Dear Friends

As always in times of trouble, people seek community—and the organizational structures of their communities—as the places to help and be helped. We’ve chosen this African proverb as our theme because it is an eloquent reminder that difficult times are the right times to be planting and nurturing trees—to strengthen nonprofit organizations for the long haul, to be bolder and more innovative, and to mobilize a greater workforce of staff and volunteers. Now is the time to enlarge our ambitions and aspirations rather than to lower what we expect or demand of ourselves.

While there are thousands of wonderful stories from 2002, many of the big stories in the world are increasingly frightening and sad. Profound poverty dominates so many parts of the world, while whole regions are engulfed by war and conflict. In the United States, civil rights, the right to private information, and the environment are under attack. The economic slump has brought, inevitably, both more urgent need and far fewer funds to the doors of nonprofits.

This is a good time to remember that all over the world, nonprofit organizations are the engines of democracy and social change. A nonprofit can start with just an idea—a small seed—and a few people committed to nurturing that seed. This inherently democratic nature of nonprofit origins means that new ideas arise through nonprofits: an intrinsic counter-action to tyranny. For this reason, citizens in emerging democracies in Eastern Europe, the Middle East, Asia and elsewhere, make the development of the nonprofit sector a cornerstone strategy. Let’s celebrate and honor the fact that our own nonprofits are part of a worldwide movement for social change.

For CompassPoint, this has been a year of deep re-commitment to making a lasting difference by identifying and addressing issues in the sector, and creating and testing solutions to these problems.
Thank you for standing side-by-side with us this last year, for the last 29 years, and for the next many years as we plant trees and grow the forest together.

Sincerely,

Jan Masaoka  
Executive Director

Clare Phillips  
Chair  
Board of Directors 2002

Rod Hsiao  
Chair  
Board of Directors 2003

CompassPoint has deep roots in the community

Rooted in the values of work that is locally based, our branches have grown to have national and even international reach. This impact comes from the work we do everyday with nonprofits of all kinds: longstanding and new organizations, small and large, local and international, in the arts, the environment, civil rights, health, human services, education, social justice, and neighborhood development.

Twenty-nine years ago, a sapling was planted that has grown into CompassPoint Nonprofit Services. Today that tree has matured and grown to scale: each year more than 11,000 nonprofit staff and volunteers choose to attend CompassPoint workshops and conferences, and more than 375 nonprofits select us as their consultants. Nationally recognized by leading foundations as their partner in strengthening the nonprofit sector, we are also proud that the NonProfit Times honored CompassPoint’s executive director, Jan Masaoka, as Nonprofit Executive of the Year for 2002.

Rather than attempt a comprehensive look at all of CompassPoint’s activities, this report to you—our colleagues, clients, supporters, critics, and friends—presents highlights from the last year.
The professional development department for the nonprofit sector

CompassPoint staff teach and produce 700+ workshops each year—a virtual corporate training department for nonprofits. These programs represent investments in the people of nonprofit organizations. The Case for Learning is a Case for Training, a paper by Jan Masaoka and Silicon Valley Director Ken Goldstein, reflects CompassPoint’s leadership in nonprofit training and highlights the value in capacity building for individuals—endowing staff and volunteers with the knowledge, skills, and perspectives for them to manage their organizations. This paper also informed the launch of TrainingPoint—www.trainingpoint.org—a groundbreaking website that provides free use and sharing of quality training materials in technology utilization; 1,400 technology trainers have already registered as participants.

Research

CompassPoint is able to propose and complete research based on our practice in the field, and the research templates we continue to refine. Two studies in 2002 focused attention on the importance of investing in the people of the nonprofit sector. On the Rise: Women of Color in Nonprofit Leadership revealed that women executive directors of color are overall better educated, have more management experience, and are more likely to have been hired from within than executive directors in general. Help Wanted: Turnover and Vacancy in Nonprofits drew attention to strategies for nonprofit success in the competition for recruiting, retaining, and developing talent. These studies—available free on our website (and for a fee in hardcopy) are the latest in CompassPoint’s highly influential research program.

healthy trees
bear healthy fruit

Trees grow best in healthy soil full of nutrients. We know that a nonprofit can thrive when set in a vibrant nonprofit community working with partners in philanthropy and government. In turn, only healthy trees can bear healthy fruit; we recognize that effective human service programs, life-changing art and victorious civil rights and environmental programs can only be sustained within strong organizations.

As an organization dedicated to increasing the impact of people working and volunteering in the nonprofit sector, we nurture a healthy forest where trees can grow strong.
Consulting

Organizations and leaders make use of CompassPoint's Executive Transitions program to sustain their health and safeguard their future. Last year, more than 50 organizations worked with CompassPoint on succession planning, executive search, interim executive director placement, and post-hire support. Another 300 organizations engaged CompassPoint consultants for work in mergers, finance, strategic planning, boards of directors, technology, and organizational change.

This large body of practice gives us opportunities to share what we know; for example, Mike Allison's Nonprofit Management & Leadership article on boards and executive change, Into the Fire, along with director Tim Wolfred's national speaking and consulting work, have built the Executive Transitions program into one with national recognition for its depth and intentionality. The Institute for Nonprofit Consulting (INC) is in its fifth year as a three-day intensive session teaching consulting skills to individuals with content expertise—another way we contribute to a healthy nonprofit ecosystem.

Financial viability is an increasing concern for nonprofits, as well as the accounting, financial analysis, and governance systems that support good decision-making. As part of our response to the economic crisis in the sector, CompassPoint's Finance Practice Group developed a new course on QuickBooks, published our own Adapting QuickBooks for Nonprofits, and began consulting with Intuit, B2P, and other for-profit publishers on the design of their accounting and fundraising software products. In 2003, CompassPoint will complete its development of a national Financial Viability Initiative to support nonprofit business analysis and planning.

While Executive Coaching has long been a professional development resource in the business world, nonprofit leaders and staff have only recently begun to explore the benefits of coaching. Completing a year-long demonstration project with 25 executive directors, CompassPoint is now working to institutionalize this service to help EDs act more fully as leaders and find more balance in their lives.
We believe that nonprofit, public benefit organizations are essential to prosperous and thriving communities. CompassPoint’s breadth of services allows us to nurture the forest along with its individual trees. The integration of CompassPoint’s services—consulting, training, and research—means that we can bring a balanced perspective based on a large body of practice. Through the Capacity-LEAP program, directed by Steve Lew, we have partnered with the federal Office of Minority Health, San Francisco Department of Public Health, and AIDS organizations in communities of color to strengthen not only their infrastructures but their ability to sustain themselves over the coming period.

Information and learning
CompassPoint’s electronic reach helps nurture the “forests” locally, nationally and internationally. While 6,500 people visit CompassPoint’s offices each year for workshops, more than 18,000 web visitors visit our website each month. This site is primarily a content site; it includes free downloadable research papers and handbooks, thought-provoking articles, and answers to hundreds of frequently asked questions. In addition, the Board Café brings thought-provoking articles to 24,000 subscribers from the US and Canada; and nearly 12,000 subscribers refer to Food for Thought and Silicon Valley Food for Thought for resources and news.

As a community-based organization ourselves, CompassPoint stands alongside nonprofits and funders in our collective mission to change the world. Nonprofits choose us as their consultants, trainers, and speakers because they trust our community roots, and because they know they will get caring and rigorous work from us. Foundations, corporations and government agencies choose us because they know that our feet are planted in the ground, and they value our scale, reach, and reputation for reliability.
democracy, like the nonprofit sector, is about collective action for a prosperous, peaceful, healthy, and just world.

Democracy is not tidy or one-sided; like a forest, democracy is an ecosystem where plants and animals find shelter, compete, mature, and evolve the nature of the forest over time. We are proud to be both a tree and a tree planter, and grateful to be part of a very large multitude who plant, champion, and care for trees everyday.

**CompassPoint by the Numbers 2002**

- Organizations contracting with us in 2002 as their consultants and speakers: 384
- Organizations contracting with Executive Transitions: 31
- Board Café subscribers: 24,615
- Food For Thought and Silicon Valley Food For Thought subscribers: 11,735
- Unique visits to CompassPoint’s website per month: 10,238
- CompassPoint official colors: green and blue
- Workshops offered: 710
- Individuals who attended a workshop or conference: 10,819
- Students enrolled in the San Jose State University-CompassPoint Certificate Program: 116
- Board members: 15
- People of color board members: 43%
- Staff members: 40
- LGBTQ staff: 30%
- People of color staff: 46%
- Volunteer faculty: 233
- Visitors to the Nonprofit Development Library in San José: 1,367
- Registered participants on TrainingPoint.org: 2,379
- Total revenue: $5,251,361
- Total expenses: $5,151,708
Board of Directors 2002

Clare Phillips  Chair, AMD
Elizabeth Share  Vice Chair, Bread and Roses
Tom Silno  Treasurer, A4C
Mary Lester  Secretary, Alliance for Technology Access
Peggy Argus  Personal and Business Coach
Cassandra M. Flipper  Bread and Roses
Diane Ford  Sobrato Family Foundation
Rod Hsiao  A.T. Kearney
Edie Kirkwood  Silicon Valley Council of Nonprofits
John Kreidler  Cultural Initiatives Silicon Valley
Alison L. Marks  Volunteer Center of San Francisco
Jules Mayer  ChevronTexaco (retired)
Ted Mitchell  Delagnes, Mitchell & Linder
David Mercer  YMCA of the USA (retired)
Jeffrey Ken Mori  Asian American Recovery Services
Arnold Perkins  Alameda County Department of Public Health
Joseph Valentine  Morris Stulsaft Foundation

Staff

Jan Masaoka  Executive Director
Mike Allison  Associate Director and Director of Consulting and Research
Marla Cornelius  Training Director
Cissy Dendy  Administrative Director
Ken Goldstein  Silicon Valley Director
Nelson Layag  Director of Technology
Karen Aitchison  Training Program Assistant
Roald Alexander  Information Systems Administrator
Mel Asher  Receptionist
Sylvia Barbosa  Silicon Valley Training Assistant
Tom Battin  Director of IT Consulting
Liana Bean  Accounting Clerk
Susan Bennett  Technology Faculty
Michael Brotchner  Development Director
Barbara Camacho  Training Program Assistant
Denis Chamberlin  Budget Director
Cristina Chan  Special Projects Director
Miriam Engelberg  Technology Faculty and Chief Cartoonist
Anushka Fernandopulle  Staff Consultant
Joel Ginsberg  Staff Consultant
Michelle Gislason  Conference Director
Jude Kaye  Senior Staff Consultant
Ken Kurtzig  Special Projects Manager
Gary Levinson  Director, Administration of Consulting and Research
Steve Lew  Staff Consultant and Director, Capacity LEAP
Gen Llamas  Research Assistant
Ellen Luo  Administrative Assistant
Sarah McKereghan  Consulting and Research Administrative Assistant
Pardis Parsa  Executive Assistant
Jeanne Peters  Senior Staff Consultant
Rosa Resendez  Silicon Valley Training Manager
Amari Romero Vorwerk  Senior Staff Consultant
Yarrow Sandahl  Receptionist
Janelle Secreto  Silicon Valley Administrative Assistant
Colleen Shelly  Receptionist
Vicki Sliger  Receptionist
Sabrina Smith  Development Manager
Lloyd Stensrud  Technology Faculty
Kara Vassily  Consulting and Research Administrative Assistant
Alfredo Vergara-Lobo  Senior Staff Consultant
John Whitmer  Circuit Rider and Technology Specialist
Tim Wolfred  Director, Executive Leadership Services
Mandy Wu  Staff Accountant
Robin Wu  Consulting and Research Administrative Manager
Dora Yung  Capacity LEAP Project Manager
Shari Zigelbaum  Office Manager

Affiliate Consultants, 2002

Mim Carlson
Viveka Chen
Jan Cohen
Ann Danner

Dawn Rubin
Liz Schaffer
Karen Schiller
Theodore H. Scott
Funders & Contributors

We are deeply grateful to our investors: the foundations, corporations, and individuals who help keep our services affordable to all nonprofits.

Institutional Donors

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The California Wellness Foundation
David & Lucile Packard Foundation
Evelyn & Walter Haas, Jr. Fund
Fireman’s Fund Foundation
The James Irvine Foundation
Levi Strauss Foundation
The San Francisco Foundation

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Alternative Telecom
Annie E. Casey Foundation
Atkinson Foundation
Applied Materials
California Consumer Protection Fund
ChevronTexaco
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City and County of San Francisco Mayor’s Office of Community Development
Community Foundation Silicon Valley
Community Technology Foundation of California
Dean & Margaret Lesher Foundation
Direct Mail Center
East Bay Community Foundation
Ford Foundation
Harder & Company Community Research
Hood & Strong LLP
Intuit
Junior League of San José
Mathile Family Foundation
McKesson Foundation
The National Community Development Institute
NetCorps
Northern California Grantmakers
Office of Minority Health
Oracle Corporation
Peninsula Community Foundation
Pennbrook Insurance Services, Inc.
Richard & Rhoda Goldman Fund
Sierra Health Foundation
Skoll Foundation
Sobrato Family Foundation
Tech Foundation
Union Bank of California
United Way of Silicon Valley
Waitt Family Foundation
The William & Flora Hewlett Foundation
William and Sako Fisher Fund
William Randolph Hearst Foundation
Y & H Soda Foundation
Zellerbach Family Foundation

**Individual Contributors**

Michael Allison & Jennifer Chapman
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Charles B. Turner, Jr.
Joseph Valentine
Claudia Viek
Deborah Wu
J. R. Yeager

Consulting Clients & Speaking Engagements

It is our honor to have worked with 384 organizations in 2002 as their consultants and speakers.

NATIONAL AND INTERNATIONAL
(a sample from 26)
Annie E. Casey Foundation
The Aspen Institute
Clean Water Fund
Enlace, A.C.
Hawai'i Community Foundation
Lambda Legal Defense and Education Fund
National Association of People with AIDS
National Minority AIDS Council
Nonprofit Risk Management Center
Terra Peninsular
Training Resources for the Environmental Community
Venezuela Without Boundaries

CALIFORNIA BEYOND THE BAY
Being Alive San Diego
Bilingual Community Education Program Projects and Services
Boys and Girls Club of Monterey County
California Institute for Rural Studies
California Pan-Ethnic Health Network
California Statewide Certified Development Corp.
Sierra Health Foundation
The Waitt Family Foundation
Yosemite National Institutes

EAST BAY
(a sample from 70)
Afghan Coalition
Alameda County Bar Association
Aquatic Outreach Institute
Asian Immigrant Women Advocates
Bay Area Coalition for Equitable Schools
Bay Area Development Company
Berkeley-Albany YMCA
Building Opportunities for Self Sufficiency
Consumer Credit Counseling Service of the East Bay
Diablo Valley AIDS Center
Disability Rights Advocates
Julia Morgan Center for the Arts
Marcus Foster Educational Institute
Natural Heritage Institute
Shelter, Inc.
Transportation and Land Use Coalition (TALC)
Urban Strategies
Volunteer Center of Alameda County
Women’s Cancer Resource Center
Youth ALIVE!
Youth Together

MARIN & NORTH BAY
(a sample from 12)
Alliance for Technology Access
Chitresh Das Dance Company
Early Childhood Resources
Napa Emergency Women’s Services
The Marin Institute
Volunteer Center of Sonoma County

**PENINSULA & SILICON VALLEY**
(a sample from 102)
Achieve
American Leadership Forum - Silicon Valley
American Red Cross, Palo Alto Area Chapter
The Bridge School
Career Closet
Center for Domestic Violence Prevention
Child Care Coordinating Council of San Mateo County
Community Action Board of Santa Cruz County
Community Breast Health Project
Community Services Agency of Mountain View and Los Altos
Dientes! Community Dental Clinic
Gamble Gardens
Girl Scouts of Santa Clara County
Hillbarn Theatre
Islamic Networks Inc.
Jacob’s Heart
Las Isabelas
Lenders for Community Development
Los Lupeños
Mayfair Neighborhood Improvement Initiative
Northside Theatre Company
Orchard School
Organic Farming Research Foundation
Pacific Art League
Pajaro Valley Health Trust
Palo Alto Chamber Orchestra
Parents Helping Parents
Pro Latino
Public Access to Wildlife Study
Raising a Reader
Redwood City Friends of Literacy
Resource Area for Teachers
Sor Juana Ines
TheatreWorks

SAN FRANCISCO
(a sample from 159)
Asian Law Caucus
Bayview Hunters Point Youth Park
Black Coalition on AIDS
Booker T. Washington Community Service Center
Children’s Book Press
Chinatown Community Development Center
Coral Reef Alliance
Deaf Communities Together, Inc.
Eth-Noh-Tec
Family Support Services of the Bay Area
Frameline
Glide Memorial Church
Haight-Ashbury Free Clinics, Inc.
Hispanic Scholarship Fund
Instituto Familiar de la Raza
Latina Breast Cancer Agency
Local Initiatives Support Corporation (LISC)
Mental Health Association of San Francisco
Mission Neighborhood Health Center
National Asian American Telecommunications Association (NAATA)
Native American Health Center
New Langton Arts
New Leaf
Northern California Grantmakers
Pacific Islander Cultural Association
Proyecto Contra SIDA Por Vida
San Francisco Arts Commission
Senior Action Network
Shanti Project
Support for Families of Children with Disabilities
Vietnamese Community Center of San Francisco
Volunteerism Project
Westside Community Mental Health Center
Wu Yee Children’s Services

Volunteer Faculty

The following individuals contributed their time and expertise as volunteer faculty in CompassPoint workshops and conferences. We are proud to be one way through which they support nonprofit, public benefit corporations.

Sharon Adam, Groundspring.Org
Alice Anderson, Silk, Adler & Colvin
Curt Anderson, East Bay Community Foundation
Fatima Angeles, The California Wellness Foundation
W. Aniseh Khan, CompuMentor
Elsy Arevalo, Friends for Youth
Marcia Argyris, McKesson Foundation
Ann Barden, The San Francisco Foundation
David Barlow, The San Francisco Foundation Community Initiative Funds
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Carla Befera
Diane Benjamin
Diana Bermudez, Berkeley Community Fund
Bebe Bertolet, East Bay Resource Center for Nonprofit Support
John Boudreau, San José Mercury News
Bernard Boudreaux, Mervyn's/Target
Lila Bringham, Fremont Community Foundation
Deane Calhoun, Youth ALIVE!
Grace Collindo, John Muir/Mount Diablo Community Health Fund
Janet Camarena, The Foundation Center
Tina Caratan, Moss Adams, LLP
Patti Chang, The Women's Foundation
Sunil Chhabra, American Fundware
Christy Chin, Skoll Foundation
Linda Clark, U.S. Census Bureau
Ellen Clear, Peninsula Community Foundation
Alice Cochran, Golden Gate Tall Ships Society
Dan Cohen
Cindy A. Cohn, Electronic Frontier Foundation
Charles Collins, WDG Ventures
Veronica Conway, Black Professional Coaches Association
Julia Cooksey, State Farm Insurance
Robert Cote, CPA
Barrie Cowan, Sanger & Olson, A Law Corporation
Hilary Crosby, Crosby & Kaneda
Betty Curtis, Atkinson Foundation
Lela DaVia, DaVia & Brown
Bruce Davis, Arts Council Silicon Valley
Greg Dei Rossi, Armanino McKenna LLP
Laurene Dominguez, Justice Matters Institute
Kate Dowling, Marcus A Foster Educational Institute
Evan Elliott
Moy Eng, The William and Flora Hewlett Foundation
Debra Engel, Community Foundation Silicon Valley
Robert Erskine, US Bancorp
Magda Escobar, Plugged In
Laurel Etheridge, Senior Access
Timothy Etheridge, Project Open Hand
Robyn Faraone, United Way of the Bay Area
Sharon Farrell, Aquatic Outreach Institute
Bobbi Fischer
David Fischer, Luther Burbank Center for the Arts
Cassandra Flipper, Bread & Roses
Diane Ford, Sobrato Family Foundation
Debbie Ford-Scriba, Peninsula Community Foundation
Susan Frank, The Steven and Michele Kirsch Foundation
Susan Freundlich, The Women’s Foundation
Mark Friedman, Alameda County - Every Child Counts
Jonathan Frieman, JoMiJo Foundation
Rosalie Gann, Oracle Corporation
Gary Gansle, Wilson Sonsini Goodrich & Rosati
Patricia Gardner, Silicon Valley Council of Nonprofits
Dan Geiger, Groundspring.Org
Forrest Gok, Haight Ashbury Free Clinics
Dan Goldes, Training Leaders
Flo Green, California Association of Nonprofits
Rick Green, The David & Lucile Packard Foundation
Kathi Gwynn, Steven & Michele Kirsch Foundation
Chris Halaburka, Parents Helping Parents
Victor Hall, Filipino Task Force on AIDS
Todd Hansen, The Health Trust
Alan Harper, Terra Peninsular
Laura Heffron, Macy’s
Keith Heller, Heller Consulting
Melinda Henning
Peter Hero, Community Foundation Silicon Valley
Lisa Hoffman
Herb Holman, Merrill Lynch
Ann Holmes, TheatreWorks
Ruth Holton, The California Wellness Foundation
Bruce Honig, Honig IdeaGuides
Virginia Hooper, East Bay Community Foundation
Roxanne Howe-Murphy, LifeWise Learning Institute
Aaron Hurst, Taproot Foundation
Suzanne Irwin-Wells
Tina Jackson-Walda, Mediation Services
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Beth Jones, Raising More Money
Karla Jones, GET ORGANIZED
Beth Jones, Raising More Money
Susan Karmprath, Earth Island Institute
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Helen Kim
Lisa Kim, PRx Inc.
Cathy Kimbell, San José Institute of Contemporary Art
Russ King, CompuMentor
Gail Kong, Asian Pacific Fund
Jane Kow
Pamela Krasney
Janine Kraus, Coral Reef Alliance
Richard Lamport, Gift Planning Associates
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Claudia Melendez, Nuevo Mundo
Victoria Mendiola, Sand Hill Foundation
CompassPoint Nonprofit Services

A resourceful guide for nonprofits and the independent sector.