

# the power of people to change the world

## thirty years strong

Dear Friends,

We are reminded that **in the last hundred years, every important idea for social change has come from the nonprofit sector.** The struggles for civil rights, for women's rights, for environmental health, for AIDS treatment, for disabled access, for sustainability, for peace, for family support, for jobs and economic development—these are all struggles incubated, nurtured and launched through nonprofit organizations that have changed the world.

**This year, we at CompassPoint celebrate not only another year of working with the nonprofit sector, but our own 30<sup>th</sup> anniversary.** In this time, we have grown and evolved alongside the sector; as a nonprofit ourselves we value the fact that we experience the same supports and the same attacks as the nonprofits we serve. We learn from managing our own organization about how to help others, and we learn from our clients about how to manage our own organization.

The lessons of this work over 30 years strengthens our belief that with each new generation, the nonprofit sector grows, renews itself and expands the potential for social change, locally and globally.

**With every generation comes a new revolution.** We are committed to supporting this generational change and strengthening the effectiveness and impact of people working and volunteering in the nonprofit sector.

Sometimes it is said that organizations make use of people to get work done. Actually, **people with vision make use of nonprofit organizations as their vehicles for social change.** We are proud that so many of you have let us partner with you over these thirty years, and we look confidently and determinedly towards a shared future.



John Kreidler and Jan Masaoka

### Our Vision

Nonprofits serve as the agents of democratic involvement, innovation, and positive social change. CompassPoint's leadership and services are local, regional, and national in scope, and support the growth of an effective nonprofit sector essential to healthy communities.

### Our Mission

The mission of CompassPoint Nonprofit Services is to increase the effectiveness and impact of people working and volunteering in the nonprofit sector.

### Core Support Funders Circle

Thank you to the foundations, corporations, and government agencies that keep our services high quality, innovative, and affordable for all nonprofits. We are especially grateful to the 70 individuals who made gifts to CompassPoint in 2004. Our heartfelt appreciation goes to those who support us with multi-year unrestricted funding:

David & Lucile Packard Foundation  
East Bay Community Foundation  
Evelyn & Walter Haas, Jr. Fund  
The James Irvine Foundation  
Levi Strauss Foundation  
Peninsula Community Foundation  
San Francisco Foundation  
Small Change Foundation  
Sobrato Foundation  
William Randolph Hearst Foundation

**Executive Transitions Initiative** replicates our multi-component Executive Transitions program across the country (New England, New York, Georgia, Illinois, Wisconsin)

**Board Café**  
With 38,000+ subscribers, reprints in dozens of newsletters and magazines each year, and a best-selling anthology – *Best of the Board Café* – this e-newsletter continues to allow board members to give and get the most from their board service.

**James A. Johnson Community Fellowship**  
In partnership with the Fannie Mae Foundation, this program honors and supports exemplary community development and affordable housing leaders across the United States.

### Nationally

**National dialogs:**  
CompassPoint staff and board members are active participants in nonprofit sector dialogs, including: Jan Masaoka serves on the Governance Working Group of the Independent Sector-convened Panel on the Nonprofit Sector, as well as on the Editorial Committee of *Stanford Social Innovation Review*. Jeanne Bell Peters serves on the Advisory Board of the *Nonprofit Quarterly*, and Alfredo Vergara-Lobo on the Leadership Committee of the People of Color Group at the Alliance for Nonprofit Management.

### Regional and National Highlights

**Consulting:**  
Our experts regularly work with organizations outside of California including Lambda Legal Defense Fund, the Hawai'i Community Foundation, the State Bar of Nevada, the Consultative Group on International Agricultural Research of the World Bank, and Institute Gualtemalteco Americano.

### California

**Points on Prevention Technical Assistance Project (POPTAP)**, an initiative designed to build capacity in HIV Prevention Organizations throughout the state serving people of color, is funded by the California State Office of AIDS. POPTAP uses a two-pronged approach to enhance organizational effectiveness through cultural competency, technical assistance and capacity building grants, and has worked with organizations from the Central Valley to San Diego County.

### Bay Area

More than 23% of Bay Area nonprofits used one or more of CompassPoint's regional services through our offices in San Francisco and Silicon Valley.

### CompassPoint by the numbers

CompassPoint website visitors	203,878 with 1.1 million page views
Successful downloads of documents from the site	54,000
% of Bay Area nonprofits served by CompassPoint in 2004	23%
Number of individual donors	70
Visitors to the Nonprofit Development Library in San Jose	1,275
Workshops	419 with 4,524 participants
Conferences	5 with 1,739 participants
Consulting clients	190
Executive Directors enrolled in a CompassPoint Executive Leadership Course	45
Food for Thought and Silicon Valley FFT subscribers	10,807
Board Café subscribers	39,025
Volunteer faculty	101
Board members	15
Staff members	34
People of color staff members	54%
LGBT staff members	28%



Above: The first CompassPoint class of a newly revamped Executive Director 101 management skills seminar graduated in December 2004. Participants came from a broad range of Bay Area nonprofits to study leadership, governance, fundraising, human resources and financial management.



Left: Ariana Proehl, executive director of Diversity Works and a participant in the 2004 Fundraising Academy for Communities of Color, discusses a fundraising letter with Steve Lew, an academy fundraising coach. As an intensive skills building program offered by CompassPoint and the Grassroots Fundraising Journal, the academy offered extensive training and fundraising coaching over 8 months.

## Key Accomplishments

As the nonprofit sector continued to weather the effects of a challenging economic and political climate, CompassPoint deepened and expanded its services to advance the power of nonprofit organizations, and the power of people to lead change in their communities

- In partnership with *Grassroots Fundraising Journal*, we launched the **Fundraising Academy for Communities of Color**, a seven-month leadership and skills development program that introduced fundraising coaching and explored the "politics of fundraising."
- Executive Coaching:** In addition to launching this program, which was a direct result of our groundbreaking research into the effects of nonprofit executive coaching, we integrated this methodology and philosophy into much of our consulting and training work.
- Women Executive Directors of Color (WEDOC) network:** In partnership with the Levi Strauss Foundation, we worked with Bay Area WEDOCs to present a powerful day including a special keynote by SF District Attorney Kamala Harris.
- ED 101:** Acquired from the Management Center, this management skills seminar was completely revamped with CompassPoint content—covering a broad swath of management topics.
- Executive Transitions Monograph Series:** Published in partnership with the Annie E. Casey Foundation, the first monograph of this eight part series introduced key concepts of Executive Transition Management.

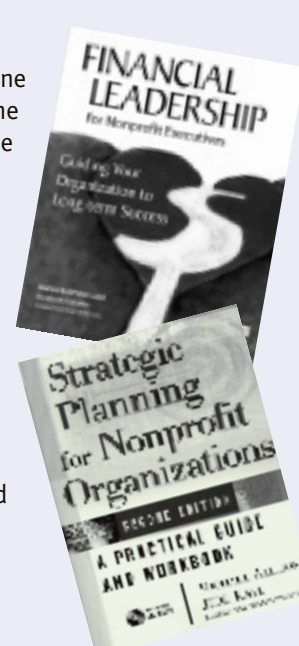


In May of 2004 we were proud to convene "On The Rise: A Celebration and Forum for Bay Area Women Executive Directors of Color", the first gathering of its kind, with 80 women executive directors of color (WEDOCs) and keynote speaker San Francisco District Attorney Kamala Harris.

## Looking forward

### Look for these new efforts in 2005:

- We continue to develop various leadership resources at CompassPoint in response to a growing interest and demand. In mid-2005, we'll offer the **Leadership Learning Path**, a more integrated program of training, coaching, peer learning circles and professional networks for executives and senior staff to pursue their professional development.
- Financial Leadership for Nonprofit Executives**, by Jeanne Bell Peters and Elizabeth Schaffer, the second title in the CompassPoint-Wilder series, provides a framework for the realization of an executive's financial vision.
- Strategic Planning for Nonprofit Organizations**, Second Edition by Mike Allison and Jude Kaye, updates and expands this best selling Wiley book.
- In partnership with the Community Technology Foundation of California, the third CompassPoint-Wilder book is slated for publication in late 2005 and will focus on supporting **Accidental Techies** – the heroes who support technology in often under-resourced nonprofits.
- Daring to Lead 2005:** Produced in partnership with the Meyer Foundation, this study continues the research on executive directors and their career paths – drawing on data from eight cities across the country.
- Convergence and Competition Between United Ways and Community Foundations:** Fall 2005 will also bring the release of this study, done in partnership with the Michigan Council of Foundations and the Mott Foundation.



## Internal developments

- We were saddened at the end of 2004 to say farewell to two long-time leaders at CompassPoint: **Mike Allison** and **Jude Kaye**. Mike directed CompassPoint's Consulting & Research Group for 15 years, and Jude Kaye worked as a Senior Consultant at CompassPoint for 25 years. Mike and Jude contributed enormously to the nonprofits they worked with, as well as to the growth and development of CompassPoint over their remarkable tenures. We miss them deeply as we celebrate our shared history.

- While we were also sad to bid farewell to **Rod Hsiao** (a former board member and chair who had joined staff), this change provided the chance for **Jeanne Bell Peters** to step up from Senior Consultant to Chief Operating Officer.

- John Kreidler** continued to lead the Board of Directors, and oversaw an Executive Agenda process, which led to the creation of a new strategic plan. We were honored to welcome the board leadership of new directors **Jerry Hiura**, **Shelley Ratay** and **Tom Silk**.

## Board

John Kreidler, *Chair*  
Cultural Initiatives Silicon Valley  
Diane Ford, *Vice Chair*  
Sobrato Family Foundation  
Alison Marks, *Secretary*  
Volunteer Center of San Francisco and San Mateo Counties  
Ted Mitchell, *Treasurer*  
Delagnes, Mitchell & Linder  
  
Teresa Alvarado, PG&E  
Cassandra M. Flipper, Bread and Roses  
Jerry Hiura, DDS  
Grace Kim, City of Sunnyvale  
David Mercer, YMCA of the USA (retired)  
Jeffrey Ken Mori, Asian American Recovery Services  
Arnold Perkins, Alameda County Department of Public Health  
Shelley Ratay, Stanford Business School  
Tom Silko, Nelson & Associates  
Tom Silk, Silk, Adler & Colvin  
Barbara Terrazas, Catholic Charities of the East Bay  
Sharon Zorbach, Deloitte & Touche

## Staff 2004

Jan Masaoka, Executive Director  
Mike Allison, Director of Consulting and Research  
Maria Cornelius, Training Director  
Roderick Hsiao, Chief Operating Officer  
Rosa Resendez, Program Manager, Silicon Valley  
  
Karen Aitchison, Training Program Assistant  
Roald Alexander, Technology Wizard  
Susan Bennett, Technology Faculty  
Noren Caliva, Receptionist, Silicon Valley  
Barbara Camacho, Training Program Assistant  
Cristina Chan, Special Projects Director  
Chelsea Correia, Intern  
Natasha D'Silva, Program Assistant, ELS  
Miriam Engelberg, Technology Faculty and Planet 501c3 Cartoonist  
Anushka Fernandopulle, Senior Consultant  
Grayton Huang, Staff Accountant  
Michelle Gislason, Program Director, ELS  
Jude Kaye, Senior Consultant  
Noah Kelly, Administrative Assistant  
Ken Kurtzig, Special Projects Manager  
Nelson Layag, Technology Projects Manager  
Gary Levinson, Consulting Group Administrator  
Steve Lew, Senior Consultant and Fundraising Academy Co-Director  
Anna Llen, Budget Director  
Steven Meyer, Office Manager  
Adrienne Morello, Receptionist  
Jeanne Bell Peters, Senior Consultant and Research Manager  
Pardis Parsa, Executive Assistant  
Nancy Ragey, Senior Consultant  
Angelica Resendez, Receptionist  
Tigran Saakyan, Intern  
Janelle Secreto, Administrative Assistant, Silicon Valley  
Sabrina Smith, Development Manager  
Kara Vassily, Projects Manager  
Alfredo Vergara-Lobo, Senior Consultant  
Bonnie Wang, Intern  
Tim Wolfred, Director of Executive Leadership Services  
Mandy Wu, Staff Accountant

## CompassPoint Finances

### UNRESTRICTED FUND Statement of Activities January 1 - December 31, 2004

TOTAL REVENUE	4,531,896
TOTAL EXPENSES	
Program	3,836,588
Management & General	690,693
Fundraising	89,563
	4,616,844
LOSS	(84,948)

### CONSOLIDATED - ALL FUNDS Balance Sheet December 31, 2004

	UNRESTRICTED	RESTRICTED	TOTAL
TOTAL ASSETS	1,504,538	1,473,422	2,977,960
TOTAL LIABILITIES	617,549	-	617,549
TOTAL NET ASSETS	886,989	1,473,422	2,360,411

Photos credit for poster front: Mimi Farina – photo by James Sugar, courtesy of Bread & Roses . Youth Organizer – photo by Jeff Paterson, Not In Our Name . Lateefah Simon – photo by Olivier Laude, courtesy of Advocacy Institute . Dr. Joseph Marshal and Mia Mitchell, courtesy of CityFlight . Reverend Cecil Williams, courtesy of Glide Memorial Church . Kim Klein, courtesy of Grassroots Fundraising Journal . Liat Weingart, courtesy of Jewish Voice for Peace . Teatro Visión – photo by Dave Lepori, courtesy of Teatro Visión . Kavita N. Ramdas, courtesy of Global Fund for Women

This Report to the Community for 2004 can be found at [www.compasspoint.org/annualreport](http://www.compasspoint.org/annualreport) along with a complete list of donors, volunteers, and a sample of consulting clients.

CompassPoint's Annual Report was written and developed by Jan Masaoka, Ellen Brotsky, Sabrina Smith, Steve Lew, Michelle Gislason, and Jeanne Bell Peters.

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