

Annual Report to the Community for 2008

Our Mission & Constituency

The mission of CompassPoint is to increase the impact of nonprofit community-based organizations and the people who work and volunteer in them.

Our core constituents are Bay Area/Silicon Valley community organizations that serve, are led by, and are supported by their communities. We have an emphasis on working with staff and organizations that serve vulnerable populations, that are based in communities of color, and that lead social change.

We also have a critical role to play in the broader capacity-building field. We share knowledge and actively partner with other capacity builders and funders who are equally committed to strengthening and supporting community organizations.

This CompassPoint Annual Report to the Community for 2008 can be found at www.compasspoint.org/annualreport.

We are pleased to share the capacity-building stories of three exceptional 2008 CompassPoint clients.

These leaders embody the spirit of boldness that is this year's annual report theme—boldness in the face of change, challenge, and even tragedy.

It is our privilege as coaches, teachers, and consultants to partner with organizations like SACNAS, 1,000 Mothers to Prevent Violence, and SOMArts Cultural Center. Their commitment to community and to excellence inspires our work.



Selecting a theme for our report this year meant considering all of the economic anguish being felt by so many organizations and communities, as well as the sense of hope and dramatic change that came with the election of President Obama. Over the past year, we have all lived with these strange polarities. Ultimately, we decided to focus on boldness because we know that great nonprofits do more than “weather storms.” They adapt; they fight back; they create new possibilities for themselves and for their constituents.

Like last year, the focus of this report is on three capacity-building stories. These stories demonstrate exactly the boldness we mean to celebrate. Our thanks to SACNAS, 1,000 Mothers to Prevent Violence, and SOMArts Cultural Center for sharing with our whole community their experiences of partnering with CompassPoint in 2008.

We are also pleased to say that CompassPoint got stronger in 2008. The dedication—and yes, boldness—of our exceptional staff and board resulted in a year of innovation, stronger community partnerships, and even a modest financial surplus.

Please let us know if you have questions or suggestions for CompassPoint.

In partnership,

Jeanne Bell

Jeanne Bell
CEO

Diane Parnes

Diane Parnes
Board Chair

Core Support Funders 2008

We are deeply grateful to our investors: the foundations, corporations, government agencies, and individuals who help keep our services affordable to community-based nonprofits. We especially thank the following institutions for their significant unrestricted support. Their commitment to our work is instrumental to everything we accomplish.

Bank of America
David & Lucile Packard Foundation
Evelyn & Walter Haas, Jr. Fund
Silicon Valley Community Foundation
Sobrato Family Foundation
Sobrato Foundation
(in-kind office space grant)
Walter & Elise Haas Fund

Connect, Inspire, Act, Repeat.

SACNAS: Advancing Hispanics, Chicanos, and Native Americans in Science

In 1994, Judit Camacho was a disillusioned math major with big questions about higher education and her future. When she first walked into the Santa Cruz office of the Society for Advancement of Chicanos and Native Americans in Science (SACNAS, www.sacnas.org) it was to interview for an office job. Though she wasn't hired that day, SACNAS quickly identified her as an ideal candidate for its mentoring and professional development services.

“SACNAS opened the world to me,” says Judit. “I instantly felt like I belonged.” Her experience renewed her commitment to the sciences, provided a network of support and mentors she has drawn on throughout her career, and established a lifelong connection with SACNAS—as a client, then as an advocate, and now as executive director (ED). SACNAS also benefits from a strong connection to CompassPoint that fuels Judit's organizational and leadership development goals. States Judit, “A lot of people do what CompassPoint does, but don't match up. CompassPoint is part of SACNAS's language and our network.” Cases in point:

In 2008, Judit attended Executive Director 101, CompassPoint's intensive skills-building seminar for new nonprofit executives. “ED 101 was a turning point. It was very clear that we needed a strategic plan and an accounting solution so the organization would never have to depend on one person for financial data. CompassPoint CEO Jeanne Bell spent one lunch with me reinforcing this. She made everything so clear.”

Judit next jumped at the chance to have SACNAS participate in the 2008 Governance Leadership Initiative. This eight-month-long program provided board leadership the opportunity to reflect on governance strategies, practice generative and strategic thinking, and learn more about how to work together. “Board engagement has increased—the difference is night and day. And the facilitation skills that CompassPoint Project Director Marissa Tirona modeled I'm now using with staff.”

SACNAS continues to broaden its capacity building, participating in CompassPoint's Fundraising Academy for Communities of Color. “We've seen a big difference in the questions being asked in development. We're now clarifying how and what our development strategy should be.” And at the March 2009 Peninsula/Silicon Valley Forum, Judit approached the keynote speaker for advice on how to use technology to advance programs and management. As a result, the organization is working with a consultant on a transformative agency-wide technology plan—and Judit and SACNAS have again added to their network of support.

The success of SACNAS and Judit Camacho is the success of proactively forging connections—with each other, their community, and the providers and resources that can help them achieve their goals. CompassPoint is one piece of this ever-growing network, and one SACNAS knows it can rely on. Concludes Judit, “CompassPoint is always first to come to mind when I need help. I can always start here and know CompassPoint will always be honest and always get back to me. CompassPoint is truly helping us get to the next level.”

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Above: Judit Camacho
Middle: SACNAS provides multiple avenues of year-round professional development for emerging scientists through its Leadership Institute, chapter activities, and regional meetings.
Bottom: Whether it happens in the exhibit hall at the SACNAS national conference or through connections at SACNAS regional meetings, SACNAS members are exposed to a broad network of mentors.

Fulfilling Organizational Promise through Leadership Development

Lorrain Taylor: 1,000 Mothers to Prevent Violence

After the murder of her twin sons in 2000, Lorrain Taylor found comfort in CoPE (Circle of Prayer + Empowerment), a grief support group she started for survivors of those lost to homicide. As a legacy to her sons and to others in the community, Lorrain vowed to build a comprehensive multi-service program to alleviate the detrimental impact of violence in the Bay Area through direct, practical, and compassionate outreach services to victim-survivor families. From this promise, 1,000 Mothers to Prevent Violence (www.1000mothers.com) emerged.

With her positive energy and nurturing guidance, leadership comes naturally to Lorrain. But the formal tools and training to advance her goals as a nonprofit leader have been harder to come by. “I needed to provide more practical services. I needed to know what I was doing to be an effective leader.” A colleague recommended CompassPoint and Lorrain immediately followed up, reading about the Management 101 course, which was starting the next day. “I knew I had to attend, so I showed up for the class without being registered—and I had no money.” Staff worked out a plan where Lorrain could volunteer her time in exchange for attendance. The effort was worth it.

“Management 101 was the most effective class I've ever taken,” says Lorrain. “This course ‘brings it all home’ for managers. I could see what it means to manage a nonprofit organization. I also learned that Management 101 was the main piece of CompassPoint and San Jose State's Nonprofit Certificate Program. I knew I had to do this, too. I completed the certificate program in six months. It was at first a little intimidating because I was with leaders who were more experienced, but the instructors made me comfortable. There were no judgments. I ended up learning so much from the others. It was an awesome experience.”

CompassPoint trainers and consultants also know how to guide and support clients to apply new skills. When confronted with writing her first grant proposal, Lorrain turned to Byron Johnson, one of her certificate program instructors. “I asked Byron to do it and he said he couldn't. I asked, ‘Then what do I do?’” She laughingly recalls his response: “Remember, do your budget first! Now I thank Byron for not bailing me out. I didn't get the grant not because it wasn't a competitive proposal, but because I didn't have experience managing a government grant. That gave me confidence. CompassPoint provided all the tools I needed to write a successful grant proposal. It was so rewarding to do it myself.”

The results of Lorrain's professional growth and learning are evident in her organization. “We can offer mothers aftercare, help with vigils, convene evenings of healing, and honor a survivor of the year.” And like every great leader, Lorrain is looking ahead. “Five years from now, I want a camp in place for children survivors. I want to hold retreats to get kids and parents away together. I want our own office space, more staff, and more programs. No matter what, CompassPoint will always be a part of my testimony. I knew my purpose, but with CompassPoint now I know how to get there. I'm going to keep coming.”



Lorrain Taylor greeting a survivor.

Evening of Healing complimentary dinner for survivor families and friends



The San Francisco Chronicle / Lucy Athlitz

From Executive Transition to New Opportunities

SOMArts Cultural Center

For thirty years, SOMArts Cultural Center (www.somarts.org) has been a vibrant partner to San Francisco's arts community as a nexus and exhibition space for cultural, performing, and visual artists and groups. Coming from a 1970s neighborhood arts movement that “demanded art for and by the people, outside the circles of high culture, and supported financially by the city,” SOMArts' unique position in the City's arts landscape brings with it a mix of funding, artistic, political, and management pressures. In this environment, SOMArts lost its long-tenured executive in 2007 and long-standing board members were seeing the need to revitalize on many levels: from building new leadership on staff and board to redefining its strategy for sustainability to serving a broader audience.

SOMArts took these challenges as an opportunity to rebuild. They used CompassPoint consulting hours provided by the San Francisco Arts Commission to explore executive transition options, ultimately opening a contract with Project Director Byron Johnson and Associate Project Director Natasha D'Silva for executive search and transition services. Within four months of launching its search, SOMArts hired arts activist Lex Leifheit as its next leader. Lex adds that CompassPoint helped start things off right: “When I was called for an interview I was impressed by Natasha and Byron's warmth and professionalism. CompassPoint helped SOMArts focus on the skills it wanted from a new ED.”

CompassPoint's work with SOMArts didn't end with Lex's placement; rather it was the beginning of a partnership of ongoing capacity building. Says Lex, “When I began as ED, one of the things I was most afraid of was change—specifically, facing necessary changes that SOMArts had struggled with in the past without reaching consensus. We engaged CompassPoint to improve our chances of successful organizational change through board development. Byron and Natasha facilitated a board retreat where we identified a vision for the board of what its highest level of functioning might look like. CompassPoint also helped us to create a board manual, revise our bylaws, and structure board agreements so members now have an evolving resource for knowledge about the organization and can be strong ambassadors.”

Many of SOMArts' core staff members have participated in professional development through CompassPoint. Says Lex, “I attended finance training with our bookkeeper. It helped us learn each others' skills and to think about ways we could strengthen the organization's financial systems over time.

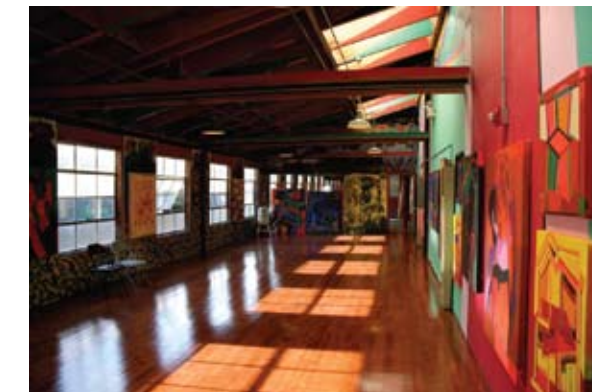
“Perhaps what I value most about CompassPoint is staff members' sincere interest to help SOMArts get where it needs to go – keeping it real and attuned to the needs of the organization. CompassPoint has helped me, SOMArts' board, and staff to work together to see where we are, where we are going, and how we are going to get there. Having access to the language, the strategy, and the human resources Byron and Natasha have provided has helped me balance my vision for SOMArts with the day-to-day business and keep things moving in a positive direction.” And with the integrated mix of services SOMArts has participated in, the future of the organization is becoming clearer from every vantage point.

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SOMArts Technical Services Program has been supporting parades (including Carnaval) for more than 30 years.

SOMArts' dance studio



What's Coming Up at CompassPoint

For 34 years, organizations and leaders have turned to CompassPoint to learn of new nonprofit management trends and frameworks, develop the skills to best serve clients, and build networks of support to help them thrive. Here are some of the key initiatives and resources we will offer in the coming year.

Books for the Nonprofit Sector
Managing Executive Transitions: A Guide for Nonprofits (The Fieldstone Alliance), by Senior Project Director Tim Wolfred, offers boards and EDs a proven approach to handle leadership turnovers in a way that prevents problems and sets an organization on a path for long-term success. *Coaching Skills for Nonprofit Managers and Leaders: Developing People to Achieve Your Mission* (Jossey-Bass), by Senior Project Director Michelle Gislason and Judith Wilson, will come out in fall 2009 and will be the first coaching book focused on nonprofit managers. We expect it to become a definitive resource in the sector on coaching for managers of all skill levels.

Nonprofit Day
We continue to shape this premier conference for the nonprofit community to meet the evolving operating and career environments organizations and leaders face. Our 2009 conference, *Leading Change in a Shifting Landscape*, remains an affordable, comprehensive day of learning grounded in the community, and features a renewed currency in programming focused on building and supporting movements. We are pleased to welcome keynote speaker, Ben Jealous, CEO and President of the NAACP, and sector thought leaders and national speakers as contributors to this dynamic event.

Leadership Development Program for Next Generation Leaders of Color
This year-long program funded by The California Wellness Foundation convenes 16 emerging leaders of color to focus on two significant challenge areas for many managers and leaders: (1) the ability and skills to supervise, develop, inspire, and influence people and (2) business acumen with an emphasis on financial strategy, comprehension, and literacy. By deepening the management and leadership capabilities of participants in these areas, we hope to increase the overall health and sustainability of their organizations. Using a framework that examines the racial and ethnic cultural dimensions in managing people and financial literacy, we will also help participants lead in a culturally competent manner.

CompassPoint

NONPROFIT SERVICES

731 Market Street, Suite 200 . San Francisco, CA 94103
415.541.9000 phone . 415.541.7708 fax
Sobrato Center for Nonprofits
600 Valley Way, Suite A . Milpitas, CA 95035
408.719.1400 phone . 408.719.1444 fax
info@compasspoint.org
www.compasspoint.org

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Written by Cristina Chan & Jeanne Bell

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traversosantana.com

CompassPoint Finances 2008

UNRESTRICTED FUND	TOTAL INCOME	\$4,262,675
Statement of Activities January 1 - December 31, 2008	TOTAL EXPENSES	
	Program	\$3,535,716
	Management & General	\$630,747
	Fundraising	\$79,118
		\$4,245,581
NET		\$17,094
TOTAL NET ASSETS		\$2,631,790

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