

Annual Report to the Community for 2009

Dear Colleague,

We are very pleased to present to you the CompassPoint annual report for 2009. One of CompassPoint's key priorities in 2009 was to develop and strengthen our partnerships: with existing and new clients, with new communities, and with others whom we work alongside to support the leaders and organizations of the nonprofit sector. As our poster quote from the great poet Gwendolyn Brooks reminds us, "We are each other's business." We all are strengthened by investing in each other's success.

We are proud to say that CompassPoint's reach expanded significantly in 2009. Our regional presence is now from Silicon Valley in the South Bay to Contra Costa County in the East Bay. We continue to build relationships across the Bay Area and learn how best we can support its diverse leaders and organizations. Additionally, our work statewide and beyond continues to grow. Through new and expanded foundation partnerships, we are now doing leadership development in the Central Valley, developing leaders statewide in the transitional age youth and domestic violence fields, and offering our Fundraising Academy for Communities of Color in Los Angeles for the first time. It's an exciting evolution of our Practice—and again, squarely informed and enhanced by our work with other intermediaries, funders, and clients.

The three client stories in this report—our work with First Place for Youth, East Bay Asian Local Development Corporation, and Sacred Heart Community Service—highlight the diversity of ways that CompassPoint partners with nonprofits and their leaders to deepen impact. We thank them for sharing their stories with our community.

Thank you for being a valued partner to CompassPoint. We look forward to serving as each other's "magnitude and bond" in the years to come.

With respect and gratitude,

Jeanne Bell
CEO

Colin Lacon
Board Chair

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



Institutional Funders

CompassPoint cannot achieve the impact and change we seek in the community without meaningful partnerships with key funders on our initiatives and programs. We thank the following institutional donors for their indispensable program and general operating support in 2009.

- Adobe
- Annie E. Casey
- Astor Street Foundation
- Bank of America
- Blue Shield of CA Foundation
- CA Community Foundation
- The California Endowment
- The California Wellness Foundation
- Charles Stewart Mott Foundation
- Chevron Corporation
- Citi
- Citi/Alliance for Nonprofit Management
- David & Lucile Packard Foundation
- Dean & Margaret Leshar Foundation
- Evelyn & Walter Haas, Jr. Fund
- Gap Foundation
- James Irvine Foundation
- Junior League of San Jose
- Mitchell Kapor Foundation
- Nonprofits' Insurance Alliance of California
- Oracle Corporation
- Pacific Gas & Electric Company
- San Francisco Foundation
- Silicon Valley Community Foundation
- San Francisco Mayor's Office of Community Investment
- Sobrato Family Foundation
- Sobrato Foundation
- Stuart Foundation
- WK Kellogg Foundation
- Walter and Elise Haas Fund
- William and Flora Hewlett Foundation
- Y&H Soda Foundation
- Zellerbach Family Foundation

"CompassPoint has given me a foundation to define what leadership is to me and to think about the culture of the organization I want to lead."



Photo credit: Sam Renner
Top: A program participant receives instruction during a Step It Up class from an Education & Employment Specialist.



Middle: An Education & Employment Specialist assists Chynna with formatting her resume.



Bottom: Aaron, a youth in program at First Place for Youth, in the front doorway of his new apartment building.

First Place for Youth: Defining, Connecting, and Supporting Leaders through the TAY Initiative

When Sam Cobb participated in the first cohort of CompassPoint's Leadership Program for Executives Serving Transition-Age Youth (TAY) in 2007, he was a new executive director at First Place for Youth (FPY) (www.firstplaceforyouth.org), an organization that supports foster youth in their transition to successful adulthood. Funded by The California Wellness Foundation, the TAY leadership program over the last four years has supported the professional and peer network development of 60 executive and senior managers from organizations statewide that work with at-risk youth in transition from foster care or state custody. Sam has used his TAY experience to cultivate his own leadership path and the paths of leaders within his organization.

"CompassPoint has given me a foundation to define what leadership is to me and to think about the culture of the organization I want to lead," he states. "I learned succession planning isn't a singular event. You have to build a 'leaderful' organization – and that leadership has to run deep and wide within the organization. This is core to what I've wanted to achieve at First Place and this lesson has filtered back and through the organization. As we've advanced and grown, individuals within the organization have advanced and grown." Sam's passion for building leaders is becoming well-known; he recently received a James Irvine Foundation 2010 Leadership Award.

Christy Saxton, FPY's Regional Executive Director, is one of four staff members who have participated in the TAY leadership program. She echoes Sam: "CompassPoint really pushes you to look at the good, the bad, and the ugly of how you lead – to look at what works and what doesn't and, if something's not working, to question why you are still holding onto it."

Both highlight the care that CompassPoint takes in cultivating the program and supporting peer learning and networking. One current employee is someone Sam met through his TAY peer network. Christy adds: "CompassPoint tries hard to make sure cohorts remain connected. This tremendous support from my cohort has been most valuable to me. If I have a question I can call a variety of people in my cohort from Eureka down to San Diego."

"Someone from First Place has been in every cohort, so it has been great to see the ongoing development of the TAY leadership program and that CompassPoint really takes the advice of previous cohorts and integrates it into the program. That's pretty special." In fact, First Place for Youth has been developing its own internal program modeled on the TAY initiative to support emerging leaders on staff. As a result, Sam says, "leadership competencies can run throughout the organization, not just the CEO."

"The preparation work that CompassPoint did with the transition team was enough to convince me to take the job."

EBALDC: Wisdom in Transition and New Perspectives

For 35 years, the East Bay Asian Local Development Corporation (www.EBALDC.org) has supported forward-thinking housing and community development in the East Bay, starting in Oakland's Chinatown. It is equally known for the exceptional tenure of Lynette Lee, the organization's executive director for 27 years until her retirement in 2009. To prepare for its first major leadership change, EBALDC hired CompassPoint Executive Transitions consultant Viveka Chen to work with its board/staff transition committee.



In Boston, Jeremy Liu had recently finished 11 years as the ED of the Asian Community Development Corporation. He grew up immersed in community development thanks to his parents, who were active in Bay Area housing and community projects. He was ready to explore work outside of community development; that is, until an EBALDC consultant called about the organization's search for its next leader.



From Jeremy's perspective, EBALDC's transition approach and groundwork were key selling points. "The preparation work that CompassPoint did with the transition team was enough to convince me to take the job," he says. "I was impressed by how strong EBALDC's senior management team was and how strong their case was. The board needed perspective and discipline to plan and execute its first ED transition successfully. The organization was really ready and open to change. It takes a lot to look deeply at yourself as an organization and to make the decisions that a board and organization have to make before you can decide who your next ED will be. Having CompassPoint as a shepherd in the transition process was critical."



EBALDC HR Director and transition team member, LaNetha Oliver adds: "One of the big benefits of CompassPoint's assistance was the focus groups conducted with staff, board, and the management team. They gave us the information to determine what kind of ED we needed and to craft the job specifications. Viveka helped us understand what transition could look like and what to expect."

As EBALDC's new ED, it's a time for Jeremy to rely on his deep experience, as well as to explore fresh ideas and opportunities.

Jeremy benefits from CompassPoint in new ways, including participating in CompassPoint's Citi Executive Leadership Program with 17 other Bay Area executive directors. "The Citi program is a great opportunity for a refresher course on being an ED," he says. "The scale and context at EBALDC is different. I went from being the longest-serving staffer in my past organization to being the newest person. I had no shred of institutional knowledge. I had no network. Through this program I've been able to meet EDs from similar organizations. The benefit is the substantive feedback, but also the context you get. To have the chance to step back and say, 'What should I do about this?' is so helpful. As an ED you always feel you have to have the answers. Here, you have support. It's put me in a different chair and given me another way to think about things."

Photo credit: EBALDC

Top: New homeowners celebrating at the grand opening of Sausal Creek Homes in Oakland's San Antonio District.

Middle: Youth participants of EBALDC's Money Savvy Youth financial education program.

Bottom: 4th grade students of Manzanita Community School and graduates of the Money Savvy Youth financial education curriculum.

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Sacred Heart Community Service and CompassPoint: Building Community Engagement Capacity Together

CompassPoint's strategic and operational planning with San Jose-based Sacred Heart Community Service (www.sacredheartcommunityservice.org) signals important growth for both organizations into new areas of client engagement and service delivery. It is work that reflects each organization's orientation toward continual learning and client-centered approaches – in Sacred Heart's mission to ensure every child and adult is free from poverty and CompassPoint's work to increase the impact of community nonprofits.



States Erin Stanton, Management Analyst at Sacred Heart: "This is a pivotal strategic planning process for us. We've had a shift in philosophy and there are new directions we want to explore. As a volunteer-driven organization, we want to expand the participation of all our constituents and integrate more community engagement, advocacy, and policy into our work. This includes creating leadership development pathways to train clients to teach or deliver services that they were once participants in."

"There was a tremendous amount of excitement about working on our strategic plan because we're moving from a service orientation to one focused on client empowerment and community building," says Executive Director Poncho Guevara, who had previously participated in CompassPoint's Fundraising Academy for People of Color. This was a new type of strategy development work for CompassPoint consultants Steve Lew and Marla Cornelius, and an area they were very eager to take on.

In many ways this was a joint learning process for both organizations on developing and refining community engagement strategies. States Erin, "The number one impact of CompassPoint has been Steve and Marla's very steady guidance. They kept us engaged and on track. They helped us set up a process to identify and contact other organizations that were doing what we wanted to do and to learn from these people, as well as our internal staff leaders. Marla's now helping us to develop an operations plan. We've never had one as an organization. It has been so helpful to have someone teach us about it so staff have ownership and can do one themselves. That's one of the things I most appreciated throughout the process: CompassPoint didn't do the work for us and then walk out the door; rather Steve and Marla gave us the knowledge and tools so we could continue to do this work ourselves." And through this effort, Sacred Heart and CompassPoint have taken big steps to build the capacity of both organizations to support community engagement and advocacy.



Photo credit: Sacred Heart Community Service

Top: Students participating in Sacred Heart's youth education programs.

Middle: Seniors involved with Sacred Heart's organizing program attending a City Council meeting to protest the closing of their local community center.

Bottom: Young boy picking up a food box from the Sacred Heart pantry with his family.

Please support CompassPoint's work in the community. Donate now at www.compasspoint.org/donate

CompassPoint Highlights

Merger On January 1, 2010, CompassPoint and The CBO Center, which served Alameda and Contra Costa counties, merged. This was a merger instigated by organizational leaders from a place of strength and shared commitment to deepening and broadening services to nonprofits in the East Bay. CompassPoint now offers workshops, leadership programs, peer networks, and consulting in both counties, as we do in San Francisco and Silicon Valley. We welcome The CBO Center Executive Director, Liz Callahan onto our staff as well as three exceptional board members: Ron Brown, Executive Director at Save Mt. Diablo, Paul Buddenhagen, Program Manager at the Contra Costa County Service Integration Program, and Seth Kaplan, Chief of Staff for Alameda County Supervisor, Nate Miley. We also gratefully acknowledge The CBO Center Board Chair, Susan Bateson, Executive Director of the Alameda County Community Food Bank, whose leadership was instrumental to our process.

Leadership Circle In 2009, CompassPoint launched our first formal program for friends and colleagues who provide a significant financial gift along with their shared commitment to supporting and strengthening community nonprofits. We thank these community leaders for their generous support.

Adler & Colvin
Ignatius Bau
Libby Dietrich
Chuck Greene
Paul Harder
Edie & Bob Kirkwood
Jan Masaoka
Ted Mitchell
Vincent Pan
Patrick Santana
Tom Silk
Claire Solot
Paulette Traverso
Steve Zimmerman

Publishing In 2009 CompassPoint staff continued to publish books and monographs that share our frameworks and learnings with nonprofit leaders and other capacity builders.



CompassPoint Finances 2009

UNRESTRICTED FUND

Statement of Activities January 1 - December 31, 2009

TOTAL INCOME	\$4,062,948
TOTAL EXPENSES	
Program	\$3,412,302
Management & General	\$605,608
Fundraising	<u>\$ 97,581</u>
	\$4,115,491
NET	\$(52,543)
TOTAL NET ASSETS	\$2,981,573

CompassPoint

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This Annual Report for 2009 can also be found at www.compasspoint.org/annualreport.

Written by Cristina Chan & Jeanne Bell
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