



## 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 Annual Report to the Community for 2007 can be found at [www.compasspoint.org/annualreport](http://www.compasspoint.org/annualreport).



We are so pleased to share with you – our clients, partners, and funders – our Annual Report to the Community for 2007.

The theme of this year's report is storytelling. We are honored that three of our recent clients were willing to tell their CompassPoint stories in this report. Art in Action, the Children's Defense Fund, and the San Francisco International Program, whose stories you see to the right, each embody the community impact and aspiration that CompassPoint's programming is designed to support. Whether we are helping nonprofit organizations to develop performance metrics, or providing them Interim Executive Directors, or offering their leaders a venue for continuous learning, we do all of it through the lens of making the Bay Area a healthier and more just community for everyone. That's the ultimate story of community nonprofits—and of CompassPoint too.

As we look ahead, our Board and Staff are focused on learning and program design in governance, executive coaching, cultural competence, and developing the next generation of nonprofit leaders, among other areas. And, we are very focused on the continued growth of our services in the South Bay, where our resource center and training facility in the Sobrato Community Conference Center now serve thousands of nonprofit staff and board members each year.

Many thanks to all of you for being partners and valued clients. Please let us know if you have any questions about what you read in this report.

In partnership,

*Jeanne Bell*

Jeanne Bell  
CEO

*Diane Ford*

Diane Ford  
Chair, Board of Directors

## Core Support Funders 2007

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.

The David & Lucile Packard Foundation

The Evelyn & Walter Haas, Jr. Fund

The San Francisco Foundation

Silicon Valley Community Foundation

Sobrato Family Foundation

## The Story of CompassPoint is the Story of Our Clients

Over 33 years, we have worked with thousands of organizations and individuals to help them achieve the impact and social change they seek in their communities.

The themes of these stories – managing change, unearthing the power of leaders, identifying the right organizational path – are universal. They are the essence of our work with community organizations. We are privileged to play a role in the stories of so many exceptional organizations.



Amource Lee with SFIP participants at the Alemany Flea Market.



Amource Lee with 1962 participant Liv Haug – SFIP's first participant.



## SUPPORTING NEXT GENERATION LEADERS A Profile of Amource Lee

As Executive Director of the San Francisco International Program ([www.SFIP.org](http://www.SFIP.org)), Amource Lee introduces leaders from around the globe to professional development and cross-cultural exchange opportunities from the Bay Area's best nonprofits, corporations, and government agencies. One recent training program has brought Ethiopian women to the Stanford Center for Entrepreneurial Studies with the intent to use this knowledge to create Ethiopia's first business school. Another has delivered tailored trainings to Turkish youth workers to aid their development of an art and theater-based afterschool program in their home country. But as an emerging leader in her own role as a new E.D., Amource was having difficulty finding some of the focused support and professional development she works so hard to provide others.

"I was six months into my job and had already 'lifted up the carpet' and seen what was going on in the organization and what it was going to take to stay there. I realized it's not about running on fumes, but about sustaining myself in the job and maintaining a balance."

Participating in CompassPoint's intensive *Thriving as an Executive Director* training and coaching program offered her resources and community linkages that have transformed the way she approaches leadership and her work.

"I had no idea how amazing *Thriving* would be. The facilitators, Rich and Michelle, are incredible – best in class... I got such a high level of personalized support, not just as an ED, but as an individual. I have been able to cultivate a leadership network.

A lot of EDs struggle with isolation, having to hold everything ourselves. If it's true, it shouldn't be. It should be about sharing responsibility and getting help when you need it. That's what leadership really is about. I was measuring my leadership against criteria that was about doing it all myself. *Thriving* helped break that...It's a huge paradigm shift, inviting the community to get involved, staff to get involved. Once you commit to sharing leadership, you learn how rich and fruitful we all are."

As a biracial, bicultural individual, Amource has always been a cultural bridge of sorts. Now, with a fortified network of support and leadership skills, she's a stronger bridge for others. She's ready for anything her job brings her way, and is proactively shaping her career and life. But in no way is she done with her skills development. Next on her list to tackle are CompassPoint's Fundraising Academy for Communities of Color and the Dashboard organizational monitoring tool.



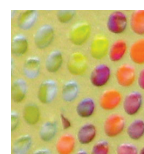
CDF California staff members



CDF's advocacy efforts provide a strong voice for America's children.



CDF California staff members



## MANAGING EXECUTIVE TRANSITIONS Children's Defense Fund California

The Children's Defense Fund ([www.CDFCA.org](http://www.CDFCA.org)) is a nonprofit child advocacy organization that has worked relentlessly for 35 years to ensure a level playing field for all children. They are well known by policymakers at all levels for their advocacy of policies and programs that lift children out of poverty and alleviate its related stresses. Supported by foundation and corporate grants and individual donations, CDF advocates nationwide on behalf of children to ensure children are always a priority. The organization's culture mirrors its approach to its work – independent, tenacious, and passionate.

In keeping with organizational culture, after the departure of its California office executive director two years ago, the organization appointed an interim executive director from within its ranks while they searched for a new leader. However, the search proved to be a challenge and the interim remained in place for longer than expected. CDF ultimately engaged an external search consultant who brought several solid candidates to the table, but the candidates were not prepared to attend to infrastructure challenges and communication deficiencies within the California office that the protracted time between permanent leaders had intensified. The search consultant recommended a different strategy to address these needs – engage CompassPoint's Executive Transition Services to identify and place an Interim Executive Director (IED) in this office.

The process quickly brought positive change to CDF California. Says Marjorie Newman-Williams, Chief Operating Officer for the national headquarters in Washington, D.C.:

"Consultant J.R. Yeager's style and knowledge, and the manner in which he engaged staff, won their trust through a very directive, transparent, and helpful process. CompassPoint was able to quickly identify from its pool of talent an interim executive director who met our needs and stabilized things.

It's not really in CDF's tradition to use an IED, usually we use interim staff. But we've learned that's a fairly unstrategic short-term solution. An external interim allows for a much more deliberate transition planning process. This is a good model for transition. And it's reassuring to know an organization like CompassPoint is there to back us up."

Perhaps the best testimony about CompassPoint's work on this transition is Marjorie's pondering of her future post-CDF and post-retirement:

"I like how this works. Maybe I want to be an interim executive director someday."

## CompassPoint 2007 by the numbers

142	Consulting clients
62	Executive Transition clients
394	Workshops delivered
26	Executive coaches placed
938	Visits to the web site per day
48,885	Board Café subscribers
6,669	TalkingPoint subscribers



## MONITORING ORGANIZATIONAL PROGRESS WITH THE DASHBOARD TOOL Art in Action

For over 25 years, Menlo Park-based Art in Action ([www.artinaction.org](http://www.artinaction.org)) has brought visual arts education to K-8 students in the Bay Area and beyond through its innovative curricula and art camps. The Art in Action program provides teachers the training and materials necessary to create a comprehensive, easy-to-use art program and offers educators and docents step-by-step lesson plans to teach students at each grade level how to analyze art masterpieces and create unique projects.

Founder and Executive Director Judy Sleeth has instilled the same discipline, detail, and creativity found in its art programs to the organization's practice of identifying indicators to measure success, but these metrics have tended to focus more on pure reporting than on the success of the whole organization. An invitation to participate in the South Bay roll out of CompassPoint's Dashboard monitoring tool initiative came at an opportune time, offering Art in Action an agency-wide monitoring framework and timing that coincided with its strategic planning process.



Students show off their watercolor paintings, based on a Kandinsky abstract art masterpiece.



Betsy Halaby, Program Director, trains teachers and docents in how to create one point vanishing point perspective in an interior environment.



A student's version of a Picasso.

Consultant Marissa Tirona worked with staff to create a tailored Dashboard that tracks the extent to which program activities meet the organization's mission to bring art to children, maintain an outstanding program, and address development and fundraising goals. Particularly, it has helped Art in Action articulate its need to scale its operations – to support program growth without compromising quality. The result is an organization that is achieving ever-increasing synchronicity between programming and tracking of client needs and ongoing priorities. Says Judy Sleeth:

"Participating has turned upside down the whole idea of how we look at reporting. It has helped us focus on the drivers that enable us to meet our goals."

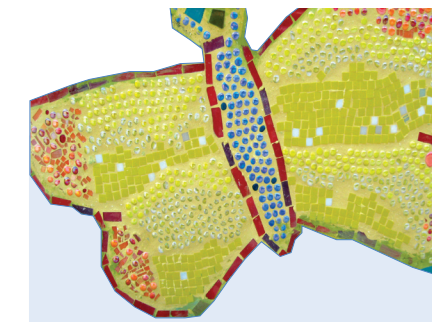
Adds Operations Director Heather Macdonald:

"Marissa has really guided us in identifying our measures. Our Dashboard helps us evaluate the progress we're making toward meeting our objectives. It has helped us articulate and evaluate our goals and priorities. Monitoring what enables us to grow effectively is something we have now systematized.

And the better your information is, the more you enable your board to make good decisions. It helps the board review what changed since the last board meeting and facilitates their ability to jump back in."

## CompassPoint Finances 2007

<b>UNRESTRICTED FUND Statement of Activities January 1 - December 31, 2007</b>	TOTAL INCOME	3,833,492
	TOTAL EXPENSES	
	Program	3,535,145
	Management & General	634,531
	Fundraising	72,372
		4,242,048
NET	(408,556)	
TOTAL NET ASSETS	1,780,835	



## Board 2007

Barbara Terrazas  
Carl Pang Chen  
Chuck Greene  
Colin Lacon  
David Mercer  
Diane Ford  
Joe Valentine  
Michael McCone  
Sharon Zorbach  
Ted Mitchell  
Teresa Alvarado  
Tom Sino, CPA  
Tom Silk

## Staff 2007

Ronald Alexander  
Jeanne Bell  
Susan Bennett  
Yasya Berezovskiy  
Elizabeth Bevans  
Barbara Camacho  
Sierra Catcott  
Cristina Chan  
Marla Cornelius  
Carrie D'Andrea  
Anita Dharapuram  
Natasha D'Silva  
Ben Felsing  
Anushka Fernandopulle  
Michelle Gislason  
Sarah Gort  
Byron Johnson  
Chuck Greene  
Grayton Huang  
Jean Klasovsky  
Nelson Layag  
Victoria Lee  
Steve Lew  
Shelby Malvoso  
Ellen Meyers  
Suman Murthy  
Marissa Tirona  
Alfredo Vergara-Lobo  
Michael Warr  
Tim Wolfred  
Mandy Wu  
JR Yeager  
Steve Zimmerman

**Mosaic Art by Kid Serve**, an arts education program that guides students age 6-18 through the design and creation of permanent outdoor murals in their communities. Projects integrate social justice, creativity, and community service, and empower young people to take a leadership role in beautifying and transforming their neighborhoods. Kid Serve has created over 70 youth murals with Bay Area Kids since 1999. Director and Supervising Artist: Josef Norris. [kidserve.com](http://kidserve.com)

Written by Cristina Chan & Jeanne Bell

Design by traversosantana.com

## Field Building

In addition to bringing the best, essential management practices to our one-on-one work with clients, we are committed to leading innovation and bringing new approaches to the work of the sector. Following are major areas in which we are conducting focused initiatives and building resources:

### Cultural Competence

Our growing work in this field affirms the need for productive, healthy organizations to integrate diversity and culturally appropriate responses into their systems and practice. For over three years, our Fundraising Academy for Communities of Color has provided intensive training, coaching, and peer learning to people of color doing fundraising in community organizations. 60 organizations served and counting! In 2007, we partnered with The California Endowment to deepen practice and theory by publishing a monograph series and convening 50 researchers and practitioners to discuss multicultural organization development within health organizations and systems. This partnership continues in 2008 when we'll lead intensive cultural competence capacity building with health organizations and collaborations throughout the state.

### Leadership Pipeline Development

Research and planning conducted in 2007 formed the important foundation for *Ready to Lead? Next Generation Leaders Speak Out*, our study on the leadership plans and perspectives of emerging nonprofit leaders. This study captured the attention of the sector in early 2008 with findings advocating for improved professional development and support of rising leaders. We're answering the call with new programming rolling out this year: the multi-session skills-building intensives *Nonprofit Management 101* and *Thriving for Emerging Leaders*, and the launch of the redesigned San Jose State University-CompassPoint Nonprofit Certificate Program.

### Coaching

Our work on the multi-year Coaching & Philanthropy Initiative, with lead funding provided by The W.K. Kellogg Foundation, is impacting the visibility and understanding among funders and nonprofit leaders of the benefits coaching can provide organizations. The tentatively titled guidebook we are co-authoring, *Coaching Skills for Nonprofit Managers*, currently in development and estimated for release in 2009, will provide a definitive resource for nonprofit managers and supervisors to gain comprehensive information about the process and goals of coaching.

### Silicon Valley Infrastructure Development

In keeping with our priority to better meet the needs of Peninsula and South Bay nonprofits, over the past year and a half CompassPoint has revitalized our Silicon Valley office, investing more staff, infusing more resources, and building and reestablishing connections to the region's nonprofit community.

**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](mailto:info@compasspoint.org)  
[www.compasspoint.org](http://www.compasspoint.org)

