TRANSFORMING SERVICES
Community Initiatives’ two core services, Human Resources and Financial Management, implemented transformational upgrades.

GROWING PROJECTS
42% of projects reported expansion in their capacity and 20% launched new programs.
A Year of GROWTH

- 42% of projects reported expansion in their capacity
- 20% of projects launched new programs
In 2018, we managed over $31 million in project assets, up from $21 million in 2017.

Through major administrative and accounting system upgrades and an expansion of staff capacity, we’re proud to say we implemented a number of long-term and short-term strategies to improve the services we offer our nonprofit community.

Community Initiatives is thrilled to report historic highs in net assets and reserves. In 2018, we managed over $31 million in project assets, up from $21 million in 2017. This increase is reflective of the growing success of our current clients, in particular, the 42% that reported expansion in their capacity and the 20% that launched new programs. We were also thrilled to welcome 10 new projects into our portfolio.

Our projects held dozens of events this year, including several annual conferences. We supported projects as they weathered leadership transitions, implemented strategic plans, completed mergers, and relocated project facilities. Projects found encouragement in online communities where networks of volunteers and supporters bolstered their missions.

This year we met a long-held customer service goal, and for the first time, our Annual Project Survey was conducted by an external evaluator. Thanks to Research Evaluation Consulting and participation from our projects, we took an independent and comprehensive look at our network’s activities and experiences.

In service to our current clients, we launched a secure online Project Portal so every employee can have quick access to a huge library of resources. From grant attachments, benefit summaries, to insurance certificate requests, it is all securely available twenty-four hours a day on the Project Portal.

Last but not least, we directly addressed our own expanding capacity needs, and moved our administrative office and team to Oakland! We are now settled into our gorgeous new space, with a large conference room available for projects to host events of their own.

This list of incredible upgrades will shape an ever brighter future for Community Initiatives. We look forward to continuing to serve our projects and help them meet and exceed their goals in 2019.

Sincerely,

Ruth Williams

President and CEO
SNAPSHOT

GROWTH IN TOTAL ASSETS

2017 $21,064,727
2018 $31,283,136

PROJECT SIZE

- SMALL up to $99,999: 36%
- MEDIUM $100,000–$499,999: 41%
- LARGE $500,000–Greater than $1M: 23%

WE WELCOMED 10 new PROJECTS

272 PROJECT EMPLOYEES
COLLECTIVE IMPACT: TOGETHER, OUR PROJECTS SERVE OVER 600,000 PEOPLE PER YEAR

PORTFOLIO MIX
Projects, which may have overlapping focus areas, are focused on a diverse set of issues.

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>education</td>
<td>51%</td>
</tr>
<tr>
<td>social justice</td>
<td>37%</td>
</tr>
<tr>
<td>health and wellness</td>
<td>31%</td>
</tr>
<tr>
<td>other*</td>
<td>25%</td>
</tr>
<tr>
<td>youth development</td>
<td>21%</td>
</tr>
<tr>
<td>capacity building</td>
<td>17%</td>
</tr>
<tr>
<td>environment</td>
<td>15%</td>
</tr>
<tr>
<td>network/alliance</td>
<td>13%</td>
</tr>
<tr>
<td>arts</td>
<td>7%</td>
</tr>
<tr>
<td>philanthropy</td>
<td>7%</td>
</tr>
<tr>
<td>animals</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Other includes career development, civic engagement, culture/humanities, data science, food/farming, immigration, journalism/media, science, and veteran support.

Why DO PROJECTS CHOOSE COMMUNITY INITIATIVES?
- 61% Save time
- 60% Save resources
- 49% Receive support from experts

How DID COMMUNITY INITIATIVES MAKE A DIFFERENCE TO OUR PROJECTS?
- 72% Decrease in administrative burden
- 10% General benefit of share nonprofit status
- 12% Personalized high-quality client services through excellent staff experts

DONATION MANAGEMENT
- 347 institutional gifts
- 8,800 gifts
In 2018, Community Initiatives’ two core services, Human Resources and Financial Management, implemented transformational upgrades. Both departments increased personalization of services and launched online tools that put resources and information at the project directors’ fingertips.
The Finance Department tripled the number of Project Accountants in 2018. Each project now has a dedicated accountant intimately familiar with their financial details. This team expansion results in timely and tailored support by a trusted financial advisor.

This year, Community Initiatives changed to Burnham Benefits for comprehensive employee benefits and Mutual of America for 401K management. Project directors and team members can now check, update, and change their enrollments online faster than ever.

To ensure that all clients are compliant with federal, state, and local regulations, the sexual harassment training that Community Initiatives offers received a major upgrade. All employees in supervisory roles can now complete the legally required 2-hour course online at times convenient to them. This upgrade means an increase in both compliance and convenience for our dispersed project network.

This year, with the successful launch of Intacct, our new online financial accounting system, the Finance Department received another major upgrade. With Intacct, projects can now securely view their historic and most recent month’s financial information 24 hours a day.

Together, these two upgrades offer an incredible increase in efficiency. Monthly accounting is now closed in one-third the time previously required, so projects receive answers quicker than ever.
In 2018, Community Initiatives launched an online Project Portal. Now every project employee can quickly and securely access an extensive library of resources 24 hours a day. On the Project Portal, projects can find grant attachments, benefit summaries, insurance certificate requests, and more. We know that our projects are thrilled to have this tool at their fingertips, as it is now the second most visited page on Community Initiatives’ website.

The services provided to projects go beyond Human Resources and Financial Management. Community Initiatives also offers our entire portfolio: insurance, legal counsel, grant management guidance, tax filing, and donation acknowledgment. The Community Initiatives Client Services team fosters in-depth relationships that seamlessly coordinate these comprehensive offerings. We know that when our projects’ administrative burden is eased our network members grow and thrive.

Flexibility

“Community Initiatives is great. I am also surprised by the SPEED, PATIENCE, AND FLEXIBILITY the staff has with us. We are small, move fast, and things are often on fire. Community Initiatives is a stabilizing force.”

Startup Policy Lab
Focus on the mission

“Community Initiatives allows us to FOCUS ON THE MISSION AND NOT GET DISTRACTED BY ADMINISTRATIVE TASKS. We are grateful to get to spend our time in that way and it allows us to put our best foot forward in our work. Likewise, we are able to pull together a particularly strong advisory committee, precisely because they get to focus on the mission rather than audits and other administrative tasks, which makes our mission work that much stronger.”

The Fund for People in Parks
STAFF AND BOARD

CEO’S OFFICE

Ruth Williams
President and CEO

Tiffany Pruitt
Executive Assistant and Board Liaison

CLIENT SERVICES

Brandy Shah
Legal Director of Client Services

Nicki Leszman
Senior Client Services Manager

Rose Cohen Westbrooke
Client Services Manager

Celeste Estrella
Client Services Admin

HUMAN RESOURCES

David McGee
Vice President of Human Resources and Operations

Rula Adranly
Human Resources Business Partner

FINANCE

Keith Chreston
Chief Financial Officer

Anthony Choy Koo
Controller

Nawfal Hachim
Assistant Controller

Cathy Nelson
Senior Payroll Administrator

Keith Sau-Simuro
Accounts Payable

Peter Byrne
Account Manager

Jenny Wu
Project Accountant

Dewey Singh
Project Accountant

BOARD OF DIRECTORS

Steve Barton
Evan Boido
Janet Camarena
Mary Ann J. Fake, CPA
Zoe Hunton
Connie Lee
Chris Mccrum
Loren Pogir
Kenji Treanor
Phillippe Wallace
Robert L. Weiner
**2018 TOTAL**

**STATEMENT OF FINANCIAL POSITION**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Total Assets</td>
<td>$31,283,136</td>
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<tr>
<td>Liabilities</td>
<td>1,677,828</td>
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<tr>
<td><strong>NET ASSETS:</strong></td>
<td></td>
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<tr>
<td>Unrestricted-CI Operations</td>
<td>1,899,965</td>
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<tr>
<td>Temporarily Restricted-FSP</td>
<td>27,705,343</td>
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<tr>
<td>Total Net Assets</td>
<td>29,605,308</td>
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<tr>
<td>TOTAL Liabilities and Net Assets</td>
<td>$31,283,136</td>
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**STATEMENT OF ACTIVITIES**

**REVENUE AND SUPPORT:**

<table>
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<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Grants and Contributions</td>
<td>$33,347,741</td>
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<tr>
<td>Other Income</td>
<td>3,298,557</td>
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<tr>
<td>In-kind Contributions</td>
<td>252,198</td>
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<td>Interest Income</td>
<td>86,960</td>
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<td>TOTAL Revenue and Support</td>
<td>36,985,456</td>
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**EXPENSES:**

<table>
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<th>Description</th>
<th>Amount</th>
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<tr>
<td>FSP-Program Services</td>
<td>22,134,994</td>
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<tr>
<td>FSP-Fundraising</td>
<td>2,459,443</td>
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<td>CI-Management and General</td>
<td>2,852,650</td>
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<td>TOTAL Expenses</td>
<td>27,447,087</td>
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<td>Change in Net Assets</td>
<td>9,538,369</td>
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<td>Net Assets, Beginning of Year</td>
<td>20,066,939</td>
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<tr>
<td>Net Assets, End of Year</td>
<td>$29,605,308</td>
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</tbody>
</table>
“I AM VERY PLEASED WITH COMMUNITY INITIATIVES AND RECOMMEND THEM TO EVERYONE. THEY ARE GREAT PARTNERS AND MAKE LIFE MUCH EASIER FOR ALL.”

Get Screened Oakland

OAKLAND OFFICE
1000 Broadway, Suite #480
Oakland, CA 94607
(415) 230-7700

FIND US ONLINE!
Communityin.org