CELEBRATION OF EXCELLENCE
25 years
IN SERVICE TO GREAT IDEAS

Community Initiatives
Celebrating 25 Years
The past two years have strained our social safety net in ways many of us have never encountered. In response, Community Initiatives and our Fiscally Sponsored Projects (FSPs) have created new strategies not just to endure, but to pivot, adapt, and build for the future. By continually placing our focus on long-term community relationships and the people who nurture them, Community Initiatives weathered what we hope was the worst of the pandemic and had the strongest year on record, with $38M in total assets.

This places Community Initiatives in an even stronger position to build resilience for the future while the COVID-19 pandemic still presents unprecedented logistical, emotional, and economic hurdles. Despite these challenges, our remarkable staff persisted and delivered on our commitment to continuous improvement. We scaled up and stepped up to meet needs locally, nationally, and globally. We stayed on track with our Enterprise Resource Planning to maximize our infrastructure. We upgraded our IT and fully transitioned to efficient work-from-home solutions. And despite it all, we continued our five-year trend of expanding our assets year-over-year.

We are proud to report back on several positive indicators for the past five years. Since 2017 we have experienced year-over-year growth in our FSP satisfaction rating, and phenomenal growth in the total number of employees (to 359) and FSPs (to 114). We have also expanded our operational footprint from three states to twenty-seven, and now have project support staff in four countries.

Each of these steps forward was carefully planned and designed to meet needs presented by local communities. As we expand and reposition our organization as an integral part of a global community, we ground ourselves in our mission: in service to great ideas. This dedication is vital to remaining a trusted and reliable partner as the very nature and structure of fiscal sponsorship evolves, and funders look to take bigger risks in response to expanding needs.

We invite you to learn more about our history and impact over the past two decades in our twenty-fifth anniversary feature section later in the report. This unique moment offers us an even richer opportunity to reflect on and learn from our twenty-five years in service to great ideas. It also reminds us of how vital it is to celebrate our successes as we work together to build a more just, equitable, and sustainable future.

Sincerely,

Ruth Williams, President and CEO

This unique moment offers us an even richer opportunity to reflect on and learn from our twenty-five years in service to great ideas.
Every year we conduct an independent survey of our Projects and ask them about their biggest successes. In 2021, Projects shared successes and improvements in the following areas:

- **Organizational Improvements**: 60% (2020: 26%, 2021: 44%)
- **Community Outreach & Engagement Activities**: 46% (2020: 46%, 2019: 22%)
- **Positive Outcomes**: 30%
- **Responses to the COVID-19 pandemic**: 19%

47% of projects report they’ve made a difference through the populations served

23% of projects report they’ve made a difference through the services they provide
In 1987, The Council on Foundations actually wrote an essay on fiscal agents – ‘A Trap for the Unwary,’ recalls Greg Colvin, one of the pioneering visionaries who helped found what is now known as Community Initiatives. First housed within the San Francisco Foundation, and then known as the San Francisco Community Initiatives Fund, Community Initiatives was founded in 1996 as a beacon of best practices in the burgeoning fiscal sponsorship field – and our long history of stability and reliable breadth of services were always defining values.

Jan Masaoka, also a Community Initiatives founding board member, highlighted the organization’s intentionally thoughtful approach that included a close review of projects and insistence that a Fiscally Sponsored Project (FSP) have more than one person responsible for its accountability and programming. Additionally, there was an insistence that an FSP’s purpose was truly for the public good. “People wanted to create non-profits for very private purposes – so culling through those helped define Community Initiatives.” A long-time leader in the Bay Area nonprofit community, Masaoka’s involvement, along with the contributions of Bill Powers, David Barlow, Ted Singer, John Kreidler, Greg Colvin, and many others, helped bolster the organization’s credibility from the start.

Whether those were challenges or opportunities, simple or complex, Community Initiatives was dedicated to meeting the need. For example, in 2005 Community Initiatives provided the critical operational link that supported public access expansion and created a more inclusive civic space in San Francisco’s Golden Gate Park.

With the help of early expert guidance, by 2008, Community Initiatives had nearly $21M in total assets. Then, a strong and stable organization, it separated from the San Francisco Foundation and moved to 354 Pine Street. This new independence ultimately allowed the organization to fully realize its mission and expand.
its impact to the community at large; Community Initiatives had grown to serve eighty-five projects in California and beyond. Then board member Frances Phillips underscores the idea that Community Initiatives was already a local bedrock presence at the forefront of community change. “That excited me the most about Community Initiatives - we had a birds eye view of the new things that were popping up.”

Though FSP management remains at the core of operations, Community Initiatives has also acted as a critical collaborator for groundbreaking public-private partnerships including the Laguna Honda Hospital Foundation, and the recent multi-million-dollar COVID-19 Emergency Response Fund anchored by the Silicon Valley Community Foundation, and in collaboration with the Alameda County Public Health Department.

Providing support to projects that otherwise might never have gotten off the ground (for example, widely loved Palomacy Pigeon and Dove Adoptions), is a consistent theme in any conversation regarding Community Initiatives’ enduring impact. But staff and board members return time and again to the lasting experience of shared learning and mutual regard. “I take away a lot of respect for other board members…. people who really cared about what they were doing, and were thoughtful about it,” John Kreidler emphasized.

Prudy Kohler, Former Director of Fiscally Sponsored Projects and Philanthropic Services at Community Initiatives, recalls her connection with then-CEO Melanie Beene as one of her favorite aspects of working at Community Initiatives, along with a sense of good-humored camaraderie in the San Francisco Office. “The old office on Pine Street was on the seventh floor and often the elevator was non-functional; we, as staff, decided that we wanted to use this opportunity for physical fitness. Every day at three p.m. we would walk down the stairs, walk up, walk down, walk up… It was time to kind of kick back, we could have conversations, a casual get-together. We did it just about every day.” Staff cohesion served the organization well through the 2008 financial crisis and the resulting years-long economic down-turn. To endure, Community Initiatives relied on its core strengths: strong leadership, provision of ethical and efficient services, and investment in deep community connections.

As the larger economy and FSPs built strategies to adapt, Community Initiatives once again began to grow and evolve. In 2011, Community Initiatives expanded their national reach by adding JunctionHouse Commons in Seattle, WA, and North American Primate Sanctuary in Ohio. In 2012, we added administrative staff to meet expanding project needs, kicking off a still-active period of stability and growth.

By 2018, Community Initiatives had over $31M in assets and moved across the Bay to newly renovated offices in Oakland. Relocating was a good business decision, states former board member Sarah Bacon. “Rents in San Francisco were skyrocketing. We did what a lot of projects were doing. It was difficult, but as an organization we could be more effective and help more people by saving on rent while continuing to see the same quality of work.” She goes on to praise the current CEO and President, Ruth Williams, as a vital piece of the leadership puzzle. “Ruth is a shining example… a testament to the longevity of Community Initiatives.”

Today, Community Initiatives stands ready as ever in service to great ideas, to address the escalating economic and existential crises facing our communities. “The place of fiscal sponsorship in emerging political movements for social change has become a fact of life. But the key is professional management; this is what the twenty-five-year history at Community Initiatives has demonstrated,” concludes Greg Colvin.
1996
- Community Initiatives inception (housed at the San Francisco Foundation)
- Number of projects: 72 coming out of the San Francisco Foundation

2000
- .com crash
- First location – 354 Pine Street, San Francisco (This was Community Initiatives first standalone office)

2002
- Launch of the 9/11 Fund (a big push for crowdfunding and fundraising)

2006
- Community Initiatives’ current bylaws written (Revised the founding constitution – these are the rules that Community Initiatives established and follows for self-governance)

2008
- First logo and creation of brand (logo, colors, tagline – look & feel)
- Added 25 projects
- Financial crash

2009
- 116 projects
- First national project – The Counsel for Global Equality, which advocates for LGBTQ+ rights internationally from their headquarters in Washington, DC

1996 - 2007 to 2014
David Barlow, First Executive Director

2007 to 2014
Melanie Beene, President & CEO
Celebrating 25 Years

2008
- First national project – The Counsel for Global Equality, which advocates for LGBTQ+ rights internationally from their headquarters in Washington, DC
- Added 25 projects
- Financial crash

2009
- 116 projects
- First national project – The Counsel for Global Equality, which advocates for LGBTQ+ rights internationally from their headquarters in Washington, DC

2010
- Laguna Honda Hospital Foundation helped open a new skilled nursing and rehabilitation center, which served as a national model
- 95 projects
- First international project (Dalai Lama Fellows)

2011
- Community Initiatives expanded their national reach by adding Junction House Commons in Seattle, WA, and North American Primate Sanctuary in Ohio
- First international project (Dalai Lama Fellows)
- 107 projects

2012
- 96 projects

2013
- 107 projects

2014
- Evelyn & Walter Haas Jr. Fund partners with Community Initiatives to support their efforts to improve the communications and strategic messaging work of their grant partners
- 109 projects

2015

2016

2017
- 87 projects

2018
- 93 projects
- Moved to Oakland, logo 2

2019
- 86 projects

2020
- Covid-19 Emergency Response Fund (a partnership with the Silicon Valley Community Foundation and Alameda County Public Health Department)
- 105 projects

2021
- 25th Anniversary, new logo
- 115 projects

2014 to 2017
- Melanie Beene, President & CEO

2014 to present
- Theresa Fay-Bustillos, President & CEO
- Ruth Williams, President & CEO
2021

COLLECTIVE impact

TOGETHER, OUR PROJECTS SERVED OVER

654,653 PEOPLE

359 TOTAL NUMBER OF EMPLOYEES SUPPORTED BY COMMUNITY INITIATIVES’ HR DEPARTMENT FOR ALL OR PART OF THE YEAR

WE WELCOMED 22 new PROJECTS

TOTALLING 114
“I FEEL PROUD TO BE ASSOCIATED WITH AN ORGANIZATION LIKE COMMUNITY INITIATIVES THAT OPERATES WITH EXCELLENCE AND VALUES OUT FRONT. THANK YOU TO THE ENTIRE LEADERSHIP AND STAFF TEAM AND TO THE BOARD OF DIRECTORS FOR ALL YOU’VE DONE DURING THIS CHALLENGING TIME TO BE OF SERVICE TO OUR PROJECT.”

People Power Project
STAFF

CEO'S OFFICE
Ruth Williams, President & CEO
Marisa Olson, Executive Assistant & Board Liaison

MARKETING & COMMUNICATIONS
Danielle Peterson, Brand Marketing Manager
Stephanie Bird, Digital Marketing Specialist

HUMAN RESOURCES
David McGee, Vice President of Human Resources & Operations
Rula Adranly, Human Resources Business Partner

FINANCE
Carl Taibi, Chief Financial Officer
Braxton Cahill, Controller
Brandon Wong, Project Accountant
Jenny Wu Zhen, Project Accountant
Marin Baker, Project Accountant
Paige Thomas, Project Accountant
Keith Sau-Simuro, Staff Accountant
Catherine Nelson, Senior Payroll Administrator

CLIENT SERVICES
Heidi Hernandez Gatty, Vice President of Client Services
Brandy Shah, Legal Director of Client Services
Audrey Roderick, Senior Client Services Manager
Rose Cohen-Westbrooke, Client Services Manager
Jose Plascencia, Client Services Manager
Luba Palionny, Client Services Manager
Erika Parke, Grant Specialist

BOARD OF DIRECTORS
Phillippe Wallace, Chair
Betsy Block
Loren Pogir
Maya Tussing, Treasurer
Janet Camarena
Barbara Rhomberg
Dee Dee Mendoza, Secretary
Mary Ann J. Fake
Robert L. Weiner
Steve Barton
Abbas Moloo
2021 FINANCIAL REPORT

STATEMENT OF FINANCIAL POSITION

Total Assets $38,228,924  
Liabilities 3,566,846  
Liabilities—Forgivable PPP Loans 2,000,000  

NET ASSETS:  
Without donor restrictions 2,296,355  
With donor restrictions 30,365,723  
Total Net Assets 32,662,078  
TOTAL Liabilities and Net Assets $38,228,924  

STATEMENT OF ACTIVITIES

REVENUE AND SUPPORT:  
Grants and Contributions $33,149,247  
Government Contracts 5,109,405  
Earned Income 3,755,281  
Other Income 40,074  
In-kind Contributions 95,613  
Investment Income 23,098  
Forgiveness of Paycheck Protection Program Program Loan 2,531,451  
TOTAL Revenue and Support $44,704,169  

NET ASSETS TRANSFERRED IN $545,529  

EXPENSES:  
Fiscal Sponsor Program $36,957,435  
Management and General $4,111,350  
Change in Net Assets  
Net Assets, Beginning of Year $28,481,165  
Net Assets, End of Year $32,662,078  

“I DO RECOMMEND CI TO FOLKS. THE EASE OF MANAGING PUBLIC CONTRACTS IS A BIG PLUS.”

Breaking Barriers
“CI has made a positive difference in our work by providing us with essential, backend services that are of high quality and contribute to the confidence that funders and supporters have for Latino Outdoors.”

*Latino Outdoors*

“We continue to be grateful for the ability to outsource administrative functions so we can focus on the mission work, which increases our job satisfaction, energy and enthusiasm, and ability to be efficient.”

*The Fund for People in Parks*