

GROWTH & *transformation*

GROWING PROJECTS

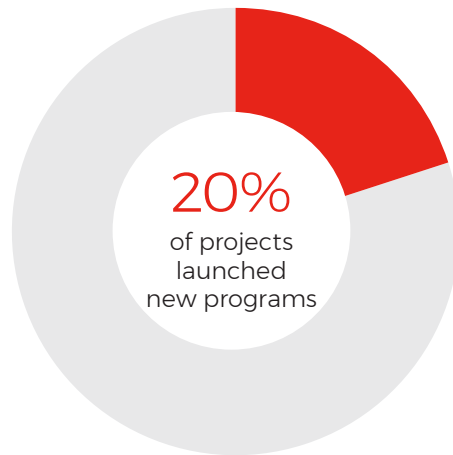
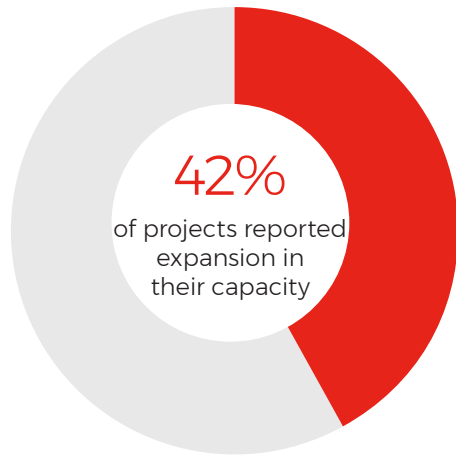
42% of projects reported expansion in their capacity and 20% launched new programs.

TRANSFORMING SERVICES

Community Initiatives' two core services, Human Resources and Financial Management, implemented transformational upgrades.

**COMMUNITY
INITIATIVES**
in service to great ideas

A Year of GROWTH



A Year of TRANSFORMATION

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

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.

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

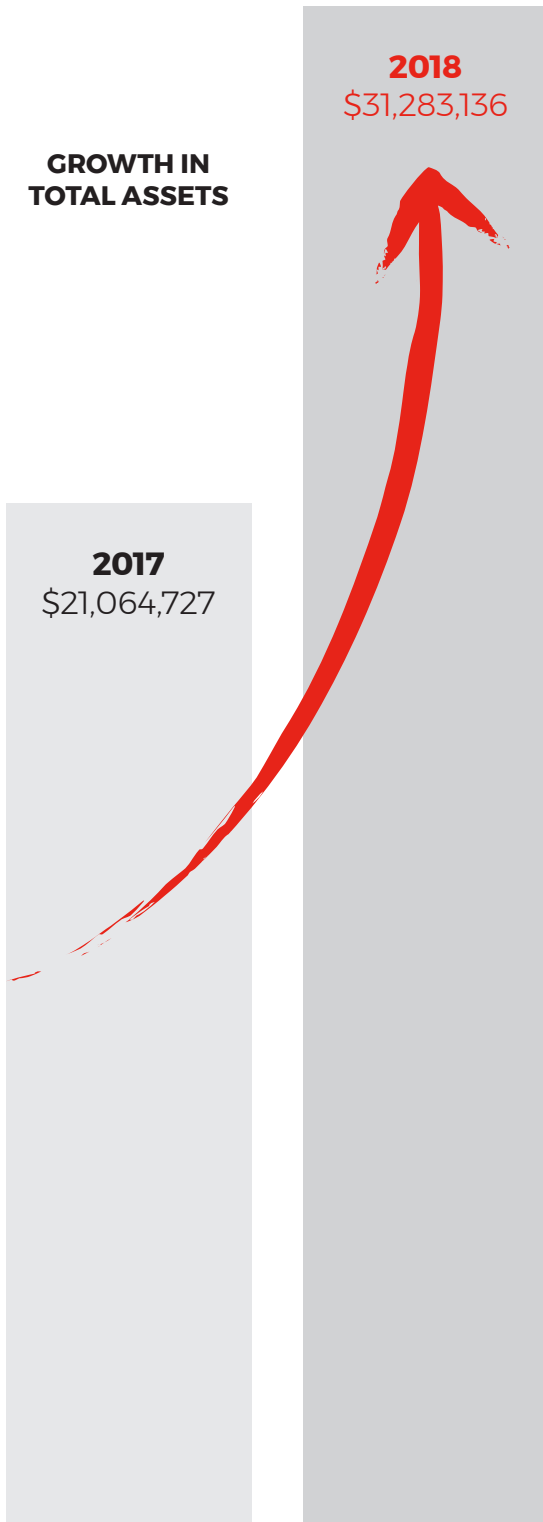
Ruth Williams

President and CEO

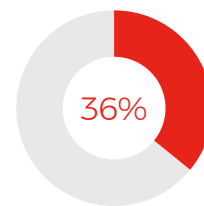
SNAPSHOT

WE WELCOMED
10 new
PROJECTS

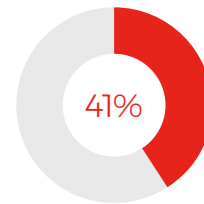
GROWTH IN
TOTAL ASSETS



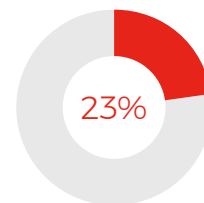
PROJECT SIZE



SMALL
up to \$99,999



MEDIUM
\$100,000–
\$499,999



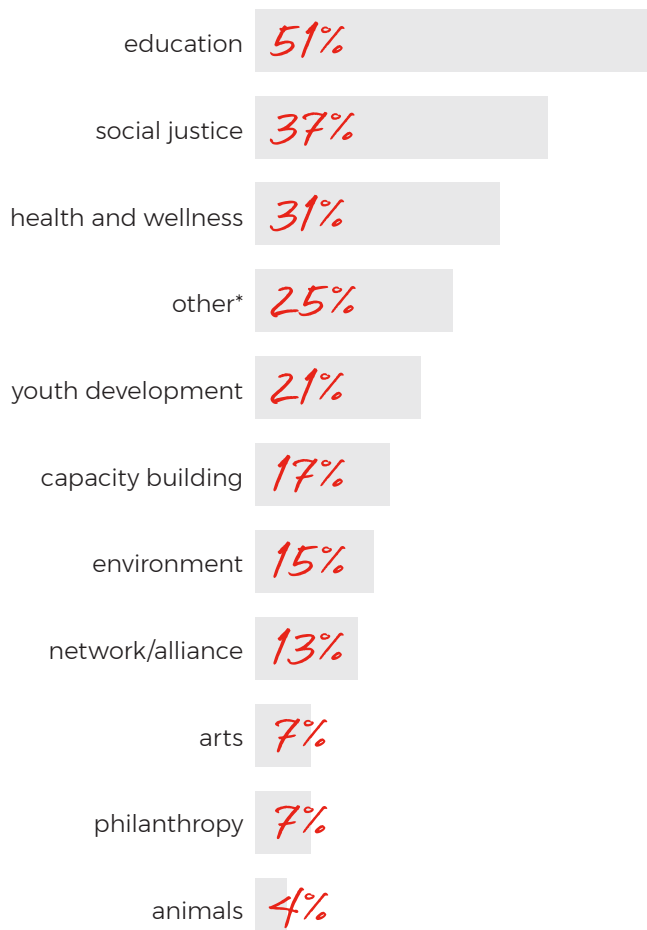
LARGE
\$500,000–
Greater than \$1M



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.

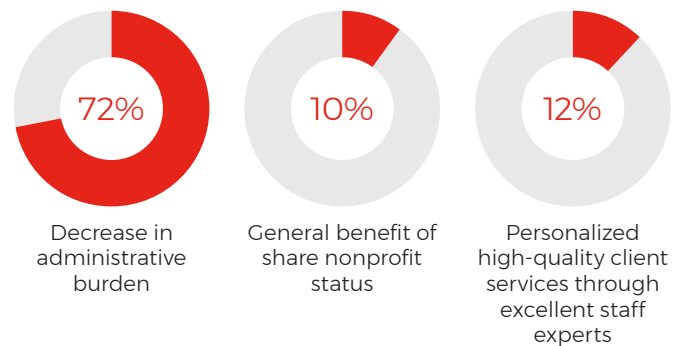


*Other includes career development, civic engagement, culture/humanities, data science, food/farming, immigration, journalism/media, science, and veteran support.

Why DO PROJECTS CHOOSE COMMUNITY INITIATIVES?



How DID COMMUNITY INITIATIVES MAKE A DIFFERENCE TO OUR PROJECTS?



DONATION MANAGEMENT



347

institutional gifts

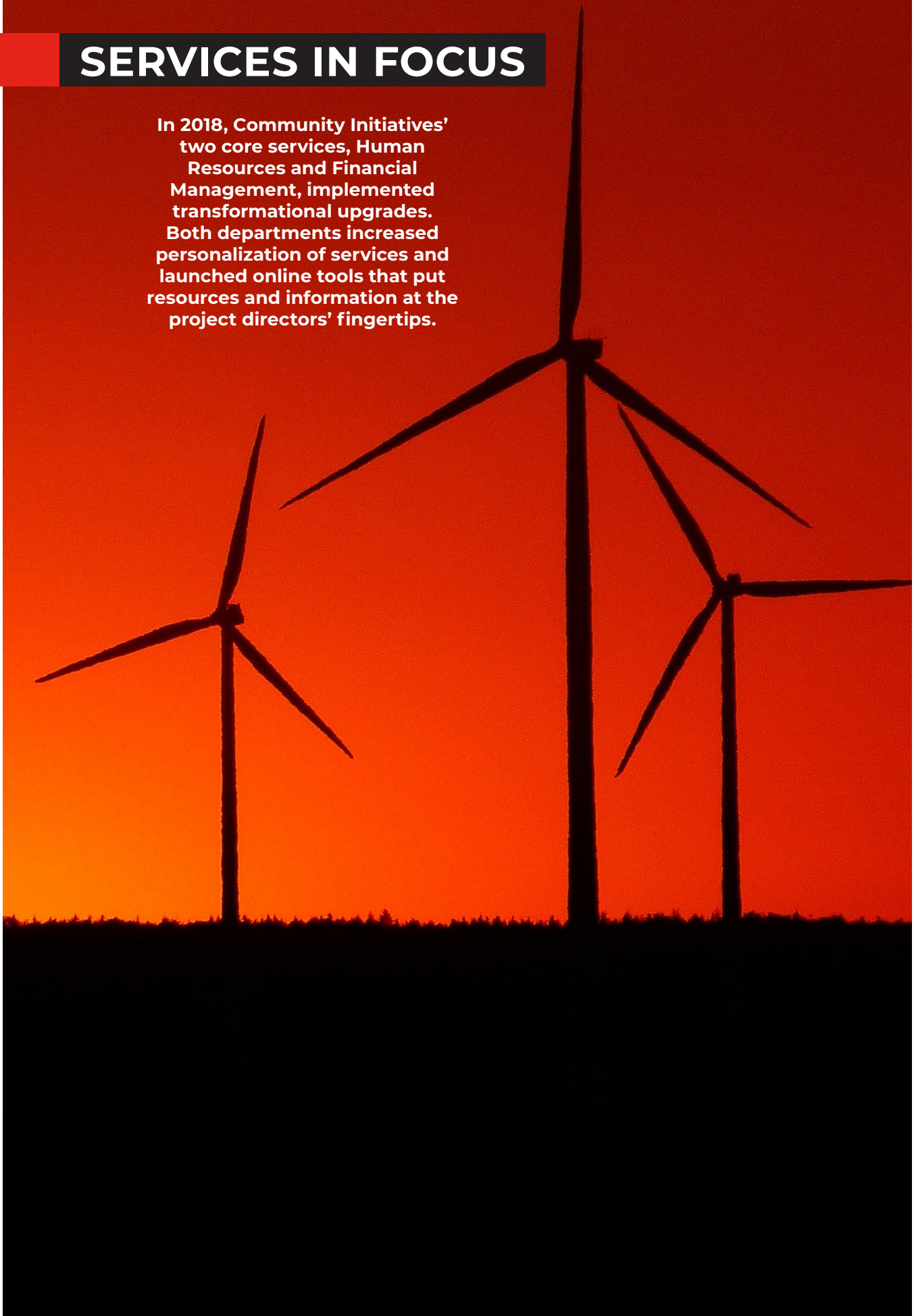


8,800

gifts

SERVICES IN FOCUS

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.





HUMAN RESOURCES

The Human Resources team widened the breadth of partnership offered to projects in 2018. They proactively addressed projects' complex human resource needs, drafted job descriptions, recruited talent, participated in interviews, and tackled compensation and employee relations issues. ***This approach increased the capacity of projects who are now more effective, efficient, and legally compliant.***

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.



FINANCIAL MANAGEMENT

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, 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.

SERVICES IN FOCUS



PROJECT PORTAL

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.



BEYOND THE BASICS

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

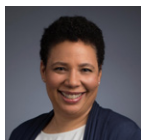
“Community Initiatives allows us to **FOCUS ON THE MISSION AND NOT GET DISTRACTED BY ADMINISTRATIVE TASKS.** We are grateful to get to spend our time in that way and it allows us to put our best foot forward in our work. Likewise, we are able to pull together a particularly strong advisory committee, 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

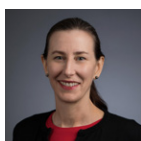


STAFF AND BOARD

CEO'S OFFICE

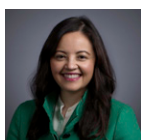


Ruth Williams
President and CEO

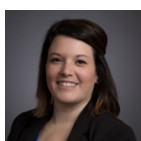


Tiffany Pruitt
*Executive Assistant
and Board Liaison*

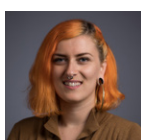
CLIENT SERVICES



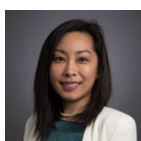
Brandy Shah
*Legal Director of
Client Services*



Nicki Leszman
*Senior Client Services
Manager*



Rose Cohen Westbrooke
Client Services Manager

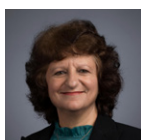


Celeste Estrella
Client Services Admin

HUMAN RESOURCES



David McGee
*Vice President of Human
Resources and Operations*

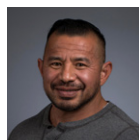


Rula Adranly
*Human Resources
Business Partner*

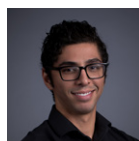
FINANCE



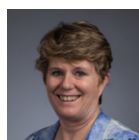
Keith Chreston
Chief Financial Officer



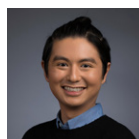
Anthony Choy Koo
Controller



Nawfal Hachim
Assistant Controller



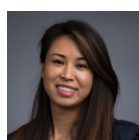
Cathy Nelson
Senior Payroll Administrator



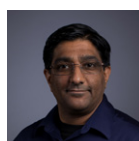
Keith Sau-Simuro
Accounts Payable



Peter Byrne
Account Manager



Jenny Wu
Project Accountant



Dewey Singh
Project Accountant

BOARD OF DIRECTORS

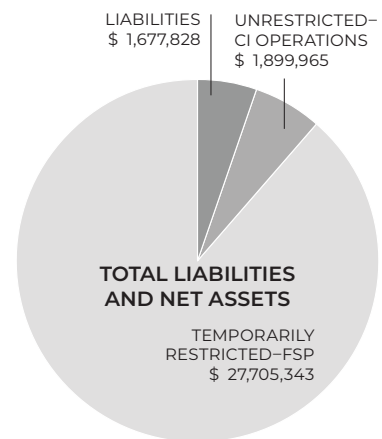
Steve Barton
Evan Boido
Janet Camarena
Mary Ann J. Fake, CPA
Zoe Hunton
Connie Lee
Chris Mccrum
Loren Pogir
Kenji Treanor
Phillippe Wallace
Robert L. Weiner

FINANCIAL REPORT

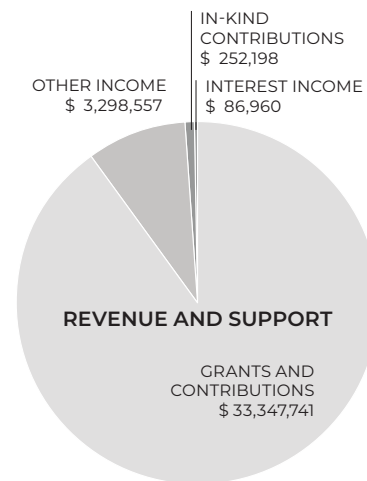
2018 TOTAL

STATEMENT OF FINANCIAL POSITION

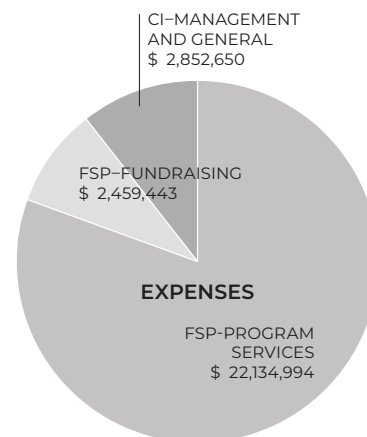
Total Assets	<u>\$ 31,283,136</u>
Liabilities	<u>1,677,828</u>
NET ASSETS:	
Unrestricted-CI Operations	1,899,965
Temporarily Restricted-FSP	<u>27,705,343</u>
Total Net Assets	<u>29,605,308</u>
TOTAL Liabilities and Net Assets	\$ 31,283,136

**STATEMENT OF ACTIVITIES****REVENUE AND SUPPORT:**

Grants and Contributions	\$ 33,347,741
Other Income	3,298,557
In-kind Contributions	252,198
Interest Income	<u>86,960</u>
TOTAL Revenue and Support	36,985,456

**EXPENSES:**

FSP-Program Services	22,134,994
FSP-Fundraising	2,459,443
CI-Management and General	<u>2,852,650</u>
TOTAL Expenses	<u>27,447,087</u>
Change in Net Assets	9,538,369
Net Assets, Beginning of Year	<u>20,066,939</u>
Net Assets, End of Year	\$ 29,605,308





**COMMUNITY
INITIATIVES**
in service to great ideas

Partners

"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



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Oakland, CA 94607

(415) 230-7700

FIND US ONLINE!

Communityin.org

