

ANNUAL REPORT 2019

SYSTEMS

for Success

PROJECT SUCCESSES

44% of projects reported organizational improvements and/or improvements in their fundraising and finances

CONTRACTS MANAGED

This year, Community Initiatives executed 468 contracts totaling \$6.1 million for leases, independent contractors, and MOUs.

**COMMUNITY
INITIATIVES**
in service to great ideas

SYSTEMS *for Success*

In 2019, the team at Community Initiatives made a committed effort to introduce **new audiences to the idea of fiscal sponsorship**. Our staff participated in a number of national and local events, and we are more energized than ever by the potential for fiscal sponsorship to bolster success in the nonprofit sector! I participated in an American Bar Association panel discussion, entitled “Fiscal Sponsorship After 25 Years.” At this national tax attorney conference, I had the opportunity to share our vision for vibrant possibilities with fiscal sponsorship partners.

Our team is spending more time in the field than ever, building relationships and experiencing our impact in action. These relationships have become institutionalized with a powerful upgrade to our Salesforce system, where **our team’s collective knowledge of the inner workings of every project has been recorded in one place**. This highly individualized record is bolstered with personal calls that identify opportunities to strengthen each project and fine tune our support. As a result of the collective wisdom gathered, our centralized client services management system now ensures that our projects are always paired with the subject-matter expert best equipped to help them.

We have deepened our work with our independent evaluator, Research Evaluation Consulting, to provide **actionable insights into our clients’ experiences**. Our annual client survey reveals information about our community and their collective impact, which you will read about in this report’s snapshot.

In a **major time-saving modernization**, we upgraded our payroll system to Paylocity. Now online and with a mobile app, our 300+ employees can quickly submit timesheets, vacation requests, and supervisor approvals. New employees can now complete all onboarding forms paperlessly. The easy-to-use platform seamlessly connects our entire HR system, and integrates with other systems including Intacct (accounting) and Mutual of America (401k).

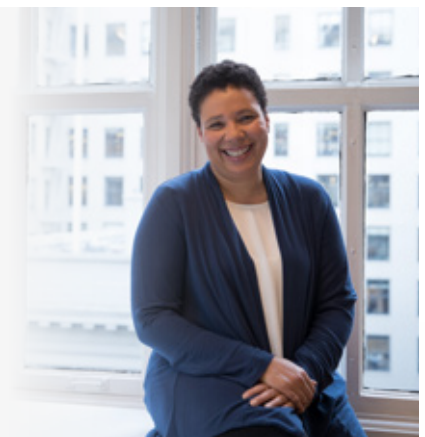
I am so proud of our team’s accomplishments and these major system improvements. We are all grateful for the opportunity to do **our part to help make so many incredible missions possible**.

Sincerely,

Ruth Williams

Ruth Williams, President and CEO

“We are more energized than ever by the potential for fiscal sponsorship to bolster success in the nonprofit sector!”



CREATING *possibilities*

"This past year 100% of Breakthrough Students graduated from High School. Nearly 90% were accepted to college. And 96% were first in their family to attend college."



"This year, The FruitGuys Community Fund awarded 15 farms and agricultural nonprofits from 12 different states, making 2019 our largest and most diverse class so far."

"[We are] working to develop a new HIV prevention educational workshop for young Black Gay and Bisexual men."



"We sent the greatest number of students ever on our educational spring break trip when we sent 17 students and 3 chaperones to New York City, and we helped fund that expansion by getting our first-ever grant from a foundation."

"Community Initiatives helped us through the process of acquiring our new TukTuk, which will be our major new development in our experiential science curriculum."



"We developed new educational resources to advise the public on how to recognize a true sanctuary from one that may exploit, and one on how a sub-par facility can start making changes to become a more reputable sanctuary."

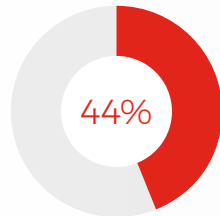
"We have...launched our first YEP (Youth Expression Project) program which focuses on youth expression through different forms of art. This year participants had the choice between writing class and an art class. We hope to expand and create different types of self expression classes."



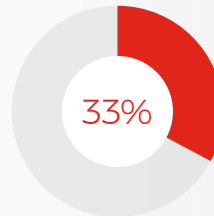
"We have saved hundreds of birds' lives who would otherwise have suffered & died. We helped thousands of people who find, rescue & adopt domestic, unreleasable pigeons & doves. We have inspired the creation of new rescues based on our model."

SNAPSHOT

IN THE PAST *year...*



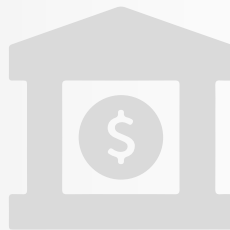
of projects reported organizational improvements and/or improvements in their fundraising and finances.



of projects reported community engagement, outreach, and/or facilitated events.

GRANTS AND CONTRIBUTIONS

5,891 total
grants & contributions

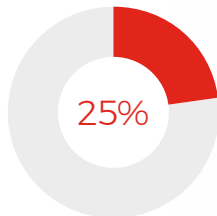


CONTRACTS

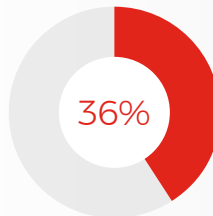
468 contracts executed
(includes Independent Contractor Agreements, MOUs, Leases, etc)



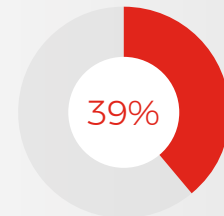
PROJECT SIZE



LARGE
\$500,000–Greater than \$1M



MEDIUM
\$100,000–\$499,999

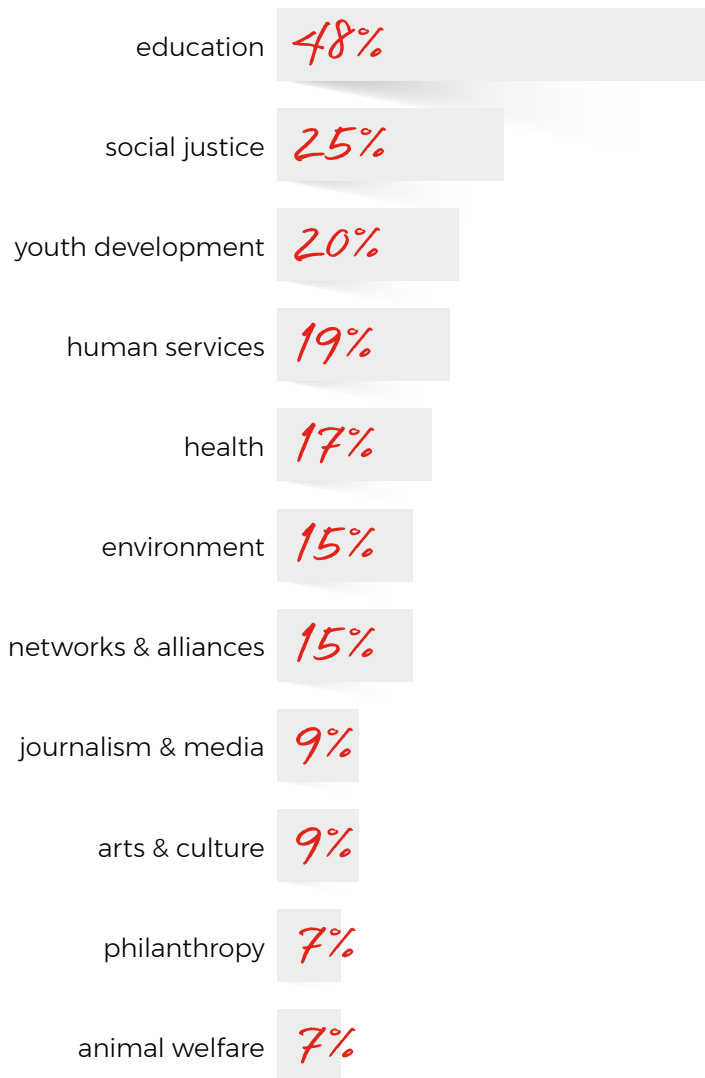


SMALL
up to \$99,999

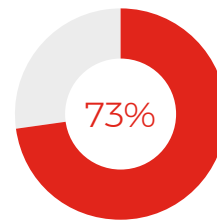
WE WELCOMED *10 new* PROJECTS

PORTFOLIO MIX

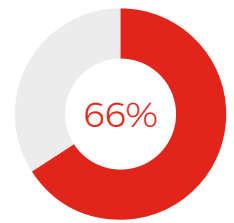
This year, projects identified both the primary and secondary foci of their mission. As projects could select multiple secondary foci, these percentages exceed 100%.



Why DO PROJECTS CHOOSE COMMUNITY INITIATIVES?

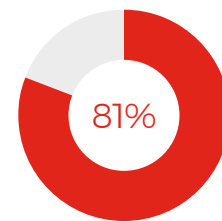


to stay focused on mission activities



to save time, money, and/or resources

How DID COMMUNITY INITIATIVES MAKE A DIFFERENCE TO OUR PROJECTS?



Easing the Administrative Burden



STAFF



BOARD OF DIRECTORS

Evan Boido
Janet Camarena
Mary Ann J. Fake, CPA
Zoe Hunton

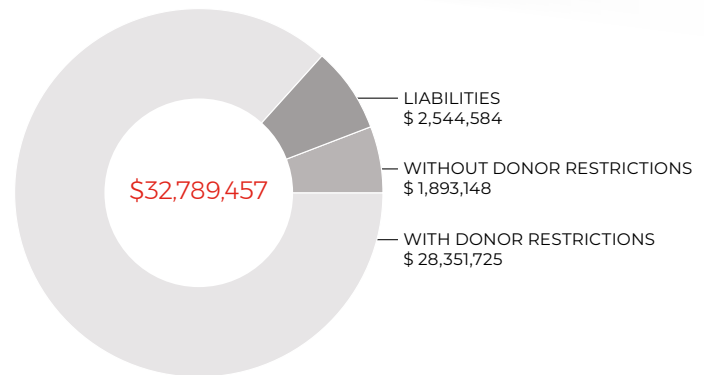
Connie Lee
Chris McCrum
Kenji Treanor
Phillippe Wallace

Steve Barton
Loren Pogir
Robert L. Weiner

2019 FINANCIAL REPORT

STATEMENT OF FINANCIAL POSITION

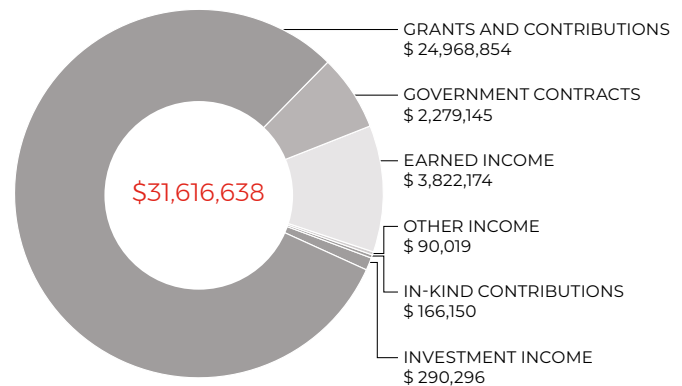
| | |
|----------------------------------|---------------|
| Total Assets | \$ 32,789,457 |
| Liabilities | 2,544,584 |
| NET ASSETS: | |
| Without donor restrictions | 1,893,148 |
| With donor restrictions | 28,351,725 |
| Total Net Assets | 30,244,873 |
| TOTAL Liabilities and Net Assets | \$ 32,789,457 |



STATEMENT OF ACTIVITIES

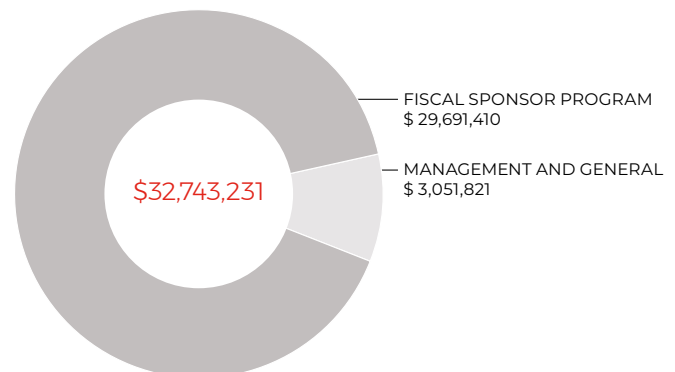
REVENUE AND SUPPORT:

| | |
|---------------------------|---------------|
| Grants and Contributions | \$ 24,968,854 |
| Government Contracts | 2,279,145 |
| Earned Income | 3,822,174 |
| Other Income | 90,019 |
| In-kind Contributions | 166,150 |
| Investment Income | 290,296 |
| TOTAL Revenue and Support | \$ 31,616,638 |



EXPENSES:

| | |
|-------------------------------|---------------|
| Fiscal Sponsor Program | 29,691,410 |
| Management and General | 3,051,231 |
| TOTAL Expenses | 32,743,231 |
| Change in Net Assets | (1,126,593) |
| Net Assets, Beginning of Year | 31,371,466 |
| Net Assets, End of Year | \$ 30,244,873 |



“[COMMUNITY INITIATIVES] CERTAINLY STREAMLINED THE PROCESS TO GET OUR 2019 GRANT CONTRACTS FINALIZED AND AWARDS ISSUED.”

“IN SPORTS AND IN LIFE, THERE ARE MEMBERS OF
TEAMS WHO MAKE EVERYONE AROUND THEM BETTER.
COMMUNITY INITIATIVES IS SUCH A TEAM MEMBER FOR
LATINO OUTDOORS. **WE ARE A STRONGER OVERALL
ORGANIZATION THANKS TO COMMUNITY INITIATIVES’
FISCAL SPONSORSHIP.**”

Latino Outdoors

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**COMMUNITY
INITIATIVES**
in service to great ideas

FIND US ONLINE!

Communityin.org

