

RELATIONSHIPS ARE

the key



OUR MOST VITAL RESOURCE: *Carefully nurtured connections*

As we look back at the changes we experienced as individuals and as an organization in 2022, the essential role that relationships play becomes clear. THESE CAREFULLY NURTURED CONNECTIONS WITH INDIVIDUALS, ORGANIZATIONS, AND COMMUNITIES, ARE OUR MOST VITAL RESOURCE. *They are the lifeblood of our work and our world.*

Community Initiatives considers relationships with our fiscally sponsored projects to be the most pivotal. We work to further our projects' ability to actualize their missions and make positive impacts in the communities they serve. These profound, hard-won relationships are key to our organization's and projects' health, and they fuel our growth and advancement.

As we look to 2023, we recognize that our communities need to be revitalized, regenerated, and restored. Community members require the ability to quickly galvanize solutions and infrastructure.

To serve this need, Community Initiatives will:

- Continue to offer community-competent services and a knowledge base that empowers individuals and organizations.
- Leverage our consulting experts, and core staff to provide best-in-class solutions for our fiscally sponsored projects.
- Capitalize on formal and informal associations that expand our reputation as an industry leader that offers best-in-class fiscal sponsorship.

We are deeply committed to community competent services and have a knowledge base that empowers individuals and organizations to bring their ideas for change to life. For us, it is key to leverage our network to maintain and create powerful relationships that ensures the benefits of high-quality fiscal sponsorship are widely known and available to all communities across the United States.

And, as always, Community Initiatives remains *in service to great ideas.*

Sincerely,



Ruth Williams, President and CEO

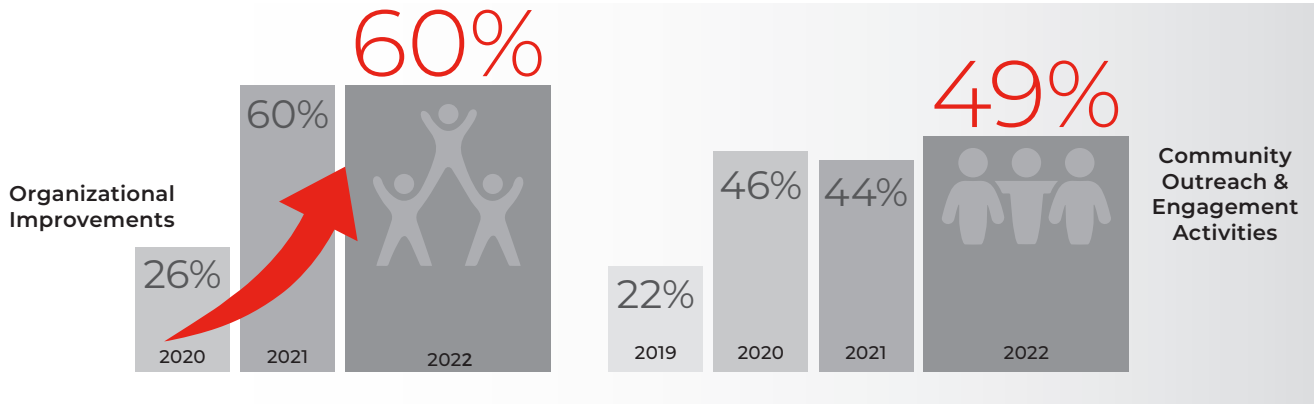
“Community Initiatives considers relationships with our fiscally sponsored projects to be the most pivotal. We work to further our projects’ ability to actualize their missions and make positive impacts in the communities they serve.”



SUCCESSSES

from our projects

Every year we conduct an independent survey of our Projects and ask them about their biggest successes. **In fiscal year 2022, Projects shared successes and improvements in the following areas:**



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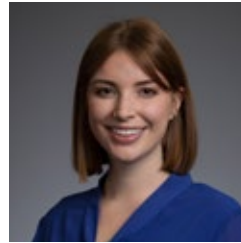


**DAVID MCGEE, VICE
PRESIDENT OF HUMAN
RESOURCES AND
OPERATIONS**

The relationships that Human Resources (HR) and Operations have with our clients is critical because HR touches every employee in the organization. Whether that's communications, programs, or any other piece of your work, having strong relationships helps us be more proactive than reactive. We offer more than processing payroll, accounts payable, and financials. Our clients look to us for strategic planning, how to effectively grow, and act as a sounding board more than ever before. We have the subject matter expertise – and the relationships – to make that happen.

Additionally, our relationships help us to navigate the system with vendors and get things done. For instance, our strong connections with our benefits broker, Burnham Benefits Insurance Services, helps us get the best coverage we can at the least expense. They know me, they know our position, and that helps them aggressively negotiate on our behalf and which save us money. Burnham Benefits has a large book of business, and we are able to piggyback on that. Without that relationship, that couldn't have happened.

I absolutely believe in the relationship factor. Why do people choose to come to Community Initiatives, why do they stay? It's our relationships.



**ERIKA PARKE, SEED GRANT
SPECIALIST**

I love this theme. The fact that relationships are key is often lost in the shuffle. The work we do is spread across many clients and there are a lot of connection points. Coming out of the pandemic, we've seen a resurgence of the desire to connect. Projects that were only doing things online are now able to get out there and see their communities grow. That goes for donors as well. People are able to connect face-to-face in a way that is so vital to the work we do. It's refreshing to see.

I'm part of a large state grant that one of our fiscally sponsored projects, Immigrants Rising, received. I've been able to form a close relationship with that team, and I feel very lucky. They provide incredible support to undocumented populations across the country. Seeing them navigate challenges and use their relationships to lift up participants has been very impactful for me.



**MAMIE FUNAHASHI, VICE
PRESIDENT OF EXECUTIVE
PARTNERSHIPS**

My role is to help Community Initiatives strengthen existing relationships as we create new ones. As we expand, we intend to do so in a thoughtful and intentional way. Since relationships are an important pillar of growth, I want to keep them at forefront of our work.

Organizations are stronger when they work together. I am working to bridge gaps in resources and thinking about how we can make a collective impact. I am confident that we can build a strong network of support for our sector and help build a much needed capacity for a sustainable future.

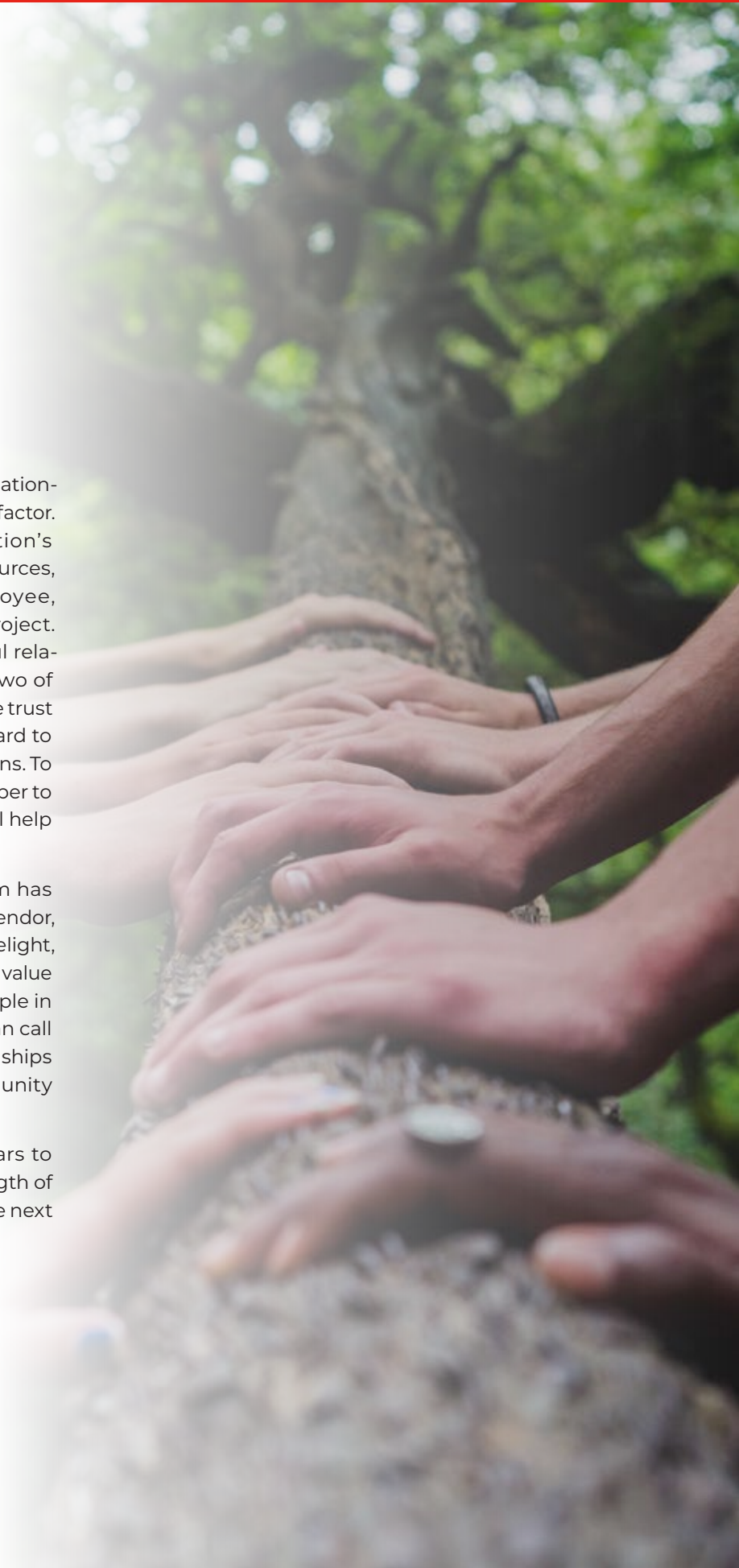


CARL TAIBL, CFO

For the Finance Team, relationships are a critical success factor. We're at the organization's center. Like Human Resources, we touch every employee, department, vendor, and fiscally sponsored project. For me, the "secret sauce" to ensure successful relationships is a strong core set of values. And two of Community Initiatives' most important values are trust and gratitude. To build trust, our teams work hard to be reliable and forthcoming in all their interactions. To promote gratitude I encourage each team member to express appreciation to others. These values will help ensure our progress.

Pivotal to our work this year, the Finance Team has developed relationships with a new credit card vendor, Divvy, a new budgeting software company, Limelight, and even a new CPA firm, Baker Tilly US, LLP. I also value my relationships with peers, networks, and people in other organizations. I find it's beneficial that I can call on them, and they can call on me. These relationships allows me to bring knowledge back to Community Initiatives and share knowledge with others.

It took Community Initiatives twenty-five years to reach this point. I suspect magnifying the strength of our relationships will have us double in size in the next generation.





**KATHY BOLTS, VICE
PRESIDENT OF CLIENT
SERVICES**

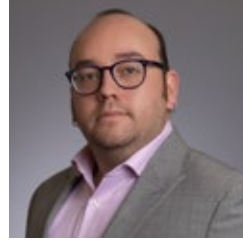
In Client Services, relationships are fundamental and critical to our work. We want our entire team to support operations and be thought partners in the project's development journey. Having close relationships is key in this effort.

All of our projects are vital. The Client Service Team's work is to have a deep understanding of what projects want to accomplish and the constituencies that they serve. Their participants are the folks on the ground who are essential to their efforts.



**AUDREY RODERICK,
ASSOCIATE DIRECTOR OF
CLIENT SERVICES**

Successful fiscal sponsorship requires collaboration and strong relationships between the sponsor and the projects. Our goal is to get to know each of our unique projects, understand what each partnership needs, what they're trying to accomplish, and what support is needed so they can do their work in their community. My role is to understand who the people and the projects are, their work, their mission, their vision. I strive to deepen the connection with all our projects and make sure we have time to understand who's in front of us, why they're here, and what they're looking for.



**BRAXTON CAHILL,
CONTROLLER**

Relationships are important for our work environment. We have over 115 projects, and building those relationships is key to our success. The Finance Team is on the front line interacting with our projects regularly. We think about how we can leverage the Team's finance skills to better address the analytical and financial understanding of our projects, and how we can more effectively create better tools for our projects, so they continue to thrive.

What's important to me is constructing relationships within the Finance Team, so we all work together to support projects, deliver timely financials, and effectively operate new software and processes that allow us to better serve our projects.

The hallmarks of good relationships are trust, respect, and collaboration. Within a team, it's important to listen to people, their needs, their challenges and understand where they require help. Projects receive support through accurate financial information and solutions to their issues. When we provide assistance, we build trust. To gain trust you have to really listen, address challenges, collaborate, and engage. We've had success on that front. I credit our team for being open to listening, remaining engaged despite challenges, and being willing to contribute and collaborate.



**LUIS VILLA, EXECUTIVE
DIRECTOR, LATINO
OUTDOORS**

Latino Outdoors has a national footprint and we are volunteer powered, so the phrase

“Relationships are key” holds a lot of meaning. We have to make sure to build close, solid, thoughtful relationships with our volunteers so that they remain motivated and inspired to contribute their valuable time and expertise. If it weren’t for the backend support that Community Initiatives provides it would be really difficult to thoughtfully engage with our network of volunteers.

An example of this level of connection is a volunteer in our San Diego chapter. Connecting underserved communities to the outdoors was so inspiring to her that she decided to go back to school to study natural resource management. She would reach out to us for anything – a letter of recommendation, asking for advice, mentorship. She really leveraged her time with Latino Outdoors to do something different and meaningful with her personal and professional life. With the support of Community Initiatives, we’re able to offer that level of care to our volunteers.

We started with Community Initiatives in 2015. Any time you have a long-time relationship, it gets richer. Every year we have evolved together as the circumstances and challenges that we face, jointly and separately, have called for. It’s been key to maintain a close relationship to evolve together in ways that nurture our respective success.



**STEPHANIE BIRD, DIGITAL
MARKETING SPECIALIST**

Relationship development is crucial for our work in supporting the communications of our fiscally sponsored projects. This

work highlights messaging both internally and externally for the projects and our greater organization through website, email, and social media communications. The cultivation of these relationships helps ensure our projects’ accomplishments get the attention they deserve.

Over the last three years, I’ve seen growth in our projects’ powerful and effective messaging. More are looking to boost this communication online and sharing across this platform allows us to help them achieve greater opportunities and response. As our internal structure benefits from that Community Initiatives being greater than the sum of the departments, our relationship with our projects strengthens the messaging for our entire organization.

Over the last year we worked to support our projects’ fundraising campaigns. This investment furthers our project relationships and amplifies the communications that help the entire organization to grow. Through these fundraising communications, we observe successes in our projects obtaining support essential to promote and grow the services they provide. I’m extremely proud to be a part of helping to build these greater relationships.

2022
COLLECTIVE
impact

TOGETHER, OUR PROJECTS SERVED OVER

1,446,617 PEOPLE

412

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

TOTALING

119

WE WELCOMED

22 new
PROJECTS



Emergency Prep Help

“Emergency Prep Help has only been on-board since February, but so far the process has been very smooth, and everyone at Community Initiatives has been responsive and professional. Community Initiatives provided the framework so that we could take right off, without having to think about all the legalities of becoming our own 501(c)3. Thank you for being there!”

South Kern Sol

“Community Initiatives has allowed us to focus on the work and address some of the most critical needs our most vulnerable communities have had, such as partnering with the food bank to provide fresh food access, PPE, COVID-19 vaccines to our communities.”

Chinatown Renaissance

“We are just getting started with Community Initiatives, but our contacts have been very helpful in walking us through the introductory process to systems and procedures. We think Community Initiatives plays an important role to informal groups in the community who want to make a difference.”

SF Hep B Free - Bay Area

“Community Initiatives has been responsive on all requests and assistance. I really appreciate the upgrades to budgeting and the upgrade to Fundrazr. It really does allow us to focus on our work. We are excited to use an easier budgeting process and improved fundraising platform.”

Center for Reaching & Teaching the Whole Child

“All the Community Initiatives people with whom we work have been extremely helpful, available with little lead time, and extremely gracious and patient. We are extremely happy with the services we receive from Community Initiatives.”

STAFF



RUTH WILLIAMS



RACHEL MILLER



MAMIE FUNAHASHI



KATHY BOLTS



BRANDY SHAH



AUDREY RODERICK



ROSE COHEN WESTBROOKE



KELLY ERNSTFRIEDMAN



ERIKA PARKE



SOFIA GARCIA



LIZ CRAIG



CARL TAIBL



BRAXTON CAHILL



TAMMY KIPOURAS



BOBBI EVANS



CATHY NELSON



SHERRY CHUE



PAIGE THOMAS



RONNETTA THOMAS



ALAN TULEY



BRANDON WONG



DAVID MCGEE



RULA ADRANLY



ROSE EMMANUELLE EMESIENE ETETI



DANIELLE PETERSON



STEPHANIE BIRD

CEO'S OFFICE

Ruth Williams, *President & CEO*

Rachel Miller, *Executive Assistant & Board Liaison*

SPECIAL SERVICES

Mamie Funahashi, *VP of Executive Partnerships*

CLIENT SERVICES

Kathy Bolts, *VP Of Client Services*

Brandy Shah, *Legal Director*

Audrey Roderick, *Associate Director of Client Services*

Rose Cohen Westbrooke, *Sr. Client Services Manager*

Kelly ErnstFriedman, *Client Services Manager*

Erika Parke, *SEED Grant Specialist*

Sofia Garcia, *Client Services Specialist*

Liz Craig, *Client Services Coordinator*

FINANCE

Carl Taibl, *CFO*

Braxton Cahill, *Controller*

Tammy Kipouras, *Assistant Controller*

Bobbi Evans, *Sr. Accountant*

Cathy Nelson, *Sr. Payroll Administrator*

Sherry Chue, *Accounts Payable Specialist*

Paige Thomas, *Project Accountant*

Ronnetta Thomas, *Project Accountant*

Alan Tuley, *Project Accountant*

Brandon Wong, *Project Accountant*

HR & OPERATIONS

David Mcgee, *VP of HR & Operations*

Rula Adranly, *HR Business Partner*

Rose Emmanuelle Emesiene Eteti, *HR Generalist*

MARKETING AND COMMUNICATIONS

Danielle Peterson, *Brand Marketing Manager*

Stephanie Bird, *Digital Marketing Specialist*

BOARD OF DIRECTORS

Phillippe Wallace, *Chair*

Maya Tussing, *Treasurer*

Dee Dee Mendoza, *Secretary*

Steve Barton

Betsy Block

Janet Camarena

Mary Ann J. Fake

Abbas Mooloo

Loren Pogir

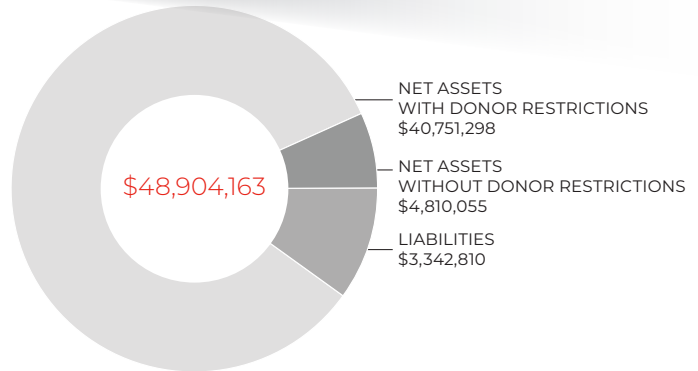
Barbara Rhomberg

Robert L. Weiner

2022 FINANCIAL REPORT

STATEMENT OF FINANCIAL POSITION

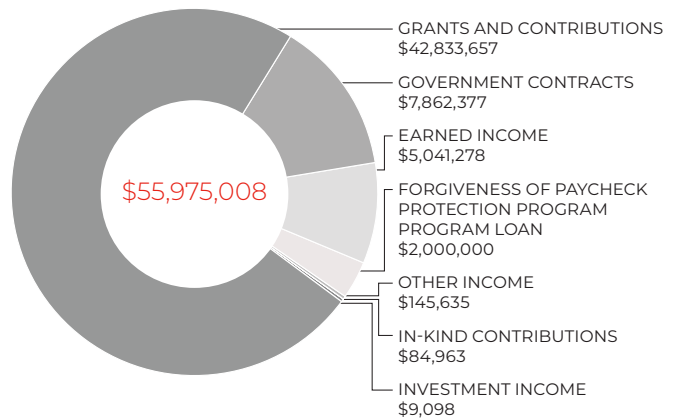
Total Assets	<u>\$48,904,163</u>
Liabilities	<u>3,342,810</u>
NET ASSETS:	
Without donor restrictions	4,810,055
With donor restrictions	<u>40,751,298</u>
Total Net Assets	<u>45,561,353</u>
TOTAL Liabilities and Net Assets	<u>\$48,904,163</u>



STATEMENT OF ACTIVITIES

REVENUE AND SUPPORT:

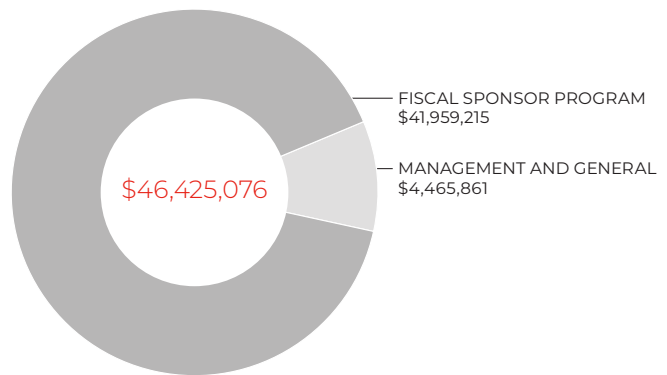
Grants and Contributions	\$42,833,657
Government Contracts	7,862,377
Earned Income	5,041,278
Other Income	145,635
In-kind Contributions	84,963
Investment Income	9,098
Forgiveness of Paycheck Protection Program	
Program Loan	<u>2,000,000</u>
TOTAL Revenue and Support	<u>\$55,975,008</u>



NET ASSETS TRANSFERRED IN \$1,347,343

EXPENSES:

Fiscal Sponsor Program	\$41,959,215
Management and General	\$4,465,861
Change in Net Assets	
Net Assets, Beginning of Year	\$32,662,078
Net Assets, End of Year	<u>\$45,561,353</u>



Widespread Care

“New projects and ideas can be shackled by administrative burdens. It has been truly freeing to partner with Community Initiatives!”

Entrepreneurship Funders Network

“Community Initiatives has been amazing to work with - responding quickly to questions and providing thought partnership as Entrepreneur Funders Network launches itself as an organization with a staff of one at a more than reasonable cost. Community Initiatives makes it possible for me to have peace of mind about our financial management, provides valuable thought partnership, and gives access to useful platforms and tools.”



Parent Advisory Council

“Community Initiatives is incredibly helpful and supportive. I feel like the services and resources they provide are worth the fiscal sponsorship fee. Being a project of Community Initiatives provides us with peace of mind, as we know that they have a knowledgeable staff and policies and procedures aligned with best practices. As the sole staff person for our organization, responsible for supporting a team of volunteer parent leaders, I don’t have to worry about my payroll and related things. Community Initiatives handles the logistics which helps me to focus on supporting my parent leaders and the work that we do.”

Bay Area Community Health Advisory Council

“BACHAC has established itself as a go to/get things done organization, because of our efforts the local health dept has asked us to lead a community assessment of mental of African Americans in San Mateo County. Thanks to Community Initiatives, hiring/recruiting individuals has been a very smooth process. Also, the ease of securing insurance for events has been great. These areas of support have required less time on our end so that we can focus more directly with the community.”

