

Strengthening the Capacities of Nonprofits:  
An Organizational History of  
CompassPoint Nonprofit Services  
(1975-2008)

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The people who devote their lives to nonprofit work are dedicated and passionate individuals who help millions of Americans receive the services they need to lead a better life, at salaries far below the for-profit marketplace. Many of these individuals are women and people of color who regularly assume leadership positions, a less common phenomenon in the for-profit world. The unique qualities that nonprofit leaders possess make the work they do all the more important. However, in order to be effective, leaders in the nonprofit sector need to acquire the organizational and management skills to effectively meet the needs of the communities they serve. In recent years, government contracting of human service programs to community-based organizations has increased the need to strengthen the organizational capacities of nonprofits. This is the history of one nonprofit established to strengthen the organizational capacity of nonprofits of San Francisco Bay Area known as CompassPoint Nonprofit Services.

Today, CompassPoint is one of the premier nonprofit capacity-building organizations in the United States. For over thirty years, CompassPoint has provided cutting-edge management support services to community-based organizations in the Bay Area. More recently, CompassPoint has earned a reputation as a national leader in nonprofit management research and a key resource for information of relevance to client-serving agencies across the nation. Over the course of its history, CompassPoint has transitioned from a small-scale management support organization to become a guiding force for effective leadership throughout the American nonprofit sector.

In 2008, CompassPoint operated with a budget of over \$ 4.6 million (for a budget history, see Appendix A). There are currently twenty full-time employees and four part-time employees. About one third of the staff is male and two thirds is female. Half of staff members are people of color. CompassPoint also involves over 30 external presenters for their workshop presentations

each quarter. The racially-diverse board of directors is comprised of eight members, four female and four male. Unlike many boards, members are mostly from the nonprofit sector and not the corporate world.

*The Mission of CompassPoint:*

The mission of CompassPoint is “to increase the impact of nonprofit community-based organizations and the people who work and volunteer in them” by: 1) delivering a range of high-impact capacity-building services to community-based organizations and the individuals working and volunteering in them, 2) refining these services through feedback from clients and their own field experience, and 3) capturing current best practices in nonprofit capacity building by conducting research, producing publications, advocating through OpEds and speaking at conferences around the country ([www.compasspoint.org](http://www.compasspoint.org), June, 2008).

CompassPoint works with nonprofit organizations throughout the entire Bay Area and beyond. The main office is located in San Francisco with a satellite office in Milpitas that serves Silicon Valley. Services include professional development, conferences, coaching, peer learning and research. Highlights of this array of services are noted in Figure 1.

CompassPoint provides an extensive array of services to the nonprofit sector that included the following in 2007:

- Gave 394 Workshops
- Consulting services to 142 clients
- Executive Transition services to 62 clients
- Placed 26 Executive Coaches at organizations in need
- Received an average of 938 visits to their website per day
- Totaled 48,885 subscribers to Board Café and 6,669 subscribers to TalkingPoint

*Figure 1: CompassPoint services (2008)*

- *Management Workshops* presented by CompassPoint staff and outside experts on board functioning and executive leadership; communication, marketing and outreach; financial management; fundraising; management and planning; human resource; personal and professional development; technology; and volunteer management.
- *Conferences* including the annual Nonprofit Day conference that began 1977.
- *Consulting services* that build on organizational strengths to increase their capacity to provide services.
- *Executive Coaching services* that pair coaches who have executive expertise with Bay Area executive directors and CEOs to expand their leadership capacity.
- *Peer Learning* which emphasizes the development of professional networks for sharing ideas and improving practice. Networks include Executive Leadership Circles, the Finance Professionals Network, the Nonprofit Human Resources Network, Women Executive Directors of Color, and the network of nonprofit consultants known as the Institute for Nonprofit Consulting.
- *Research and Publications* including articles, and monographs on management issues (e.g. board governance, executive leadership and staff development) and an electronic newsletter for members of nonprofit boards (Board Café, which is now a regular column in Blue Avocado, a new online magazine developed in partnership with CompassPoint).

CompassPoint's revenue is a combination of philanthropic donations and income from workshops, consulting and publications. Workshops and coaching services are entirely funded by

the income they bring in. To support more costly or less lucrative projects, such as research studies and in-depth issue initiatives, CompassPoint utilizes philanthropic dollars.

CompassPoint has a multitude of partners throughout the Bay Area. Funders play a role in helping finance conferences through in-kind and monetary donations. Chevron has continuously financed CompassPoint's annual Nonprofit Day conference, which has grown over the years, with approximately 850 people in attendance in 2008. CompassPoint also develops additional conferences in the Bay Area and representatives from the organization often speak at engagements all over the country. Though the amount of these conferences has declined in recent years as organizations have come to more regularly demand individualized capacity-building services, CompassPoint's involvement in countless conferences over the years has played a key role in enhancing their reputation as a leader in the field.

CompassPoint has continued to provide high-quality one-on-one consulting services to organizations in need. CompassPoint's team of in-house and contracted consultants provide coaching to community-based organizations, as well as statewide and national organizations, foundations and government agencies. CompassPoint's brand of capacity building is unique in its approach. The organization creates individualized plans to meet each client's needs, rather than using a "one size fits all" template for all organizations. In order to help clients reach their full potential as organizations, CompassPoint avoids traditional consultant behavior of completing tasks, and instead teaches organizations to complete the tasks themselves. Consultants also assist organizations to improve and diversify their funding streams, and help organizations improve their mastery of technology, engage in strategic planning and improve their human resources departments. Additional consulting services include board development, planning and implementing mergers and assistance with cross-sector partnerships.

CompassPoint consultants also help individual nonprofit executives to develop and expand their leadership effectiveness. The Leadership Learning Path (LLP) is a program that helps executives develop an individualized learning plan to increase their skills by attending relevant workshops and services offered by CompassPoint. In addition, CompassPoint and San Jose State University offer classes in San Jose and Santa Cruz that allow students to work towards a SJSU Certificate in Nonprofit Management. The Silicon Valley Nonprofit Resource Center (located in the Silicon Valley office of CompassPoint) offers a collection of over 200 publications on topics related to nonprofit management in cooperation with the San Francisco Foundation Center, a national resource that identifies funders and offers fundraising training to nonprofit managers.

In recent years, CompassPoint has gained a reputation for its research and publications. The organization has conducted multiple nationwide surveys on the causal factors and adverse effects of executive transition throughout the sector. As current Executive Director Jeanne Bell describes, the organization used an “on the ground” approach for these studies, beginning with staff members’ own experience in the field to design the study (Personal interview, June 6, 2008). As a result, these studies provide relevant information about the current state of nonprofit executive leadership and what the next generation of leaders will look like. Two “Daring to Lead” reports uncovered vital information about the issues that most impact an executive’s decision to leave their post. A third “Ready to Lead?” report focused on the next generation of leaders by administering a survey to 5700 nonprofits to find out who is in the leadership pipeline. This timely body of research has received considerable national attention and has helped CompassPoint to improve their leadership transition services.

Today, CompassPoint is an influential force in the nonprofit sector but the organization did not start out that way. To understand the evolution of CompassPoint as a leader in nonprofit capacity building, it is important to first understand its humble beginnings.

## **The 1970s and 1980s**

The Support Centers of America was a national nonprofit organization comprised of multiple management support organizations (MSOs) around the country. Established in 1971, SCA opened its San Francisco branch in 1975 and at its peak included 12 Support Centers nationwide. The San Francisco office, one of SCA's most successful and lucrative branches, eventually became an independent organization and after multiple subsequent mergers became CompassPoint Nonprofit Services in 1999.

In 1971, John Cook and Bob Orser established the Public Interest Management Association (PIMA) in Washington DC. In 1972, PIMA changed its name to the Support Center. Throughout the 1970s, Support Centers across America were established. John Cook was a graduate of Harvard Law and an unconventional thinker who was influenced by the philosophies of cooperatives and collectives that were popular in the late 1960s and early 1970s. He had a vision of a national Support Center program with a centralized headquarters that organized and supported local affiliates all over the country. However, Orser did not share the same passion for a nation-wide organization and within seven years, philosophical differences resulted in a rift between the two founders. In 1977, Orser left the Support Center to start the Management Center, while Cook continued to lead the SCA until his death in 1992.

In the early years, the San Francisco branch of the Support Center focused on financial management workshops with funding provided by government contracts. In 1980, Jude Kaye joined the staff of the San Francisco office. A graduate of the London School of Economics, Kaye found herself keeping the books as a part-time employee for three nonprofits in the Bay Area. When she had questions about financial management, she would call the Support Center. It

was not long before she joined the Support Center staff and offered financial management consultation to other bookkeepers.

The nonprofit sector as a whole was in great need of financial management support at this time. Nonprofit agency directors were more focused on services and often did not have a “business-mind” for finance. Funders demanded little accountability from their grantees and as Kaye recounts, money management was a dirty word in the field. The Support Center set out to change this situation by emphasizing accountability and good recordkeeping. As she noted, the Support Center showed people that they didn’t have to keep financial information in “a shoe box” (Personal Interview, May 30, 2008).

Between 1976 and 1983, three executive directors led the Support Center in San Francisco. Bob Orser managed the San Francisco branch from Washington D.C. until 1978. Then Pauline Proschan assumed the position locally from 1978 to 1980 and Kathleen Schuler followed her from 1980 to 1983. During these early years, the Support Center provided services based on the expectations of its funders and the interests of staff members. The size of the Support Center staff ebbed and flowed with the contracts that funded the organization. For example, when the political support for juvenile justice organizations declined in the early 1980s, the Support Center lost nearly all of its funding. Though the staff had grown to eight members by the end of the 1970s, only three staff members remained in 1983. One of these staff members was a young man named Rick Smith who was hired in 1981. Before coming to the Support Center, Smith served as executive director at a small advocacy organization.

With the loss of government contracts and a budget of approximately \$70,000, the three staff members began to rebuild the organization as interest in management support grew throughout the nonprofit sector, especially in San Francisco. As a result of this growing interest,

the field of management support had quickly become crowded however funders did not yet support the concept (Personal Interview, July 18, 2008). In order to distinguish their organization from the crowd and actively compete for funding, Kaye and Smith wanted to try a different approach to nonprofit management support.

In the early 1980s, consulting firms such as McKinsey and Bane had become very popular in the business world. The staff of the San Francisco Support Center believed they could replicate the model in the nonprofit sector in a unique way. Most consultation services to nonprofits at the time were provided by volunteers, many of whom were retired executives from the business world. The staff at the Support Center wanted to show that consultation services could be provided by nonprofit professionals from within the sector. They also believed in the importance of training workshops and wanted to expand beyond traditional one-on-one consultation services to become a training organization with a broader reach. As a result, those early workshops on a variety of management support issues provided the foundation for the current offering.

The Support Center's unique approach helped the organization succeed in the early days. However, other factors contributed to the organization's survival in the increasingly crowded field of competitors. The San Francisco Support Center had the assistance of a national organization behind it that provided vital resources and training, as well as financial support, funding contacts, and training expertise that other independent MSOs in the area did not possess. This advantage helped the Support Center to establish a strong footing in the Bay Area in the years that followed.

Key staff changes in 1983 and 1984 also played a part in the solidification of the organization. Kathleen Schuler resigned as Executive Director and Rick Smith stepped in to role,

though Schuler remained connected with the Support Center and served as Board Chair during the early 1990s. Smith's promotion marked a turning point for the organization as he would be the first Executive Director to have a lengthy tenure in the position (1984-1993) that helped the program to grow and expand with a consistent and cohesive vision. During his time as Executive Director, the Support Center would develop from a small MSO in a field of many to the leading consulting firm for nonprofit services in the Bay Area.

In another key staffing development, Smith hired Jan Masaoka shortly after his promotion. A Bay Area native, Masaoka had been an active member of the nonprofit sector for years before coming to the Support Center. Hiring Masaoka reinforced the practice of hiring consultants and experts from within the nonprofit sector rather than from the business world. According to colleagues, Masaoka was an incredibly strong financial advisor but she also had a knack for adapting to whatever task was thrown her way. As Smith remembers, "Every two years, I was changing her job title" (Personal Interview, July 18, 2008). At one time, Masaoka was a Staff Consultant, the Director of Consulting Services, a part-time Consultant, and ultimately Executive Director. Masaoka's reputation as a multi-talented nonprofit business professional would continue to grow during her more than twenty years with the organization. Throughout the 1980s, 1990s and 2000s, Masaoka would play a key role in growing and shaping the organization to become a nationally-respected source of management support in the nonprofit sector.

Smith, Kaye and Masaoka began building the organization's reputation in the field by offering workshops that were often full to capacity. The workshops served as a unique marketing tool for the organization as word spread throughout the local network of nonprofit professionals. These workshops also provided a critical funding stream for the organization.

Much like any emerging market, MSOs in the 1980s experienced mergers and acquisitions and the Support Center in San Francisco was no exception. As it expanded its scope, the Support Center found itself competing with other MSOs for funding and began to explore mergers and partnerships with some of these organizations. This trend of forming partnerships and mergers would become a key aspect of the Support Center's (and now CompassPoint's) future success.

The Community Training and Development Center (CTD) (founded in 1976 as a project of the American Society for Training and Development) provided volunteer-led management workshops in the Bay Area and eventually became a nonprofit in 1982. Over the next few years as the CTD expanded, volunteers began offering consulting services as well as workshops. Staff of the Support Center and the CTD constantly found themselves engaged in similar work. As the Support Center increasingly emphasized training over consulting services, the overlap in services grew and it was not long before a merger became a possibility.

The idea of a merger grew out of a casual conversation between Rick Smith and Paul Harder who was Board Chair of the CTD (today he manages a reputable consulting and research business in the nonprofit sector called Harder and Company). At the time, CTD was experiencing internal financial difficulties and the executive director position had recently become vacant, leaving the door open to blend the staff and boards of the two organizations under the Support Center. The merger was completed in 1987 with Harder as the Board Chair and Smith as Executive Director of five staff members. Shortly after the merger, a representative from Bank of America, which gave funds regularly to the organization, threw a luncheon at the Carnelian Room in San Francisco inviting nearly 50 big local funders to the event to increase

support for the newly merged organization and ultimately raised over \$250,000 for the Support Center.

By the end of the 1980s, the Support Center had grown immensely as a result of their streamlined high-demand services. The staff not only responded to the needs of struggling nonprofits but also began to define nonprofit management support by addressing topics that emerged from consultation and training. Though it would not change its name for another ten years, the Support Center entered the 1990s providing a compass for the local nonprofit sector.

### **The 1990s**

The early 1990s marked an era of great change and development for the Support Center. Workshops were offered on a variety of subjects including board development, management and planning, supervision of staff, volunteer management, fundraising, financial management, and marketing. Most notably, the impact of new technological developments was reflected in the types of workshops offered and the types of funders subsidizing them. For example, the Telecommunications Education Trust Program provided a two-year grant for \$66,000 in 1992 to support the development of workshops on telecommunications including networking, voicemail, and new phone systems. That same year, Apple Computers donated ten PowerBook laptops to the Support Center to be used by workshop facilitators. The laptop technology allowed the facilitators to “put them in the trunk and set up a computer training room almost anywhere” (Executive Director Report, September, 1992). Other workshops included Microsoft Word, Macintosh FileMaker, and fundraising software, as well as advice on how to use modems to access the internet.

Issues of diversity were also at the forefront of the workshop agenda in the early 1990s and continue to this day. Managers were encouraged to explore issues of gay, lesbian and

bisexual awareness, very much ahead of national awareness, and topics for which the Bay Area and its nonprofit sector are renowned. Besides workshops on racial and ethnic diversity (e.g. “Where Does Your Face Come From?”), other topics included time management, conflict resolution, teambuilding, and grief in the workplace.

In 1992, the Support Center’s workshops generated \$230,000, which was nearly one third of the organization’s revenue that year. Presenters were from a diverse range of backgrounds (e.g. Masters in Business Administration, Masters of Education, Certified Public Accountants and other finance professionals, lawyers, and technology experts). Workshops were offered on a sliding scale based on the budget of the participating organizations.

Beyond its extensive workshop offering, the Support Center was responding to specific community needs as was the case with AIDS service organization (ASOs). As AIDS became recognized as a national epidemic in the 1980s, San Francisco experienced a health crisis of epic proportions. As one former Support Center staff member reports, everyone knew someone who was sick or dying (Personal Interview, June 13, 2008). The virus impacted staff members on a personal as well as professional level. San Francisco was an epicenter for first responders in the early days of the epidemic and continues to be a leader in providing support to and advocacy for people living with HIV and AIDS. As the virus spread throughout the city, multiple nonprofit organizations emerged to respond to the growing need for medical assistance, emotional support, and legal advocacy. Fear about the transmission of the disease was rampant, as they attempted to respond to the chaotic environment.

As the number of ASOs in the Bay Area quickly grew, their coordination with each other and their ability to navigate the government contracting system was limited. Many of these organizations were also floundering as they sought to develop efficient management capacities in

financial accounting, grant-seeking, personnel management, and accountability. Mike Allison, former director of Support Center's consulting services, described these struggles in a 1993 newsletter of the AIDS Service Providers Association.

“ASO's face the common difficulties of young, relatively small organizations; few resources, often inexperienced staff, etc. ASO's also face a unique combination of management challenges including grief and death in the workplace, ongoing changes in program strategy and design, and the high involvement of members of the target population in leadership positions” (AIDS Service Providers Association Newsletter, 1993).

The article encouraged ASO's to assess management needs at the “system level,” not just in their own organization and called for coordination among providers.

In the early 1990s, the San Francisco AIDS Office engaged the Support Center to create the AIDS Agency Management and Assistance Program (AAMAP) to provide management support to the ASOs that were funded by the County. Consultation was provided to ASOs to address a variety of issues and to aid them in meeting the requirements of their government contracts. The first year of the program was a huge success and by the second year, the program was operating with a \$98,000 budget.

The early 1990s also marked the streamlining of the Support Center's consulting services. Since the Support Center merger with CTD in the late 1980s, the organization's consulting services were provided by both volunteers and paid staff. Mike Allison, an MBA and a graduate of the Yale School of Organization and Management, was the Director of Consulting and Research at the time, who worked for the Support Center/CompassPoint for over 14 years. By 1992, Allison and Jan Masaoka, then the organization's interim Executive Director (more on this leadership transition below) were working to integrate the staff and volunteer consulting programs. As a result a new blended consulting program was created called the Support Center Consulting Group (SCCG).

The SCCG offered individualized training, group workshops, and consulting on both management and computer topics. In the first two years of operation, volunteers were partnered with in-house consulting staff on larger consultation projects. Volunteers were recruited by Allison on a case by case basis, but consistent high-quality volunteers were difficult to find. Meanwhile, Support Center workshops were in high demand. Funders interested in capacity building such as the David and Lucille Packard Foundation and United Way had increased the amount of funding available to nonprofit organizations that could be used to support workshops and consultant services. As a result, the volunteer consultant program was dissolved entirely and all consulting services and workshops were provided by paid staff or contracted consultants.

During this period of growth, the Support Center also decided to offer its services at a more competitive rate, though it continued to maintain its sliding scale. This decision reflects not only the high demand for the Support Center's services, but the organization's desire to send a message that their product was of the highest quality and up to business consulting standards. By 1992, revenue from contracting services was exceeding budget projections and the SCCG was thriving. As the Support Center continued to grow, it became clear that the organization needed to strengthen its own development practices. In late 1992, the organization applied for a \$25,000 grant that was used in part to hire a part-time development director.

Earlier that year in 1992, major changes in management at the national and local level had left vacancies in the organizations administration and the Support Center of San Francisco needed to find a new Executive Director. In a sad turn of events, John Cook, the founder and visionary leader of the Support Centers of America, passed away after battling cancer. As the father of the organization and the philosophical leader of its operations, his death was not only a personal but a professional loss for the administration of SCA.

In order to uphold Cook's vision, the national board of SCA decided to look for his replacement within the organization. Through his tenure as Executive Director in San Francisco, Rick Smith had been a loyal staff member under Cook's leadership and emerged as the most obvious successor. Smith negotiated to have the national headquarters moved to San Francisco and became the director of the national organization shortly after Jon's death. Masaoka was named interim director of the San Francisco branch that same year and the search for an Executive Director began.

With funding support from the San Francisco Foundation for an executive search, approximately 50 applications for the position were submitted and interviews for the finalists were scheduled for October. By this time, Jan Masaoka had developed a formidable reputation in the field of nonprofit management. She was known for excellence in teaching finance and accounting and had also taught nonprofit management classes at California State University East Bay. She was a passionate proponent of providing support to grassroots organizations. She took note of the changing public perception of nonprofits, realizing that the public was becoming more critical of nonprofit operations and demanding increased transparency. She wanted the Support Center to help these organizations respond to this criticism and thrive in the face of it.

Smith and the San Francisco board were convinced that Masaoka was the right person for the job (Personal Interview, July 18, 2008). After some personal deliberation, Masaoka accepted the position. As New Years Day of 1993 came and went, Masaoka was appointed the official Executive Director and was the first Asian American Executive Director of any branch of the Support Center of America. She took the helm with a vision of increased entrepreneurship that had the support of many staff members. Masaoka's vision also offered a unique perspective on the relationship between MSOs and the community-based organizations they serve. Rather than

act as a doctor to a sick patient, Masaoka believed MSOs should see themselves as coaches of potential Olympic athletes (Personal Interview, May 20, 2008).

By 1993, San Francisco's Support Center was the most successful of all 12 Support Centers of America that included branches in Boston, Rhode Island, Chicago, San Diego, Oklahoma City, Tulsa, Newark, New York City, and Washington D.C. San Francisco's budget of \$670,000 was more than twice the size of New York's budget (SCA's second largest branch) and more than three times the size of the D.C.'s budget (SCA's third largest branch).

In January of 1993, a Client Advisory Council was approved by the board of directors to capture the perceptions of a wide variety of grassroots community organizations. Council members included representatives from The St. Anthony Foundation, the Chinatown Resource Center, AIDS Indigent Direct Services, Immigrant Legal Services, the Foundation for Technology Access, the Peninsula Humane Society, the Bay Area Black Women's Health Project, and the Center for the Arts at Yerba Buena Gardens. At the first meeting, council members were encouraged to consider two questions: 1) what did their own organization and the organizations of their peers need to be more productive? and 2) how could the Support Center could improve its services in order to support local organizations in meeting their goals?

Another key development demonstrated the growing reputation of the Support Center as a leader in the field of management support. In the early 1990s, the Bay Area United Way operated a well-regarded management training program (Managing a Nonprofit Agency for Growth and Effectiveness, or MANAGE), and asked the Support Center to take over its operations. As a result, the program was incorporated into the Center's offerings.

As the Support Center's budget grew, so did the need to produce a marketing plan that would help the organization heighten its visibility. A consultant was hired to survey Support

Center clients and audit the organization's marketing practices. The consultant's final report offered the following recommendations: 1) Support Center staff should volunteer more often in the communities of the nonprofits they served, 2) the Support Center should co-sponsor other special events in addition to the annual Nonprofit Day conference and 3) the Support Center should create a newsletter that shared its accomplishments with its clients and the sector. Over the years since this report, CompassPoint has offered a variety of newsletters including *Board Café* (now part of the independent partner online magazine, Blue Avocado), and more recently *TalkingPoint*, a newsletter about the newsworthy items in the Bay Area nonprofit sector.

The organization is also known for publishing the comic strip *Planet 501c3*, which brings levity to the more frustrating aspects of nonprofit culture and encourages the sector to laugh at itself. The comic strip was drawn by the late Miriam Engleberg, a 13 year employee of Support Center and CompassPoint who was one of the organizations most popular trainers and passed away after battling cancer at the young age of 48 (but not before she produced a book of comics entitled *Cancer Made Me a Shallower Person: a Memoir in Comics*, published by Harper.) For *Planet 501c3*, Miriam would draw from her own experiences in the field and the anecdotes of her coworkers to help make the rest of the sector laugh. Two compilations of the comic are available at the CompassPoint bookstore (*They Came From Planet 501c3* and *Planet 501c3: The Next Generation*).

In response to the recommendation for more events beyond Nonprofit Day to increase their local and national profile, the Support Center hosted a successful conference in November of 1993 for the Technology Resource Consortium that included a unique multi-media social event at Fort Mason. By this time, Support Center employees were beginning to appear at conferences across the country, sharing the organization's unique approach to client-centered

capacity building of local nonprofit organizations. The Support Center requested and received assistance from the Evelyn and Walter Hass Jr. Fund to develop practical, hands-on tools to help agencies with diversity issues (Haas continues to be a “core support funder” of the organization today).

Grant money from Haas also allowed the Support Center to respond to the requests for more guidance on recruiting new board members. Another local MSO, the Management Center, had recently ceased running its Board Bank program, leaving a gap in board nomination assistance in the Bay Area. The Support Center realized the sector needed a comprehensive means of searching for and nominating new board members. As a result, with Haas funding, the Support Center collaborated with the Volunteer Center, another local nonprofit that links volunteers to organizations, to create a board placement program called Board Match Plus in 1995. At the conclusion of its first year, Board Match Plus enrolled 80 board candidates and 60 organizations in the program. That year, over half of the candidates were matched with over half of the organizations enrolled. By 1996, Board Match Plus was quickly becoming one of the Support Center’s most sought-after services. Funding for the program was awarded by the Packard Foundation as well as corporate funders such as Wells Fargo Bank and Bank of America.

Also during the first half of the 1990s, the Support Center noticed an increased interest in improving and expanding its computer and technology support services. With the board’s assistance, it established a system for assessing computer systems utilization and availability in nonprofit organizations. The organization also began offering “volume computer training” to larger organizations. Organizations were able to purchase 100 computer workshops at a time for a fixed rate of \$10,000 dollars. In order to encourage employee literacy of computer programs,

employees of these organizations were encouraged to retake workshops if they needed to do so at no extra charge to the organization.

Other developments included continued assisting seven local AIDS organizations (through AAMAP), with efforts to replicate the program in Alameda County (in partnership with the Alameda County AIDS Office). The addition of a Director of Development was also a major factor in helping the organization secure additional grants of up to \$50,000 from a variety of sources (e.g. the Mayor's Office, the William Randolph Heart Foundation, Pacific Gas and Electric, and Bank of America). The Support Center also began taking its first steps towards publishing research on issues pertaining to capacity building. During the summer of 1993, an intern from the Harvard Kennedy School of Government worked under the supervision of Mike Allison to conduct a survey of clients seeking strategic planning services.

By 1994, San Francisco was the flagship program for the SCA. This position had its advantages and disadvantages. As the national office moved to San Francisco in 1993, the staff at the Support Center of San Francisco looked forward to the sharing the burden of the office rent and other operational costs and made plans to address any confusion about identity that might occur from having a branch and national office in the same location (Memo to the Board of Directors, March 1993).

Unfortunately, the relationship between the National office and the Support Center of San Francisco did not remain as positive in the year that followed. As staff of the Support Center wanted to become a more entrepreneurial and autonomous organization, they felt hindered by the control of finances and major decisions by the national staff. In order to support some of the centers that regularly ran at a deficit, the National office often asked San Francisco to help cover costs. It was clear that issues at the National level were having a negative impact on the local

organization's image among stakeholders. For many staff members, the irony that their organization was offering financial management advice while having trouble managing its own finances was demoralizing. There was also fear that more mistakes by the national office would cause long-time funders to abandon the Support Center. The frustration caused by these issues led to staff burnout and was lowering their motivation to provide workshops and consulting services.

Between the growing unrest of the employees of the Support Center and the fear of larger consequences in the sector, it was clear that the local organization would need to find a new way to operate. Throughout 1994, a philosophical rift between members of the national office and the staff in San Francisco emerged. National office representatives maintained the centralized vision of the organization that featured all branches helping each other to become as strong as San Francisco. By contrast, San Francisco was calling for increased independence in order to manage its own finances and pursue a more entrepreneurial path. Eventually, the call for independence won out. By late 1994, the national office made the decision to allow each branch to pursue its own incorporation.

Upon its independent incorporation, the San Francisco office decided to change its name to Support Center for Nonprofit Management (SCNM) in order to more clearly articulate its mission to the its clients, its funders and the sector as a whole. The nonprofit sector was thriving (that year the nonprofit sector expenditures totaled approximately 6% of the U.S. GNP or \$295 billion) and SCNM viewed itself as an active participant in the growth and development of the sector. (In 1994, five major conferences were scheduled in California alone.) On June 9th of 1994, SCNM put on its best Nonprofit Day conference to date with \$30,000 from Chevron, a long time supporter of Nonprofit Day. The event attracted over 700 participants drawn, in part,

by a high profile keynote speaker (James Joseph, who was the President of The Council on Foundations) (Board Minutes, May 1994).

Through 1995, SCNM continued to grow and expand its services. The newly hired development director was successfully soliciting new funders, including the Gap Foundation (\$10,000 in late 1995). The organization was also beginning to gain national recognition for its publications. Jan Masaoka and Mike Allison co-authored a chapter for a book on Trusteeship published by the University of Indiana. Their chapter, entitled “Why Boards Don’t Govern,” was based on SCNM’s experience in providing board support and development. Masaoka also contributed to a publication by the national Minority AIDS Council entitled “Action Handbook for Boards of AIDS Service Organizations.”

The geographical scope of SCNM was also expanding. In 1995, SCNM began offering services as far south as Monterey Bay. The organization also began publishing a monthly advice column in the Marin Council of Agencies newsletter, answering nonprofit management-related questions posed by local agencies. The organization was also expanding its workshop series by including evening and weekend workshops for nonprofit professionals and those desiring to join the sector who could not attend day time classes.

Meanwhile, SCNM was continuing to lay the groundwork for separating from the national organization by completing the local incorporation process. The board played a critical role by assisting with the preparation of the incorporation documents and by-laws, as well as developing a plan for separating finances from the national organization. With incorporation papers approved in December 1995, board members with legal and accounting backgrounds helped the organization file for tax exemption status and to secure a Federal Employer Identification Number. In April of 1996, one board member obtained a line of credit for both the

independent organization and the national office, and the two branches established their own bank accounts. By July of 1996, SCNM was in total control of its own payroll and had terminated all connections with the national office by 1997.

SCNM continued to increase its profile by hosting and attending multiple conferences, while staff members presented at an international conference for nonprofit engagement. SCNM sponsored a conference with the Center for Electronic Arts (The Internet, the Web and Points Beyond) with space donated by the San Francisco Museum of Modern Art and funding provided by Apple Computers and Pacific Bell. Chevron continued to sponsor the annual Nonprofit Day (with an increased gift of \$42,000).

The annual budget for the organization was approximately \$3.5 million. The organization's financial success and high quality programs drew the attention in 1997 of the Nonprofit Development Center (NDC). NDC was a twenty year old organization that began as a project of the Junior League under the name of the Grantsmanship Resource Center (GRC). Located in the South Bay at the Santa Clara Community Foundation, GRC was staffed entirely by volunteers. In 1986, the project hired its first part-time paid staff person and by 1988 the project had become incorporated as a nonprofit (NDC). With a budget that grew from \$38,000 to \$200,000, NDC offered workshops that were primarily led by volunteers.

By the mid 1990s, NDC found itself struggling financially and felt that joining with SCNM would allow the organization to continue offering services while financially staying afloat. According to one former board member, the early meetings between the board members and management of SCNM and NDC were fairly casual, with each party trying to assess the merits of a merger (Personal Interview, July 14, 2008). While SCNM wanted to make sure that a

merger would enhance its mission, NDC wanted to make sure that their organization would not be completely absorbed and disappear into SCNM.

From the beginning, the administrative staff at NDC expressed their desire to maintain a leadership position during and after the merger. The board of directors played an active role in helping to prepare the two organizations for the transition. Joe Valentine was the board chair of SCNM and played a key role in facilitating the merger. After serving as the director of the United Way of San Francisco for twelve years, Valentine served two separate terms on the board of SCNM and CompassPoint, holding the position of board chair during part of both terms. As the merger approached, Valentine and Masaoka worked to alleviate the concerns and anxieties of NDC leadership. For example, the two boards blended together to form a combined board with very few board members lost except for those who were ending their terms or who were ready to move on. Similarly, to preserve NDC's autonomy, its office remained in the Silicon Valley office. In the years that followed the merger, Masaoka made a concerted effort to be present at the Silicon Valley location at least one or two days a week, and responded to staff concerns for real organizational change with action (Personal Interview, July 14, 2008).

The merger clearly required all parties to make many adjustments. The two boards needed to get to know one another in order to work cohesively and a dinner was held to foster new relationships. Addressing financial matters was also crucial as SCNM absorbed the deficit from NDC. In August of 1998, at the first blended board meeting, a representative from Pac Bell (which had recently gone through its own merger) presented the Board with a check for \$10,000 made out to the merged organization (Support Center/Nonprofit Development Center, or SC/NDC). Masaoka and Support Center board members viewed this donation as a symbol of SCNM's commitment to fully incorporate NDC into the organization.

Shortly after the merger, it became clear that the name SC/NDC lacked the marketing punch that the organization needed. In early 1999, a marketing firm (Master-McNeil) was recruited to help select a new name. A naming committee was created to select a name and bring it to the Board's marketing committee. In September of 1999, the board unanimously approved the name CompassPoint Nonprofit Services, which would be announced in January of 2000 after a logo had been created.

As the Millennium approached, the merged organization engaged in many other noteworthy activities. Masaoka and board members worked tirelessly to engage the South Bay nonprofit and business community as well as maintaining communication with their own funders about the value of the name for the recently merged organization. At the time, the Bay Area was experiencing an economic boom with the success of the Dot Com industry. The budget for 1999 was over \$4.2 million and would continue to grow over the next couple of years, reaching its peak of \$5.5 million in 2001.

### **2000 and Beyond**

In her first report to the board in 2000, Masaoka noted, "I'm writing this on Day 2 of the name change and am very happy and relieved to say it's going well." She described the name as a big leap forward and one that would take time for all stakeholders to accept, but she shared the excitement generated by the new signs in the hallway and the new letterhead.

Open houses were held to welcome the new name at both locations in San Francisco and in Silicon Valley. Balloons with the new organizational colors, blue and green, and compass shaped cookies helped bolster the new imagery. The San Francisco event welcomed over 100 people and over 60 people attended the Silicon Valley event. In order to help staff adjust to the change, a lighthearted art contest was held in which employees were encouraged to make a work

of art out of their old business cards. One staff member went so far as to dye his hair green to support the change.

The name CompassPoint reflects the vision of becoming a leader in the field of organizational capacity building. The work done by CompassPoint staff members at the beginning of the decade demonstrated their determination to implement this vision. In early 2000, the organization:

- secured a \$150,000 grant to support development of workshop curricula and a national speaking tour on Federal Tax Form 990.
- worked with the Volunteer Centers of Alameda County and Contra Costa County to bring more workshops to East Bay locations.
- launched a marketing study on consulting with nonprofits in the Bay Area.
- conducted an evaluation of CompassPoint's Executive Transitions program.
- gathered baseline data from 60 child care centers to make recommendations for improving their computer systems, in partnership with the Child Care Center Technology Initiative.
- analyzed data on 20 merger and restructuring efforts among ASOs to publish conclusions about ASO restructuring needs.
- reassessed the partnership with the Volunteer Center on Board Match Plus and changed the relationship so that each would proceed on their own with CompassPoint continuing the bulk of the matching work.
- implemented a \$70,000 grant from the Northern California Grantmakers Task Force on AIDS to assist African American AIDS organizations with board recruitment and development.

- continued the annual Nonprofits and Technology conference in Silicon Valley, with the theme “Succeeding as a Dot Org in a Dot Com World” in 2000.
- received funding from a group of public and private funders for \$30,000 to conduct a needs assessment of the occupancy needs of nonprofit organizations.
- Masaoka participated in a panel on local radio station KQED about the impact of this “boomtown period” on nonprofits, noting the loss of staff to higher paying jobs (Executive Director Report, July 2000).

Quickly, CompassPoint came to be known as an organization that had successfully changed its name. Given their history of supporting so many organizations on a variety of subjects, it is no surprise that some of those organizations began asking them how to successfully change their own name. One foundation director noted the following on the name change, “It was handled so professionally and successfully, and I hear people everywhere just using the name CompassPoint – it seems to be completely accepted already” (Executive Director Report, May 2000).

Eighteen months after the merger, Mary Cefalu, the Director of the Silicon Valley office stepped down but stayed on as a consultant for the organization. This transition allowed both offices to reassess their experiences since the merger. An emphasis was placed on searching for an executive director for the Silicon Valley office in the hope of increasing the future independence of the Silicon Valley office in fundraising and operations.

In January of 2001, Masaoka was invited to participate in a speaking tour on nonprofits in Japan. She gave six speeches in five cities about nonprofit-government relationships in the United States. Masaoka was also invited to participate in three nonprofit-related forums and was interviewed for a news article. The trip gave Masaoka the opportunity to share information about

the Japanese nonprofit sector with Bay Area organizations and also helped raise the profile of CompassPoint abroad.

In 2001, CompassPoint's newsletter *Food For Thought* was replicated in the South Bay. *Silicon Valley Food For Thought* was designed to contain items that were particularly newsworthy to the South Bay nonprofit sector. The addition of this newsletter allowed the organization to showcase the distinct needs and accomplishments of the South Bay. By the second issue of the newsletter, CompassPoint was already receiving positive feedback regarding the content.

The organization also held its first event in Contra Costa County. The East Bay Funders Fair brought 300 representatives from local nonprofits together with over 55 funders. These funders included corporate and foundation representatives as well as major donors. One hundred people were waitlisted and slated to be the first to receive brochures the following year.

Unfortunately, as quickly as the economy in the Bay Area had boomed, it began to bust. That May, the third annual Technology Conference was tainted by concerns over the flailing dot com market. Even though 460 people attended the two day conference, it raised less money than the year before and required more staff effort. CompassPoint also experienced some turbulence as the newly hired Director of Silicon Valley suddenly resigned. This resignation highlighted the differing cultures of the two regions (San Francisco and the South Bay) and the underlying obstacles to successfully integrating as one organization. These cultural differences would continue to emerge over the next few years as CompassPoint worked to straddle the nonprofit sectors of two distinct communities.

In spite of the economic strife of the region, the year 2001 was still a productive year as CompassPoint:

- launched the program Capacity LEAP as a three-year initiative to build the capacities of selected ASOs
- continued to draw increased support for Nonprofit Day with Chevron supplying a grant of \$50,000 for the conference, which had become the largest nonprofit conference in the Bay Area.
- created the Executive Coaching program with a grant from the Richard and Rhoda Goldman Foundation of \$150,000.
- received an award from Deaf Counseling, Advocacy and Referral for attention to making services accessible to deaf people over the years.

The terrorist attacks of September 11, 2001 greatly affected the staff of CompassPoint, as it did all Americans. As Masaoka recounts in her September Executive Director Report, “Some of our staff have lost people close to them, while others have welcomed the news that their family members and friends are safe.” Both offices were closed for the day and staff members joined together to support each other. Following the events of September 11, nonprofit organizations in the Bay Area and around the country witnessed an increase in the emotional and financial needs of their clients. As the economy struggled and the nation mourned, CompassPoint’s support to nonprofit organizations became even more crucial.

In order to prepare for the growing needs of their clients in a struggling economy, staff at CompassPoint began working to identify the messages they wanted to send, the vehicles they would use to do so, the audiences they were targeting and the practical tools that those audiences would require. The organization made a concerted effort to provide additional financial planning services that were appropriate in the face of the growing recession. Staff also attempted to

address these issues through a variety of workshops and conferences, in OpEds and other publications such as Food For Thought, and through their consulting services.

Despite the slowing economy, CompassPoint continued to increase its body of published research in 2001. The organization published a report on the co-location of nonprofits in San Francisco. The other, more notable report was the first study on Executive Transitions, *Daring to Lead: Nonprofit Executive Directors and Their Work Experience*. In early 2002, the organization also published a study on the nonprofit workforce called *Help Wanted* that resulted from the discussions of the board-staff Workforce Task Force.

CompassPoint also created a Partnership Impact Review tool to monitor the many partners it had throughout the sector. Partners in the early 2000s included CompuMentor, a technology support nonprofit, the Center for Excellence in Nonprofits, and the Nonprofit Insurance Alliance of California. In 2002, CompassPoint also released a manual on how to adapt QuickBooks for nonprofit use. The organization worked with Business to Philanthropy, a Chicago based firm, to help market their QuickBooks overlay NonprofitBooks. That same year, CompassPoint also kicked off a board recruitment and matching program for Silicon Valley nonprofits called Board Connection.

As the organization continued to expand its consulting and research practices, it became clear that the term Management Support Organization no longer truly described the work of CompassPoint. Rather than simply operate as a broker of services (e.g. a facilitator of workshops, a link between consultants and clients), the organization was increasingly engaged in research and curriculum development, and beginning to fulfill its promise to be a compass, or guide, for the sector. For example, Mike Allison's paper, "Into the Fire: the Board's Role in Executive Transitions", was the lead article in the fall issue of *Nonprofit Management and*

*Leadership* (a nationally recognized journal on nonprofit management). CompassPoint was also pioneering new methods of training and consulting by helping launch e-learning trainings for their clients.

January of 2003 started out with the announcement of two new research studies. One was a modest survey of 49 women of color in leadership positions entitled “On the Rise: a Profile of Women of Color in Nonprofit Leadership.” The study found that the women executive directors of color were better educated and had more management experience than executive directors in general. One in four of the women interviewed were immigrants from another country. The other study, which was supported by the Hewlett Foundation, helped to make the case for increased investment in facilities for nonprofit organizations.

Staff members of CompassPoint had also recently received recognition for their individual work. As testament to the strength of CompassPoint’s leadership, Jan Masaoka was named Executive of the Year by the Nonprofit Times. In addition, Tim Wolfred, CompassPoint’s Senior Projects Director, had an article published in *Nonprofit Quarterly* (Winter, 2002) entitled “Stepping Up: a Board’s Challenge in Leadership Transition.”

CompassPoint’s 2001 Study, *Daring to Lead*, also continued to gain recognition. The report drew important conclusions related to executive burnout and the causes of executive exit. As a result of this study, the California Wellness Foundation approached CompassPoint about creating a statewide sabbatical program for executive directors of health organizations (six sabbatical awards of \$30,000 each to pay the salary of executives on sabbatical). Finalists were selected by CompassPoint representatives, and the selection process allowed Compass to identify and build a relationship with new organizations that could utilize their services.

As the American economy continued to flounder in 2003, CompassPoint was hit hard when four staff members were laid off and work hours for several more were cutback. Staff salaries were also cut by 5% for staff earning under \$50,000 a year and 7.5 % for staff earning over \$50,000. Consultant rates were cut by 10% and many travel and other additional expenses were cut. Staff members were also asked to cover other duties of laid-off staff. Masaoka, the administrative team and the board of directors worked together to address underlying structural issues in order to help the organization transition to a less costly model without having to ask staff to make further sacrifices.

Based on considerable effort on the part of the administration and the board, the organization's finances were back on track by the end of 2003. The organization also celebrated the completion of a year-long assessment of its Executive Coaching program that was conducted in cooperation with Harder and Company. As part of the study, coaches were assigned to 25 new executive directors and worked with them for a year. The study marked the first efforts to document of the impact of executive coaching over a period of time in the nonprofit sector.

In 2004, the Management Center of San Francisco, an organization started by one of the founders of the Support Centers of America, explored the possibility of a merger with CompassPoint. After some deliberation, it was decided that the Management Center would auction off its programs and close up their business. CompassPoint obtained the Management Center's ED 101 program. In 2004, CompassPoint also:

- launched the Finance Professionals Network, with membership dues that served as a form of revenue for the organization in exchange for discounted workshops and networking events.

- created e-learning trainings for employees of Cisco Systems who want to volunteer for nonprofits or join nonprofit boards.
- held an all-day forum for the Women Executive Directors of Color that was attended by 78 local E.D.s and featured a keynote speech from San Francisco District Attorney Kamala Harris.
- celebrated the contributions of Jude Kaye, who retired after 25 years of service, and Mike Allison, who left to pursue independent consulting after 14 years of service.

For the fiscal year of 2003-2004, CompassPoint's was able to break even and thereby affirm the efficacy of the fiscal changes that had been made during difficult times.

In 2005, CompassPoint celebrated its 30<sup>th</sup> anniversary. The organization celebrated this milestone at a reception at the Nonprofit Day conference and at a more intimate "family and friends" dinner in the fall. Also in 2005:

- Mike Allison and Jude Kaye's published the book *Strategic Planning for Nonprofit Management* with 2,500 advance copies sold.
- (Chief Operations Officers) Jeanne Bell published *Financial Leadership for Nonprofit Executives* as part of a five book series in partnership with Wilder.

Masaoka also formed a "Reinvention and Design Team" to develop structural and procedural changes to improve the organization. As a result of the team's assessment of the organization, CompassPoint enhanced its website to become hub for agency operations, and created the Program Services Team out of the formerly separate teams in Training, Consulting, and Executive Services.

The year 2006 marked a time of great change for CompassPoint. The Silicon Valley and the San Francisco offices both moved to new buildings. The new building in San Francisco

placed CompassPoint on Market St. in the center of San Francisco's financial district. The location also allowed for more direct access to public transportation.

In May of 2006, Masaoka announced she would be leaving her post as Executive Director. The move was something Masaoka had been discussing with key board members for some time. Having led the organization for 14 years, Masaoka was ready to make a professional change. However, she wanted to ensure that her exit was smooth and reflected all the practices that CompassPoint preached to other organizations. For this reason, Masaoka removed herself from the decision making process, entrusting the board of directors and key staff to fill her position. Together, the staff and board discussed some of the aspects of CompassPoint that made it unique. It was agreed that the organization wanted to maintain its commitment to social justice, support organizations in communities of color, and find a balance between being a consulting firm and a nonprofit organization (Board Minutes, July 2006).

In July of 2006, the search for an interim executive director was conducted and Chuck Green was hired to fill the position. Green, a Harvard MBA and former CEO of a nonprofit and a foundation, had worked closely with CompassPoint over the years as the Executive Director of the Volunteer Center. Green was a key participant in the development and operations of BoardMatch Plus. Green believed that development should be a high priority of the organization and hit the ground running by working to apply for four grants in his first week on the job.

Despite this forward movement, it was clear to the board and staff that Masaoka's exit would be a big loss for the organization. As described by one board member, "Jan had built a formidable reputation. Her perception of things is just different. She is never threatening and is never threatened. She doesn't walk on water but her feet aren't very wet" (Personal Interview,

July 14, 2008). In the beginning, the board was certain that they wanted someone who would match Masaoka's national stature.

In August, the Search Committee began working with a national search firm but it became clear that the relationship with this firm would not work after some time working together. CompassPoint's money was refunded, and the Search Committee was back to square one. The Committee then began working with another search firm that had experience with nonprofits and institutes of higher education. The relationship was far more positive from the start and attracted over fifty applications from experienced nonprofit executives located all over the United States. One of those applications belonged to Jeanne Bell, an eight year employee of CompassPoint who had first worked with the organization as a result of the research she had done for her master's thesis on unions in nonprofits. While the board had assumed that the new executive director would come from outside the organization, Bell successfully impressed them at every step of the process. The final three candidates were asked to write a vision statement for the organization. In the end, it was Bell's vision that seemed the most in line with the organization and she was hired with excitement. The response to Bell's promotion from funders was overwhelmingly positive and the Search Committee was commended for the painstaking process they went through to prove Bell would be best.

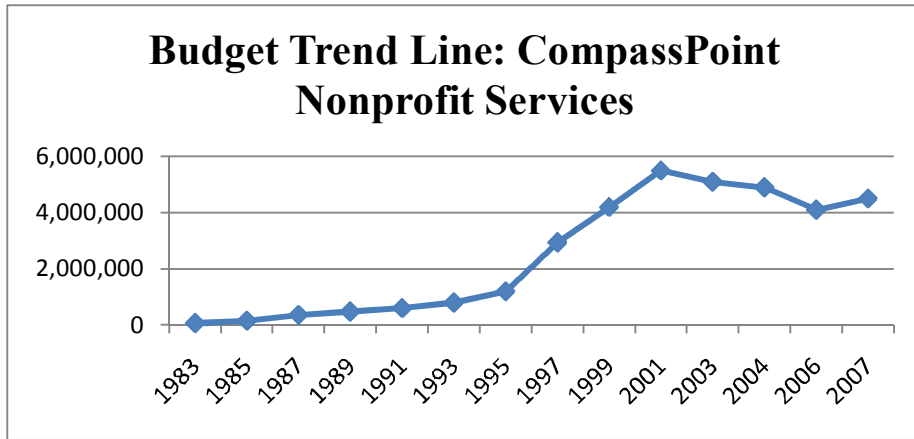
On April 2<sup>nd</sup> of 2007, Bell officially became CompassPoint's new Executive Director with a commitment to guide CompassPoint as a leader in the field of nonprofit capacity building through the provision of services and research. In her first year as Executive Director, Bell worked on improving relations with the Silicon Valley community by meeting with Silicon Valley funders and cultivating partnerships with other local capacity building organizations, such as the Center for Excellence in Nonprofits. CompassPoint wanted to send a message to these

stakeholders that they were not outsiders looking to impose their vision on the region, but that they were and continue to be interested in serving the South Bay sector in the most appropriate and beneficial manner possible.

CompassPoint also made some strategic internal changes during 2007. Bell's title was changed from Executive Director to Chief Executive Officer, in concert with a growing trend amongst many major nonprofits and foundations to use this title. As CEO, Bell continued to focus on strengthening the financial state of the organization. CompassPoint's budget had steadily decreased since reaching its zenith in the late 1990s and Bell emphasized addressing structural issues in order to strengthen the organization's fiscal performance. She also implemented a "Dashboard" for CompassPoint staff that provides concise quarterly reports on the organization's performance indicators.

With a long and accomplished history behind them, CompassPoint continues to adapt to the ever-changing nonprofit sector. A far more competitive landscape exists today in the field of nonprofit management support than did at the organization's birth. Capacity building has become a popular and well-established concept in the 21<sup>st</sup> century and clients seeking capacity building services are more sophisticated. CompassPoint's long-documented ability to adapt to changes in the sector has allowed them to thrive in spite of these challenges and sustain their sterling reputation in the field. The organization's solid vision of maintaining a grassroots approach that responds to the needs of each individual client has enhanced this adaptability and has only been reinforced as executives have been promoted from within. As the staff members of CompassPoint look to the future, their own desire to build their organization's capacity will continue to serve as a model for their clients and the nonprofit sector as a whole.

Appendix A: Budget Trend Line



**Appendix B:**

Executive Directors of CompassPoint

1976-1978: Bob Orser

1978-1980: Pauline Proschan

1980-1983: Kathleen Schuler

1983-1992: Rick Smith

1992-2006: Jan Masaoka

2007-Present: Jeanne Bell

**Appendix C:**

Interviews were conducted with the following people from May to August of 2008:

- Mike Allison
- Jeanne Bell
- Paul Harder
- Jude Kaye
- Jan Masaoka
- Rick Smith
- Joe Valentine