

# Greenlights 2007 Annual Report

**G**REENLIGHTS FOR **N**ON**P**ROFIT  
**S**UCCESS STRENGTHENS  
**C**ENTRAL **T**EXAS **N**ON**P**ROFITS  
**T**HROUGH **C**ONSULTING,  
**E**DUCATION, **N**ETWORKING, AND  
**R**ESOURCES.

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# Letter from our Board Chair



**Greenlights for NonProfit  
Success**

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In this annual report, you will find that 2007 was a watershed year for Greenlights. We successfully and smoothly transitioned to a new Executive Director, recruited some great new Board members, grew our budget by more than 10%, and grew our consulting practice by 83%!

We continued to expand and grow our services in order to help the nonprofits we serve meet their missions and become more effective and efficient organizations. By providing skill-building workshops, customized consulting and financial management support, Greenlights enables nonprofits to focus on the mission-specific activities they are passionate about. A few highlights of our performance in 2007 include: 77 consulting clients, more than 30 Back Office financial management clients, 127 new members, and nearly 500 attendees at our 6th annual Crossroads Conference. Based on evidence that the majority of Central Texas nonprofit executive directors intend to leave their positions within the next 5 years, Greenlights launched consulting services around executive transition management to help nonprofits survive and thrive during difficult transition times. Using the proven *Prepare - Pivot - Thrive* model for executive

transitions, we consulted with a number of nonprofits undergoing transitions, and our customized facilitation and coaching services helped them through important leadership changes.

We are also proud of the excellence with which we provided our services this year, as measured by customer satisfaction surveys and other forms of feedback. Our consulting clients rated us a 9.0 out of 10 in overall satisfaction (up from 8.3 in 2006), our workshop participants rated us an 8.7 out of 10, and nearly 60% of our members renewed their Greenlights memberships. In addition to these formal ratings, the community continues to voice their support of Greenlights as an innovative service provider to Central Texas nonprofits. Our staff members are regarded as not only experts in their respective fields, but also as accessible and helpful community service providers - a perception underscored by Greenlights' selection as a finalist for the 2007 Greater Austin Chamber of Commerce Business Awards in the Customer Service category.

Matt Kouri took the helm at Greenlights as our new Executive Director in early 2007 and led us through the process of developing a three-year strategic plan. The overarching theme of

Greenlights' 2008-2010 Strategic Plan is "Creating Impact - Providing Leadership - Modeling Excellence." Greenlights believes that our nonprofit community can become truly exceptional and that we can provide the services, support, positive impact, and leadership needed to help more nonprofits achieve their own mission excellence. This strategic plan focuses on improving the performance and increasing the impact of nonprofits in Central Texas through focusing our services on areas of greatest need, serving more nonprofits, and serving more impactful nonprofits. The work we did on the strategic plan was intense and rewarding, and we left the process with new mission and vision statements that reflect Greenlights' commitment to excellence in serving Central Texas nonprofits and becoming a leader in the nonprofit sector.

As we look forward to 2008, I would like to thank the many donors, board members, collaborators, and friends who have made it possible for Greenlights to continue to serve the nonprofit community in so many ways.

Bryan Campbell  
Board Chair

# Our Impact



**Consulting**  
77 consulting engagements, a 13% increase over 2006

**Back Office**  
More than 30 clients

**Workshops & Events**  
1,679 attendees representing over 500 organizations

Greenlights for NonProfit Success strengthens Central Texas nonprofits through consulting, education, networking and resources. Established in 2001, Greenlights has developed a reputation for high quality service; respectful and fun programming; resource-rich web site; and responsive and affordable consulting.

In 2007 Greenlights expanded our impact and our services. We:

Directly served more than 2,500 individuals through our information and referral services and with 53 skill-building programs and workshops on fundraising, governance, marketing, planning, fundraising, finance, human resources and technology

Grew our consulting practice by more than 83%, serving 77 different nonprofits

Turned our Back Office into a breakeven business, serving over 30 organizations

Held the most successful Board Summit matching event ever, attended by over 200 business professionals

Held the most successful Crossroads Conference ever – the theme for our sixth annual conference was Going the Distance

Maintained high membership numbers at more than 350 nonprofits, supporting individuals, and businesses

Continued to earn more through our programs and services with less reliance on contributed income (55% of total income was earned revenue)

Expanded our website services and online resource library

Continued to get high rates of satisfaction from participants – 8.7+ on a scale of 1 to 10.

We look forward to continuing to impact the community in 2008, and look forward to seeing many of you at our workshops and conferences, and to working with others through our Consulting and Back Office services. Thank you for your support in 2007!

# Our Leaders

## Staff 2007

Matt Kouri — Executive Director  
Deborah Edward — Executive Director  
Janice Bush — Accounting Specialist  
Kimberly Caldwell — Consulting Services Coordinator  
Mary Alice Carnes — Program Manager  
Esther Chung — Consulting Intern  
Rachel Daugherty — Back Office Services Coordinator  
Paula Del Carmen — Bookkeeper  
Julie Farias — Administrative Intern  
Alaine Hutson — Administrative Intern  
James Jacobs — Chief Financial Officer  
Jarod Jett — Work Study  
Heather Jones — Account Manager  
Tara Kirkland — Director of Consulting Services  
Don Kruciak — Database Administrator  
Tara Levy — Senior Consultant  
Michael Linan — Education Work Study  
Lynn McKee — Back Office Consultant  
JoAnn Mills — Accounting Specialist  
Clay Newman — Chief Financial Officer  
Anne Rickard — Membership & Marketing Coordinator  
Katherine Shilling — Intern  
Greg Smyth — Director of Back Office Services  
Drew Watson — Development & Marketing Associate  
Kim Wilson — Director of Development

## Advisory Council 2007

Carmel Borders — Tapestry Foundation  
Larry Earvin, Ph.D. — Huston Tillotson University  
Michael Guerra — Capital Area Food Bank  
Melissa Jones — Community Volunteer  
Cindy Kozmetsky — Community Volunteer  
Charles Luellen — Retired  
Libby Malone — Grande Communications  
Lynn Meredith — MFI Foundation

## Board of Directors 2007

Bryan Campbell, Chair — DuBois, Bryant, Campbell & Schwartz  
Edd New, Treasurer — Ernst & Young (Retired)  
Sydnia Crosbie, Secretary — Travis County Transportation & Natural Resources  
David W. Balch — United Way Capital Area  
Drew Beckley — Deloitte  
Rob Bridges — Wortham Insurance  
Suzanna Caballero — Wachovia Bank  
Cathy Casey — Texas Monthly  
Ron Ford — Plains Capital Bank  
Adam Goldman — Public Strategies  
Stephanie Haase — Meritage Capital  
Linda Haines — Linda Haines Associates  
Brooke Hardie — Attorney  
Kay Kirchner — Applied Materials  
Bettye Nowlin — Community Leader  
Dave Shaw — Russell - Shaw  
Hector Silva — LatinWorks  
Greg Talley — McDonald and Associates  
Bill Waxman — Waxman Cavner  
Mike Nellis — Austin Children's Museum  
MariBen Ramsey — Austin Community Foundation  
Anna Sanchez — Wells Fargo Bank  
Eugene Sepulveda — UT McCombs School  
Patricia Shield Ayres — Shield Ayres Foundation  
Steve Taylor — Applied Materials  
Gary Valdez — Focus Strategies  
Kirk Watson — Hughes and Luce

We are still considering our options for the future, but it does seem to me that we are the type of organization that Greenlights was created to serve... We are heading in the right direction.

-Bill Peacock, Texas Public Policy Foundation

I just want to personally tell you how much we have gained from this project. It takes the cake as the most cost effective in depth organizational analysis we've ever done and I am confident that the changes we make will allow us to enjoy phenomenal improvements that put us light years ahead of most businesses, non-profit or not!

-Rachel Muir, Girlstart

# Our Supporters

THANK YOU very much for your outstanding work. Can't tell you enough how much I appreciate you for all you are both doing... Your work will lay the foundation from which to build a stronger, better CASA.

-Bobby Garcia, Transition Committee member  
CASA of Travis County

## Foundations & Corporations

A Glimmer of Hope Foundation  
Accenture  
Acton MBA in Entrepreneurship  
Advanced Micro Devices (AMD)  
Applied Materials  
AT&T Foundation  
Austin Community Foundation  
Dandy Idea  
Dell Foundation  
Frost Bank Austin  
H-E-B  
IBM  
KDK-Harman Foundation  
Maxwell, Locke & Ritter  
MFI Foundation  
Microsoft Matching Gifts Program  
Plains Capital Bank  
Prosperity Bank  
Red Bull North America  
RGK Foundation  
Shield-Ayres Foundation  
Silicon Laboratories Inc.  
Spansion  
St. David's Community Health Foundation  
Tate Austin  
The Republic Group  
Topfer Family Foundation  
Wachovia Foundation

## Foundations & Corporations (continued)

Washington Mutual  
WaterStreet Investment Consultants, LLC  
Wells Fargo Bank  
Winstead P.C.  
Wortham Insurance and Risk Management

## Individuals

David Balch and Kathy Uitvlugt  
Violet Bell  
Lynne Campbell Bonham  
Peter Bradford  
Rob Bridges  
Dan R. Bullock  
Suzanna Caballero  
Bryan C. Campbell  
Mary Alice Carnes  
Allen Cowden  
Larry Elsner  
Mr. and Mrs. Dewitt Gayle  
Michael Guerra  
Stephanie Haase  
Linda Haines  
Brooke Hardie  
Mary Ann Heller  
Stacy L. Herrington  
Melissa Jones  
William and Nicole Kessler  
Kay Kirchner  
Cindy Kozmetsky  
Melanie Meador

## Individuals (continued)

Michael Nellis  
Edd New  
Bettye Nowlin  
William H. Page, Jr.  
William Pate, II  
Janis and Joe Pinnelli  
Pam Reed  
Sabine Romero  
Anna M. Sanchez  
Dave Shaw  
Mr. and Mrs. Eugene Shepherd  
Hector Silva  
Suzi Sosa  
Angela Sparks  
Tyler Sutliff  
Greg Talley  
Leonard Villagomez  
David Vliet  
Bill Waxman  
Larry and Jane Wilson

## In-Kind Donors

AMD  
Mary Alice Carnes  
Ms. Pauline Hoen  
Mrs. Alfred King  
Qualitative Direction  
Seeds for Change Consulting  
Tammadge Market Research  
Trademark Media

# Our Financials

## Financial Report

	2006	2007
CHANGES IN UNRESTRICTED ASSETS		
REVENUES		
Contributions	\$461,279	<b>\$572,050</b>
Program fees	\$504,520	<b>\$650,463</b>
Membership fees	\$42,357	<b>\$45,915</b>
Other income	\$0	<b>\$165</b>
Total unrestricted revenues	\$1,008,156	<b>\$1,268,593</b>
EXPENSES		
Program services	\$867,939	<b>\$881,179</b>
General and administrative	\$205,142	<b>\$211,480</b>
Fundraising	\$82,387	<b>\$82,281</b>
Total expenses	\$1,155,467	<b>\$1,174,900</b>
Increase (decrease) in unrestricted net assets	(\$147,311)	<b>\$93,693</b>
ASSETS		
Cash and Cash equivalents	\$2,436	<b>\$89,251</b>
Other assets	\$16,482	<b>\$39,860</b>
Property and equipment	\$32,855	<b>\$28,057</b>
Total Assets	\$51,773	<b>\$157,168</b>
LIABILITIES AND NET ASSETS		
Liabilities	\$53,406	<b>\$56,344</b>
Deposits	\$1,830	<b>\$10,693</b>
Total Liabilities	\$55,236	<b>\$67,037</b>
Net assets	(\$3,563)	<b>\$90,131</b>
Total liabilities and net assets	\$51,773	<b>\$157,168</b>