



Greenlights 2008-2010 Strategic Plan

Creating Impact – Providing Leadership – Modeling Excellence

Introduction

The overarching theme of Greenlights' 2008-2010 Strategic Plan is “***Creating Impact – Providing Leadership – Modeling Excellence.***” It is built around the desire of the Greenlights board and staff to see the Central Texas community become stronger through the strength of its nonprofit sector. We believe that our nonprofit community can become truly exceptional and that Greenlights can provide services, support, 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 the areas of greatest need,
- serving **more** nonprofits,
- serving **more impactful** nonprofits, and
- **increasing our leadership** role in the sector.

After more than six years in operation, Greenlights has experienced strong, if sometimes uneven growth in the Central Texas community. More than 800 nonprofits annually have come to rely on Greenlights for some type of service. To further increase our impact and to strengthen our own ability to serve and lead the community, Greenlights has honed in on its mission and vision, and developed the following three-year strategic plan.

Greenlights Strategic Plan

The Larger Picture

New Mission and Vision

Our Mission

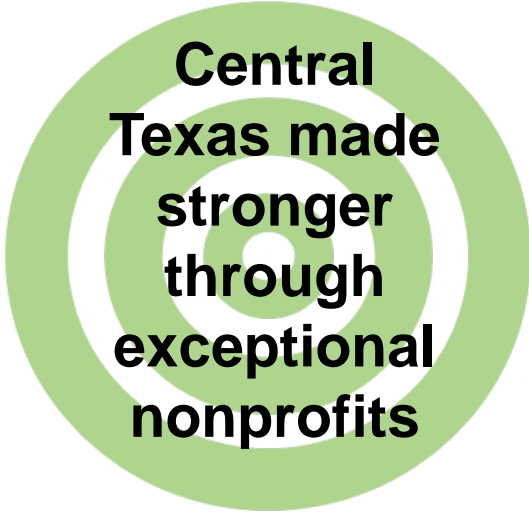
(what propels us)



**Greenlights
is a catalyst
for
extraordinary
nonprofit
performance**

Our Vision

(what we're aiming for)



**Central
Texas made
stronger
through
exceptional
nonprofits**

Big Hairy Audacious Goals (BHAG's)

In addition to setting a new long-term (10+years) vision and short-term (1-3 years) goals, Greenlights believes the following two BHAG's representing intermediate objectives that we will strive to achieve:

- **Central Texas' nonprofit sector is nationally recognized as a leading sector**
 - Evidence: Other nonprofits come to Central Texas to learn how to do things; Central Texas nonprofits win many national awards, etc.

- **Greenlights is recognized as a leading national resource for nonprofit thought leadership, services, and products**
 - Evidence: Number of national speeches/presentations Greenlights staff deliver, amount of non-Central Texas users of our services and purchasers of our products (online, etc.)

Greenlights 2010 Overview: Impact...Leadership...Excellence

Our Mission (what propels us)

Greenlights is a catalyst for extraordinary nonprofit performance

Our Work (how we get there)

Services and Programs

- Customized consulting, facilitation, training, and coaching
- Educational workshops, conferences, and peer learning
- Back Office financial management and outsourcing
- Free information, resources, and thought leadership
- Low-cost membership program with discounts and resources
- Low-cost, off-the-shelf management toolkits

Primary Practice Areas

- Strategy & Planning
- Board Excellence
- Leadership Advancement
- Financial Management
- Resource Development

Our Vision (what we're aiming for)

Central Texas made stronger through exceptional nonprofits

Our Goals (how we measure our success)

Make a positive, measurable impact on nonprofit performance

Exemplify nonprofit excellence and best practices in all we do

Provide clear leadership on critical nonprofit sector issues

Our Core Values (the foundation of how we work together)

Service Excellence

Learning

Collaboration

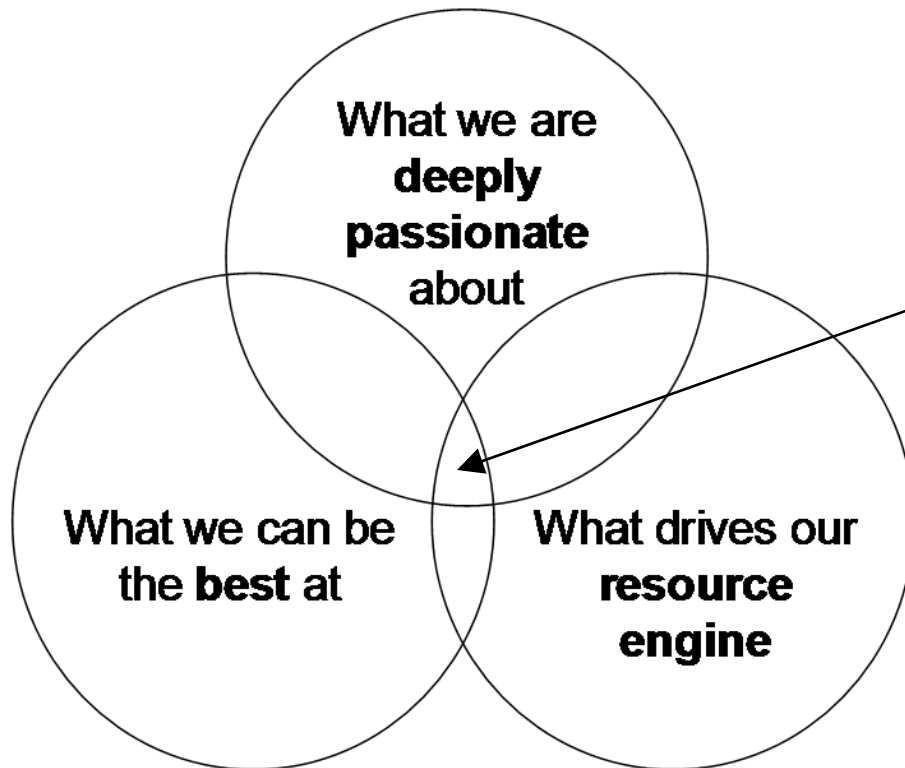
Innovation

Integrity

Fun 6

Greenlights' Hedgehog

The Hedgehog Concept (from Jim Collins' book *Good to Great*) is designed to help an organization obtain **piercing clarity** about how to produce the best long-term results and impact. It is the intersection of three things:



Greenlights' Hedgehog

We bring leading practices in management and governance to nonprofits that are poised for excellence.

Greenlights' Shared Values



Our values serve as:

- The foundation of our organizational **culture**
- Key **measures** of our success
- The **underlying principles** that guide how we work at Greenlights and with our stakeholders

We live them through...

- Our **daily interactions** with each other and with our customers
- Our **program and service** delivery and measurement
- Our hiring, employee development, and rewards and recognition programs

Greenlights Practice Areas

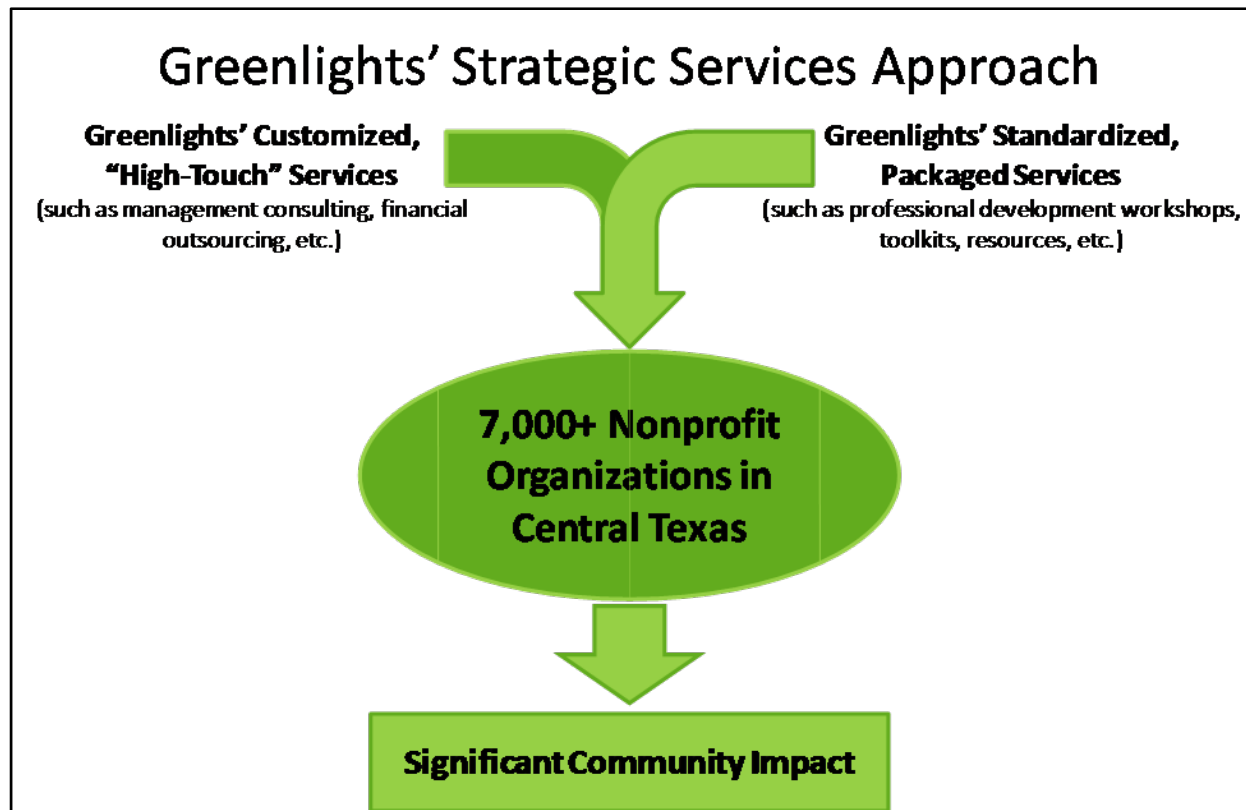
Greenlights focuses its services primarily around the following five core practice areas:



Greenlights 2008-2010 Practice Areas

Revised Approach to Services

Greenlights will offer both “high-touch” customized services and more standardized services/products to achieve the greatest, most efficient impact on the nonprofit community.



Thought Leadership Areas

Greenlights will focus its thought leadership, innovation, research, and advocacy on the following areas:



Greenlights 2008-2010 Thought Leadership Areas

Thought Leadership Areas, cont.

In making each of these areas a priority for 2008-2010, Greenlights commits to the following:

- Conducting cutting-edge **research** on trends, best practices, etc.
- Developing and publishing research and analysis **papers/articles** either independently or via the local media
- Investing in new **innovative programs or services** that emerge from our research and development in these areas
- Dedicating **staff time** to each of these areas
- Seeking **funding** to support our activities in these areas

Greenlights Strategic Plan

The Details

2008-2010 Strategic Plan Goals

- 1. Make a positive, measurable impact on nonprofit performance**
 - Focus: Our direct programs and services

- 2. Provide clear leadership on critical nonprofit sector issues**
 - Focus: Sector-wide thought leadership and awareness-building efforts

- 3. Exemplify nonprofit excellence and best practices in all we do**
 - Focus: Our internal capacity - operations, board, and staff

Goal 1 Metrics: Impact on Nonprofit Performance

TACTICS	METRICS
a. Focus our services on 5 new Practice Areas	<ul style="list-style-type: none"> • By December 2010, 90% of client service engagements clearly fit within one of the five practice areas • By December 2010, 90% of educational offerings clearly fit within one of the five practice areas
b. Develop longer-term, deeper relationships with clients who have a high propensity for success and impact	<ul style="list-style-type: none"> • By December 2010, 75% of organizations served use more than one Greenlights service within a given year • Each year, the average client service contract size increases • By January 2009, consulting and Back Office have implemented a “client filtering” model which takes into account serving clients with greater propensity for impact • Each year, client satisfaction scores exceed 85% overall average satisfaction
c. Develop and expand resources available to <i>all</i> nonprofits	<ul style="list-style-type: none"> • By December 2010, develop and take to market 5 different toolkits • By December 2010, sell at least 50 toolkit units • Expand the number of downloadable resources in our online library from 40 in 2007 to 60 in 2008, 70 in 2009, and 80 in 2010 • Each year, increase the number of resources in our physical library • Each year, increase the number of “click-throughs” (as a measure of actual resources downloaded from the site) by 10%

Goal 1 Metrics (cont.): Impact on Nonprofit Performance

TACTICS	METRICS
d. Increase the number of individuals and organizations we serve	<ul style="list-style-type: none"> • By December 2010, increase the number of organizations and individuals we serve via all Greenlights services by 20% over 2007 base
e. Develop an evaluation model for measuring our true impact	<ul style="list-style-type: none"> • By Q3 2008, develop the evaluation model • By Q1 2009, incorporate the model into all Greenlights evaluation methods (surveys, etc.) • By December 2009, incorporate evaluation results into regular planning activities

Goal 2 Metrics: Provide Sector Leadership

TACTICS	METRICS
a. Develop and communicate high-quality thought leadership on key sector issues	<ul style="list-style-type: none"> • In 2008, publish at least one thought leadership piece on key sector issues; in 2009, publish at least two; in 2010, publish at least three • Each year, deliver at least 10 public presentations or speeches on these thought leadership areas • Each year, obtain positive media coverage for at least one Greenlights thought leadership piece or related story
b. Facilitate more peer learning opportunities for leaders and staff on key issues	<ul style="list-style-type: none"> • By December 2010, increase the number of individuals participating in peer learning opportunities (e.g. Breakfast Series, Board Summits, Crossroads peer breakout sessions, etc.) by 50% over 2007
c. Launch one new action-oriented innovation per year in support of thought leadership areas	<ul style="list-style-type: none"> • Each year, launch at least one new initiative (regardless of size and scope) that is tied to a thought leadership area, service- or action-oriented, and is either grant-funded, self-sustaining, or very low cost

Goal 3 Metrics: Exemplify Nonprofit Excellence

TACTICS	METRICS
<p>a. Become a nonprofit employer of choice in Central Texas</p>	<ul style="list-style-type: none"> • By December 2008, implement incentive-based pay for all employees • By January 2009, implement an enhanced performance evaluation methodology including 360-degree evaluations • By January 2009, include Greenlights core values in all hiring criteria, performance evaluation criteria, and HR policies • By December 2010, decrease “unforced” employee turnover to less than 20% on average per year over the last 3 years • By December 2009, implement at least one enhancement to employee compensation (e.g. 3% of salary 403(b)match)
<p>b. Become a model board among Central Texas nonprofits</p>	<ul style="list-style-type: none"> • Maintain a “full board”, with 90% of 21 slots filled on average through 2010 • Beginning in 2008, 100% of new board members will be oriented within 3 months of joining • Beginning in 2008, our board will complete an annual formal performance evaluation of itself, to include Board Primer attendance, pledge-making and fulfillment, meeting attendance, fundraising, etc. • Before the end of 2008, the board will implement a formal new board member mentoring program • Each year, our board will set strategic diversity goals (e.g. race, gender, skillset, etc.) and will achieve those goals

Goal 3 Metrics (cont.): Exemplify Nonprofit Excellence

STRATEGIES	METRICS
c. Exemplify and share with other organizations our own operational excellence	<ul style="list-style-type: none"> • By December 2008, update all Greenlights HR and Financial policies and procedures and use them as best practices for other organizations • Each year, at least one new technological advancement will be launched (e.g. online board community, blogs, etc.) • By January 2010, procure a new Customer Relationship Management solution to replace current MS Access database

Strategic Program and Service Changes

2007 PROGRAMS	CURRENT DESCRIPTION	NEW STRATEGIC FOCUS
Back Office	Affordable financial management, "Virtual CFO", bookkeeping, and payroll services	Grow number and stature of clients served
Consulting	Customized, project-based assistance to a wide variety of nonprofits on a wide variety of issues.	Focus on 5 practice areas, grow revenues, improve stature of clients served, increase impact through deeper services
Conferences	Full-day Crossroads Conference and ½ day Sector Connector networking and education conferences	Continue Crossroads (reevaluate growth potential in 2009); Eliminate Sector Connector in '08 and reconsider in future
Membership	Entry point into Greenlights services, members receive free workshops, discounts on events and services, etc.	Grow number of members and increase repeat memberships
Workshops	More than 60 courses per year focused on the real needs of nonprofit staff, board members, and supporters	Grow, and focus on 5 new practice areas
Nonny Awards	An event to celebrate the nonprofit sector	Eliminate; Pilot awards at 2008 Crossroads
Information & Referral	Online resource library, physical library, and staff answering over 700 requests for information annually	Continue
Board Summit & Board Place	These programs help introduce prospective board members to nonprofits needing new board members	Continue Board Summit; Eliminate BoardPlace
Philanthropy Cafe	An invitation-only forum for donors from the different giving sectors focused on idea sharing and connecting	Continue
Good Community is Good Business	Community philanthropy project that coaches small businesses to increase community engagement	Eliminated (new home found)

New Programs and Services

In addition to strategic changes in existing programs and services, Greenlights will launch the following in 2008-2010:

2008-2010 NEW PROGRAMS and SERVICES	DESCRIPTION	TARGET
Toolkits	Low cost, off-the-shelf packages containing templates, tools, best practices, and a limited number of accompanying consulting hours on five “hot topics”, including Nonprofit Financial Management, Board Governance Excellence, and 3 more TBD	Small – Medium Nonprofits
Thought Leadership	Leading-edge research, publications, and speaking engagements, focused on our 5 Practice Areas and Sector Leadership Areas	General Public
New Facilitated Peer Learning Offerings	At least one new offering per year, such as 2008’s CFO Breakfast Series	All Nonprofits
One Additional New Innovation Per Year	One new action-oriented innovation per year, tied closely to our thought leadership focus areas, that must either be funded fully, self-sustaining, or very low cost	TBD

Revisiting the Plan

The Greenlights board and staff commit to revisiting, re-evaluating, and modifying as needed this strategic plan according to the following schedule:

- Summer/Fall of 2008 – evaluate performance against plan and make revisions as needed
- Summer/Fall of 2009 – evaluate performance against plan and make revisions as needed
- Summer/Fall of 2010 – conduct new 3- or 5- year strategic planning process resulting in a new plan for 2011

Greenlights Staff and Board

Many thanks are due to the following Greenlights Board and Staff members who contributed to the development of this strategic plan:

Board Members

- Rob Bridges, chair *
- Suzanna Caballero, chair-elect *
- Bryan Campbell, past chair *
- Edd New, treasurer
- Linda Haines, secretary *
- Drew Beckley
- Cathy Casey*
- Ron Ford
- Adam Goldman
- Brooke Hardie
- Kay Kirchner
- Bettye Nowlin
- Dave Shaw
- Greg Talley
- Bill Waxman

Staff Members

- Matt Kouri, executive director *
- Angie Adams
- Janice Bush
- Mary Alice Carnes
- Kimberly Caldwell
- Laraine Johnston
- Heather Jones
- Tara Kirkland *
- Tara Levy
- Jo Ann Mills
- Anne Rickard
- Kim Wilson

* Strategic planning committee members