



2013

ANNUAL REPORT



Celebrating 20 Years
Advocacy | Research | Leadership

2013

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Advocacy | Research | Leadership



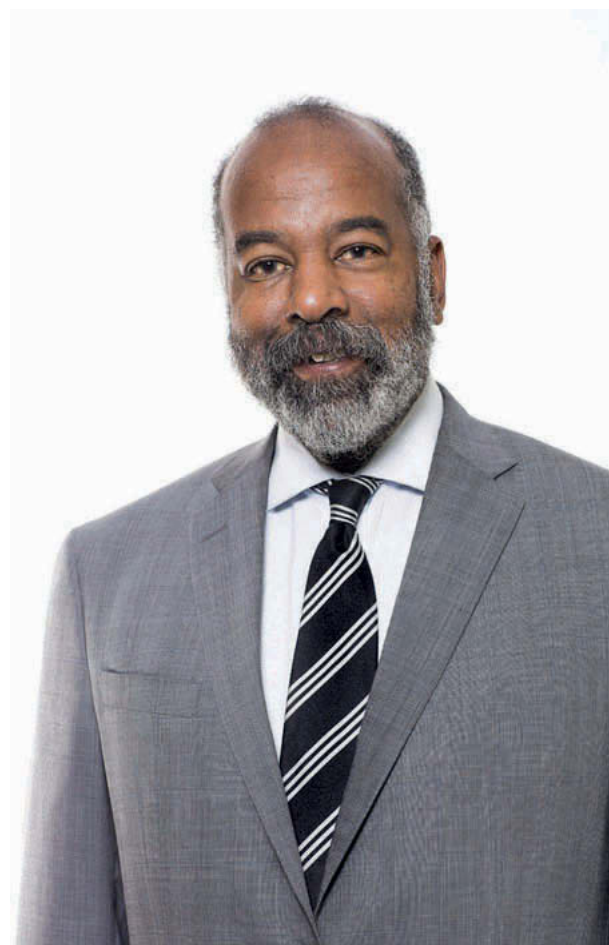
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In Memoriam: David Glover, Executive Director, OCCUR and founding Greenlining board member

We dedicate this year's annual report to David Glover, a cherished and powerful community leader whom we lost in 2013. David was the Executive Director of OCCUR, an Oakland-based organization committed to creating communities of opportunity. David's impact and contributions cannot be underestimated—he treated every person he met as an equal and as a partner in the fight for racial equity.

The Greenlining Institute would not be what it is today without David's tireless work and vision. He was a visionary, an inspiration, and a friend to many of us. We miss him dearly and are forever inspired to continue in his footsteps.



MESSAGE FROM LEADERSHIP EXECUTIVE DIRECTOR & THE BOARD

Dear Friends, Allies, & Critics,

Depending on who you were, 2013 was either a remarkable year or a year that you'd rather forget. In 2013 a booming stock and housing market gave investors record profits, yet for those of us who are passionate about justice and racial equity, it was painful to see America's immense racial wealth gap barely budge in the midst of this supposed economic recovery. A country that starts to resemble a racial caste system is not one we at Greenlining can accept.

This is why we worked harder than ever at Greenlining in 2013. With a budget of approximately \$4 million¹, our staff members and academy participants published 11 reports, spoke about issues impacting our communities at over 70 hearings and events, and were quoted or referenced by the press in over 300 stories, appearing some 1,000 times. In addition, our nationally recognized Academy successfully trained six health equity fellows, two policy fellows, two legal fellows, 10 summer associates, and provided a nurturing home to 36 U.C. Berkeley students at Casa Joaquin Murrieta.

We also organized more events than ever before. We kicked off the year with our first-ever Opportunity Summit held in Washington, D.C. with over 100 guests in attendance, including members of Congress, White House officials, and appointed financial regulators. Our Supplier Diversity Forum at the Public Policy Institute of California drew a sold-out crowd of people dedicated to increasing opportunities for minority-owned businesses. Our year-end Budget Conversation with California Sen. Mark Leno and numerous policy leaders gave us further inspiration to keep fighting for equity in California's budget.

And if you think that's a lot, we also celebrated our 20th anniversary in San Francisco with over 1,000 guests, including San Francisco Mayor Ed Lee, Van Jones, Sempra CEO Debra Reed, and many others.

We ended the year with a successful Greenlining Coalition trip to Washington, D.C., where we met with the nation's most powerful financial regulators, such as Federal Reserve Chairman Ben Bernanke, Securities and Exchange Commission Chair Mary Jo White, Consumer Financial Protection Bureau Director Richard Cordray, Federal Deposit Insurance Corporation Chair Martin Gruenberg, and many others. In these meetings, they heard from us of the need to create an inclusive economy that serves all Americans.



As we look to 2014, we also recognize that we have to work smarter, not just harder. Given the growing inequalities we face as a nation, we have to remember what the late Nelson Mandela said: "After climbing a great hill, one only finds that there are many more to climb." Although much needs to be done, we have to also reflect and plan for the long fight ahead. Thanks to the James Irvine Foundation, 2013 was also a year where we built the strength of our "bench" through the development of shared leadership among our team members.

Overall, we are proud that in 2013, we lived up to our brand: We continue to be, as our opponents put it, "a bunch of shakedown artists, a growing menace," and a "national policeman for diversity."² We make no apologies for standing up for a fair share for all, or for being a menace to those who perpetuate inequality.

Let's Keep Fighting,

**Orson Aguilar, Executive Director
The Greenlining Board**

¹ Sadly, a budget of \$4 million at Goldman Sachs only gets you approximately 12 white guys who all seem to wear the same slacks and brown loafers.

² Taken from a Special Five Day Report in *The Examiner* the week of April 12, 2010.

ABOUT US

Founded in 1993, The Greenlining Institute is a policy, research, organizing, and leadership institute working for racial and economic justice. We work to bring the American Dream within reach of all, regardless of race or income. In a nation where people of color will make up the majority of our population by 2043, we believe that America will prosper only if communities of color prosper.

Greenlining at a Glance

Operational Expenses: **\$ 4,831,622**
End of Year Assets: **\$18,242,946**
FTE Employees: **32**
Academy Participants Trained: **56**
Coalition Members: **46**
Publications and Policy Briefs: **11**
Unique Earned Media Stories
(Internet, print, radio, and television): **322**
Website Visitors: **91,983**



Race

Asian/Pacific Islander 18.75%

African American 12.5%

Latino 25%

Multiracial 25%

White 18.75%

Women 50%

Men 50%



Gender



20TH ANNUAL ECONOMIC SUMMIT

VISION 20/20: OUR LEGACY, OUR HORIZON

In May 2013, Greenlining celebrated our 20th Anniversary Economic Summit. The event was a huge success, with 1,000 community activists, corporate leaders, government officials, and ordinary citizens joining in lively discussions and reliving some inspiring history. During the Summit, we were able to reflect on our past, build on 20 years of achievement, and envision a future filled with promise for all of our communities.



Speakers & Awardees

Van Jones, [Founder, Rebuild the Dream](#)

Ed Lee, [San Francisco Mayor](#)

Aimee Allison, [Media and Community Affairs Director, SF Dept. on the Status of Women](#)

Stuart Ishimaru, [Director, Consumer Financial Protection Bureau Office of Minority and Women Inclusion](#)

Carly Hare, [Executive Director, Native Americans in Philanthropy](#)

Phil Ting, [Democratic Caucus Chair, CA Assemblymember](#)

Daphne Kwok, [Chair, President's Advisory Commission on Asian Americans and Pacific Islanders](#)

Jamila Edwards, [Northern California Director, Children's Defense Fund](#)

Chris Johns, [President, PG&E](#)

Jon Campbell, [Head of Government & Community Relations Group, Wells Fargo & Co](#)

Sheila C. Bair, [Former Chairman, Federal Deposit Insurance Corporation \(Legacy Award\)](#)

Michael Peevey, [President, California Public Utilities Commission \(Legacy Award\)](#)

Frankie Guzman, [Soros Justice Fellow, National Center for Youth Law \(Torchbearer Award\)](#)

Judy Patrick, [President & CEO, Women's Foundation of California](#)

Panels & Workshops

Coalition Meeting: [Call to Action](#)

The opening session featured presentations by Greenlining thought leaders on the organization's current advocacy efforts.

State of the Majority: [Making Sense of the Demographic Revolution](#)

This panel of visionaries from varying fields discussed how policymakers can respond more effectively to the needs of the nation's growing populations of color.

Corporate Social Responsibility: [Not An Oxymoron, A Necessity](#)

Our lunch panel explored the current realities of corporate success: aligning profit and progress is a necessity; engaging and responding to community needs are imperative.

Idea Lab: [From People to Policy](#)

Ideas have the power to transform the way we think and live. Led by award-winning journalist Aimee Allison and co-facilitated by over a dozen community leaders, this interactive session engaged participants to inform effective policy work.



GREENLINING 360

OUR MOVE TO OAKLAND, CALIFORNIA

Greenlining believes this country has the capacity to revive its dreams and reinvent them for The New Majority. We believe we can renew America's promise — the notion that all of our people can achieve the American Dream regardless of race, ethnicity, ZIP code, or the socio-economic status we are born into.

In 2015, we will be moving into a newly-revitalized building at **360 14th Street**, in Oakland, California. Greenlining's acquisition and proposed rehabilitation of this old, blighted, and vacant building in one of America's most diverse cities is a response to unsustainable trends we will fight to change. We believe that rising income inequality and double-digit unemployment rates for young people are not inevitable, and that determined action can and will change the direction of our nation for the better.

On the heels of Greenlining's 20th anniversary and the 50th anniversary of the War on Poverty, Greenlining plans to start its next chapter in a city at the forefront of social and racial justice. We have seen the devastation that the financial crisis had on working-class communities, but we have also seen the amazing resilience within those communities and inspiring models for economic growth that include communities of color. Nowhere do we see both of these trends more clearly than in Oakland.

Greenlining is proposing a nationally replicable redevelopment project focused on reclaiming blighted property, revitalizing an old building, and transforming it through a collaborative, sustainable model. We aim to redefine the process by which not-for-profit organizations, government, individuals, and corporations invest in communities.

We see our move as a sustainable investment in downtown Oakland: not just another building with non-profit offices, but rather an ecosystem that fosters the vitality of the whole region. The economic and political problems our nation confronts today can only be reversed with catalytic projects that bring together diverse stakeholders for a common vision.



Our move to Oakland will bring:

7,500 square feet of permanently affordable office space for Oakland nonprofits

100 well-paying jobs

8,000 square feet of state of the art innovation space for the community

OUR PROGRAMS

We work on a variety of issues because we recognize that economic opportunity doesn't operate in a vacuum. We don't see these issues as being in separate silos, but as interconnected threads in a web of opportunity. Below are Greenlining's six key program areas:

Greenlining and our allies defeated not one, not two, but three industry-backed bills that would have raised prices and lowered service quality for low-income customers in California.

Telecom & Technology

Works to make sure that people at all income levels have access to the information and communications technology vital to succeeding in today's economy.

Claiming Our Democracy

Strives to make the voices of communities of color and low-income Americans heard in our electoral process and the halls of government.

Issued a research brief, "Odd-Year vs. Even-Year Consolidated Elections in California," that garnered major press attention, and stimulated the introduction of state legislation to improve voter turnout.

Environmental Equity

Focuses on the emerging green economy to make sure that communities of color not only have a clean environment, but also benefit from the economic opportunities made possible by environmental efforts.

Created a historic climate credit, the largest scale program to date to return electric sector revenues to ratepayers. Also got new CPUC energy efficiency financing pilot programs started, including one to help low and moderate income families.

Secured crucial consumer protections in AB 327, a landmark bill opening the door for comprehensive electric rate reform in California, so that low-income customers can keep the lights on as reforms roll out.

Energy

Ensures that low-income ratepayers are protected and that race, language or income are never barriers to the essential electric and gas services upon which homes and businesses depend.

Economic Equity

Works to overcome the lingering effects of redlining, help communities of color build wealth, and ensure that our financial system works for all.

Helped increase access to basic banking services to millions of un-or-underbanked Californians by successfully advocating for two of the largest banks in California, Union Bank and Bank of America, to create safe and affordable checking accounts for low-to-moderate income consumers

Bridges to Health

Seeks to bring the resources needed for a healthy life, including access to care, within reach of all communities while opening doors to economic opportunities in the health industry.

Removed an employment barrier for the formerly incarcerated by persuading Covered California to assess applicants individually, and drop their blanket ban on applicants with criminal records. Applicants also now have the right to appeal an interim disqualification.

LEADERSHIP IN THE FIELD

This year, our staff was busier than ever, constantly working to build bridges between community leaders, regulators, legislators, and corporate stakeholders. Greenlining staff worked to advance a racial equity agenda at over **136** conferences, events, and meetings throughout California and the nation.

16 | GLI HOSTED
CONFERENCES
AND EVENTS

SPEAKING
ENGAGEMENTS | **70**

50+ | MEETINGS
ON KEY
ISSUES

Highlights:

Greenlining Hosted Conferences & Events

Budget Briefing: "Filling in the Gaps: The Governor's 2013-14 Proposed Budget and California's Diverse Majority" (February 27, Sacramento)

Opportunity Summit: Diversity & Fairness in the Financial Services Sector (March 5, Washington, D.C.)

2nd Annual Supplier Diversity Forum: "Expanding Supplier Diversity: An Economic Engine for Growth" (June 7, San Francisco)

Voting Rights Convening: A convening of allies to discuss legal, legislative, and organizing strategies to enfranchise inmates and former felons in our democracy (July 23, Berkeley)

Policy Briefing: "Not for Profit Hospitals and Community Benefit" (November 20, Sacramento)

Speaking Engagements

Carla Saporta, Presenter, Families USA Health Action 2013 (February 1, Washington, D.C.)

Ryan Young, Panelist, "Weighing up the pluses and minuses: The impacts of carbon emission regulation on industry, the environment, transportation, and land use—is the price worth paying?" Capitol Weekly Conference on Cap and Trade (February 28, Sacramento)

Stephanie Chen, Panelist, "National Broadband Plan and State Policies," California Emerging Technologies Fund Annual Conference (March 14, Sacramento)

Michelle Romero, Panelist: "Language Access and Plain Language Voter Materials," Presidential Advisory Commission on Election Administration (August 7, San Francisco, CA)

Sasha Werblin, Panelist, "Advocating for Equality in Times of Inequality," Shaking the Foundations: The West Coast Progressive Lawyering Conference at Stanford Law School, (November 1, Palo Alto, CA)

S



Though our research, Greenlining engages various stakeholders on issues that are critical to our communities and provides solid data and solutions to shift policies to benefit all. Below is a list of all of the major research reports that we published in 2013.

Filling in the Gaps: The Governor's 2013-14 Proposed Budget and California's Diverse Majority

Foundation Board Diversity: No Change in Diversity Since 2009

Annual Bank Board Diversity Report 2012

2013 Supplier Diversity Report Card

Racial Equity Toolkit: Implementing Greenlining's Racial Equity Framework

Racial Equity Framework: Strengthening the Financial Sector Through Diversity

Navigating Covered California Background Check Requirements

The Art of Listening: Social Media Toolkit for Nonprofits

Odd-Year vs. Even-Year Consolidated Elections in California

Not-for-Profit Hospitals and Community Benefit: What We Don't Know Can Hurt Us

DISCONNECTED: What the Phone System's Digital Transition Will Mean For Consumers

GREENLINING IN THE NEWS

2,943

Facebook
friends

Average weekly
user reach:

6,562

**27 RADIO
INTERVIEWS**

**34 Op-eds published,
appearing a total of 73 times**
322 unique traditional media hits
(997 total hits)

Los Angeles Times KQED

星島日報
SING TAO DAILY

AMERICAN BANKER

UNIVISION

POLITICO

San Francisco Chronicle

OP-ED HIGHLIGHTS

"We Should Get Immigration Reform Right" by Orson Aguilar, *Kansas City Star* and 10 other papers

"Supreme Court Should Realize that Race Still Matters" by Orson Aguilar, *Charlotte Observer* and 13 other papers

"Cambios de Cuidado de Salud Vienen al Valle Central" by Justin Rausa, *Vida en el Valle*

"Forgive All Student Loan Debt" by Preeti Vissa, *Huffington Post*

"What the Senate Needs to Ask Tom Wheeler" by Stephanie Chen, *The Hill*

**11 TV
INTERVIEWS**

**2,907
Twitter followers**
**2,478
tweets**

"Don't Buy Big Oil's Class Warfare" by Vien Truong and Kim Carter, *San Bernardino Sun*

"Supreme Court Voting Rights Ruling May Have Negative Consequences" by Michelle Romero, *Tallahassee Democrat* and 5 other papers

"More Must Be Done to Promote Homeownership for All," by Orson Aguilar and Sasha Werblin, *American Banker*

"Changing LifeLine Could Hurt Low-Income consumers" by Stephanie Chen, *Capitol Weekly*

**91,983
website hits**

**64,498
unique website visits**

LEADERSHIP ACADEMY:

TRAINING THE NEXT GENERATION OF LEADERS

First-Generation College Students: 48%

Latino: 27%

Middle Eastern: 6%

African American: 25%

Asian/Pacific Islander: 20%

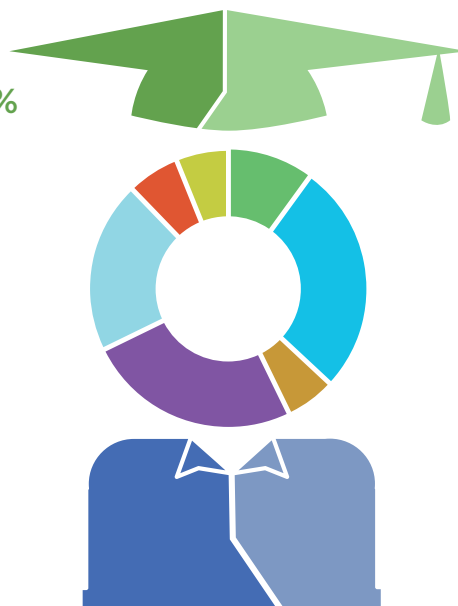
Multiracial: 6%

White: 10%

Declined to State: 6%

Women: 68%

Men 42%



The Greenlining Academy, established in 1996, works to empower and develop multi-ethnic leaders to advance racial and economic equity and create social change toward justice. Our vision is to develop a cadre of leaders ready to work together across sectors to address the most critical policy issues facing our state and our nation. The Academy provides participants the opportunity to acquire skills, deepen capacity, build vital social networks, and otherwise develop in ways that will enhance their effectiveness as leaders. Academy participants are integrated immediately as part of the Institute staff and participate actively in the development, planning and implementation of the Institute's projects.



2013 Participants

Policy Fellows

Adrian Sanchez, *Health Fellow*

Tierra Moore, *Executive Fellow*

Danielle Beavers, *Community Reinvestment Fellows*

Jose I. Sanchez, *Claiming Our Democracy Fellow*

Noemi Gallardo, *Legal Fellow, Environmental Equity / Energy*

Health Equity Fellows

Sadad Ali, *Building Healthy Communities, San Diego-City Heights*

Jamilah Bradshaw, *Neighborhood Health, Oakland*

George Chacon, *Boys & Men of Color, Los Angeles Region*

Adriana Diaz-Ordaz, *Building Healthy Communities, Los Angeles Region*

Jessica Dunn, *School Health, Oakland*

Kristine Lee, *Prevention Health, Sacramento*

Summer Associates

Alberto Avalos, *Claiming Our Democracy*

Sydney Céspedes, *Economic Equity*

Sydney Fang, *Bridges to Health*

Reynold Graham, *Executive Associate*

Jose Pablo Hernandez, *Claiming Our Democracy*

Brian Kim, *Telecommunications*

Jose Antonio Perez, *Research*

Vincent Raboteau, *Telecommunications*

Allison Reed, *Economic Equity*

Denisse Rojas, *Bridges to Health*

Asia Womack, *Environmental Equity*



The Greenlining Academy Alumni Association

The Greenlining Academy Alumni Association (GAAA) is a vital component of the Academy's success. GAAA is a network of social benefit, public and private sector professionals, many of whom hold leadership positions in government, non-profit organizations, business, law, education and consulting. This network provides professional and personal support to its members, sharing career and professional development opportunities, making connections, and providing support building community in new locations.

“ I appreciate that the organization prioritizes leadership development and mentorship. I'm so thankful to be a part of this organization and the Academy. ”

- 2013 Academy Participant

“ Such an amazing program. I can directly transfer the skills gained during my time here to my future employment and career opportunities. ”

- 2013 Academy Participant



Danielle Beavers:

Organized an Opportunity Summit in Washington, D.C., to promote diversity and opportunity in the financial world, including both banks and financial federal regulators.



George Chacon:

Organized the Sons and Brothers Leadership Camp that empowered 85 young men of color to have a greater understanding of their power and ability to create social change in their communities.



Jose Pablo Hernandez:

Wrote a report on odd-year local elections that spurred legislators to sponsor legislation to improve voter turnout.



Sydney Fang:

Co-wrote a report on hospital community benefit plans that resulted in amendments to sponsored legislation that will promote equity in how these dollars are spent.

FINANCIAL STATEMENTS

STATEMENT OF FINANCIAL POSITION

For the Twelve Months Ending December 31, 2013

ASSETS	
Current Assets:	
Cash and Cash Equivalents	\$1,448,913
Accounts Receivable	\$115,845
Accounts Receivable Restricted	\$518,647
Prepaid Expense	\$36,109
Security Deposit	\$250
Total Current Assets	\$2,119,764
Fixed Assets:	
Equipment	\$588,769
University Building	\$3,918,984
Casa Building	\$2,528,620
Building Oakland	\$1,960,000
Less: Accumulated Depreciation	\$1,624,113
Total Fixed Assets	\$7,372,261
Other Assets:	
Investments	\$8,500,921
Investment Solar Mosaic	\$250,000
Total Other Assets	\$8,750,921
TOTAL ASSETS	\$18,242,946

LIABILITIES AND NET ASSETS

Current Liabilities:	
Accounts Payable	\$113,796
Accrued Expenses	\$110,156
Deferred Rent	\$1,050
Security Deposits - University Building	\$2,702
Casa Tenant Security Deposits	\$20,034
TOTAL LIABILITIES	\$247,738
Net Assets:	
Unrestricted	
Property and Equipment	\$7,372,261
Reserve Fund	\$8,827,348
Temporarily Restricted	\$1,795,599
Total Net Assets	\$17,995,207
TOTAL LIABILITIES AND NET ASSETS	\$18,242,946

* Unaudited Financial Statements

STATEMENT OF ACTIVITIES

For the Twelve Months Ending December 31, 2013

SUPPORT

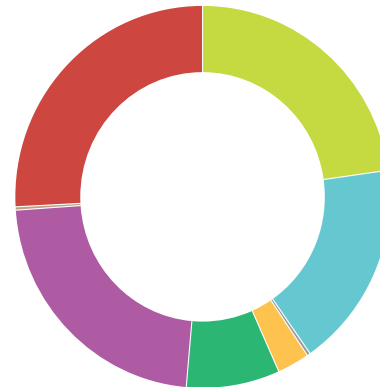
Foundations	\$1,032,388
Corporations	\$789,464
Individual	\$14,661
Earned Legal Fees	\$133,848
Rental Income	\$353,039
Conference Revenue	\$1,012,002
Miscellaneous/Reimbursement	\$19,023
Investment/Interest Income	\$1,153,893

TOTAL SUPPORT \$4,508,318

EXPENDITURES

Subtotal Salaries	\$3,056,330
Subtotal Professional Fees	\$557,098
Subtotal Occupancy	\$380,342
Subtotal Operating	\$837,853

TOTAL EXPENDITURES \$4,831,622



- Foundations: 22.9%
- Corporations: 17.5%
- Individual: .03%
- Earned Legal Fees: 3%
- Rental Income: 7.8%
- Conference Revenue: 22.4%
- Miscellaneous/Reimbursement: 0.4%
- Investment/Interest Income: 25.6%



GREENLINING BOARD

Ortensia Lopez Co-Chair	Rosario Anaya	Jessie Buendia Alumni Designee	Yusef Freeman	Olga Talamante
George Dean Co-Chair	Robert Apodaca Treasurer	Alfred Fraijo Jr.	Darlene Mar	Tunua Thrash
				Orson Aguilar Ex-Oficio

GREENLINING COALITION

4C- Community Child Care Council of Santa Clara County, Inc.
Allen Temple Baptist Church
American GI Forum
AnewAmerica
Asian Business Association
Asian Inc.
Asian Journal*
Asian Pacific Islander Small Business Program*
Black Business Association
Brightline Defense Project
California Black Chamber of Commerce
California Hispanic Chambers of Commerce
California Journal for Filipino Americans
California Rural Legal Assistance
Chicana/Latina Foundation
Community Resource Project, Inc.
Council of Asian American Business Associations of CA
El Concilio of San Mateo County
Ella Baker Center for Human Rights
FAME Renaissance
Fresno Metro Black Chamber of Commerce
Greater Phoenix Urban League
Hispanic American Growers Association
Hispanic Chamber of Commerce- Alameda County

Hispanic Chamber of Commerce- Orange County
KHEIR
Korean Churches for Community Development*
La Maestra Family Clinic
Mentoring in Medicine & Science, Inc.
Mexican American Political Association
Mission Housing Development Corporation
Mission Language & Vocational School
NaFFAA
OCCUR
Our Weekly
Rising Sun Energy Center
Sacramento Observer
San Francisco African American Chamber of Commerce
Search to Involve Pilipino-Americans
Southeast Asian Community Center
TELACU
Time for Change Foundation
Visión y Compromiso*
Ward Economic Development Corporation
West Angeles CDC
West Coast Black Publishers Association

* New coalition members in 2013

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Our work would not be possible without the partnership of the Greenlining Coalition and the numerous organizations, stakeholders, and individuals who share our vision for economic justice and opportunity for all communities. We extend our deepest appreciation to these partners, our Board of Directors, the Greenlining Academy Alumni Association, Greenlining Staff, Academy Participants and Alumni.

Thank you to our donors, and to our organizational and philanthropic sponsors.

AT&T | Bank of America | Bank of the West | Bay Area Air Quality Management District | BBVA Compass | Blue Shield of California Foundation | California Pan-Ethnic Health Network | Cathay Bank | Charles Schwab Bank | Citi | Citizens Business Bank | City National Bank | Comerica | East West Bank | Energy Foundation | Environmental Defense Fund | Facebook | First American Corporation | First Republic Bank | Ford Foundation | Friedman Family Foundation | HSBC | JPMorgan Chase | Lim Ruger | Manufacturers Bank | McCormack Baron Salazar | Mercury Insurance | Mills College | Mission Economic Development Agency | One West Bank | PG&E | Prevention Institute | Rabobank | SDG&E | Silicon Valley Community Foundation | Southern California Edison | Southern California Gas Company | State Farm | Surdna Foundation | TELACU | The California Endowment | The California Wellness Foundation | The James Irvine Foundation | The San Francisco Foundation | Union Bank | Univision | US Bank | Verizon | Wells Fargo



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