



SOCIAL INNOVATION FORUM'S 2020

SOCIAL IMPACT INVESTMENT GUIDE

ADVANCING EMERGING INNOVATIONS



wbur

HELPING YOU UNDERSTAND THE CHANGING WORLD.

LISTEN WEEKDAYS

**Morning
Edition**
5-9am

**On
Point**
10am-12pm

**Here
& Now**
12-2pm

**Radio
Boston**
3-4pm

**All Things
Considered**
4-6:30pm

Bob
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Young

Tonya
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Letter from the Executive Director



June 19, 2020

Dear Friends and Supporters,

We hope this letter finds you and your loved ones safe and well. We miss seeing you in-person but deeply appreciate how so many of you have stayed engaged and connected with the Social Innovation Forum (SIF) these last few months.

Like each of you reading this letter today, the SIF team has made many changes these last few months in response to the global pandemic. We have pivoted our work to stay safe, keep others safe, and to continue supporting our Social Innovators and our other portfolio organizations. One thing that has NOT changed is our determination to strengthen the social sector through our “marketplace approach” to social change. We hope that you were able to join us for our first ever Virtual Social Innovator Showcase Series and saw the many ways the marketplace continues thriving. Now we are counting on you to step up along with us and think about what role YOU can play in strengthening the work of our 2020 Social Innovators. You can access the Showcase videos on our YouTube channel using this link: <https://rb.gy/i3cklz>.

Our eight 2020 Social Innovators work in communities that both face marginalization and have been hardest hit by COVID-19. Throughout the pandemic, they have been working every day to meet the immediate needs of their community members. As you saw in their presentations, this critical day-to-day work has not stopped them from focusing on their long-term sustainability and growth. They have been responsive and nimble, but they have also stayed the course.

Over the past six months the SIF team of staff, consultants, volunteers, and in-kind partners has helped each of these innovative organizations articulate a two-year plan for growth. They have each identified the resources (time, talent, and money) needed to achieve their ambitious goals and they need each one of us to play a part in their success! We encourage you to think about how you may be able to help: make a financial gift, introduce our Social Innovators to your personal and professional networks, volunteer, or become an in-kind partner.

We were inspired by the presentations our Innovators shared at our Virtual Showcase and impressed with their prospectuses and slides, but to have seen them in action these last few months and be a witness to their incredible strength and leadership has been meaningful. We hope that their commitment and passion inspire you to take action that will help them move their work forward. Your efforts are essential. The marketplace is at its strongest when everyone is engaged in creating a thriving and more equitable greater Boston. We are counting on one another now more than ever.

Warmly,

A handwritten signature in black ink that reads "Susan Musinsky". The signature is fluid and cursive, with a large initial 'S'.

Susan Musinsky
Executive Director, Social Innovation Forum

About the Social Innovation Forum



OUR MISSION

The Social Innovation Forum (SIF) creates positive change in greater Boston by engaging leaders, strengthening organizations, and building networks.

OUR APPROACH

SIF forges partnerships between innovative social impact leaders and engaged supporters (funders, investors, and volunteers) who collaborate to grow social impact.

OUR PROGRAMS

SIF offers innovative programs that increase capacity and build networks.



Social Innovator Accelerator – SIF’s signature two-year program accelerates the growth of small- to mid-sized nonprofits by providing them with consulting, coaching, presentation training, and other resources to support their growth and increase their impact. These “Social Innovators,” chosen through a rigorous selection process, receive access to benefits and cash valued at more than \$150,000.

Capacity Camp – SIF leads a range of different types of Capacity Camps, which are condensed versions of its Social Innovator Accelerator. Beginning in 2016, SIF conducted a two-year pilot with four versions of Capacity Camps, all tailor designed by SIF with both the organizations’ and the funders’ interests in mind. One Camp was for a large group of 20-30 nonprofits, the three others were small, intimate programs for of 6-8 nonprofits. Each Capacity Camp involved a series of workshops – some over a period of two months, while others were spread out over a year – and included follow on support focused on such topics as presenting and public speaking, development and fundraising, or something specific depending on the Camp participants’ goals and needs. The goal for SIF is to continue running a range of Capacity Camps for small nonprofit organizations that are primarily past applicants to its Nonprofit Accelerator.

Alumni Program – Since 2003, SIF has accelerated the performance of 106 innovative, results-oriented nonprofits in its flagship Social Innovator Accelerator in greater Boston. SIF has always been committed to supporting its Innovator alumni, who are considered to be part of its “forever portfolio.” In FY20, SIF hired a Program Manager to lead the launch of a formal Alumni Program to provide three levels of alumni programming, ranging from one-off training sessions to multi-part cohort learning to an “Accelerator 2.0.” The Accelerator 2.0 will be designed to refresh and deepen the skills built during the original Accelerator or to train new executive directors and senior leaders at alumni organizations who may not have worked with SIF themselves.

Education and Engagement for Investors and Supporters – SIF creates opportunities for philanthropists, business executives, skilled volunteers, and others to come together to support social change in greater Boston. With over 40 events held throughout the year, these constituencies come together to learn from leading practitioners, discuss social issues, and engage with and support high-performing organizations solving challenging social issues.

Coworking and Community Support – SIF manages a collaborative, community space dedicated to helping nonprofits work productively, build their capacity, and broaden their networks to achieve social impact. We strive to build an inclusive community of diverse programs and leaders who engage and grow together. In addition to basic office amenities, members have access to workshops, trainings, peer-to-peer network building, and other events and activities to connect more deeply with Boston’s philanthropic and social sector leaders.

OUR IMPACT

- To date, SIF has directed more than \$40 million in cash and in-kind services to more than 100 social impact organizations.
- On average, Social Innovators more than double their revenue within four years of working with SIF.
- 1,366 individuals are part of SIF’s community of funders, mentors, and supporters.

Investors & Supporters



THANK YOU TO OUR SOCIAL INNOVATOR SHOWCASE SPONSORS!

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Social Innovation Forum In-kind Partners



In-kind partnerships are an important component of the Social Innovation Forum (SIF) model which strengthens the value of our programs. In-kind partners use their unique professional skills and experiences to provide meaningful, hands-on support to current and past Innovators, helping them to build their capacity to improve our communities. Over the years, our in-kind partners have provided millions of dollars worth of services to SIF Innovators.

altr

altr specializes in user experience research and design, product design and development (native and web-based), user research and testing, visual design, digital marketing and consulting. Organizations might work with altr when part of their service offering is a digital product that could benefit from a redesigned user experience; they are looking to design, build and release a new digital product offering; they need more effective communications to reach customers, donors, partners and the people they want to serve; or they need a new marketing website.



Analysis Group

Analysis Group (AG) is one of the largest economics consulting firms in North America. Through its partnership with SIF, teams from Analysis Group work with Social Innovators to assess and contribute to projects that address their data and analytics needs. Some of AG's past projects with Social Innovators include developing database management systems, designing surveys, and conducting a variety of statistical analyses to help evaluate their programs' effectiveness and demonstrate their impact to potential investors and foundations.



Ariel

Ariel is an international training and coaching firm based in Lexington, Massachusetts. It is comprised of performing artists and business professionals who believe that the workplace functions better when people interact generously and communicate well. Ariel provides group and individual presentation coaching to our newest cohort of Social Innovators each year, helping them make stronger pitches to investors and build sustainable relationships. When possible, Ariel opens up extra slots in their regular trainings to nonprofit leaders in the SIF community.



DPA Communications

DPA Communications is a full-service public relations and marketing firm. Clients of DPA Communications are industry leaders who rely on the firm's expertise leveraging communications strategies to meet their unique business goals in a complex and cluttered media landscape. DPA provides public relations guidance and advising to Social Innovators on an as-needed basis, helping organizations to connect with relevant media sources, create innovative event marketing strategies, and build relationships in the public relations space.



Emerson College, Nonprofit Communication Management Program

The Nonprofit Communication Management program at Emerson College provides students with a foundation in nonprofit communication and fundraising combined with service-learning partnerships that join students with local and global nonprofit organizations. Students in this program provide 8-10 organizations each year with comprehensive social media audits and communication improvement recommendations.



In-kind Partners



Goodwin

Goodwin is a national law firm with a growing international presence. Its attorneys are nimble, creative, and pragmatic, working tenaciously to protect and promote its clients' interests in the United States and around the globe. Goodwin offers Social Innovators pro-bono legal services, including assistance with accounting, real estate management, and corporate governance on an as needed basis.



Microsoft New England Research & Development Center

The Microsoft New England Research & Development (NERD) Center is a research and software innovation campus located in the heart of Cambridge, Massachusetts. The NERD campus spans two buildings, with its primary presence and conference center located at One Memorial Drive and a recently renovated space located at One Cambridge Center. NERD regularly hosts events for local nonprofit organizations, including many Social Innovation Forum events over the past 10+ years. Social Innovators seeking meeting or event space may receive preferred access to its facilities when available.



Positively Partners

Positively Partners is a social enterprise committed to helping organizations achieve exceptional performance from their employees. As experts in the fields of positive psychology, human resources, and people technology, its team is uniquely positioned to implement the evidence-based practices, systems, and tools that build employee engagement and productivity. Positively Partners offers support to the newest cohort of Innovators through employee relations/human resources consulting, job scoping, and performance management support.



PROMUS+ Consulting

PROMUS+ Consulting is a Boston-based development consulting firm. Promus+ applies a multi-disciplined approach and nearly two decades of industry experience to assess its clients' fundraising strengths and weaknesses. With such knowledge, Promus+ identifies efficient, effective, and practical solutions for Social Innovators' immediate and long-term fundraising goals.



William James College

The Executive Coaching Graduate Certificate Program at William James College is a two-year, International Coach Federation-approved program that trains experienced professionals to become executive coaches. Students from the program serve as executive coaches to past Social Innovators and Social Innovator Accelerator finalists during their capstone experience at William James. Each year they provide 10-20 individuals with four months of high-level coaching supervised by experienced faculty.



Interested in Becoming an In-kind Partner?

For more information about how you or your company could become involved with the Social Innovation Forum as an in-kind partner, please email Tanya Inwald, Director of Programs, at tinwald@socialinnovationforum.org.

Social Innovator Accelerator



PROGRAM OVERVIEW

The Social Innovator Accelerator provides a unique opportunity for innovative nonprofits to gain visibility, expand their networks, and build capacity. Each year, the Social Innovation Forum uses a rigorous application and evaluation process to identify effective, small- to mid-sized nonprofits with budget ranges of \$100,000-\$2M that are poised for growth and increased social impact. Once selected into the SIF portfolio as “Social Innovators,” organizations receive access to cash and benefits valued at more than \$150,000.

A RIGOROUS PROCESS FOR IDENTIFYING SOCIAL INNOVATORS

Our search and selection process lasts six months and involves two rounds of written applications, in-person interviews, and other forms of due diligence. It brings together a range of stakeholders, including SIF staff, funding partners, issue area experts, and an evaluation committee made up of more than 80 business, government, and foundation leaders. By drawing on the expertise of our community throughout this evaluation stage, we are able to assure investors and pro-bono partners that support of SIF or one of our chosen organizations will yield significant social impact.

A PROVEN APPROACH TO SUPPORTING SOCIAL INNOVATORS

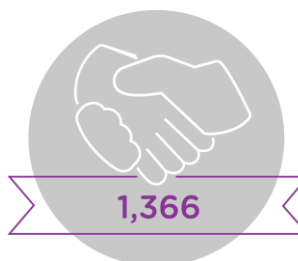
Once selected, Social Innovators receive 24 months of support from SIF in the following areas:

| | |
|-------------------------|---|
| Consulting | Articulation of a social impact model and growth plan, along with preparation of a five-minute PowerPoint presentation and a four-page prospectus for potential investors |
| Executive Coaching | Six months of guidance from a senior-level executive coach |
| Graphic Design | Creation of a professional-quality PowerPoint deck for investment presentations and design of an operating model graphic |
| Performance Measurement | Selection of performance metrics and targets, quarterly progress reporting, and opportunities to present successes and lessons learned in a one-year Progress Report |
| Presentation Advising | Presentation and messaging support from an experienced member of the business community |
| Relationship Building | Comprehensive, individualized advice on funding strategies as well as promotion at Social Innovation Forum events to raise organizational profile |
| In-kind Partner Support | Access to SIF’s network of in-kind partners who offer pro-bono support in a variety of areas, including legal, data analysis, communications, development, and more |
| Alumni Program | Ongoing capacity-building, in-kind and networking support as part of SIF’s “forever portfolio” |

OUR IMPACT



On average, our Innovators more than double their revenue four years after engaging with SIF.



1,366 individuals are part of SIF’s community of funders, mentors, and supporters.

2020 Social Issue Tracks



Addressing the Opioid Epidemic

Track Partner: Boston Open Impact

Innovator: PAARI (Police Assisted Addiction & Recovery Initiative)

Opioid use disorder (OUD) is a chronic disease characterized by compulsive drug use despite destructive consequences. A complex mix of environmental and genetic factors puts people at risk to develop OUD.¹ Left untreated, addiction is progressive and can result in severe disability or death, creating substantial costs to society. Opioids were involved in 47,600 overdose deaths in the United States in 2017—more than two-thirds of all overdose deaths.² With the rise of more potent synthetic opioids, overdoses rates have worsened and fatalities have accelerated. Since 2000, OUD has escalated into a public health crisis that the CDC has declared a national epidemic. Massachusetts consistently ranks among the top five states in the country for opioid-related deaths.³ It is estimated that 300,000 individuals in Massachusetts currently have an OUD, costing the state healthcare system nearly \$1 billion in 2017.⁴

This epidemic knows no geographic or social boundaries, but disproportionately affects some of the most vulnerable populations in our society, including those experiencing mental illness, homelessness, incarceration, and postpartum issues.⁵ Despite the prevalence of OUD, the powerful stigma surrounding OUD limits effective and coordinated prevention efforts and creates hesitancy in employers, insurance companies, and medical professionals to recognize and treat the condition.⁶ Sadly, for those with an OUD, stigma in the medical profession makes it easier to get high than to seek help. With increased education and reduced stigma, a cooperative, empathetic and large-scale effort can be made to improve prevention and ensure a path to treatment and recovery to those affected by the disease.

Advancing Arts Engagement

Track Partner: JAKET Foundation

Innovators: Elevated Thought and OrigiNation Cultural Arts Center

Engagement with the arts is a vital part of well-balanced development for children and adults alike. Numerous studies indicate the positive effect of arts, either through creation or exposure, on every population regardless of age, race, ethnicity, gender, income, or ability. Arts, in general, boost IQ and school-readiness in young children and contribute to career readiness, critical thought, and empathy in adolescents and young adults.⁷ For older adults, arts participation correlates with improved physical and mental health, socialization, and memory retention.⁸ Arts also serve as an important connector to civic engagement. Those who participate in the arts are twice as likely to engage in volunteer activities and more likely to vote.⁹ Arts also can be a powerful source of healing while serving as a voice to those for whom other forms of communication are unavailable. For example, arts engagement is used to help veterans with PTSD or traumatic brain injury recover from traumatic experiences and helps them rebuild meaningful relationships.¹⁰

Despite these acknowledged benefits of arts engagement, many barriers exist that keep the most vulnerable populations from experiencing it. These barriers include accessibility to venues, cost of tickets or materials, awareness of available arts offerings, knowledge of the benefits of arts engagement, or lack of funding for arts organizations. Providing access to the enriching and healing quality of the arts is crucial for ensuring equal opportunity to their innumerable advantages.

¹ <https://www.ncsc.org/~media/Files/PDF/Topics/Opioids-and-the-Courts/NJOTF%20Resources/Understanding%20the%20Basics%20of%20Addiction%20Final.ashx>

² <https://www.cdc.gov/drugoverdose/data/statedeaths.html>

³ <https://www.masstaxpayers.org/sites/masstaxpayers.org/files/mtf%20opioid%20report%20final.pdf>

⁴ <https://www.masstaxpayers.org/sites/masstaxpayers.org/files/mtf%20opioid%20report%20final.pdf>

⁵ <https://www.mass.gov/files/documents/2017/08/31/data-brief-chapter-55-aug-2017.pdf>

⁶ <https://heller.brandeis.edu/mass-health-policy-forum/categories/mental-health-substance-abuse/pdfs/opioids-in-the-workforce/opioids-workforce-2018-issue.pdf>

⁷ <https://www.americansforthearts.org/socialimpact#>

⁸ <https://www.americansforthearts.org/socialimpact#>

⁹ <https://www.arts.gov/sites/default/files/CivicEngagement.pdf>

¹⁰ <https://www.arts.gov/national-initiatives/creative-forces/research/art-therapy-research>

¹¹ <https://www.arts.gov/sites/default/files/when-going-gets-tough-revised2.pdf>



2020 Social Issue Tracks

Nurturing the Whole Health of Children, Families, and Communities

Track Partner: Inspire Boston Funder Collaborative

Innovator: Vital Village Network

The conditions, in which people live, learn, work, and age – also known as the social determinants of health – affect a range of health outcomes for individuals and populations. These health-related behaviors, socioeconomic factors, and environmental factors are estimated to account for 80-90% of the “modifiable contributors” to healthy outcomes for a population, with medical care estimated to account for the remaining 10-20%.¹ Social circumstances are also largely responsible for health inequities among different groups of people based on social and economic class, gender, race and ethnicity.²

For children, one of the most critical social determinants of health is poverty. “Poverty and related social determinants of health can lead to adverse health outcomes in childhood and across the life course, negatively affecting physical health, socioemotional development, and educational achievement,”³ according to the American Academy of Pediatrics. In Massachusetts, 29% of children live in low-income families, putting them at increased risk of a range of negative health outcomes, including low-birth rate, chronic disease, poor nutrition, exposure to trauma and toxic stress, and behavioral health issues. Thus, interventions at the mezzo (group/family unit) and macro (community) levels that target the social determinants of health have the potential to improve the health of children, families, and communities in under-resourced communities.

Promoting Teacher and Educator Training Opportunities for Effective and Innovative Approaches

Track Partner: Wellington Management Foundation

Innovator: 1647

Quality education is imperative to the economic success of any community, yet many children lack access to educational opportunities that will allow them to grow into knowledgeable and successful adults. The transformative power of effective, engaged, and inspiring teachers is undeniable when it comes to enhancing the everyday lives of students and their lifelong educational and career aspirations.

In fact, when parents and community leaders are asked what they want for their children, they overwhelmingly agree that they want excellent educational leadership for their children. Research confirms that an inspiring and informed teacher is the most important school-related factor influencing student achievement.⁴ Effective teacher training programs enable educators and providers to develop the knowledge and skills needed to address various learning needs of students, as each one of them has a unique background, unique strengths, a unique path to college and career. Schools, after-school programs, and youth development organizations, all need instructional resources and ongoing training to support their staff in encouraging and engaging student participation. Exploring and applying innovative, new, and better ways to educate students, in addition to teaching the skills they need to succeed in today’s world, can have a significant impact on student outcomes.

¹ <https://nam.edu/social-determinants-of-health-101-for-health-care-five-plus-five/>

² <https://catalyst.nejm.org/social-determinants-of-health/>

³ <https://pediatrics.aappublications.org/content/pediatrics/137/4/e20160339.full.pdf>

⁴ <https://www.leaningforward.org>

2020 Social Issue Tracks



Revitalizing New Bedford Through Community-Based Efforts

Track Partner: Schrafft Charitable Trust

Innovator: WHALE (Waterfront Historic Area League)

Historically known as the industrial growth center of the region, New Bedford was once teeming with textile factories and vibrant fishing industry. Less than a century later, some of these same communities are struggling with high unemployment and poverty rates. Located just 60 miles south of Boston, the New Bedford community falls behind the rest of the state in key indicators such as education (16% of New Bedford residents have Bachelor's Degree or higher compared to 41% in MA), median household income (\$38,178 in New Bedford compared to \$70,954 in MA)¹, and poverty (23.5% of individuals are living below the poverty level in New Bedford compared to 11.4% in MA). However, there is strength in New Bedford's diverse, multi-cultural community, deep history, and cultural resurgence in entrepreneurship and the arts. The city boasts its place as America's #1 fishing port, the 7th most artistic city in America², and takes pride in its waterfront, museums, and small businesses. By leveraging the assets of the New Bedford community, local leaders are tackling challenges and investing in a brighter future for all.

Strengthening Financial Health Through Building and Increasing Social Capital

Track Partner: MassMutual Foundation

Innovator: Boston HERC (Higher Education Resource Center)

Everyone needs help at some point in their lives. Support from family, friends, neighbors, and community organizations is essential in navigating complex financial situations that many encounter in their lives. Connections in the community can open doors to jobs, reveal practical financial advice, uncover paths to reasonable loans, and other resources to help meet people's daily obligations and goals.

In 1995, Harvard Professor Robert D. Putnam defined social capital as "Features of social organization such as networks, norms, and social trust that facilitate coordination and cooperation for mutual benefit."³ Economic segregation that exists in various communities across the country makes access to social capital incredibly important. More than ever, underserved communities need social capital that connects people from those communities with more resources and opportunities. A 2016 University of California, Berkeley study revealed that social networks play an especially important and positive role in helping low-income individuals find jobs. In particular, it showed that job seekers with connections and relationships are more likely to find work and they typically earn more than their peers without networks.

Social capital pays off economically not only for job seekers, but also for the communities in which they live. One county-level analysis found that places more densely populated with volunteer associations, faith-based organizations, and labor and business associations, had higher levels of household-income growth than places with fewer such institutions.⁴ In addition, social capital positively affects quality of life. A network of good relationships leads to happiness, satisfaction, and a meaningful life.⁵ A good network improves health and lengthens life.⁶

¹ <http://southcoastindicators.org/wordpress/wp-content/uploads/2018/03/New-Bedford.pdf>

² <https://www.citylab.com/design/2011/11/most-artistic-cities-america/592/>

³ <https://www.brookings.edu/blog/up-front/2019/04/08/feeling-good-or-doing-good-emotional-social-capital-versus-relational-social-capital/>

⁴ <http://www.aei.org/publication/social-capital-and-public-policy/>

⁵ http://www.euro.who.int/_data/assets/pdf_file/0005/170078/Is-Social-Capital-good-for-your-health.pdf

⁶ Achieving Success Through Social Capital. Wayne Baker

2020 Social Issue Tracks



Supporting and Advancing Health of People with Disabilities, Their Families, and Their Caregivers

Track Partner: Edith M. Ashley Fund at The Boston Foundation

Innovator: Adaptive Sports New England

Access to quality services – including healthcare – that promote healthy and active lifestyles are essential to achieving a high quality of life. However, for 11.7% of MA residents who have a disability, gaining access to these programs and services can be extremely challenging.¹ The American Journal of Public Health classifies individuals with disabilities as an “unrecognized health disparity population,”² with alarmingly limited and unequal access to healthcare and other critical resources. Some of the obstacles include limited financial resources, lack of transportation, physical barriers that impair mobility for exercise, restricted and inadequate information about accessible facilities and programs, and lack of health and fitness professionals who have the training to support people with specific disabilities. As a result, people living with a disability are three times more likely to develop heart disease, stroke, diabetes, or cancer than those who do not have a disability.

Furthermore, caregivers who provide support to a family member or a friend with a disability also experience poor health outcomes. According to the American Psychological Association, family caregivers experience significant negative emotional and physical health effects with higher mortality rates than non-caregivers.³ Over half (53%) of caregivers indicate that a decline in their health compromises their ability to provide care in addition to experiencing economic hardships through lost wages and additional medical expenses.⁴ Family members of people with disabilities who become caretakers experience stress, elevated levels of depression and anxiety, higher use of psychoactive medications, worse self-reported physical health, compromised immune function, and increased risk of early death.⁵

¹ <https://www.mass.gov/files/documents/2018/08/30/MRC-Disability-Fact-Sheet-2017.pdf>

² <https://ajph.aphapublications.org/doi/full/10.2105/AJPH.2014.302182>

³ <https://www.wbur.org/commonhealth/2013/10/14/respice-caregivers-conference-boston>

⁴ <https://www.cdc.gov/aging/caregiving/index.htm>

⁵ <https://www.cdc.gov/aging/caregiving/index.htm>

2020 Social Innovator Prospectuses



Adaptive Sports New England

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Supporting and Advancing Health of People with Disabilities, Their Families, and Caregivers

Track Partner: Edith M. Ashley Fund at the Boston Foundation

Boston HERC (Higher Education Resource Center)

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Strengthening Financial Health Through Building and Increasing Social Capital

Track Partner: MassMutual Foundation

Elevated Thought

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Advancing Arts Engagement

Track Partner: JAKET Foundation

OrigiNation Cultural Arts Center

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Advancing Arts Engagement

Track Partner: JAKET Foundation

PAARI (Police Assisted Addiction & Recovery Initiative)

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Addressing the Opioid Epidemic

Track Partner: Boston Open Impact

1647

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Promoting Teacher and Educator Training Opportunities for Effective and Innovative Approaches

Track Partner: Wellington Management Foundation

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Nurturing the Whole Health of Children, Families, and Communities

Track Partner: Inspire Boston Funder Collaborative

WHALE (Waterfront Historic Area League)

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Revitalizing New Bedford Through Community-based Efforts

Track Partner: Schrafft Charitable Trust

Adaptive Sports New England



FOUNDED: 2003
CURRENT ORGANIZATION BUDGET: \$245,000
CONTACT: Joe Walsh, President
PHONE: 617.690.9103
EMAIL: joe.walsh@adaptivesportsne.org
WEB: www.adaptivesportsne.org

Investment Opportunity

Adaptive Sports New England is seeking an investment of \$600,000 over the next two years to increase its impact across Greater Boston and additional Eastern Massachusetts locations. Adaptive Sports NE will build its program and communications functions to connect more youth with disabilities to sports that are closer to their homes. Additional staff, contractors, and equipment will all contribute to strengthening Adaptive Sports NE partnerships, increasing opportunities for young people to get involved with sports and supporting them as they continue playing sports.

Sports participation leads to improved fitness and physical health for children around the world. In addition, it builds self-confidence, resilience, and friendships. Sports teach important life skills such as teamwork, goal setting, and time management.

The value that American society places on youth sports is evident in the prominence of sports in nearly every high school in the country.

Unfortunately, children with disabilities face significant barriers to participating in sports. A lack of appropriately trained coaches, a small and geographically dispersed population of peers, and lack of specialized equipment are all-too-common challenges. A federal study showed that only 20% of students with visual or mobility impairments play sports, while the number is 60% for students without disabilities.

Adaptive Sports New England provides programs, services, and advocacy that facilitate increased participation in sports among youth and young adults who have visual or mobility impairments.

Two-year Goals

- Increase the number of youth served from the current 100 to 300
- Establish a youth wheelchair basketball league with at least four teams
- Establish Sport Club programs in three additional locations

Ways to Invest

FINANCIAL

- \$50,000 funds a full-time Program Manager (annual)
- \$24,000 funds communications support for 1 year
- \$10,000 funds a set of 12 basketball wheelchairs
- \$2,500 funds 1 racing wheelchair

IN-KIND

- Storage facility for equipment
- Van (with or without driver) to transport equipment
- Public relations/web/social media support

Leadership & Governance

Founder and President Joe Walsh is a two-time Paralympian in cross-country skiing and the former Managing Director of Paralympics for the U.S. Olympic and Paralympic Committee. Joe holds masters' degrees from Dartmouth College and Umass, Amherst. He currently serves on the Board of Adaptive Sports USA and was Vice President of the International Blind Sports Federation from 2013-2017.

Adaptive Sports NE is governed by an active board of 10 directors including experts in sport management, exercise science, medicine, sport, law, and finance. Included on the board are two Paralympians and one Olympian.

“

I love the people that are in my rowing program with me. I met one of my best friends who is also in a chair and it is really nice to have that camaraderie.

LILLIAN
Age: 17

”



ADAPTIVE SPORTS NEW ENGLAND'S MODEL



Adaptive Sports NE: a) conducts specialized adaptive sports programs; b) works with athletes and families on individualized sports plans; c) develops programs and policies that allow youth with a disability to participate in sports; and d) promotes quality sports programs offered by its regional network.

Adaptive Sports NE's **Sport Club** programs in swimming, track and field, wheelchair basketball, rowing, and sailing are led by Paralympians and other coaches who are experts in sports for athletes with a visual or mobility impairment. Weekly practices bring together peers from across Greater Boston for expert coaching, mentorship, and camaraderie.

Adaptive Sports NE's **Sport Concierge** services include training or other support for school or community-based coaches, as well as assistance securing appropriate adaptive sports equipment. The program assists athletes, families, coaches, teachers, and local sport leaders in identifying and cultivating the opportunities that best match the interests and abilities of the individual athlete. Referrals to a local YMCA or cooperating adaptive sports organization often facilitate individualized and/or specialized programs that are close to participants' homes.

Adaptive Sports NE collaborates with the Massachusetts Interscholastic Athletic Association, the Bay State Games, YMCAs, Boys & Girls Clubs, and other sports organizations to create rules and policies, develop programs, and train staff so that youth with a disability can participate in typical sports settings.

Adaptive Sports NE uses a wide variety of broad-reaching and targeted communication channels to raise the awareness of sport opportunities for youth with a visual or mobility impairment. Additionally, Adaptive Sports NE partners with the Massachusetts Commission for the Blind, Boston Children's Hospital, and other like-minded organizations to promote participation of youth in sports and physical activity.



Think about how much your life was impacted by being part of a team, whether you were competitive or not - it doesn't matter. Learning to win, learning to lose, learning how to work as a team. These boys and girls don't have that opportunity and Adaptive Sports New England gives it to them.



CHRIS BABCOCK, Parent and Board Member

Key Investors

- THE LENNY ZAKIM FUND
- THE JANEY FUND
- MARTIN RICHARD FOUNDATION
- RUDERMAN FAMILY FOUNDATION

Collaborators

- BOSTON CHILDREN'S HOSPITAL
- COMMUNITY ROWING, INC.
- MA COMMISSION FOR THE BLIND
- MA INTERSCHOLASTIC ATHLETIC ASSOCIATION
- SPAULDING ADAPTIVE SPORTS CENTERS
- YMCA

IMPACTING SOCIETY

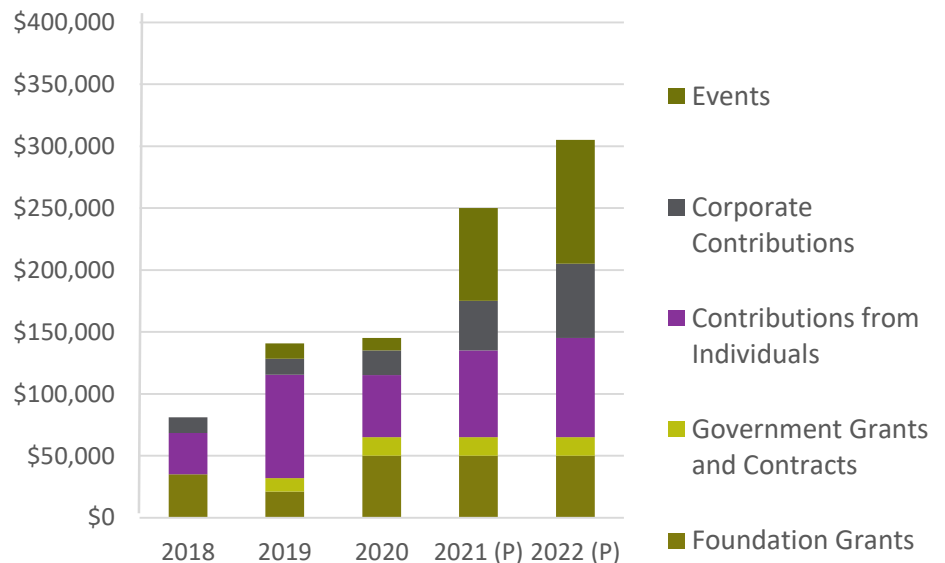
Adaptive Sports New England is the region's only organization focused on outreach, program expansion, and barrier reduction to enhance the opportunity for youth with a visual or mobility impairment to participate in sports. Increasing their participation in sports is shown to yield the following results:

- More kids playing more sports more often leads to happier and healthier youth who not only cost society less in medical expenses, but who are wage earners, taxpayers, and contributors to the social fabric.
- The physical activity of sports reduces the prevalence of obesity, diabetes, depression, and other chronic medical conditions that are major challenges to the health of Americans and even more common among people with disabilities.
- Participation in sports by youth with disabilities changes the perception and expectation of them among others in school and community sports programs.
- Students who participate in extracurricular sports exhibit improved academic performance.

FINANCIAL SUSTAINABILITY

Adaptive Sports NE is a young organization that has been growing over the past seven years with steady support from foundations and angel investors. 2019 was a pivotal year that featured a successful fundraising dinner, a marked increase in major gift donors, and a small, multi-year government contract. With a stable and diversified revenue base, Adaptive Sports NE is prepared for further growth in 2020 and beyond.

Revenue by Source



Success Story: Mikayla

Mikayla Chandler stands tall in the world of athletics in spite of her short stature. A four-year letter winner at Old Rochester Regional High School, Mikayla competed on the field hockey, indoor track, and outdoor track teams. She was a standout in the Para track and field events at the Massachusetts Interscholastic Athletic Association state championships, and now studies and competes at San Diego State University.

Mikayla was introduced to track and field as a high school freshman by a senior teammate who also has dwarfism. With guidance from the Adaptive Sports New England Sport Concierge program, Mikayla has progressed in national and international Paralympic competition. Mikayla joined Team USA for the 2019 Parapan American Games in Lima, Peru and is presently training for the Tokyo 2020 Paralympic Games.



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below is a summary of the key measures Adaptive Sports NE tracks to demonstrate progress, create internal accountability, capture lessons learned, and evaluate strategy.

| | FY 2020 | FY 2021 (P) | FY 2022 (P) |
|--|-----------|-------------|-------------|
| PROGRAM PERFORMANCE | | | |
| Number of participants | 100 | 200 | 300 |
| Number of program hours | 200 | 300 | 500 |
| Number of user days | 500 | 1,400 | 2,100 |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Number of staff | 3 | 4 | 5 |
| Number of hub locations | 1 | 3 | 4 |
| Number of board members | 10 | 12 | 13 |
| Total Revenue | \$175,000 | \$290,000 | \$375,000 |

SOCIAL IMPACT

Playing sports is tied to improved physical health, mental health, social relationships, academic performance, and other positive outcomes. Adaptive Sports New England seeks to increase participation in sports among youth who have a visual or mobility impairment. Adaptive Sports NE will over time use qualitative and quantitative methods to assess specific outcomes such as those below. Specific metrics and parameters will be developed during 2020 in cooperation with SIF collaborator Analysis Group.

| INDICATOR | FY2022 |
|---|--------|
| Percent of participants reporting improved physical well being | >75% |
| Percent of participants reporting increased confidence | >75% |
| Percent of participants reporting improved social connections with peers in school and/or community | >75% |

Boston HERC



FOUNDED: 1999

CURRENT ORGANIZATION BUDGET: \$710,000

CONTACT: Samuel Acevedo, Executive Director

PHONE: 617.733.2329

EMAIL: sacevedo@bostonherc.org

WEB: www.bostonherc.org

Investment Opportunity

Boston HERC seeks an investment of \$700,000 over the next two years to increase the number of students served, grow the number of Boston Public School partners, and expand alumni services. The addition of BPS high school Coaches, alumni staff, development staff, along with expansion in technology is essential in supporting the projected growth, in depth and breadth, of Boston HERC's Passport to College program.

The Boston Higher Education Resource Center (HERC), through its signature Passport to College Program, addresses the opportunity and achievement gaps that have haunted Boston Public Schools' (BPS) first-generation students for years. The Boston HERC matches first-generation students with Passport Coaches who arm them with 21st-century skills and the "Habits of the Mind" indispensable for success in college and careers. First-generation students are more likely to be Black or Latino, low-income, and English learners, demographics most impacted by the opportunity and achievement gaps.

- BPS students are 72% low-income, 32% English learners, 86% students of color.
- 18% of BPS students are off-track to graduate high school on time; 90% of those off-track are Black or Latino.
- First-generation students are twice as likely to drop out of college.
- The college dropout rate for Blacks and Latinos is 20% higher than for white and Asian students.

The Boston HERC equips first-generation youth to achieve a higher education, to break the cycle of poverty, and to become agents of change in their communities.

Two-Year Goals

- Increase the number of BPS high school students served by 80% from 800 to 1,440
- Increase the number of BPS high school partnerships by 33% from 9 to 12 schools
- Increase the number of Coaches in BPS partner schools to serve more students
- Expand services for Boston HERC alumni who are in college and triple the number served from 150 to 450

Ways to Invest

FINANCIAL

- \$450,000 funds 9 Passport Coaches in BPS
- \$160,000 funds a full-time alumni program director and 2 alumni program Coaches
- \$60,000 funds a full-time development coordinator
- \$30,000 funds the expansion of technology

IN-KIND

- Classroom volunteers
- Graphic designer
- Communications consultant
- College supplies, snacks, gift bags, Chromebooks

Leadership & Governance

Samuel Acevedo has served as the founding Executive Director of the Boston Higher Education Resource Center since 1999. He holds a B.A. from Stetson University and a J.D., cum laude, from Boston College. Mr. Acevedo draws upon his various leadership roles in the City of Boston and schools to lead the Boston HERC. The 10-member Board of Directors is chaired by Dr. Roberto Miranda, Senior Pastor at Congregación León de Judá (and, himself, a first-generation college graduate). The Board brings a wide range of talents to guarantee the Boston HERC's success as it expands its ability to serve additional first-generation students of color in the coming years, representing diverse experience and expertise in law, education, religion, marketing, sales, and banking.

BOSTON HERC'S PASSPORT TO COLLEGE MODEL



The Boston HERC's Passport to College Program is a Latino-led, culturally sensitive, college readiness program focusing on students who are first-generation, low-income, and attending under-resourced non-exam high schools. Passport targets first-generation students with a GPA between 2.0 to 3.0, who face generational barriers to success in college and beyond. It connects first-generation students with first-generation Coaches who serve as ambassadors to a host of social capital throughout their journey through college, enabling them to break the cycle of poverty and become leaders in their community.

“

“Passport gave me all the resources I needed, fought with me and for me every step of the way to get to college. I’m so grateful.”

”

ERICK JUAREZ
Passport Student, Class of 2019



- **Passport Coaches** are the distinguishing hallmark of the Boston HERC's model. The majority of Coaches are former first-generation students, reflecting the target student population. Coaches receive intensive training, equipping them with skills to provide culturally sensitive services addressing students' unique needs. Coaches spend on average 15 hours a week in each partner BPS school, facilitating classroom workshops and supporting students individually inside and outside school. Students spend on average two years with their Coach, in relationships that endure into college, where students receive continued support from the Passport Alumni Program.
- **21st-century skills and “Habits of the Mind” curricula** are cultivated in the classroom and reinforced through individual coaching. These are skills first-generation students typically do not receive at home, and are not taught in high school classrooms; they are indispensable for success in the 21st-century workplace. Repeated exposure to the “Habits of the Mind”, reinforced in college through the Alumni Program, build on our Passport students' innate resiliency and agency necessary for them to map their own path to greatness in college and beyond.
- **College application and admissions support** is offered in the classroom and through one-on-one coaching. Coaches shepherd students through the often bewildering college application process, demystifying the process of identifying colleges, writing essays, completing financial aid forms, and more. Using their network of school and community partnerships, Boston HERC provides access to college tours and fairs, career panels, and SAT prep.



I know from personal experience, as a first-generation student, that with every Passport student we impact, we are making a difference in the whole family of that student.



DAZLEE ALVERADO
Boston HERC Donor

Key Investors

- AMELIA PEABODY FOUNDATION
- BOSTON PUBLIC SCHOOLS
- CUMMINGS FOUNDATION
- IMAGO DEI FUND
- LIBERTY MUTUAL FOUNDATION
- STATE STREET FOUNDATION
- THE BOSTON FOUNDATION

Partners

- BOSTON PUBLIC SCHOOLS
- BOSTON PRIVATE INDUSTRY COUNCIL
- COLLEGE ADVISING CORPS
- UASPIRE



IMPACTING SOCIETY

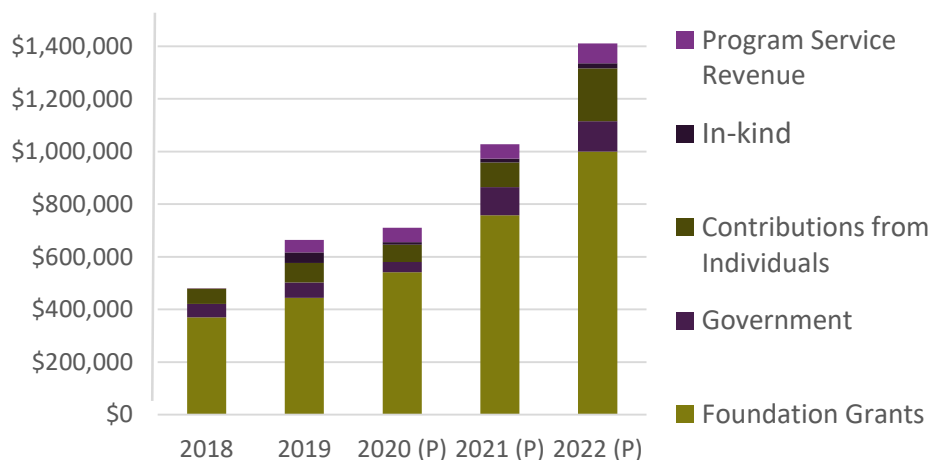
The “Habits of the Mind”, core to the Passport experience, are skills first-generation students typically do not learn in high school, and do not pick up at home. The absence of those skills is one of the main reasons they do not graduate from college, even when they succeeded in enrolling. Particularly in the 21st-century, failure to earn a degree can relegate you to lifelong socioeconomic disparities. Those facing these intractable disparities (limiting access to a livable wage, to the professions, and to levers of influence), are overwhelmingly black and brown. Already, unemployment rates for Blacks and Latinos in Boston are more than double the unemployment rate for whites. The impact of the loss of this potential workforce is all too real. Between 2016 and 2018, losing these potential young professionals cost the Massachusetts economy half its growth for lack of enough college-educated workers to fill high-demand jobs. The Boston HERC Passport Program addresses these disparities by:

- **Facilitating an Escape from the Cycle of Poverty:** Passport Students graduate and have viable career options that allow them and their families to move into a higher income level. These changes improve the trajectory of their children’s wealth, education, and social capital.
- **Strengthening Neighborhoods and Communities:** With an increase in highly skilled, educated, and employed citizens, neighborhoods see greater economic growth, more robust civic engagement, and a deepening sense of emotional ownership and community pride.
- **Diversifying the Workforce Landscape:** Employers diversify their workforce and its leadership, driving innovation and economic growth.

FINANCIAL SUSTAINABILITY

The Boston HERC has delivered high-quality programming with a small staff over the last twenty years. In order to continue to serve its students well, expand the services offered, and accommodate the increasing needs of first-generation students, the Boston HERC will need to increase its revenue. In the next two years, the Boston HERC is focused on expanding its capacity. The Boston HERC projects continued growth of support from foundations, government, and individual donors to help the organization achieve this goal.

Revenue by Source



Success Story: Florecita

Florecita Carías Mejía arrived in Massachusetts from Guatemala at the age of six. After connecting with the Boston HERC in her sophomore year, she considered college for the first time. “There wasn’t anyone in my family who knew about college, it was a subject that never came up,” she says. Florecita shared her hopes with her guidance counselor, but he laughed and dismissed her. With the persistent help and encouragement of the Boston HERC, she persevered, diving into SAT classes and college applications. In her senior year of high school, Florecita received a full scholarship to Gordon College. Today, as Vice President at BNY Mellon, Florecita is 10 years into a successful business career, gives back to her community through volunteering, and has transformed the economic trajectory of her family for generations to come.



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below is a summary of the key measures that the Boston HERC will track to demonstrate progress, create internal accountability, incorporate lessons learned, and adjust strategy as necessary.

| | FY 2020 | FY 2021(P) | FY 2022(P) |
|--|--|--|---|
| PROGRAM PERFORMANCE | | | |
| BPS high school students served | 800 | 1,000 | 1,440 |
| BPS partners | 9 | 10 | 12 |
| Passport alumni served | 150 | 300 | 450 |
| Total coaching hours | 10,000 | 14,300 | 20,700 |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Full- time equivalent staff | 11 | 17 | 24 |
| Expand Board of Directors | 10 | 12 | 15 |
| Establish Friends of the Boston HERC | Recruitment, planning | 6 | 9 |
| Expand technology | Hire salesforce consultant; augment salesforce | Invest in technology to support virtual coaching | Provide upgraded laptops and technology for Coaches |
| Total Revenue | \$710,00 | \$1,027,400 | \$1,410,00 |

SOCIAL IMPACT

Despite city-wide efforts to close the opportunity and achievement gaps, particularly confronting BPS's first-generation Black and Latino students, those gaps stubbornly remain. The Boston HERC exists to address these gaps and unlock the greatness within our first-generation BPS students. Each first-generation youth who earns a degree achieves a socioeconomic “escape velocity”, transforming their lives, and the generations that follow them, as well as the communities they inhabit. At its core, the Boston HERC believes their *Destination is Greatness*. And the Boston HERC will not rest until they each achieve it.

| INDICATOR | 2020 |
|---|--------|
| Passport high school seniors who enroll in post-secondary education | 83% |
| Passport students who persist into their second year of college | 81% |
| Number of coaching hours | 10,000 |

Elevated Thought



elevated thought®
i AM ART. i AM CHANGE.

FOUNDED: 2010

CURRENT ORGANIZATION BUDGET: \$400,500

CONTACT: Marquis Victor,
Founding Executive Director

PHONE: 978.552.3439

EMAIL: marquis@elevatedthought.org

WEB: www.elevatedthought.org

Elevated Thought (ET) welcomes, nurtures, and exposes youth ages 13-22 to the power of arts and creativity to help them harness and amplify their voices to change their community and society. Based in Lawrence, MA, ET works with a primarily Latinx population who are persistently experiencing the consequences of inequality and inequity typical in marginalized communities in America.

Using visual arts, spoken word, and video production as an entry point, ET is an inclusive, affirming, and welcoming space for youth. Through its tested model, ET's students gain both hard and soft skills, secure jobs, advance their education, and make positive, impactful, long-lasting changes by collaborating and participating in socially-themed public art projects.

According to Americans for the Arts, each dollar invested in the arts yields a nine dollar return on investment (ROI); ET witnesses this outcome firsthand. ET has injected \$200,000 back into the Lawrence community by employing youth over the past two years in roles that engage and leverage their creativity, while developing individual pathways to success. This directly impacts not only their own lives, but their communities as well, and supports the process of bringing about an active, equitable, and just society.

Investment Opportunity

Elevated Thought is seeking an investment of \$1,028,500 over the next two years to amplify its impact by doubling the number of youth served. This is achieved by investing in staff and contractor infrastructure to offer more workshops as well as paid employment and apprenticeship opportunities for youth. Elevated Thought also needs to continually upgrade its video and sound recording equipment to stay current with industry standards.

Two-Year Goals

- Feasibility study for capital campaign
- Double the number of youth served through workshops from 450 to 1,000
- Triple the number of paid youth through commission projects and apprenticeships
- Expand the number of engaged community members from 900 to 1,500 through increased community workshops, public forums, gallery openings, and public art projects

Ways to Invest

FINANCIAL

- \$40,000 funds six Youth Apprentices for one year
- \$20,000 funds expansion of existing ET space to accommodate increased program capacity
- \$10,000 funds one community mural
- \$5,000 funds new digital equipment for video and visual arts program

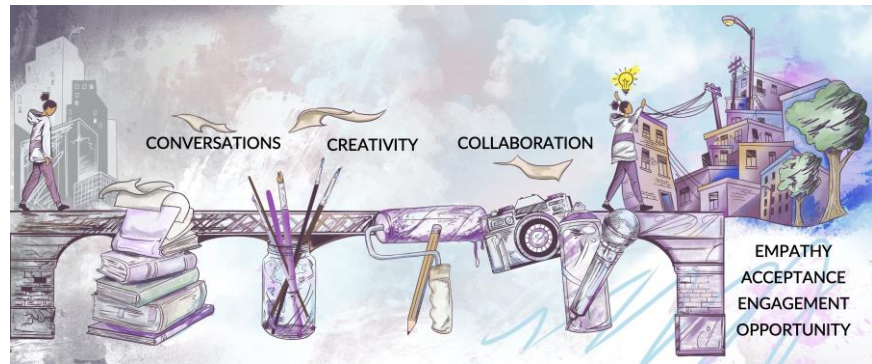
IN-KIND

- Trademark, licensing, and legal assistance
- HR training and systems development
- Social media marketing assistance

Leadership & Governance

Executive Director Marquis Victor holds an MA in Education from Lesley University and is completing his EdD at Northeastern University. A poet and artist, Marquis developed the art and social justice curriculum that serves as the foundation of ET's creative youth development work after acquiring over seven years of experience in Boston Public Schools. Marquis works closely with ET's young staff and 8 members of their Board of Directors who represent the passion, talent, and diversity of Lawrence.

ELEVATED THOUGHT'S MODEL



“

ET addresses the needs of youth holistically by activating their talents and inviting critical thinking into their lives through art, recognizing its healing power.

”

JESSICA VILAS NOVAS, DIRECTOR
Lawrence Public Library



CONVERSATION + CREATIVITY + COLLABORATION

With a space located in a mixed-use former textile mill adjacent to the historic Lawrence Bread and Roses Strike of 1912, ET youth continue the tradition of lifting voices for justice and equity through various art mediums. ET provides a safe and welcoming entry point to youth ages 13–22 to explore their creativity to tell their own stories and leverage their skills to address the plight of residents in their community.

CONVERSATION. *I AM ART. I AM CHANGE.* This afterschool-based program is at the heart of ET's work. Creative Mentors push ET participants to explore new ideas and creative solutions, yielding end products as varied as community murals, short films, and development of a student bill of rights for Lawrence Public Schools.

CREATIVITY. *Commissions & Beautification.* Elevated Thought's Commission Services provide funds for the youth programs and operating costs producing commissioned murals, design, photo, and film projects for for-profit and nonprofit businesses alike. Through the beautification efforts, ET students create relevant and positive art culture in the City of Lawrence, spark conversation, create awareness of art's positive impact, and strengthen the community as a whole.

COLLABORATION. *Community Workshops.* ET knows the power that comes from creative community engagement, relationship building, and collaboration. Creative Mentors and ET students often lead a wide range of workshops for nonprofits, schools, and municipalities. ET also provides Lawrence community members with monthly free or low-cost creative workshops in their space, designed for a wide range of ages and creative experiences.



At ET, I explored my passion for poetry, literature, and social activism by learning and doing with guidance and deep mentorship. Transitioning into college, I already knew what I wanted to study thanks to my experience.



DANIEL CARRERO

ET Alumus/Former Staff

Providence College, '24

OPPORTUNITY AND EQUITY FOR ALL

ET has provided paid jobs for 30 youth over the past two years. Successful participants in ET's programs have demonstrated their work ethic, responsibility, professional behavior, and communication skills, and have exhibited dedication to their creative skills. The Creative Mentor staff works with ET's youth, helping them to direct commissioned projects such as large-scale murals, photo assignments, or documentary filmmaking for clients that range from for-profit companies to the City of Lawrence. Assisting in the development and execution of the creative projects, ET's staff and youth work directly with clients, create task/flow charts, and are responsible for keeping deadlines and staying within budget. All of their responsibilities require real-time, collaborative problem-solving techniques that are vital skill-building opportunities as they prepare for their careers as creative practitioners, artists, academics, and activists. ET leadership works with the staff and participants to ensure their success through regular check-in meetings, performance reviews, and training sessions. 100% of ET's program participants have continued to college and/or have established their own careers as teachers, graphic designers, photographers, and filmmakers.

FINANCIAL SUSTAINABILITY

Elevated Thought has demonstrated the ability to manage limited funds efficiently and effectively since its inception. With the primary source of funding coming from foundations and fee for service for commissions and in-school programs, ET's Executive Director and Board of Directors are well poised to develop and deepen their individual and corporate fundraising.

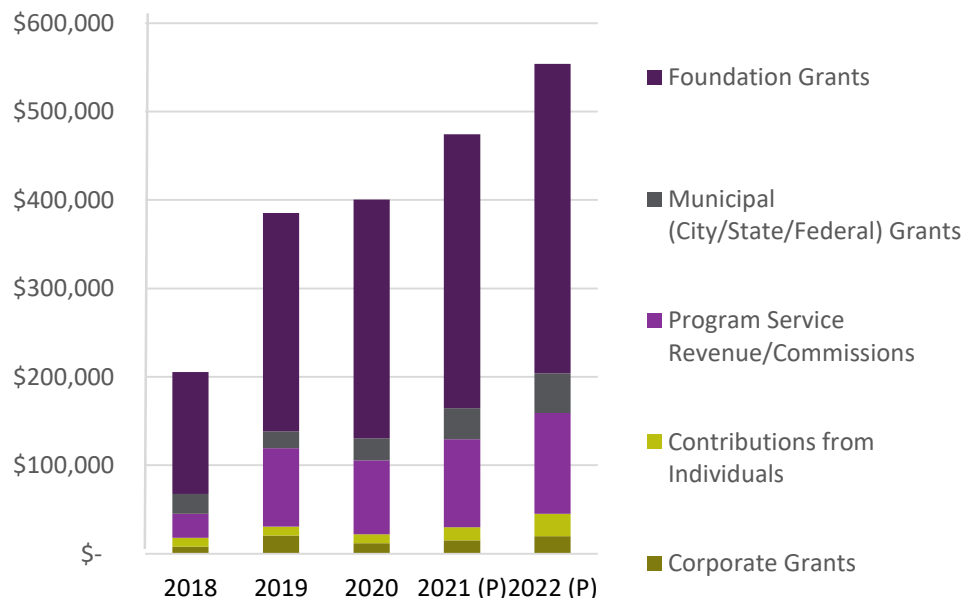
Key Investors

- AMELIA PEABODY FOUNDATION
- ESSEX COUNTY COMMUNITY FOUNDATION
- MASSACHUSETTS CULTURAL COUNCIL
- NELLIE MAE EDUCATION FOUNDATION
- STEVENS FOUNDATION

Partners

- ANDOVER BREAD LOAF
- CITY OF LAWRENCE
- LAWRENCE PUBLIC LIBRARY
- NORTHERN ESSEX COMMUNITY COLLEGE

Revenue by Source



Success Story:

Amaryllis Lopez

Amaryllis Lopez is an Afro-Puerto Rican poet, born and raised in Lawrence, MA, whose work explores themes of womanhood, colonialism, and Blackness. Amaryllis joined ET in the fall of 2015 at 16 years old and by the summer of 2016, she was directing ET's first short film, supporting youth conversations around equity in schools, and drafting program ideas and themes to implement in workshops. As ET's first Youth Leader, Amaryllis received a yearly scholarship to use at Bridgewater State University, where she is currently a senior majoring in English, with concentrations in Latin American, Caribbean, and African American studies. With 5+ years of experience in nonprofit work and youth-led organizing, as well as 3 years of national and international writing workshop facilitation, she has continued to support the development of ET programs during college breaks and summers. Upon graduating in May 2020, she will join ET as its second full-time staff member, Program Director.



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below are some of the key measures ET tracks using a build-measure-learn strategy, in order to demonstrate progress, create internal accountability, capture lessons learned, and adjust strategy as necessary to maximize success.

| | FY 2020 | FY 2021 (P) | FY 2022 (P) |
|---|-----------|-------------|-------------|
| PROGRAM PERFORMANCE | | | |
| Number of youth served | 450 | 800 | 1,000 |
| Number of community gallery openings | 3 | 5 | 7 |
| % of youth who graduate from high school | 100% | 100% | 100% |
| % of youth who continue to college or meaningful employment | 100% | 100% | 100% |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Number of full-time employees | 2.5 | 3.75 | 5 |
| Number of collaborating artists | 12 | 15 | 20 |
| Number of collaborating partners | 12 | 16 | 20 |
| Total Revenue | \$400,500 | \$474,500 | \$554,000 |

SOCIAL IMPACT

Elevated Thought works with primarily Latinx young people ages 13-22 exposing them to and teaching film production, creative writing, and visual art skills. ET currently employs 14 part-time Lawrence youth between the ages of 17 and 22 in their youth and community programs. In the past two years, ET has provided over \$200,000 in youth stipends and salaries and \$20,000 in college scholarship support to program alumni. Through pre and post program surveys, ET has gathered the following Social Impact indicators:

| INDICATOR | 2020 |
|--|------|
| % of youth self-reporting increased confidence | 100 |
| % of youth active and engaged in the political process (registered to vote, attend local meetings, work on campaigns, run for office). | 100 |
| % of youth /alumni reporting increased understanding of social structures and their role | 100 |
| % of youth participating in art commissioned projects | 60 |
| % of youth participating in public art projects | 60 |
| % of youth participating in arts impact conferences | 60 |

OrigiNation Cultural Arts Center



Building a Nation of Empowered Youth Leaders - One Dancer at a Time.™

FOUNDED: 1994

CURRENT ORGANIZATION BUDGET: \$262,500

CONTACT: Ms. Musau Dibinga, Executive Director

PHONE: 617.522.3900

EMAIL: musau@originationinc.org

WEB: www.originationinc.org

Investment Opportunity

OrigiNation seeks an investment of \$650,000 over the next two years to increase youth enrollment, subsidize students' tuition and fully staff the organization. OrigiNation also seeks investors and in-kind architectural design services for transforming its storefront into a vibrant cultural arts center. Through new partnerships, OrigiNation hopes to offer arts engagement opportunities to more low-income youth and families, expand its programming to communities beyond Boston, and increase the visibility of its dance performances and events.

OrigiNation Cultural Arts Center transforms young people's lives through the art of dance, theater, and spoken word. The Center provides children and youth, ages 2 to 18, from diverse areas of Roxbury, Dorchester, and Mattapan, with 9-month repertory dance training as well as opportunities to audition for its professional dance division, perform in concerts and events, and tour internationally. Through dance, OrigiNation builds youths' confidence, well-being, and voice through its core principles of "Learn, Serve, and Teach."

OrigiNation is a vital cultural resource in communities with limited arts access. According to researchers, Black and Latino youth are less likely to receive art instruction in school than White students. In fact, while the vast majority of Boston Public School students want to learn a range of art forms, 37% have no formal arts training in school and just 9% experience artistic training outside of school.

Moderate arts exposure has been found to lessen behavioral problems and increase academic achievement and civic engagement among at-risk youth. OrigiNation staff and teachers use dance as a method for instilling discipline, social awareness, and the desire to reach greater heights in over 1,500 young people annually.

Two-Year Goals

- Increase youth enrollment in dance classes by 67%, from 150 to 250 students. Offer additional subsidized tuition to students
- Increase full-time and part-time staff salaries to be competitive with the market
- Redesign storefront to increase public awareness of OrigiNation as a vibrant, community-based, cultural arts center
- Recruit 3 new Board members with expertise in public relations, marketing, and fundraising

Ways to Invest

FINANCIAL

- \$470,000 to increase staffing to 3 full-time staff: Executive Director, Artistic Director, and Development Coordinator, and 1 part-time Program Coordinator
- \$80,000 will fund an engaging redesign of the storefront
- \$50,000 to subsidize dance classes for 50 new students for one year
- \$50,000 for an additional 5 part-time dance instructors

IN-KIND

- Host an event to promote OrigiNation to new audiences
- Provide marketing and public relations support
- Provide printing services of concert and event programs
- Set up online registration system to help organization "go green"
- Introduce to schools for workshops, lecture demonstrations, and events

Leadership & Governance

OrigiNation has a small but active Board of Directors, led by the Founding Artistic Director Shaumba-Yandje Dibinga. Board members provide expertise in nonprofit management, arts education, strategic marketing, and cultural arts production and management. In addition, there is a four-person Advisory Board whose members are experienced dance and literary professionals and arts organization leaders. Board meetings are held monthly, except for July and August. The organization is seeking to expand its Board membership over the next two years. It is seeking new members who will be dynamic cheerleaders and networkers and offer public relations and fundraising support.

“
Joy is 10, and last night at the [Camille A. Brown] workshop, she was one of the first children to go into the big circle of dancers to try out what they had just learned. I feel so proud of her courage, self-confidence, and willingness to be less than perfect!
”

DEENA, PARENT



ORIGINATION'S MODEL



BUILDING A NATION OF LEADERS, ONE DANCER AT A TIME

OrigiNation offers a range of programs for different ages and levels, aimed at developing artistic and life skills in its youth members.

PERFORMING ARTS ACADEMY

The Performing Arts Academy trains youth, ages 2 to 18, in ballet, tap, jazz, African, hip hop, salsa, Tae Kwon Do, and contemporary forms of dance. They perform in the annual Kwanzaa and Spring Concerts.

PROFESSIONAL DANCE DIVISION

This program has four companies: Aleye Boyz Troupe, IMANI Jr., Girlz of IMANI, and NIA Dance Troupe. 65 children, ages 8-18, are admitted annually by audition. These aspiring dancers attend master classes, workshops, and dance intensives led by renowned dance companies. They also develop life and job skills through leading dance rehearsals, creating choreography, designing costumes, offering workshops in schools, fundraising, and performing community service.

SPRING & SUMMER DANCE INTENSIVES

OrigiNation facilitates two dance intensives—1 week in the spring and 5 weeks in the summer—in which dancers of all levels participate in daily classes meant to strengthen techniques, condition bodies, and improve overall performance in a fun, engaging, and nurturing environment.

YOUTH EMPOWERMENT TOUR

This cultural exchange program raises youths' awareness and exposure to diverse cultures through conducting lecture demonstrations and performances around the world. The company has travelled to Ghana, Senegal, South Africa, Trinidad, Jamaica, and the United Kingdom.

COMMUNITY OUTREACH & EDUCATION PROGRAM

Through this program, the OrigiNation experience is brought to youth who are unable to participate in our regular programming. We travel to schools, youth programs, and various organizations throughout the United States and abroad to give lecture demonstrations and performances.

“
OrigiNation changed my life. My mother enrolled me 13 years ago and it has made me stronger, fearless, more confident, and a proud African American young woman.
 ”
 AUTUMN



MORE THAN DANCE - ORIGINATION TRANSFORMS LIVES!

For 25 years, OrigiNation has offered high-quality arts and cultural programs to underserved Boston youth and witnessed the transformative effects on hundreds of lives. OrigiNation alumni have overcome hardships, such as deportation, homelessness, drug addiction, and attempted suicide; they can now pursue careers that seemed unimaginable when they were children.

OrigiNation uses a sequential training structure that increases in the level of difficulty over time. It serves to continuously build up participants’ persistence and resilience, which is invaluable preparation for when they seek to become professional artists or to enter the workforce.

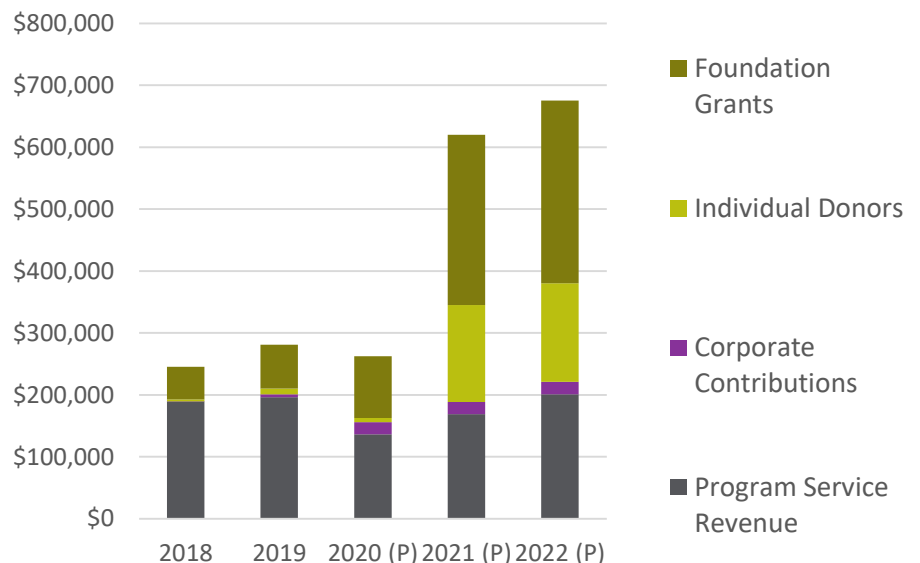
Youth are trained in technique, performance, and dance etiquette for mastery on the stage. They also are educated on the business side of the arts—auditions, networking, branding, and promotion. They receive help with applications to other high-level arts programs, independent high schools, and colleges for continuing their growth.

Program graduates perform with major companies such as Alvin Ailey American Dance Theater and Ronald K. Brown/EVIDENCE A Dance Company and choreograph for major artists, such as Jennifer Lopez. Beyond dance, alumni have been successful in many ways. They have earned college degrees, started businesses, given back to their communities, and raised their own families. Many attribute their success to lessons learned at OrigiNation.

FINANCIAL SUSTAINABILITY

OrigiNation has relied on earned revenue from student tuition and ticket sales to operate. Over the next two years, it will diversify revenue through increased foundation and donor support, which will allow the center to expand to 3 full-time and 1 part-time employee(s) and serve 67% more youth.

Revenue by Source



Key Investors

- CONVERSE
- LINDE FAMILY FOUNDATION
- MASSACHUSETTS CULTURAL COUNCIL
- THE SHOUT SYNDICATE/ THE BOSTON FOUNDATION

Partners

- ALVIN AILEY AMERICAN DANCE THEATER
- ARTSEMERSON / EMERSON CUTLER MAJESTIC THEATRE
- BOSTON PUBLIC SCHOOLS
- CELEBRITY SERIES OF BOSTON

Success Story: Belén Pereyra

Belén Pereyra wanted to become a dancer from an early age. She auditioned for and joined OrigiNation’s senior dance company, NIA Dance Troupe, when she was a junior at Boston Arts Academy. At the time, she faced various struggles and was nearly kicked out of school because she wasn’t a Boston resident. She traveled daily from Lawrence to Boston to pursue her dreams.

OrigiNation’s Executive Director took Belén into her home during Belén’s senior year so she could stay at her high school. She ultimately graduated as valedictorian of her class.

Today, Belén is in her 9th season with the Alvin Ailey American Dance Theater in New York. She returns annually to OrigiNation to meet with youth members and convey to them the importance of setting goals, believing in oneself, working hard, and never giving up! It was the discipline, nurturing, and encouragement that she received through OrigiNation that helped Belén make the transformation from girlhood to internationally acclaimed dancer.



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below is a summary of the key measures OrigiNation will track to demonstrate progress, create internal accountability, incorporate lessons learned, and adjust strategy as necessary.

| | FY 2020 | FY 2021 (P) | FY 2022 (P) |
|--|-----------|-------------|-------------|
| PROGRAM PERFORMANCE | | | |
| Enrolled students | 150 | 200 | 250 |
| School lecture demonstrations | 6 | 8 | 10 |
| School residencies | 3 | 4 | 4 |
| Audiences and event attendees | 2900 | 3300 | 3600 |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Individual donors | 30 | 50 | 75 |
| Board members | 4 | 6 | 7 |
| Full-time staff | 2 | 3 | 4 |
| Total Revenue | \$262,500 | \$620,000 | \$675,000 |

SOCIAL IMPACT

OrigiNation instills the principles of “Learn, Serve, and Teach” into young lives. The profound transformation that its participants experience from childhood to adulthood is evident through the graduates who attend college, dance in acclaimed companies, choreograph for noted celebrities, and work at local nonprofits and as teachers. OrigiNation provides the nurturing, high expectations, and tough love that develop participants’ whole selves so that they become the best people they can be for their families and their communities.

Below is a summary of the social impact OrigiNation expects to have on youths’ lives during the next two years.

| INDICATOR | 2020-2022 |
|---|-----------|
| Youth participants who grow in confidence, voice, and leadership abilities | 100% |
| Youth participants who have greater understanding of their cultural heritage and identities | 90% |
| Youth participants who graduate high school and go to college | 80% |
| Youth participants who pursue the arts as part of their lifestyles | 33% |
| Professional Dance Division youth who increase their career readiness and job skills | 80% |
| Professional Dance Division youth who travel beyond their neighborhoods and broaden their social and global awareness | 100% |

Since 1994, OrigiNation has engaged over 40,000 youth in cultural arts programming. It has a 94% retention rate of dance students; has employed 350 youth in jobs; and has taken 110 youth abroad to perform in Ghana, Jamaica, Senegal, South Africa, Trinidad, and the United Kingdom.

PAARI – The Police Assisted Addiction and Recovery Initiative



FOUNDED: 2015
CURRENT ORGANIZATION BUDGET: \$664,088
CONTACT: Allie Hunter, Executive Director
PHONE: 888.972.2749 x700
EMAIL: allie@paariusa.org
WEB: www.paariusa.org

Investment Opportunity

With an investment of \$900,000 over two years, PAARI will expand the number of police department partnerships from just under 600 to 1,500. These resources will support the development of additional online and group trainings; enhance consultation and strategic guidance offered to police departments to launch and deepen a public health approach tailored to individual communities; and support greater national connection between police departments through an increased ability for meeting and communication.

The opioid epidemic is one of the most urgent public health and public safety issues we currently face as a nation. Drug overdose is the leading cause of accidental death, higher than car crashes and gun violence combined. The data is startling:

- 89% of people who need treatment don't receive it
- 70% of people in jail have a substance use disorder
- 72,000 overdose fatalities each year; one death every 11 minutes
- Lost productivity and forgone wages have cost the state of Massachusetts over \$70 billion since 2000

Police officers have a front row seat to the opioid epidemic and are most likely to interact with the affected population.

The mission of the Police Assisted Addiction and Recovery Initiative (PAARI) is to provide police with the tools they need to help prevent overdose deaths and to get those dealing with addiction into treatment. Prior to PAARI's founding, most officers did not receive the training or support on non-arrest strategies to address addiction in their community.

PAARI has helped hundreds of police departments design and launch programs that have saved thousands of lives, changed police culture, and shifted the perception of addiction as a crime to addiction as a disease.

Two-Year Goals

- Expand the number of police department partnerships from 600 to 1,500
- Develop additional online and group trainings
- Enhance consultation and strategic guidance to police departments to launch and deepen a public health approach
- Support greater connection between police nationally through increased meetings and communication

Ways to Invest

- | | |
|--|--|
| <p>FINANCIAL</p> <ul style="list-style-type: none"> ▪ \$70,000 funds a full-time communications manager to oversee the development of training programs and PAARI's website ▪ \$25,000 funds a regional conference for 200 participant ▪ \$10,000 funds a new police department partner (average cost) | <p>IN-KIND</p> <ul style="list-style-type: none"> ▪ Provide organizational support in: graphic design, grant writing, and social media ▪ Donate space for large group meetings ▪ Speak out to help change the stigma associated with addiction to shift the perception of addiction as a crime to addiction as a disease |
|--|--|

Leadership & Governance

Allie Hunter became PAARI's first Executive Director in 2016 and is a recognized expert on policing and the opioid epidemic. With over a decade in nonprofit management and personal experience with a family member who has struggled with an opioid addiction, Allie is uniquely qualified to lead PAARI.

PAARI has a governing board of seventeen members, who come from diverse backgrounds, including law enforcement, public health, and private industry. PAARI also has a nine person advisory board composed of national leaders from law enforcement.

“

PAARI has been a game changer for police. I can now offer someone in crisis treatment rather than arrest.

”

LT. JEREMIAH NICASTRO

Gloucester Police Department



PAARI'S MODEL



THREE ELEMENTS TO PAARI'S MODEL

PAARI guides police departments, big and small, to reshape their practices quickly to support people with substance use disorders.

Train: PAARI provides comprehensive instruction for how police can better engage with and support people with substance use disorders – adapting to a rapidly changing environment. Training subjects include: the neuroscience of addiction, effective treatment modalities, power and privilege, and how to make referrals into the recovery process. PAARI has been a leader in training officers to administer NARCAN, the primary antidote for opioid overdose and an essential tool for law enforcement to combat fatalities.

Support: After an initial assessment, PAARI provides a road map for police departments to launch programs and implement changes – consulting directly with each department to develop a plan that is unique to their local needs and resources. PAARI acts as a hub for departments to access information and direction to set policies and procedures. PAARI has also been instrumental in accessing resources for police departments to increase resources and personnel, through a partnership with AmeriCorps.

Connect: PAARI serves as a vital intermediary between police departments – linking law enforcement and the public health sector nationally. Through PAARI, police departments learn from each other, share what's working, address challenges, and collectively advocate for local and national policy changes. In addition to an annual Leadership Summit, PAARI participates in webinars and regional gatherings, and provides regular electronic newsletters.

“

PAARI offers a resource for us to learn from our mistakes, learn from other departments, and create a comprehensive solution.

”

MAJOR BRITTNEY GARRETT

Jeffersontown Police Department (Kentucky)



POLICE EMBRACE PAARI

In 2015, after a series of fatal opioid overdoses, the Gloucester, Massachusetts Police Department launched a non-arrest referral program to help people with substance use disorders access treatment on demand. This sparked a national policing movement that led to the development of PAARI. In just five years, police departments that have implemented the PAARI model have reported up to a 40% reduction in crime. Police departments also report that officer satisfaction increases when officers focus on helping versus arresting.

Through PAARI, the police station can become a walk-in **safe haven** where people find treatment immediately. Officers can also conduct **incident-based outreach**, following up with individuals who have experienced an overdose when they return to the community and **outreach** to individuals who are known to be at elevated risk of overdose. Officers are also now in a new position to make **referrals for treatment** through their encounters with residents. PAARI supports a number of departments through its **Recovery Corps**, which places additional trained service members, many with lived experience with addiction, to serve alongside police to build program capacity and expand access to care.

FINANCIAL SUSTAINABILITY

PAARI is poised for significant growth to meet increasing demand from police departments across the country. To accomplish this, PAARI will add a development manager to focus on expanding revenue through increased foundation and corporate grants, individual donors, and local police departments.

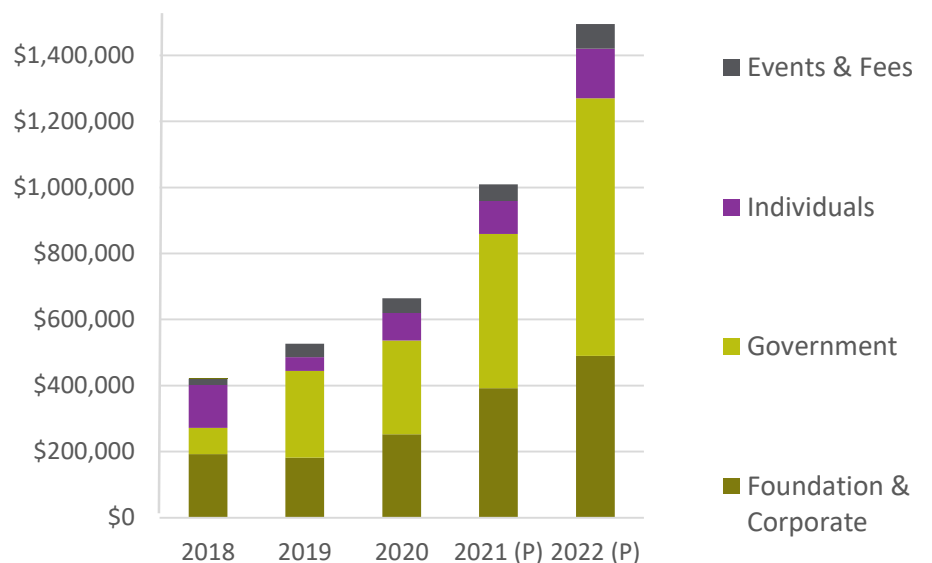
Key Investor

- CORPORATION FOR NATIONAL AND COMMUNITY SERVICE
- RIZE MASSACHUSETTS
- SOUTH SHORE HEALTH
- THE EVELYN LILLY LUTZ FOUNDATION

Partners

- AMERICORPS
- BOSTON DEPARTMENT OF PUBLIC HEALTH AND MAYOR'S OFFICE OF RECOVERY SERVICES
- MASSACHUSETTS DEPARTMENT OF PUBLIC HEALTH
- 579 POLICE DEPARTMENTS FROM 34 STATES AND CANADA

Revenue by Source



Success Story: Steve

Steve started using drugs in his teens. When he got into a head-on automobile collision, he was prescribed opiates and became addicted. After the prescriptions ended, he went to the streets to purchase pills and moved quickly to using heroin, the cheaper substitute. He ultimately lost contact with his children and family.

He was homeless and living in Florida when he attempted suicide. This was the low point of his life, but also a turning point. He called his mother and said, "I'm done, I'm ready, and I want to come home." Once home in Massachusetts, they called multiple places to get help and had no luck. They contacted the Gloucester Police Department and within twenty-four hours, Steve was in a detox program. After twenty years of addiction, Steve is now 4 years in recovery. Through PAARI's Recovery Corps program, Steve is now a recovery coach with the Boston Police Department.



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below is a summary of the key measures that PAARI will track to demonstrate progress, create internal accountability, incorporate lessons learned, and adjust strategy as necessary.

| | FY 2020 | FY 2021 (P) | FY 2022 (P) |
|--|-----------|-------------|-------------|
| PROGRAM PERFORMANCE | | | |
| Number of law enforcement agencies receiving training, technical assistance, and/or support from PAARI | 500 | 1,000 | 1,500 |
| Number of police officers taking PAARI online training | 300 | 2,000 | 3,000 |
| Number of police officers attending PAARI conferences | 150 | 300 | 500 |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Number of staff | 4 | 6 | 8 |
| Number of Recovery Corps members | 22 | 30 | 40 |
| Number of academic partnerships researching the impact of the PAARI model | 3 | 5 | 7 |
| Number of individual contributors | 800 | 1,200 | 2,000 |
| Total Revenue | \$664,088 | \$1,009,000 | \$1,495,000 |

SOCIAL IMPACT

PAARI is leading the development of a nationwide movement of law enforcement agencies that believe in treatment over arrest. When police support access to treatment, they have a positive impact on the health and well-being of people with addiction disorders. PAARI improves the police's ability to respond to the community, which leads to enhanced communication and trust in law enforcement overall. As PAARI grows, it will continue to track the efficacy of its work.

Below is a summary of the social impact that PAARI aspires to have on police departments.

| INDICATOR | 2020 | 2021 |
|--|-------|--------|
| Number of people accessing treatment from a PAARI-affiliated police department | 8,000 | 15,000 |
| % of partner police departments reporting an increase in program effectiveness after PAARI support | 80 | 90 |
| % of partner police officers reporting an increase in knowledge relating to addiction after PAARI training | 70 | 85 |
| % of partner police officers who indicate change in perception of people with substance use disorders after PAARI training | 70 | 80 |
| % of police officers who indicate increased job satisfaction as a result of implementing the PAARI model | 60 | 70 |



FOUNDED: 2014
CURRENT ORGANIZATION BUDGET: \$143,650
CONTACT: Ann Walsh, Founding Director
PHONE: 617.780.5027
EMAIL: ann.walsh@1647families.org
WEB: www.1647families.org

Investment Opportunity

In July 2018, 1647 pivoted to new program and financial models, relying entirely on earned revenue for that prototype. 1647 now receives philanthropic support for operations such as business development, while all programming is delivered on a fee-for-service basis. 1647 now seeks to establish a sustainable and balanced revenue model by combining philanthropic operating support with program fees that are accessible to a wide range of clients. Due to the COVID-19 crisis, 1647 established a “Family Engagement Fund” of \$200,000 over two years to provide programs on a sliding scale through 2022.

For children to succeed, families and educators need to work closely together, but our systems don't provide a roadmap for these partnerships to thrive. Educators and families want to collaborate, but are hindered by challenges, including systemic racism and bias, “remote learning,” competing priorities for educators’ time, and lack of effective training for educators on how to build successful home-school partnerships.

A national study by Learning Heroes in 2018 outlined the challenges facing educators. "Nine in 10 teachers report that it’s important for them to make sure parents have a clear picture of how their child is achieving academically. But...nearly one in four say 'teachers are not given the proper support from school administrators to relay this type of information.'"

1647 prepares educators to build authentic partnerships with families that are essential to student success. Families are the experts on their children, and 1647 helps educators leverage that expertise to ensure that every student succeeds.

Two-Year Goals

2020-21 School Year

Prototype new “Partnership Pathways” model via:

- Two educator prep programs
- 12 workshops and coaching for K-12 and out of school time (OST) educators

2021-22 School Year

Expand “Partnership Pathways” to include:

- Three educator prep programs
- 12 workshops and coaching for K-12 and OST educators
- One school district in a three-year engagement

Ways to Invest

FINANCIAL:

- General operating gifts totaling \$75,000/year allow 1647 to keep program fees low and accessible to schools and non-profit organizations
- Contributions to the new \$200,000/2 years “Family Engagement Fund” support a sliding scale in response to the COVID-19 pandemic and the resulting economic fallout

IN-KIND

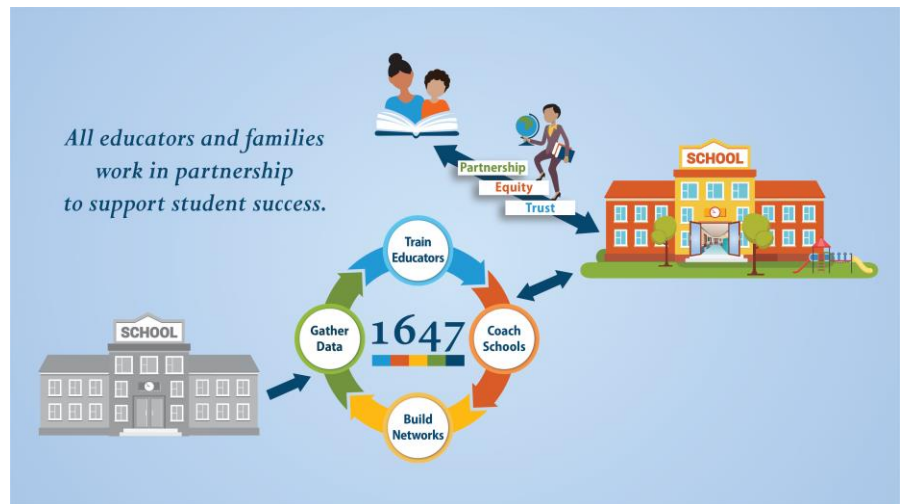
- Introductions to potential partners, especially those in higher education and alternative certification programs for teachers and school leaders
- Social media and website design
- Creation of client database and communication systems to build a Community of Practice

Leadership & Governance

Founding Director Ann Walsh, Director of Coaching Christine Vulopas, Director of Operations Jennifer Larson, and Lead Family Facilitator Beliza Veras-Moriarty develop and deliver trainings and provide ongoing coaching to educators as they build authentic partnerships with families.

Co-Founder John Connolly serves as Chair of the five-person Board of Directors, which is supported by a robust eight-member advisory board representing diverse perspectives in the education sector and including many parents of school-aged children.

1647'S MODEL



“

I really enjoyed diving into this topic as it's something that we haven't talked about in any other professional development, but is such relevant and complex work.

Administrator, K-8 School

”

1647's model aligns with the Dual Capacity-Building Framework created by Dr. Karen Mapp, which demonstrates that families and educators have not had the opportunity to develop their capacity to engage in effective partnerships and provides a roadmap to a new paradigm.

All of 1647's Family Facilitators have children and bring this expertise to workshops and coaching sessions. These experts provide educators the opportunity to hone their skills, learn from their mistakes with real families, and to receive honest feedback before connecting with their own students' families.

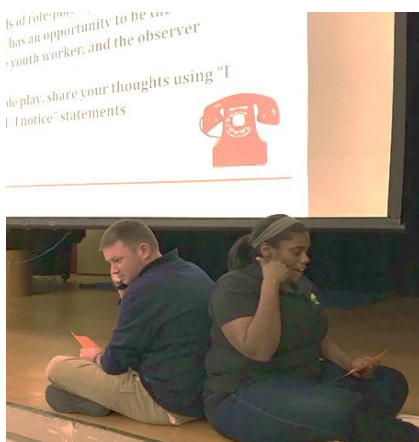
In 2020-21, 1647 will pilot three redesigned **Partnership Pathways** to meet educators where they are and build their family engagement capacity over time.

The **Preparing to Partner** pathway provides a three-part series of workshops for teachers-in-training and school leader candidates, interspersed with scheduled time with a 1647 coach.

The **Learn As You Go** pathway provides a menu of workshops to expand a school or organization's family engagement toolkit and includes follow-up coaching on implementation. All partners begin with a "Foundations of Family Engagement" session and then move on at their own pace.

In the **Reimagining Family Engagement** three-year pathway, 1647 uses Design Thinking to create a shared understanding of each school's or organization's family engagement realities. Working with a site-based team, 1647 conducts interviews, focus groups, and surveys to identify strengths and challenges. With this data, the team develops a plan to embed new practices over the remaining two years of the coaching engagement.

1647 hosts **Community of Practice** sessions for partners to share their expertise with each other. Additionally, 1647 offers a **Summer Institute** at Simmons University for school-based teams to jump-start or re-invigorate their family engagement plans for the upcoming year.





The best aspect of today's course was thinking about the way that my school authentically engages our families in student learning in a way that is comfortable for them and how I can support my teachers in building their capacity to engage more families of color.



School Leadership Program Fellow

1647'S APPROACH

1647 helps educators reach out and connect with families to build the partnerships that are essential for student success. The COVID-19 global pandemic has amplified 1647's mission by putting families at the center of their children's learning. It's clear that educators and families want to work together, but if they haven't seen it done well, they don't know how. 1647 partners with teacher and leader preparation programs, K-12 schools and districts, and out-of-school time (OST) providers to fill that gap.

The Partnership Pathways follow a three-step progression:

Mindset: Before introducing new practices, 1647 first helps educators to understand their existing biases, identify what they bring into their relationships with families, and acknowledge how their actions impact equity in their schools.

Operations: Family Facilitators lead workshops that include role plays to build skills such as calling a student's home, writing clear and helpful texts, and holding effective family-teacher conferences.

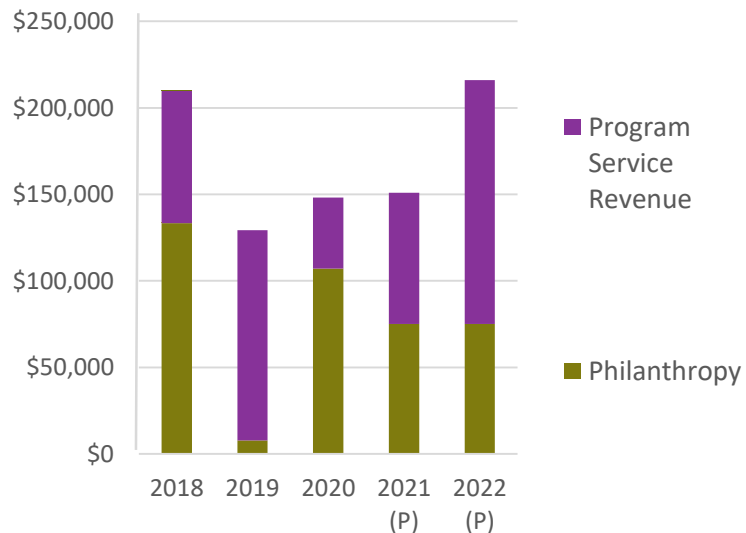
Coaching: 1647 continues supporting partners as they go about changing the way they connect with families.

1647 doesn't use one-size-fits-all solutions, but works with partners to create data-driven strategies responsive to each context and encourages site-based teams to continue learning and improving together.

FINANCIAL SUSTAINABILITY

Business development is 1647's priority for 2020; grants from the Barr and Wellington Management Foundations are supporting this work. The aim is to build capacity to identify potential clients, conduct outreach in order to scale programming with demand, and achieve a sustainable balance between philanthropic and earned revenue. In light of the COVID-19 pandemic, Wellington Management Foundation has provided \$25,000 in seed funding to jumpstart the Family Engagement Fund for FY 2021.

Revenue by Source



Key Investors

- BARR FOUNDATION
- WELLINGTON MANAGEMENT FOUNDATION

Partners

- BOSTON ADULT TECHNICAL ACADEMY
- BOSTON AFTER SCHOOL & BEYOND
- BOSTON TEACHER RESIDENCY
- HAVERHILL PUBLIC SCHOOLS
- LAWRENCE PUBLIC SCHOOLS
- MILTON PUBLIC SCHOOLS
- SALEM PUBLIC SCHOOLS
- SQUASHBUSTERS
- VASSAL LANE UPPER SCHOOL, CAMBRIDGE

Success Story:

Grace Evans, Boston Plan for Excellence Teacher Leadership Fellow

“Family communication is often intimidating for young teachers. We know it’s important, but we aren’t sure how to best connect with our students’ families, especially if we’ve never met face-to-face. We’re plagued by worries:

‘What if my voice sounds too young over the phone and they think I’m not qualified to be their kid’s teacher? How do I tell them their kid is failing, even though he comes to school every day and works really hard, because he’s missing skills from prior years and doesn’t understand the content? This student’s behavior challenges seem really complex, how do I involve the parent without overcomplicating the situation?’

1647 coaches give teachers reliable, effective strategies for navigating this challenging and incredibly important part of the job, helping teachers and families become actual partners in students’ education.”



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

1647 believes that the unit of change for family engagement is the leader of a school or organization. When leaders decide to prioritize family engagement, they contact 1647. Family Facilitators provide workshops to shift mindsets and build skills, gather data from stakeholders, and help the team redesign their operations through coaching. Events such as the Summer Institute allow teams from different schools to meet each other in order to build a Community of Practice across the sector. Through engagements spanning seven school districts in Eastern Massachusetts, ranging from single-day workshops to three-year partnerships, 1647 has proven it can adapt to the needs of schools and communities. Moving forward, the Partnerships Pathways will streamline program delivery in order to bring it to scale.

| | FY 2020 | FY 2021(P) | FY 2022(P) |
|--|-------------------------------|-------------------------------|-----------------------------|
| PROGRAM PERFORMANCE | | | |
| Educator prep programs | 1 | 2 | 3 |
| Workshops and coaching for school/OST partners | 11 | 12 | 12 |
| School district in a three-year agreement | 0 | 0 | 1 |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Number of staff | 4 (equivalent to 1.5 FTEs) | 4 (equivalent to 1.5 FTEs) | 4 (equivalent to 2 FTEs) |
| New advisory board members | 2 | 2 | 2 |
| Client referrals from advisory board | 6 | 6 | 6 |
| Total Revenue | \$148,111 | \$151,000 | \$216,000 |

SOCIAL IMPACT

When a school team is all in for this model, it’s transformative. A 1647 partnership “opens up” a school as educators reach out to families to build partnerships that are based on trust and respect, culturally responsive, and focused on learning. Through this process, families’ involvement with learning at home deepens. Together, staff and families establish a positive climate that leads to 1647’s vision becoming a reality.

Below is the summary of the social impact that 1647 aspires to have in the next year.

| INDICATOR | FY 2021 |
|---|----------|
| Comparative rating of workshop quality on educator exit surveys | >4.0/5.0 |
| Clients’ year-to-year rate of return | 60% |
| Annual increase on family survey metrics of feeling welcome | >5% |
| Annual increase on staff survey metrics of belief in families’ capacity to support student learning | >5% |

Vital Village Networks

at Boston Medical Center



FOUNDED: 2010

CURRENT ORGANIZATION BUDGET: \$1.95M

CONTACT: Dr. Renée Boynton-Jarrett,
Founding Director

PHONE: 617.414.3674

EMAIL: renee.boyntonjarrett@bmc.org

WEB: www.vitalvillage.org

Investment Opportunity

Vital Village Networks (VVN) is seeking a \$1.5M investment over the next two years to expand its local and national footprint. With increased operational leadership and fundraising capacity, VVN will double the number of civically engaged volunteers in its Service Learning and Leadership Model, advance the portfolio of early childhood research and evaluation, grow data stewardship and public dashboards, and expand its cross-sector networks. VVN will be poised to emerge as a national thought partner for hospitals and coalitions seeking to improve community health.

Vital Village Networks (VVN) builds the capacity of communities to optimize child well-being, prevent early life adversities, and advance equity. VVN convenes cross-sector networks, supports collective learning, and fosters partnerships between residents and organizations, guided by trauma-informed lens. Using a collaborative approach, the network creates innovations with community residents as designers and harnesses local community assets. VVN conducts research and develops public data dashboards and analytic tools to track benchmarks for child health, development, school readiness, and well-being. Through these combined efforts VVN is pioneering a sustainable approach to transforming systems of care and education in order for children to thrive in equitable, flourishing, resilient communities.

Success Starts Early – Kindergarteners with strong social and emotional competence are four times more likely to graduate from college.

Neighborhoods Matter – Children who grow up in neighborhoods with fewer social and economic obstacles have higher earnings, greater employment, and better health.

Childhood Trauma Impacts Health – Research shows that on average children with six or more adverse childhood experiences live nearly 20 years less than those with none.

Two-Year Goals

- Diversify funding to support operations capacity and sustainability
- Double the number of community leaders engaged in Service Learning and Leadership
- Expand the Supportive Trauma Interventions for Educators (STRIVE) Program from Boston to Gateway Cities
- Endow a scholarship fund for Service Learning and certification for community leaders
- Grow the network of hospitals and coalitions engaged in community capacity-building and systems change

Ways to Invest

FINANCIAL

- \$40,000 launches a new, year-long hospital or coalition partnership
- \$30,000 funds 15 fellowships for Community Leadership Certificates
- \$25,000 funds 10 community champion stipends for a year
- \$15,000 provides health equity training for 25 community leaders
- \$5,000 supports translation services
- \$3,500 funds trauma-sensitive training and tools for 10 classrooms

IN-KIND

- Design, communication, or development support
- Donation of technology to help members connect and collaborate
- Donation of community meeting space
- Volunteering to be a mentor for a community leader

Leadership & Governance

Vital Village Networks has a strong national board of physicians, educators, researchers, social workers, attorneys, nonprofit leaders, and community members who represent the cross-sector and cross-disciplinary approach necessary to build healthy communities.

A core of community champions co-create and lead efforts.

Dr. Renée Boynton-Jarrett is the Founding Director of the Vital Village Networks. She is a primary care pediatrician at Boston Medical Center and a social epidemiologist. Along with a talented and dedicated core staff, she provides backbone support for community-led efforts.

“

Vital Village is a village of people who care about other people, who want to help people who are having some problems they need help with, they know they can help them. . . Vital Village is a welcoming setting.

ANGE-YOLETTE BELLEGARDE
10-year-old Boston resident
Child of a VVN Member



VITAL VILLAGE NETWORKS MODEL



BUILDING COMMUNITY CAPACITY

Vital Village Networks, based at Boston Medical Center, builds community capacity to solve inequities in child health and well-being through collaboration, research, data-sharing, training, and advocacy. VVN’s approach is guided by empirical research that demonstrates the benefits of community-based strategies and socially cohesive neighborhoods to prevent and mitigate childhood adversities. The VVN model originated and continues in Boston, and is also shared nationally through the NOW Innovation Forum, which provides technical assistance, training, and supports peer-based learning to use equity tools to drive community change.

INVESTING IN LEADERSHIP TRAJECTORIES

Residents who live in the communities they serve are often overlooked as designers of community solutions, although they are charting the course for building strong, equitable places for children and families. VVN forges a path for greater civic engagement and resident leadership to improve child well-being by providing established and emerging community resident leaders with mentors as well as advanced skills, resources, expanded networks, and partnership opportunities. This work is crystallized by VVN’s Service Learning and Leadership Model.

CONNECTING INSTITUTIONS

VVN engages and invests in institutional capacity-building, stronger cross-sector alignment, and stronger communities and community institutions by recognizing the wisdom and leadership of neighborhoods, reducing the need for doctors, lawyers, and emergency rooms. For example, the Supportive Trauma Interventions for Educators program (STRIVE), a VVN partnership with Boston Public Schools and Boston Medical Center Child Witness to Violence Project, trains teachers in new classroom strategies to address trauma and learning.

ADVANCING RESEARCH EVIDENCE AND DATA

VVN’s Community Data Dashboard uses local data to understand and improve health. The Dashboard’s user-friendly visualizations track child outcomes, neighborhood assets and disparities, and equips communities with a tool to advance partnerships and policy changes to build equitable communities. VVN’s Research Lab, CRADLE, builds the research evidence to address inequities by evaluating innovative community-based programs that use a two-generation approach (such as group based well child care) and developing tools to measure community-level determinants of health.

“

Here is what’s been birthed out of this whole strength-based initiative, acknowledging my own strengths and also believing in myself, believing that I have expertise. I have something to offer.

”

JOHN KING, JR.

Kudos Family Mediation Services



Key Investors

- BARR FOUNDATION
- DORIS DUKE CHARITABLE FOUNDATION
- OVERDECK FAMILY FOUNDATION
- ROBERT WOOD JOHNSON FOUNDATION
- THE GISELA B. HOGAN CHARITABLE FOUNDATION
- VALHALLA CHARITABLE FOUNDATION

Partners

- BOSTON CHILDREN’S MUSEUM
- BOSTON PUBLIC SCHOOLS
- BOSTON UNIVERSITY SCHOOL OF MEDICINE
- FIRST TEACHER BOSTON
- URBAN COLLEGE BOSTON
- 75+ GREATER BOSTON PARTNERS
- 35 NATIONAL PARTNERS

HOW WE BUILD COMMUNITY CAPACITY

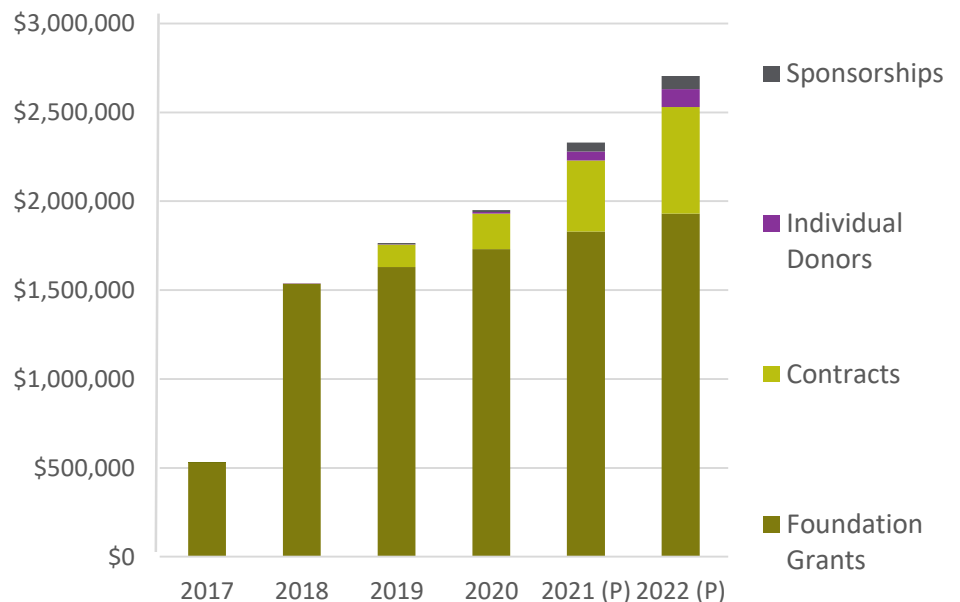
VVN supports the diverse forms of experience and wisdom needed to shape the equity agenda for families.

- **BELONG** – VVN supports a community of practice where people and organizations gather, via diverse forums, to build trust, connect, and collaborate. VVN uses co-design—a participatory approach to design where social innovations are developed cooperatively—and human-centered design so individuals and groups can and collaboratively lead.
- **LEARN** – VVN’s *Service Learning and Leadership Model* builds civic capacity and promotes social mobility for families. Through a service learning commitment, leaders receive cost-free opportunities for advanced skill-building and volunteerism. Rigorous research projects, like our CK-READY study which explores the impact of a group-based care on school readiness, builds evidence.
- **ENGAGE** – VVN’s popular *90-Day Challenge Model* supports aligning systems of health and education in early childhood by promoting peer learning and iterative improvement to rapidly scale and spread innovation in local and national work.
- **TRANSFORM** – VVN supports resources, opportunities and mechanisms to improve equity. VVN’s Community Data Work Group designed a Housing Data Tool to increase access to quality, safe, affordable housing through shared data, resources, and advocacy. They also designed a Dashboard and App to help neighbors find accessible, low-cost, high-quality food.

FINANCIAL SUSTAINABILITY

Over the past decade, VVN has experienced steady growth in size, geographic reach, and impact, while primarily being funded by foundation grants. In 2019 VVN established a financial model and blueprint to continue to expand geographically. The organization seeks to increase and diversify its revenue streams in the upcoming years.

Revenue by Source



Success Story:

Supportive Trauma Interventions for Educators (STRIVE) is an evidence-informed model to help schools identify, respond to, and support the unique learning needs of young children impacted by trauma.

The STRIVE model supports inclusive school environments by using an equity framework to highlight disparities in exposure to adversities. Co-created by educators and sustained independently by the school following the training, this innovative program has reached over 500 educators, 20 public schools, numerous early care centers, and over 4,000 students.

VVN has played a key role in the research, development, and implementation of STRIVE. Its evaluation shows improved student-teacher interactions, socio-emotional regulation, reduced classroom interruptions, and high acceptability by educators.



“ VVN supports teachers in developing trauma-sensitive classrooms that encourage students to navigate emotions before conflicts emerge.... Making emotional vocabulary available in the classroom helps.”

JEFFREY CIPRIANI

Boston Public School Teacher

Teach Plus Teaching Policy Fellow

PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below is a summary of the key measures that Vital Village Networks will track to demonstrate progress, create internal accountability, incorporate lessons learned, and adjust strategy as necessary over the next two years.

| | FY 2020 | FY 2021 (P) | FY 2022 (P) |
|--|-------------|-------------|--------------|
| PROGRAM PERFORMANCE | | | |
| Size of the Boston Network | 1,800 | 2,300 | 2,800 |
| Size of the National Forum | 1,300 | 1,600 | 2,000 |
| Active partner organizations | 100 | 112 | 125 |
| Civic engagement - volunteers (hours) | 75 (4,500) | 110 (7,500) | 150 (10,000) |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Full-time employees | 9 | 10 | 12 |
| Geographic footprint | 12 States | 14 States | 15 States |
| Equity Partners Friends Circle Members | 0 | 3 | 6 |
| Board members | 12 | 13 | 14 |
| Total Revenue | \$1,950,000 | \$2,330,000 | \$2,700,000 |

SOCIAL IMPACT

VVN strengthens community capacity by developing leaders, connecting institutions, and building research evidence and shared data systems. An independent evaluation of VVN Boston in 2019 found high collective capacity for community change as measured by sustainable infrastructure, distributed leadership, use of data for improvement, collaboration, and inclusion. VVN members routinely evaluate the network’s performance and use data for improvement.

Since 2016, VVN has grown its footprint nationally to include work in 12 states and an intensive NOW Learning Community of 10 community coalitions. An independent evaluation of VVN’s impact on these 10 coalitions reveals substantial improvement in development of action plans, strategies, and engagement that advanced racial equity: inclusion of community members in leadership roles; coalitions’ capacity to tell the story of their work with data and operationalize equity; stronger communication with policy stakeholders.

| BOSTON INDICATORS | 2019 |
|--|------|
| Members receive training or resources to address childhood trauma from VVN | 89% |
| Members feel VVN leadership development and mentorship is successful | 96% |
| Partners report VVN is successful in supporting cross-sector collaboration and increasing access to tools and data on child well-being | 92% |
| VVN organizational partners improve practices to support staff wellness | 91% |
| Partners and members involved ≥ 3 years | 75% |
| NATIONAL INDICATORS (% Increase over 18 months) | 2019 |
| Coalitions increase work to address racial equity to improve child health | 75% |
| Coalitions address health equity through cross-sector collaboration | 70% |
| Coalitions develop inclusive and diverse governance structure and process | 67% |

WHALE – Waterfront Historic Area League



FOUNDED: 1962
CURRENT ORGANIZATION BUDGET: \$325,000
 (excluding capital project fund)
CONTACT: Teri Bernert, Executive Director
PHONE: 508.997.1776
EMAIL: tbernert@waterfrontleague.org
WEB: www.waterfrontleague.org

Investment Opportunity

WHALE seeks an investment of \$850,000 over the next two years to grow its capacity to undertake and complete complex restoration projects that will revitalize low-income neighborhoods. To do so, WHALE will hire staff both to manage current projects and to coordinate outreach to the community. In addition, funds will be used to expand the capital resources available to finish two vital projects currently underway – a community theater and a Cape Verdean cultural center– and begin restoration of a multi-use project in an underserved neighborhood.

In the mid-19th century, fortunes from whaling and the textile industries made New Bedford one of the richest cities per capita in the world. Architecture and the arts flourished, creating a legacy of distinctive historic buildings. With the end of whaling and relocation of manufacturing in the 20th century, the city went into a decline, from which it is still recovering.

Today, it is a gateway city of 100,000 with an ethnically diverse population, including 43% of Portuguese or Cape Verdean heritage. The average income of \$37,000 is half the state average.

Low-income neighborhoods have experienced disinvestment due to economic redlining and discrimination, resulting in high unemployment, dilapidated buildings, a lack of affordable housing, and a loss of community pride. Many historic structures that were once anchors of the community are no longer needed for their original purpose and have fallen into disuse.

WHALE (the Waterfront Historic Area League) is working to end the cycle of disinvestment in low-income neighborhoods in New Bedford. WHALE’s role is to assemble the resources to acquire and restore foreclosed and abandoned historic properties for re-use that will stimulate jobs, create affordable housing, and restore pride by revitalizing the community.

Two-Year Goals

- Increase capital project fund by \$200,000 per year to accelerate pace of restoration
- Hire a project manager
- Hire a community outreach coordinator
- Double the number of affordable housing units developed, from 25 to 52

Ways to Invest

FINANCIAL

- \$500,000 transforms abandoned theater into Cape Verdean Cultural Center
- \$300,000 completes restoration and transformation of historic church into community theater
- \$45,000 funds a project manager
- \$30,000 funds a part-time community outreach coordinator

IN-KIND

- Light construction work
- Cleanup of sites
- Landscaping
- Event logistics
- Graphic design

Leadership & Governance

Teri Bernert, Executive Director of WHALE since 2013, has over 25 years of experience in community and economic development, concentrating in real estate development. She has a Master's in Urban Planning from George Washington University and is an adjunct professor at Roger Williams University.

The 16-member Board of Directors is reflective of the New Bedford community in its ethnic diversity. With expertise in architecture, real estate sales and development, and historic preservation, the directors guide the organization to fulfill its mission of community revitalization.

WHALE'S MODEL



The Waterfront Historic Area League (WHALE) was founded in reaction to “urban renewal,” a controversial 1960s federal program of demolition and clearance of targeted areas. The founders of WHALE saw the embodiment of New Bedford’s rich and diverse heritage in the city’s deteriorated waterfront area: quality structures built during the city’s whaling and textile manufacturing heyday in the 19th century. WHALE acquired buildings, renovated, and even moved them to fill in vacant lots in the district. It also saved properties that now rank among the city’s most popular cultural treasures, including the Zeiterion Theatre.

Six years ago, WHALE evolved to become what is now **the only historic preservation organization in the country that is also a Community Development Corporation (CDC)** – a nonprofit real estate developer that promotes economic revitalization by acquiring and restoring dilapidated historic properties for reuse in order to uplift and transform the surrounding community.

WHALE'S APPROACH

- **Identify vacant historic buildings**, especially in underfunded and low-income neighborhoods.
- **Engage the community** – neighbors, businesses, city planners, local nonprofits – to determine the best and most needed reuse of the buildings.
- **Work with a restoration team**, including architects, engineers, and project partners, to design the reuse of the building and undertake financial feasibility, including a sustainable business plan. In every project, WHALE incorporates green building practices.
- **Enlist investors**. As a nonprofit developer, WHALE has the expertise to assemble a wide variety of resources for historic restoration – including government grants, tax credits, and private philanthropy, in addition to bank loans.
- **Undertake the restoration work** with a team consisting of staff, architects, professional construction crews, and volunteers to return the buildings to their historic integrity, with new purpose.
- **Transform and activate** a building, giving it a whole new life and helping uplift the surrounding neighborhood with an infusion of community pride.

“

As a single mother with two young girls, I would not have been able to purchase a home like this if it wasn't for WHALE.

DANIELLE

First-time homebuyer

”





The innovative and adaptive reuse of this historically significant property as housing for veterans could not have been done without WHALE's expertise in this complicated project.



JIM REID, EXECUTIVE DIRECTOR
Veterans Transition House



REVITALIZING COMMUNITY

Mary Anthony, Executive Director of The 1772 Foundation, encapsulates the relevance of historic preservation in today's world:

"At 1772, we support the efforts of change-making programs nationwide. Within the field of historic properties redevelopment programs, we are looking specifically for efforts that are locally driven, proactive, inclusive, collaborative, people-centered, and future-oriented. WHALE is at the forefront of such efforts, bringing a holistic approach to ensure that historic buildings play a meaningful role for the entire community of New Bedford. We are very pleased to play a supporting role in their efforts, which have been used nationally as an example of just what is possible in the historic revitalization of cities."

FINANCIAL SUSTAINABILITY

WHALE'S **operating budget** is poised to accommodate additional staff, in part through increased earned income from consulting fees paid by developers for WHALE's expertise. In addition, as a Community Development Corporation, WHALE is able to participate in the state's Community Investment Tax Credit Program (CITC), which doubles the impact of all gifts and grants over \$1,000 – giving a special incentive to a growing number of upper-level donors.

Separate from the operating budget, but essential to WHALE's mission-driven work, is the **capital project fund**, which is the pass-through account for all financial resources used for the purchase and renovation of each building. Growing the core of available monies in this fund – similar to an ongoing capital campaign – is key to long-term project sustainability.

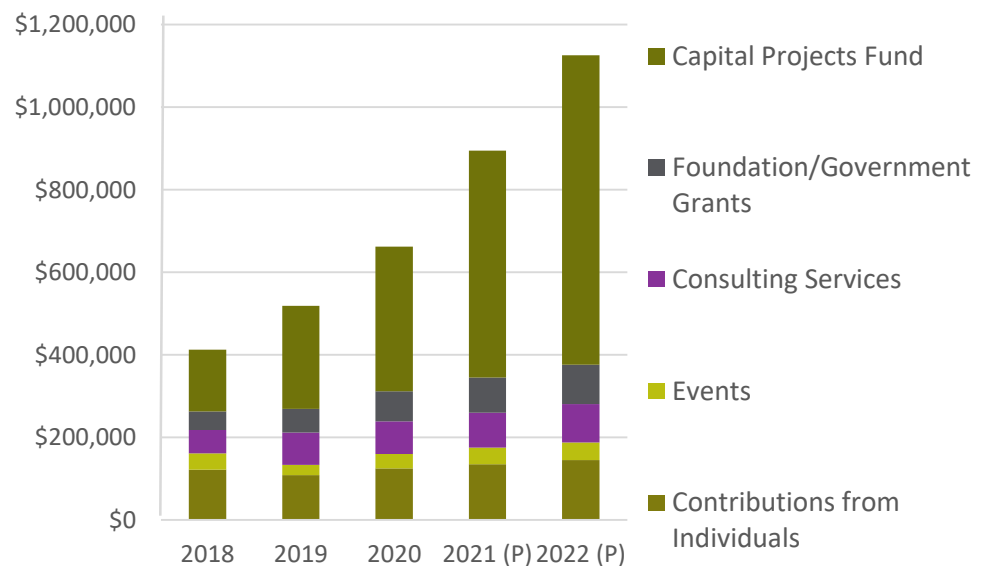
Key Investors

- 1772 FOUNDATION
- BRISTOL COUNTY SAVINGS BANK
- ISLAND FOUNDATION
- LOCAL INITIATIVES SUPPORT CORPORATION (LISC)
- MASS. CULTURAL COUNCIL
- MASS. DEPT. OF HOUSING AND COMMUNITY DEVELOPMENT
- NATIONAL TRUST FOR HISTORIC PRESERVATION

Partners

- CAPE VERDEAN ASSOCIATION IN NEW BEDFORD
- CITY OF NEW BEDFORD
- COMMUNITY ECONOMIC DEVELOPMENT CENTER
- NEW BEDFORD PORT SOCIETY

Revenue by Source



Success Story:
Co-Creative Center

WHALE undertook the \$3 million restoration of two historic buildings in the heart of downtown New Bedford in 2016. The once-abandoned block is now transformed into a collaborative retail, living, and arts venue that has brought new vibrancy to the neighborhood.

Named the Co-Creative Center, the mixed-use development features an art gallery, education space, co-working space, affordable apartments, business and nonprofit offices, and two women-owned business startups.

The goals achieved by the project include:

- The restoration of two vacant buildings with a creative multi-use approach for space that includes more affordable housing
- Access for artists and creatives through a community gallery, co-work space, and makerspace
- Enlivening of the streetscape to draw people downtown
- Access to hands-on art education for low-income residents
- Job creation, both construction and permanent



PROGRAM PERFORMANCE AND ORGANIZATIONAL HEALTH

Below is a summary of the key measures that WHALE will track to demonstrate progress, create internal accountability, incorporate lessons learned, and adjust strategy as necessary.

| | FY 2020 | FY 2021 (P) | FY 2022 (P) |
|--|-----------|-------------|-------------|
| PROGRAM PERFORMANCE | | | |
| Cumulative affordable housing units developed (since 2015) | 25 | 37 | 52 |
| Number of restoration projects underway | 10 | 11 | 12 |
| Revitalization funding leveraged | \$2.5 M | \$3.7 M | \$5.5 M |
| ORGANIZATIONAL HEALTH/CAPACITY-BUILDING | | | |
| Full-time equivalent employees | 4 | 5 | 6 |
| Growth of capital project fund | \$350,000 | \$550,000 | \$750,000 |
| Earned income from consulting services | \$20,000 | \$30,000 | \$40,000 |
| WHALE membership base | 350 | 400 | 450 |
| Total operating budget (excluding capital) | \$312,000 | \$345,000 | \$376,000 |

SOCIAL IMPACT

Over the past 5 years, WHALE has leveraged \$15 million in funds to complete 11 restoration projects, creating affordable and transitional housing, cultural venues, and women- and minority-owned small businesses. The economic benefit includes job creation – both construction and new permanent jobs.

WHALE anticipates taking on and completing additional complex projects to further revitalize this historic city – allowing more people to both live and work in New Bedford and grow a thriving local economy.

| INDICATOR | 2020 |
|---|--------------|
| Investment leveraged in New Bedford since 2015 | \$15,000,000 |
| Jobs created in New Bedford since 2015 | 532 |
| Number of restoration projects completed since founding | 70 |



We are pleased to support the

Social Innovation Forum

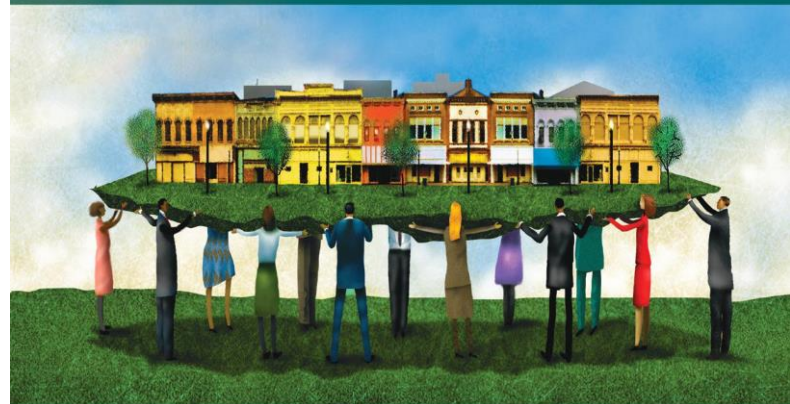
and the **Social Innovator Showcase.**

We celebrate the Social Innovation Forum's work in bringing impact-driven leaders together for positive social change.



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MARCUS PARTNERS

Social Innovator Portfolio

- 2020** Adaptive Sports New England
Boston HERC (Higher Education Resource Center)
Elevated Thought
Origination Cultural Arts Center
PAARI (Police Assisted Addiction & Recovery Initiative)
1647
Vital Village Network
WHALE (Waterfront Historic Area League)
- 2019** Boston Youth Wrestling
Disability Policy Consortium
The Dream Out Loud Center
English for New Bostonians
LEAP for Education
Paige Academy
Urban Farming Institute
Y2Y
- 2018** ACT Lawrence
Community Boating Center
Fathers' Uplift
GreenRoots
Political Asylum/Immigration Representation (PAIR) Project
Partners for Youth with Disabilities
The Renew Collaborative, a program of HomeStart
Strategies for Youth
- 2017** Boston CASA
Citizens for Juvenile Justice
Community Economic Development Center
Institute for Nonprofit Practice
Julie's Family Learning Program
Project Citizenship
Room to Grow
- 2016** African Community Education
Budget Buddies
Cambodian Mutual Assistance Association
Dorchester Community Food Co-op
Hale
Louis D. Brown Peace Institute
MassCOSH
SMART Team, a division of JRI
- 2015** Catie's Closet
Company One Theatre
Courageous Parents Network
Massachusetts Public Health Association
Mystic River Watershed Association
Transformative Culture Project
Waypoint Adventure
- 2014** Coaching for Change
Doc Wayne Youth Services, Inc.
Mill City Grows
Silver Lining Mentoring
Veterans Legal Services
- 2013** AgeWell West Roxbury
GRLradio
Groundwork Lawrence
Safe City Academy, a program of Dorchester Youth Collaborative
Shelter Music Boston
- 2012** Cooking Matters, a program of Share Our Strength
InnerCity Weightlifting
LGBT Aging Project
Science Club for Girls
Tempo Young Adult Resource Center, a program of Wayside Youth & Family Support Network
WorkExpress, a program of Father Bill's & MainSpring
- 2011** Fiscal Health Vital Signs (Dotwell)
Future Chefs
Massachusetts Senior Action Council
MathPOWER
Smart from the Start
- 2010** Generations Incorporated
Home & Healthy for Good, a program of the Massachusetts Housing & Shelter Alliance
Medicine Wheel Productions
My Life My Choice Project, a program of JRI
Playworks MA
Workforce Development & Employer Partnerships, a program of ProjectHope
- 2009** Bessie Tarrt Wilson Initiative for Children
Hearth, Inc.
Maritime Apprenticeship Program
More Than Words
Raw Art Works uAspire
- 2008** City Sprouts
Cradles to Crayons
Girls' LEAP
ReVision Urban Farm, a program of Victory Programs
True Colors: Out Youth Theater, a program of The Theater Offensive
UTECH
- 2007** Boston Urban Youth Foundation
Building Impact
Incarcerated Youth at Play, a program of the Actors' Shakespeare Project
Strong Women, Strong Girls
- 2006** Boston Black Women's Health Institute
Tacos Unidos (project of Roca)
Treehouse Boston
WriteBoston
Zumix, Inc.
- 2004** Boston Children's Chorus
Boston Health Care and Research Training Institute
Close to Home
Common Impact
RediscoveryHouse
VietAID (Vietnamese American Initiative for Development)
- 2003** ACT Roxbury/Madison Park Development Corporation
Boston Learning Center
Eagle Eye Institute
Haley House
Social Capital Inc.
Year Up



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