



# Generations Incorporated Prospectus



## overview

**FOUNDED in 1989 as a program of *Magic Me*, a national intergenerational program**

**INDEPENDENTLY INCORPORATED 1991**

**CURRENT REVENUE \$2.2 million**

**DESCRIPTION:** Generations Incorporated strengthens individuals and communities in Greater Boston by uniting older adults ages 55+ seeking meaningful opportunities for community service with 1st–4th grade students in need of literacy tutoring. Each year, the organization engages over 300 older adult volunteer “members” to deliver the nationally recognized Experience Corps literacy intervention to more than 2,000 public school students. Its evidence-based intergenerational programming fosters strong interpersonal relationships and achieves marked health benefits for members and academic improvements for students.

**INVESTMENT OPPORTUNITY:** Generations Incorporated is seeking \$1.5 million over two years to grow its volunteer member base to serve more students at more sites in Greater Boston. Currently operating in 12 sites, the organization plans to deepen its impact in its existing sites and expand its reach to 15 sites by 2012.

## THE NEED

The U.S. faces challenges at both ends of the age spectrum:

- The rapidly growing population of older adults ages 55+ is increasingly seeking opportunities for meaningful community service that will keep them active well into their later years.
- 55% percent of older adults live alone and 39% only leave their homes on a limited basis, which places them at greater risk of social isolation and its negative consequences, including depression and other health impacts.
- At the same time, many of today’s 1st–4th grade children are not receiving the individualized literacy instruction they need to learn to read and succeed throughout their academic careers and lives. In Boston alone, 70% of third-graders are classified as “needing improvement” or “failing” reading skills.
- Reading is “the fulcrum of academics, the pivotal process that stabilizes and leverages children’s opportunities to succeed and to become reflective, independent learners.”
- Struggling in school and failing classes are principal factors that drive school dropout rates, and these patterns tend to develop early.

## THE OPPORTUNITY FOR SOCIAL IMPACT

Today’s population of older adults is projected to grow to 108 million by 2030. They are the healthiest, best-educated cohort to ever move through and beyond their ‘50s. As part of the Experience Corps national network, Generations Incorporated is uniquely positioned to tap this growing pool of human capital with a proven service model that positively impacts older adults and the children they serve.

A 2009 randomized control study conducted by Washington University and endorsed by the Federal Department of Education demonstrated the efficacy of the Experience Corps model:

- Participating students show an average of 60% more progress in learning critical reading skills than their peers.
- Volunteers show significant decreases in depression and functional limitations in comparison to their peers.

In the Greater Boston area, Boston Public Schools Superintendent Carol Johnson has publicly lauded the program, as has the superintendent of the Revere Public Schools, indicating strong growth opportunities in both districts.

## TWO-YEAR GOALS

- Increase revenues by 31% to \$2.8 million per year
- Increase staff from 10 to 19
- Increase volunteer membership from 301 to 500
- Add additional healthy aging programming to augment current member direct service work
- Increase student reach from 12 to 15 sites
- Increase students served from 2,100 to 3,700

## WAYS TO INVEST

### Financial

- \$25,000 – Recruit, train, & deploy 5 teams of 15 members
- \$5,000 – Recruit, train, & deploy one team of members
- \$1,000 – Curriculum materials for one team of members

### In-kind

- Volunteer membership – join us in service!
- Public relations and marketing services
- Catering and space for training and events



*“The mentoring programs offered by Generations Incorporated are a lifeline for thousands of students who would otherwise be likely to drop out of school or even be involved in crime.”*

– SENATOR EDWARD M. KENNEDY

## SOCIAL INNOVATION IN ACTION – THE GENERATIONS INCORPORATED MODEL

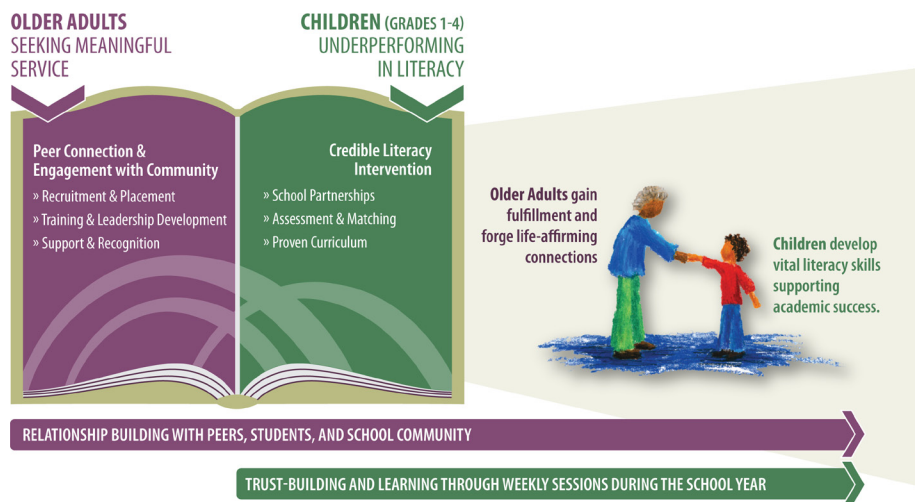
Generations Incorporated engages older adults to provide literacy tutoring for children struggling with reading. Through strong mentoring relationships, the organization’s evidence-based program drives proven results that improve children’s academic outcomes and volunteers’ lives.

### 1. Peer Connection and Engagement with Community

**Recruitment and Placement:** Generations Incorporated recruits its volunteers primarily from the communities surrounding its partner schools. Following a rigorous screening process, members are selected and assigned to peer teams of 15–20 members for orientation training and placement in schools.

**Training and Leadership Development:**

Throughout their service, members receive ongoing leadership and skills development opportunities through regular training sessions. Members attend 5–7 core pre-service training modules along with ongoing in-service trainings. Interested members have the option of training to become site team leaders.



**Support and Recognition:** Site team leaders manage and support members throughout their service. To ensure a sustainable and growing base of qualified volunteers, member recognition and appreciation are integral components of the organization’s volunteer management strategy. Through stipends and awards, members are regularly recognized for their service.

**Relationship Building with Peers, Students, and School Community:** Deliberate relationship building is a key component of the model, ensuring emotional and operational support for members, a fulfilling sense of community with school partners, and quality tutoring delivered to students. Monthly team meetings reinforce group cohesion, and members often organize extracurricular social events such as knitting clubs or coffee get-togethers.

### 2. Credible Literacy Intervention

**School Partnerships:** Strong partnerships with school districts are critical to successful execution of the Generations Incorporated model. Through these partnerships, the organization identifies which schools, classrooms, and students will benefit most from a literacy intervention. Targeted schools typically include those in low-income neighborhoods with persistently low reading scores.

**Assessment and Matching:** Longitudinal reading studies examining reading skills acquisition have repeatedly concluded that students with poor initial reading skills are likely to have poor reading skills later. As a result, Generations Incorporated targets students in grades 1–4 in order to provide the greatest opportunity for a student’s early and sustained academic success. Teachers participate in selecting students, prioritizing children who need additional literacy help but might “fall through the cracks,” rather than those whose needs are severe enough to require professional school resources. Students are administered pre- and post-assessment tests to measure literacy progress.

**Proven Curriculum:** Generations Incorporated employs a rigorous reading curriculum approved by the Boston Public Schools. It builds comprehension, vocabulary, and fluency through an interactive mix of writing, reading, and linguistics.

**Trust Building through Consistency:** Based upon the minimum effective dosage level indicated by the Washington University study, members follow a rigorous 1:1 service delivery model consisting of a minimum of 35 45-minute sessions, conducted no less than twice per week. Through these regular sessions, a strong bond develops between student and member.



## TEAM AND GOVERNANCE

Executive Director Mary Gunn joined Generations Incorporated in 2002, bringing 25 years of experience within the nonprofit sector. Prior to joining Generations Incorporated, she spent 12 years as the executive director of Bird Street Community Center in Dorchester, where she oversaw significant budget growth from \$100,000 to \$1.2 million while leading an increase in program quality and the number of youth programs offered. Tara Finnegan, director of Resource Development, is responsible for donor development, stewardship, and communications. Chrissy Holt, director of Finance and Administration, oversees day-to-day internal operations. A 17-member Board of Directors provides the organization with guidance and support, offering a diverse array of experience from the for-profit and nonprofit sectors with expertise in finance, resource development, business administration, the Greater Boston Public Schools, civic engagement, and law.

## FINANCIAL SUSTAINABILITY

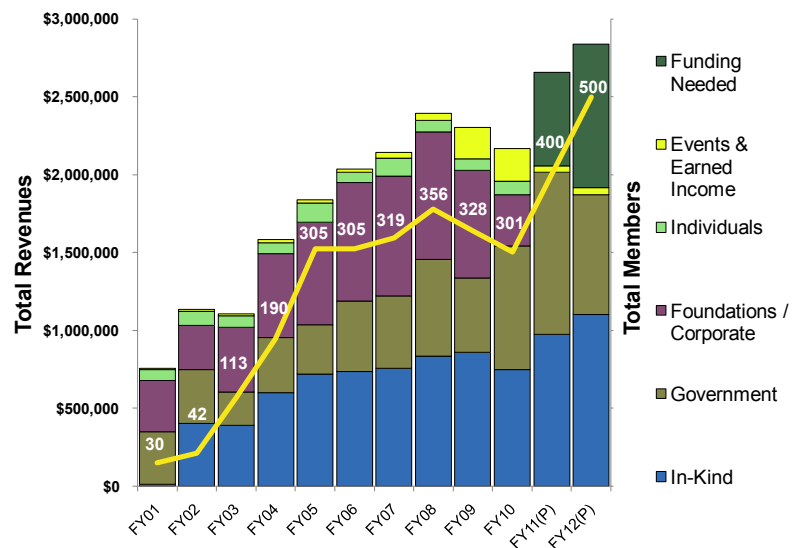
Generations Incorporated has grown substantially over the past 10 years and currently maintains a diverse revenue base of \$2.2 million. In-kind support, primarily member service time, is a key component of the organization's income, accounting for approximately 36% of revenues. Additionally, a stable and recurring stream of government dollars continues to flow to the organization, with \$1.8 million currently committed for FY11–FY12. Rounding out the organization's income are foundation grants, a growing stream of fees charged to schools, and a small but loyal individual donor base that Generations Incorporated would like to grow over time.

Like many nonprofits, the recession took a toll on the organization's FY09–FY10 revenues, resulting primarily in a scaling back of foundation dollars, which shrank nearly \$500k over that time. The organization's senior leadership took proactive measures to cut costs, scaling back staff salaries, member recruiting, and the number of sites served to ensure financial stability. It is important to note that the drop in members over this time reflects natural attrition due to aging out, rather than a loss of volunteers. Significantly, Generations Incorporated learned an important lesson during this time—redeploying its existing member base to fewer sites made it possible to serve a larger number of students less expensively. As a result, whenever feasible, Generations Incorporated now looks to meet the full need of a school before expanding to additional sites. With this new knowledge, and with the organization's financial future more assured, Generations Incorporated is now poised to grow again, with a two-year goal of growing annual revenues by ~30% to support the recruitment of an additional 200 members (a 66% growth to its volunteer base) to serve an additional ~1,500 students. The organization is seeking \$1.5 million over the next two years to help support this growth.

## KEY SOCIAL IMPACT INVESTORS

- Clowes Fund
- Corporation for National and Community Service
- Liberty Mutual
- Orchard Foundation
- Roxbury Trust Fund
- State Street Foundation
- Tufts Health Plan Foundation
- US Department of Justice

Revenue Sources and Projections



*"We are truly grateful to the 300+ volunteers who weekly give of their time and energy to encourage and inspire the hearts and minds of our students!"*

– Dr. Carol Johnson

SUPERINTENDENT, BOSTON PUBLIC SCHOOLS

## PERFORMANCE MEASUREMENT

**Program Performance and Organizational Health:** Generations Incorporated tracks both its program performance and organizational health across a number of dimensions. Below is a summary of the key measures the organization will continue to track over the coming years to demonstrate progress, capture lessons learned, and make course corrections as needed. *Note: Fiscal year is July 1 – June 30.*

	FY 2010	FY 2011 (P)	FY 2012 (P)
<b>Program Performance</b>			
Number of members volunteering annually	301	400	500
Number of students tutored	2,100	2,900	3,700
Member satisfaction rate	97% <sup>1</sup>	97%	97%
<b>Organizational Health/Capacity Building</b>			
Number of full-time-equivalent staff <sup>2</sup>	10	18.5	19.5
Number of new volunteers recruited <sup>3</sup>	--	160	180
% of schools paying fees for service	82%	90%	100%
Total revenue	\$2.2 million	\$2.7 million	\$2.8 million

<sup>1</sup> 2009 actual rate and 2010 target. Final results not calculated until June.

<sup>2</sup> Includes increasing existing staff time and adding staff to provide local site support.

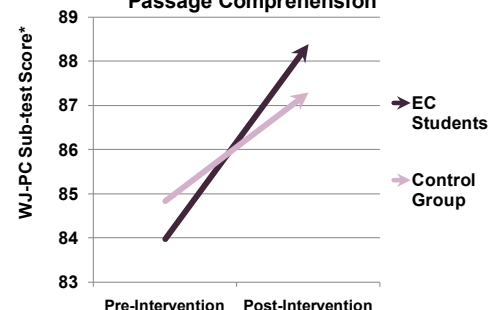
<sup>3</sup> Accounts for 20% health-related member attrition rate in addition to growth goals.

<sup>4</sup> Exclusive of potential DOE investing in innovation-related sites.

**Social Impact:** Currently, Generations Incorporated measures its social impact through an annual member survey and pre- and post tests to document student literacy gains. The organization also participated in a rigorous external control-trial study conducted by Washington University between 2007 and 2009. In that study, the impact of the organization's service delivery model on both members and students was compared with control groups, and the results were statistically significant. Members showed lower rates of self-reported depression and fewer functional or physical limitations, while students showed marked increases in grade-specific reading skills, passage comprehension, and phonemic awareness. Generations Incorporated is committed to continuously improving its operating model, and over the next two years will work with the national Experience Corps network to refine its measurement tools and processes to provide a deeper understanding of its impact.

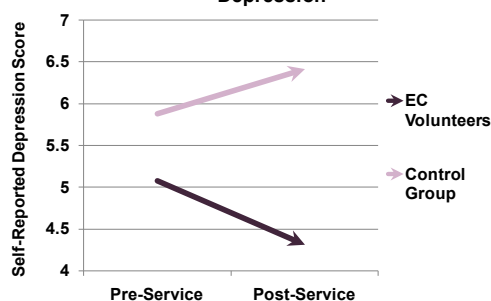
<b>Older Adults:</b> % of members exhibiting decrease of physical limitations	66%
<b>Students:</b> Average % of additional progress in learning critical reading skills over peers	60%

**Student Outcomes:  
Passage Comprehension**



\*Woodcock Johnson III Tests of Achievement

**Member Outcomes:  
Depression**



## Success Story: Mary Austin

Mary Austin was born and raised in South Boston and worked at the Boston Housing Authority for 40 years until she retired at age 65 with chronic back pain. Mary quickly realized that without a motivational activity to keep her socially engaged, her back pain would homebound her, increasingly isolating her from society. She wasn't sure, however, where to look for opportunities. Then she saw a Generations Incorporated advertisement and picked up the phone to volunteer.

Following her orientation, Mary began tutoring six students at Boston's Condon Elementary School. Despite her chronic pain, Mary rarely missed a day of service, stating frequently that seeing her mentees motivated her to get up and head to the Condon school each morning. On one such day, the site's coordinator heard loud music coming from Mary's tutoring room. Upon inspection, he found Mary and her student dancing to a hip-hop piece, using lyrics the student had written himself.

Mary served with Generations Incorporated for 10 years and said it was the most important work she'd ever done.

