

ROOT CAUSE'S SOCIAL INNOVATION FORUM

2012 Social Innovator Performance Report

INVESTING IN EMERGING INNOVATIONS



rootCAUSE 



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Letter from the Director

Dear friends and supporters,

As we celebrate the Social Innovation Forum's 10th year and enter our second decade of work, we are so pleased and excited to share with you both the results of our 2012 Social Innovators and the impact metrics from our first 10 years. Like their peers before them, our 2012 Social Innovators have collectively and individually grown, learned, and shared successes and challenges along the road. Their commitment to tracking their progress and making course corrections is just one of the many attributes that have propelled them forward and helped position them for continued growth and success.

At the Social Innovation Forum, we believe that performance measurement continues to serve as a valuable decision-making tool for both Social Innovators and the investors that support them. We believe performance measurement must be integrated into any assessment process and, if provided, will allow funders to effectively evaluate an organization and its impact. To this end, the Social Innovation Forum is committed to supporting the ongoing learning of its Social Innovators through our performance measurement process, which includes developing a set of performance metrics and tracking these metrics against established short-term goals on a quarterly basis.

To demonstrate our personal commitment to performance measurement, this past year we have looked back and assessed our own work. Over the past 10 years, we have collected data that validates that our work has made a difference. Our results show that the capacity building support we provide has assisted our Social Innovators in increasing their revenue 200% and their FTE's 275% on average within five years of their engagement with the Social Innovation Forum. We also noted that \$1 invested in the Social Innovation Forum corresponds to an average \$3 increase in budget for our Social Innovators within 24 months of the Social Innovation Forum engagement.

Our approach to performance measurement is based on a methodology developed through Root Cause's consulting practice: **Measure, Report, Learn, Improve, and Repeat**. It is alongside our partners – both Social Innovators and investors – that we achieve our results and help both our nonprofit and philanthropic partners advance their goals.



Measurement is valuable not as an end in itself, but as a means to help organizations and investors deepen their impact. We are delighted to share this report with you and look forward to another 10 years of collaboration.

Regards,

Susan Musinsky
Director, Social Innovation Forum



About Root Cause

We believe resources allocated based on performance will accelerate progress on social issues.

Root Cause is driven by a passion for shaping the future of social problem solving. Our services and programs individually and collectively bring together nonprofit, philanthropy, government, and business to advance solutions to today's toughest social issues by helping them understand and invest in what works. Our decade of work to accelerate performance shows that sustained change happens when resources flow to organizations committed to continuous improvement to ensure they are maximizing their impact.

Founded in 2004 by Andrew Wolk, Root Cause is a nonprofit research and consulting firm that partners with nonprofits, philanthropy, government, and business to advance solutions to today's toughest social issues. We have been on a journey to bring these sectors together to foster social innovation and invest in what works.

why we exist

**We believe resources allocated based on PERFORMANCE
will ACCELERATE PROGRESS on social issues.**



WHAT WE DO

Since 2003, Root Cause has improved the performance of more than 200 organizations and funders in a wide range of social service sectors, including economic empowerment, education and youth development, and health and well-being.

We help organizations accelerate their performance by:

- Understanding how their performance stacks up against their peers
- Developing actionable roadmaps to grow their impact
- Putting them on a path to sustainability
- Communicating their value to diverse group of funders

We help funders put their money where the impact is by:

- Developing, executing, and monitoring a strategy and plan
- Assessing the impact of current or potential grantees

We work collaboratively with organizations to move them from working day to day to address social issues to improving their performance towards realizing tangible and sustainable results.



About the Social Innovation Forum

Root Cause’s Social Innovation Forum provides a unique opportunity for innovative nonprofit organizations to gain visibility, expand their networks, and build capacity. Each year, the Social Innovation Forum partners with leading local funders to select outstanding nonprofits working on the most pressing social issues in greater Boston. We offer our Social Innovators consulting and executive coaching support and introduce them to a community of social impact investors interested in supporting them with financial or in-kind resources, volunteer time, and personal referrals or connections.

A RIGOROUS PROCESS FOR IDENTIFYING SOCIAL INNOVATORS

Through an extensive process involving social issue experts, philanthropists, and leading practitioners, the Social Innovation Forum selects innovative, effective organizations poised for growth and increased social impact. For the 2013–2014 Social Innovation Forum, more than 100 organizations applied for the small number of available slots. By drawing on the expertise of the community in our due diligence process, we are able to assure investors and pro-bono partners that an investment in the Social Innovation Forum or in one of our portfolio groups will yield significant social impact.

A PROVEN APPROACH TO SUPPORTING SOCIAL INNOVATORS

Once selected, Social Innovators receive 18 months of support from the Social Innovation Forum:

- **Consulting:** Articulation of social impact model and growth plan, and preparation of a PowerPoint presentation for investors and a four-page prospectus
- **Executive Coaching:** A year of guidance from an experienced, professional executive coach
- **Presentation Advising:** Presentation and messaging support from a high-level business executive
- **Graphic Design:** Creation of a professional-looking PowerPoint deck for investment presentations and design of an operating model graphic
- **Relationship Building:** Advice on fundraising strategies as well as visibility at Social Innovation Forum organized events to raise organizational profile
- **Measurable Outcomes:** Selection of performance metrics and targets, quarterly progress reporting, and opportunities to present successes and lessons learned to potential funders

STRATEGIC PHILANTHROPY: EDUCATION AND COMMUNITY FOR SOCIAL IMPACT INVESTORS

The Social Innovation Forum provides a space to learn about key social issues, effective organizations, and the best ways to leverage skills and resources for social change. We host a number of events throughout the year that provide opportunities for our community members to meet other investors, discuss social issues and the nonprofit landscape, and learn from leading practitioners. Events include our Social Issue Talks in the spring and our signature Social Innovator Showcase, at which the year’s Social Innovators present their unique approaches to solving social problems.

HOW TO GET INVOLVED

LEARN	Attend our spring Social Innovator Showcase and invite others who might consider contributing to the Social Innovators Attend our events about social innovation and strategic philanthropy throughout the year
ENGAGE	Volunteer to advise a Social Innovator with your business expertise Ask about opportunities to engage with our Social Innovators or visit our website
PARTNER	Host an event and bring social innovation to your workplace Become an in-kind service partner
INVEST	Sponsor a social issue track Join our community of angel investors Invest in the Social Innovation Forum or one of our Social Innovators



Performance Measurement and the Social Innovation Forum: How It Works

Root Cause’s Social Innovation Forum is committed to supporting the ongoing learning of its Social Innovators. This includes helping our Social Innovators to make use of performance measurement, which enables them to monitor their progress in achieving their missions and identify opportunities for improvement.

PERFORMANCE MEASUREMENT AND SOCIAL INNOVATION

Root Cause believes that social innovation is an ongoing process of testing and improving potentially transformative approaches to difficult social issues. Performance measurement is essential to the development of emerging social innovations. Thoughtful analysis of program performance, organizational health, and social impact ensures that Social Innovators are learning and making improvements that will increase their social impact.

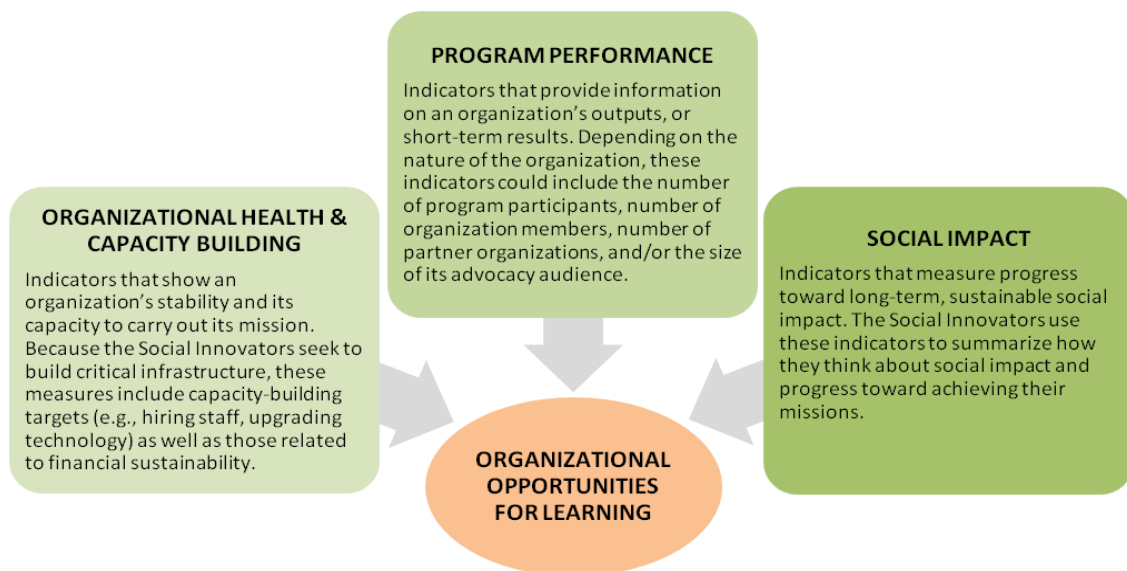
OUR PROCESS: EMPOWERING SOCIAL INNOVATORS TO USE PERFORMANCE MEASUREMENT

- STEP 1** Through their work with the Social Innovation Forum, our Social Innovators **define a set of indicators and targets** that will enable them to measure and improve performance.
- STEP 2** In the year following this work, the Social Innovation Forum holds **quarterly check-ins with the Social Innovators to help analyze the results** and make recommendations. This *2012 Social Innovator Performance Report* marks the culmination of that process: a public report on the lessons learned from performance measurement.

OUR METHODOLOGY: THE ROOT CAUSE APPROACH TO PERFORMANCE MEASUREMENT

Based on a series of defined indicators of success, Root Cause helps organizations develop a customized, internally driven performance measurement system designed to heighten their potential for social impact. The system is designed with two objectives in mind: 1) to meet stakeholder requirements, and 2) to empower the leadership of these organizations to track performance, learn from the data, and engage in data-driven decisions focused on continuous improvement.

Our approach, based on a methodology developed through Root Cause’s consulting practice, emphasizes a triad of indicator categories which provide a comprehensive snapshot of the organization’s position:





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Cooking Matters Massachusetts, a program of Share Our Strength



SHARE OUR STRENGTH'S
**COOKING
MATTERS™**
NO KID HUNGRY

FOUNDED: 1994
CURRENT ORGANIZATION
BUDGET: \$585,890
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WEB:
www.cookingmatters.org/mass

Share Our Strength's Cooking Matters® Massachusetts empowers low-income families with the skills to stretch their food budgets so their children get healthy meals at home. Cooking Matters MA partners with community organizations and volunteer culinary and nutrition instructors to offer six-week cooking courses and grocery store tours. Participants learn to shop smarter, use nutrition information to make healthier choices, and cook delicious, affordable meals. Serving a diverse population of low-income families—most of whom are enrolled in programs including SNAP (food stamps) and WIC—Cooking Matters MA envisions a future in which all Massachusetts children have the nutritious foods they need to grow, learn, and thrive, and all parents and caregivers have the knowledge and skills to prepare delicious and balanced meals.

The Cooking Matters Massachusetts Model



INVESTMENT OPPORTUNITY

Cooking Matters MA aims to raise \$1 million over the next two years to support the continued expansion of its program. Providing more families with the opportunity to participate in courses and tours will require on-going development of a strong state-wide volunteer base, building internal capacity, and raising community awareness of the availability of Cooking Matters programming.

ONE-YEAR ACCOMPLISHMENTS

- Secured funding to develop a volunteer instructor certification program
- Relocated the office from Quincy to Boston, providing more suitable and accessible space for group trainings
- Significantly increased one-time engagement opportunities for participants and volunteers
- Expanded programming into Holyoke, Pittsfield, North Adams, Athol, Fitchburg, Leominster, Webster, Gardner, and Barre

WAYS TO INVEST

FINANCIAL

- \$50,000 – Provides all the groceries used in courses for a year
- \$4,000 – Sponsors a six-week signature course, reaching eight to 16 families
- \$100 – Funds a grocery store tour for 10 families

IN-KIND

- Groceries or grocery gift cards
- Cooking utensils for course graduates
- Volunteers to help in courses or to lead grocery tours

LESSONS LEARNED

During FY 2013, Cooking Matters MA observed a slight reduction in the graduation rate from its six-week courses. This change was linked to community partners who were enthusiastic about providing this programming but lacked the capacity to effectively recruit program participants. In response, Cooking Matters MA developed new ways to assess and support potential partners in order to ensure the highest levels of effectiveness.

Cooking Matters MA faced an additional challenge when federal SNAP-Education funding was reduced this year. Cooking Matters MA had to scale back its plans to accelerate expansion of six-week courses in central and western Massachusetts. However, despite the federal cuts, Cooking Matters staff were still able to expand delivery of effective programming by increasing the number of grocery tours offered into nine new cities and towns.



SUCCESS STORY: MISHY

A single mother of two young boys, MiShy struggled with challenges familiar to many parents around mealtime: time constraints and finding healthy foods kids will eat. Now a graduate of a Cooking Matters MA course, MiShy feels confident in her new abilities to shop strategically, make healthier food choices, and prepare nutritious and affordable meals that she and her boys will enjoy.

Program Performance and Organizational Capacity

Below is a summary of the key measures that Cooking Matters MA is tracking to demonstrate progress, capture lessons learned, and make course corrections as needed. Note: Fiscal year is January 1 – December 31.

	FY 2012	FY 2013 (P)	FY 2013 (A)
PROGRAM PERFORMANCE			
Graduate more families from six week courses	1,000	1,250	1,000
Maintain graduation rate for six week courses	91%	91%	87%
Reach more families through educational outreach events	500	4,000	3,000
Expand presence in central and western Massachusetts	--	Initiate accelerated regional expansion strategy	Expanded programming into nine new cities/towns
ORGANIZATIONAL CAPACITY			
Establish Cooking Matters MA volunteer certification program	Engage to design program	Pursue program research and development	Certification program complete
Add an educational event coordinator and two new course coordinators to the staff	Hire educational outreach event coordinator	Hire a course coordinator	Added 1.5 FTE to support educational events and courses
Establish and implement a strategic development plan	Develop plan	Implement plan	Plan developed, implementation pending
Total revenue	\$420,000	\$672,000	\$585,890

Social Impact

Cooking Matters MA measures the extent of the changes in behavior, skills, and confidence that participants report at the conclusion of a six-week course— in regard to nutrition, food budgeting, and cooking. The table below reflects a sample of the behavior change data tracked in all six-week courses. Successful results are consistent from course to course and year to year.

FREQUENCY WITH WHICH COURSE PARTICIPANTS NOW:	
Plan meals ahead of time	+58%
Use the "Nutrition Facts" label to make food choices	+144%
Eat at least 2.5 cups of vegetables per day	+46%
Eat at least 2 cups of fruit per day	+53%
Drink more water	+60%
Run out of food before getting money to buy more	-18%
Thaw frozen food at room temperature	-49%

InnerCity Weightlifting



FOUNDED: 2010

CURRENT ORGANIZATION BUDGET: \$680,000

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WEB: www.innercityweightlifting.org

INVESTMENT OPPORTUNITY

InnerCity Weightlifting is seeking \$750,000 per year for two years to meet the demand for its program expansion.

InnerCity Weightlifting (ICW) improves the life trajectories of Boston's youth at the highest risk for violence by providing compelling opportunities for them to avoid violence and choose productive paths. Using the sport of weightlifting to get gang-involved young people off the streets and into the gym, ICW builds meaningful relationships and a support network for each student. Its program revolves around the students' core needs: education, career development, life skills, self-esteem, and optimism. Students who demonstrate their commitment to the program become eligible for a paid internship and participation in a certified personal training course. Upon completion of the course, they may run their own personal-training business within ICW, providing a pathway to a viable career.

As participation in ICW is entirely voluntary, students who come to ICW have a genuine interest in change. When they see peers whom they respect making positive choices, and they see adults whom they respect supporting these choices, the path to change comes into focus. Youth involved in gang violence are often considered to have insurmountable barriers to living productive lives; yet, ICW has shown that by meeting certain conditions these students can and will elect to transform their lives. Through its work with Boston's youth and young adults at the highest risk of violence, ICW brings positive change to the broader community and aspires to significantly reduce coordinated youth violence across the city.

ONE-YEAR ACCOMPLISHMENTS

- Opened its first, dedicated training space
- Hired 10 students as paid personal trainers
- Began training at its first corporate site, Microsoft in Cambridge, and grew from two personal training clients to more than 100
- Received awards from Babson College, Boston Celtics, BostInno (one of "50 on Fire"), Good Sports, and Year Up
- Featured on ESPN's Sports Center and the cover of the Sunday Boston Globe

WAYS TO INVEST

FINANCIAL

- \$450,000 – Provide an additional training facility located in an area that will be safer for students and more lucrative for personal training; this will also allow rival groups to train in different facilities
- \$30,000 – Pays salary for coach to be deeply involved with 20 target students
- \$15,000 – Enrolls five new students in our certified, personal-training career track
- \$20 – Buys a personal-training session with an ICW student

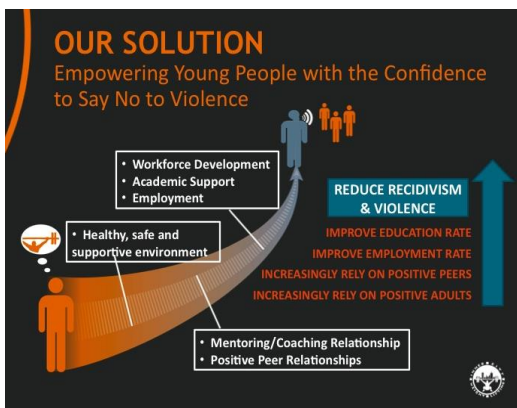
IN-KIND

- Individual or corporate-sponsored personal-training contracts
- Contacts with property managers or gym owners
- Coaches committed to student transformation

LESSONS LEARNED

To work with the ICW target population, the starting point is to build a solid relationship with each student and to care about the student more than the outcome. Because ICW's approach is so personal and intentional, the staff coached more target students and fewer secondary students than planned this past fiscal year. However, the staff spent more hours per week with those secondary students.

The InnerCity Weightlifting Model



SUCCESS STORY: JOE S.

Joe had never been out of jail more than 30 days and he hadn't celebrated a birthday since he was 11. Today, he has been out of jail for 2 years, and recently celebrated his second birthday in a row out of jail! He has more than 15 personal training clients and is the assistant manager at InnerCity Weightlifting.

Program Performance and Organizational Capacity

Below is a summary of the key measures that ICW is tracking to demonstrate progress, capture lessons learned, and make course corrections as needed. Fiscal year is July 1 – June 30. *Note: ICW's target students are young adults most likely to be perpetrators or victims of gun violence in Boston. A secondary cohort of students consists of friends invited by the target group. This combination allows ICW to create an environment that is more comfortable and effective for target students.*

	FY 2012		FY 2013 (P)		FY 2013 (A)	
PROGRAM PERFORMANCE						
Number of students receiving coaching (target and secondary students)	42	41	50	100	67	50
Number of hours per week with coach (target and secondary students)	6	3	15	6	15	8
Net promoter score (percentage of students, after six practices, inviting others to ICW)	100%		100%		100%	
Percentage of target students retained after three practices	95%		90%		97%	
Number of personal training clients	4		50		83	
ORGANIZATIONAL CAPACITY						
Secure a lease for a facility to be used exclusively for ICW and expand the number of facilities	--		Secure lease to exclusive facility		Secured	
Hire additional coaches	Hired 2 coaches		Hire 2 additional coaches		Hired 2 part-time coaches	
Expand staff capacity (business development manager, programming manager, volunteer manager)	Hired programming manager		Hire development officer		Hired part-time development officer	
Enhance tracking tools for program and operational evaluation	Crafted rudimentary tracking tool		Further develop tracking tool		Hired data evaluation specialist	
Total revenue	\$480,000		\$710,000		\$570,000	

Social Impact

ICW uses the metrics below to measure its effect on students and is developing enhanced tracking tools to provide a deeper understanding of its effect on students in the near and long term. Although it is complex to measure, ICW is also interested in understanding how its role in facilitating relationships between students and personal training clients builds social capital and leads to attitude and systems changes.

STUDENT PRO-SOCIAL CHOICES		
Net promoter score (percentage of students, after six practices, inviting others to ICW)	100%	
Percentage of violent crime recidivism after six months in program (target and secondary students)	16%	3%
Percentage of non-violent crime recidivism after six months in program (target and secondary students)	7%	1%
Percentage of students experiencing their longest tenure from last arrest	83%	
Number of students in Student Apprenticeship Program	18	
Percentage of students in apprenticeship program with repeat clients	100%	

The LGBT Aging Project



FOUNDED: 2001
CURRENT ORGANIZATION BUDGET: \$262,000
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The LGBT Aging Project is the premier organization in New England dedicated to ensuring that lesbian, gay, bisexual, and transgender older adults and their caregivers have equal access to the life-prolonging benefits, protections, services, and institutions that their heterosexual neighbors take for granted. LGBT elders are more likely to lack traditional family networks of care, and thus are more likely to need formal care providers' services. However, LGBT elders also face significant barriers to accessing mainstream services and benefits, leaving many socially and financially vulnerable.

The LGBT Aging Project works in three key areas. First, it provides training and technical assistance through the Open Door Task Force (ODTF), an innovative multi-session approach that educates mainstream elder service providers about LGBT cultural competency, helping agencies build their institutional capacities for creating and sustaining LGBT-welcoming environments. Second, it partners with mainstream service providers to develop community-building programs for LGBT older adults and caregivers. Third, the LGBT Aging Project works to enact policy and legislative changes to improve access to care and benefits for LGBT elders. Through these activities, the LGBT Aging Project ensures that LGBT older adults can live healthy, vibrant lives and age with dignity and respect.

The LGBT Aging Project Model



INVESTMENT OPPORTUNITY

Over the next two years, the LGBT Aging Project will require an investment of approximately \$600,000 in order to expand its reach to new markets of providers and to serve a greater number of LGBT older adults and caregivers.

ONE-YEAR ACCOMPLISHMENTS

- Incorporated into The Fenway Institute, the research, education and policy division of Fenway Health
- Awarded \$100,000 grant through the Cummings Foundation's "100k for 100"
- Successfully advocated for the creation of a Special Commission on LGBT Aging, the first statewide LGBT Aging Commission in the country

WAYS TO INVEST

FINANCIAL

- \$25,000 – Supports half the salary of a full-time trainer
- \$2,500 – Funds a monthly LGBT support group for one year
- \$1,000 – Funds one day of ODTF cultural competency training for up to 80 individual aging service providers

IN-KIND

- Advisory committee members
- Events to raise awareness about the organization and issues

LESSONS LEARNED

A lot can happen in a year.

In the final quarter of 2012, an unexpected funding shortfall resulted in the suspension of the planned staffing and program expansion.

Then in early 2013, Fenway Health presented the LGBT Aging Project with a Letter of Intent to incorporate the Aging Project into The Fenway Institute, their division for research, training and policy.

This new relationship provides the LGBT Aging Project with significant infrastructure support, including a development team, as well as greater opportunities for growth.

At the same time, Fenway Health is able to show its sincere commitment to LGBT older adults by engaging with an established leader in the field.

Effective July 1, 2013, the LGBT Aging Project is a program of The Fenway Institute and will be focused on this transition, growth and expansion in the coming years.



Program Performance and Organizational Capacity

Below is a summary of the key measures that the LGBT Aging Project is tracking to demonstrate progress, capture lessons learned, and make course corrections as needed. Note: Fiscal year is July 1 – June 30.

	FY 2012	FY 2013 (P)	FY 2013 (A)
PROGRAM PERFORMANCE			
Number of ODTF agencies engaged per year	6	8	6
Number of fee-for-service trainings	0	Develop and launch	Launching in FY 14
Number of LGBT elder meal sites running	6	9	9
Number of LGBT elder social and educational programs per year	10	12	14
Number of speaking engagements on LGBT aging and caregiving	50	60	69
ORGANIZATIONAL CAPACITY			
Add ODTF trainer	n/a	Search and hire	Trainer starts in FY 14
Add development contractor (part time)	n/a	Search and hire	No longer needed due to affiliation with Fenway Health
Add steering committee members	4	2	Developed sub-committees with current members
Total revenue	\$280,000	\$293,000	\$262,000

Social Impact

The LGBT Aging Project measures the social impact of its training and programs primarily through participant evaluations. Every participant fills out a survey prior to the training program and then again at the program's completion. Another indicator of the organization's impact is the high number of agencies receiving training that then choose to engage in LGBT programming. In addition to the data the organization has gathered, there is also significant evidence showing that agencies that have completed ODTF engagement are better at serving LGBT people among their clients.

INDICATOR	
ODTF training participants who rate the value as high	78%
ODTF training participants who would recommend the program to others	77%
ODTF organizations that engage in LGBT social and educational programming	80%
LGBT bereavement group participants who rate highly the importance of an LGBT-specific group experience	85%

SUCCESS STORY: ELLEN, LGBT MEAL SITE PARTICIPANT

Ellen, an 80 year old woman, had been married with children, and carried a secret with her throughout her life. A battle with breast cancer made her realize she needed to be honest with herself and come out as a lesbian. Because of her age the challenge of driving to LGBT gatherings in the city made her increasingly isolated from her new found community. Ellen then learned about the Lakeside LGBT Café operated by The LGBT Aging Project. Ellen called the meal site "an answer to a prayer, and I had stopped praying for something like this."

Science Club for Girls



**Science
Club
for Girls**

FOUNDED: 1993

CURRENT ORGANIZATION BUDGET: \$520,000

CONTACT: Connie Chow

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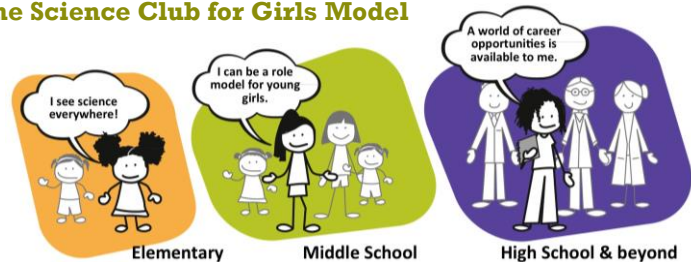
Science Club for Girls (SCFG) is an out-of-school-time program for girls designed to increase their excitement, confidence and literacy in science, technology, engineering, and mathematics (STEM). SCFG provides free programs that offer fun hands-on learning, teaching, and leadership opportunities, with adult scientists guiding girls from elementary to high school. Girls in general, and particularly those in disadvantaged communities, face negative stereotypes and often develop a sense of inadequacy in math and science subjects, despite their actual ability. The gap between their confidence and ability leads girls away from academic study and professional careers in STEM fields.

SCFG creates a platform that brings together age-appropriate, hands-on curricula, leadership development, role modeling in STEM, and a near-peer mentoring model to serve both young and teen girls in a community setting. SCFG's "whole girl" approach transforms girls' attitudes, identities, and confidence as STEM learners, broadening their horizons and instilling a belief in their ability to succeed in whatever field they choose.

INVESTMENT OPPORTUNITY

In order to increase the number of Science Clubs offered in Boston and Lawrence, expand the SCFG curriculum in middle school grades, and pilot an expansion outside of Massachusetts, SCFG is seeking a \$1.7 million investment over the next two years.

The Science Club for Girls Model



ONE-YEAR ACCOMPLISHMENTS

- Increased school-year enrollment by 35%
- Successfully piloted a high-school STEM internship program with six placements
- Hired a contract COO and a full-time, senior program director
- Sent Rocket Team teens to national finals
- Added five new board members

WAYS TO INVEST

FINANCIAL

- \$50,000 – Funds planning and execution of pilot expansion of K-5 clubs beyond MA
- \$25,000 – Funds expansion of middle-school "STEMinista" project-based learning program
- \$10,000 – Funds the launch of a new science club site
- \$2,000 – Supports a teen participant for a year

IN-KIND

- 2,000 square feet of office space to house SCFG operations
- A van to transport students and equipment
- Tablets to supplement clubs with multimedia resources
- Internship placements

LESSONS LEARNED

- Teens want in-depth experiences. Surveys of challenge team members revealed that girls are eager for substantive STEM experiences to deepen their learning. We leveraged our network to create a pilot internship program to place girls in a professional or academic environment, match them with mentors, so they could develop research, project management and communication skills that will boost their pursuit of STEM pathways. We will be expanding this program in FY14.
- Systems and capacity are critical to expanding development efforts. While we were eager to step up our development efforts, an evaluation of our operational needs and fundraising assets suggested that our resources were better allocated to a contract staff who could organize internal processes, leaving the ED to spend more time on increasing fundraising capacity. This included recruiting new board members to contribute to this effort. While this year's revenue did not meet our initial goal, the foundation we have since built will help move us further in coming years.



SUCCESS STORY: JORDAN P.

Jordan is a senior at Cambridge Rindge and Latin School. She became a junior mentor in 7th grade and grew to love mentoring young girls and engaging them in science activities. This past summer, as a member of Young Leaders in STEM, she fell in love with computer programming after a two-day workshop. She didn't get into the Computer Science class that was offered at her school, but because of Science Club for Girls, she is now an intern at Bocoup, an open web development company. She is working on a project that is designed to track her varsity indoor track team's individual race times and relay times, and predict the run times for each runner at track meets. She is happy that she has an internship that satisfies her curiosity, allows her to connect with inspiring and caring mentors, and to gain new skills.

Program Performance and Organizational Capacity

Below is a summary of the key measures that SCFG is tracking to demonstrate progress, capture lessons learned, and make course corrections as needed. Note: Fiscal year is July 1 – June 30.

	FY 2012	FY 2013 (P)	FY 2013 (A)
PROGRAM PERFORMANCE			
Number of Science Clubs	40	50	48
Number of girls participating in Science Clubs	400	500	543
Number of junior mentors	80	100	116
Number of mentor-scientists	80	100	113
Number of challenge teams/competitions entered	4	5	6
ORGANIZATIONAL CAPACITY			
Develop and implement middle-school Science Club curriculum	--	Engage consultant to build curriculum	Piloted 3 modules
Increase program staff capacity	--	Add 1 FTE (teen programs)	Hired FT senior program director
Professionalize development and partnership building	--	Hire director of strategic development	Hired COO
Increase corporate support	\$145,000	\$245,000	\$275,000
Total revenue	\$400,000	\$600,000	\$520,000

Social Impact

In the spring of 2012, SCFG conducted an evaluation of girls in fourth through sixth grade to determine how its programming impacts girls' attitudes toward STEM. Survey results showed a marked difference in attitudes and career interests between girls who have participated in SCFG for at least two years and new participants.

INDICATOR OF SCIENCE ATTITUDE TRANSFORMATION	VETERAN SCFG PARTICIPANTS		NEW SCFG PARTICIPANTS	
	Science	Engineering	Science	Engineering
Self-perception of aptitude	85%	71%	78%	58%
Awareness of STEM careers	77%	72%	57%	55%
Likelihood to pursue STEM careers	62%	54%	44%	38%
Looking forward to science class	77%		55%	

Tempo Young Adult Resource Center, a program of Wayside Youth & Family Support Network



FOUNDED: 2007
CURRENT ORGANIZATION BUDGET: \$466,788
CONTACT: Yolanda Ortiz
PHONE: 508.879.1424
EMAIL: yolanda_ortiz@waysideyouth.org
WEB: www.tempoyoungadults.org

Tempo Young Adult Resource Center co-locates multiple community resources from across MetroWest Boston into a single “one-stop” site where transition-age youth (ages 17-24) access support as they move toward self-sufficiency. Tempo provides unconditional support to young adults, many of whom are transitioning from the streets, the criminal justice system, or foster care.

On-site resources—provided through Wayside and four collaborating partners—include employment support, health screenings, legal advice, education assistance, and housing search guidance. There are no eligibility restrictions for the resources at Tempo.

Whether for help with one specific issue or for complex, interrelated goals, Tempo teams with young adults to develop high-intensity, individualized plans to reach their objectives. Tempo fosters skills of independent living, community service, and peer leadership, and shares governance with a Young Adult Advisory Council, empowering young people in their own lives. Tempo’s vision is that all young people will have strong, resilient foundations for adulthood—anchored in the education necessary to secure meaningful employment and supported by stable mental and physical health.

The Tempo Model



INVESTMENT OPPORTUNITY

Tempo is seeking to raise \$140,000 over two years to build capacity, plan for long-term financial sustainability, and expand resource offerings that build a pathway toward meaningful employment for young adults.

ONE-YEAR ACCOMPLISHMENTS

- Received \$250,000 in new funding from the state of Massachusetts
- Successfully launched a micro-enterprise, *Green House Graphics* – a youth-run, graphic design company
- 72% of young adults on probation who worked with a Tempo Transition Facilitator successfully completed probation
- 25 young adults were newly enrolled in health insurance
- More than 60 young adults participated in leadership opportunities

WAYS TO INVEST

FINANCIAL

- \$50,000 – Pays salary and benefits for transition facilitator to support young adults in comprehensive planning
- \$25,000 – Hires a career specialist for one year to provide one-on-one consultation to more than 300 young adults
- \$10,000 – Sponsors a part-time nurse on-site for one year
- \$1,600 – Provides full range of Tempo resources to one young adult for one year

IN-KIND

- Fundraising and marketing support
- Database and outcome measurement support
- A passenger van for youth transport to employment and other resources
- Employment leads and opportunities for young people

LESSONS LEARNED

Over the last year, Tempo has deepened its understanding of its target population, observing, for instance, that many young adults are resistant to behavioral health treatment. Furthermore, Tempo found that young adults are often overwhelmed by the wait for insurance and that insurers generally provide inadequate coverage for substance abuse treatment. Tempo has also learned that young adults prefer to engage in activities with their peers, often reaping the benefits of mental health counseling in nontraditional settings, such as peer support groups, and through the formation of strong relationships with their peers. Lastly, Tempo has realized that workshops focused on healthy eating, fitness, and healthy relationships tend to increase the likelihood that a young adult will engage in behavioral health services and seek a primary care physician.



“When I’m at Tempo I feel a part of something that is bigger than just a resource center. I feel welcomed, and more important, I feel safe.

SHANE, AGE 21

Program Performance and Organizational Capacity

Below is a summary of the key measures that Tempo is tracking to demonstrate progress, capture lessons learned, and make course corrections as needed. Note: Fiscal year is July 1 – June 30.

	FY 2012	FY 2013 (P)	FY 2013 (A)
PROGRAM PERFORMANCE			
Grow the number of youth who visit Tempo each year	300	350	300
Increase the percentage of youth working with a transition facilitator through comprehensive planning process	15%	20%	20%
Invest in professional development/skills training annually for peer mentors and Young Adult Advisory Council	Identify skill areas to target for growth	Conduct 2 trainings and gather feedback	Conducted 2 trainings
Expand calendar of weekly workshops held on site in areas of health, employment, legal matters, and life skills	1.5 per week	2 per week	2 per week
Increase percentage of participants completing six-month reassessment survey after work with transition facilitator	70%	85%	75%
ORGANIZATIONAL CAPACITY			
Enhance database and outcome evaluation	Develop database capabilities	Input all current and past data	All data entered
Hire career specialist (0.5 FTE) .	--	Secure funding	Funding secured
Hire three full-time transition facilitators (1 FTE)	--	Secure funding	Funding secured
Develop and implement strategic fundraising plan	Develop	Implement	In development
Host quarterly open houses to cultivate prospective funders	Plan	Launch	Regularly hosting 2 per year
Increase total revenue	\$450,000	\$489,000	\$466,788

Social Impact

Currently, Tempo uses the metrics below to measure its impact on those youth engaged in a comprehensive planning process with a transition facilitator. One of Tempo’s short-term goals is to develop a more robust evaluation system to capture impact data beyond a participant’s immediate involvement, as well as data about youth not involved in comprehensive planning.

INDICATOR	
Improved their education (graduated from high school, started college, continued working on GED or vocational training)	63%
Found a new job and/or stayed employed	86%
Kept or improved housing	92%
Stayed out of trouble with police and/or successfully completed probation	83%
Stayed clean and sober through recovery	50%
Obtained applicable health insurance benefits	90%

WorkExpress, a program of Father Bill's & MainSpring

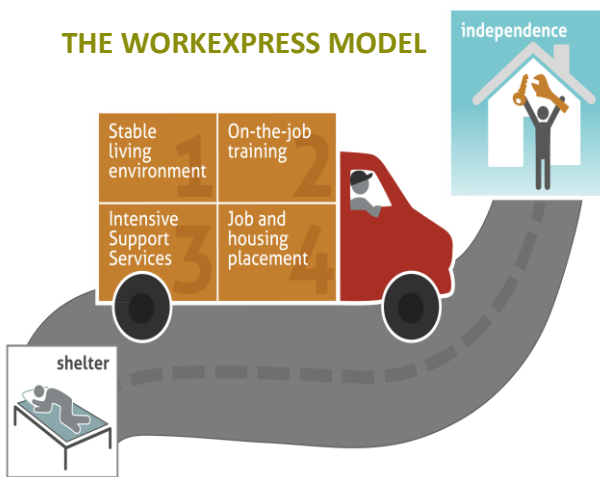


FOUNDED: 1996
CURRENT PROGRAM BUDGET: \$593,852
CONTACT: Paul Key
PHONE: 508.894.8520 x201
EMAIL: pkey@helpfbms.org
WEB: www.workexpress.org

WorkExpress is a social enterprise that provides commercial maintenance and cleaning services to customers in southeastern Massachusetts. Operating within Father Bill's & MainSpring (FBMS), a nonprofit organization providing shelter, housing, and services to meet the needs of the homeless, the purpose of WorkExpress is to help homeless men and women achieve self-sufficiency through regular employment and stable housing. Through WorkExpress, FBMS provides participants with a stable living environment, supportive case management, positive work experience, and assistance in finding employment and permanent housing.

WorkExpress enrolls FBMS shelter guests who are not ready for job and housing placement due to various obstacles, but who demonstrate a commitment and physical ability to overcome their barriers to self-sufficiency. Men and women, most in the early stages of sobriety, work in landscaping, commercial cleaning, apartment rehab, painting, and graffiti removal. Founded as a social service program, WorkExpress was restructured as a social enterprise in 2009. Since then, earned income has grown to cover 78 percent of the budget from 48 percent. In the same period, graduation rates doubled, and today 94 percent of graduates find employment and 100 percent find permanent housing.

THE WORKEXPRESS MODEL



INVESTMENT OPPORTUNITY

WorkExpress aims to raise \$200,000 over the next two years to achieve its goals, including growing by 20 percent to serve 60 homeless men and women annually by fiscal year 2015; expanding its reach in southeastern Massachusetts; and hiring the staff necessary for sustainable growth.

ONE-YEAR ACCOMPLISHMENTS

- Served 50 men and women in FY13
- 100% of graduates completed the curriculum with stable housing
- 94% of graduates secured employment within six months of completing the program
- 89% of graduates retained employment for a minimum of six months
- Hired a full-time program coordinator
- Established 62 new on-the-job training opportunities in Quincy, including a \$30,000 annual contract with a leading real estate company

WAYS TO INVEST

FINANCIAL

- \$25,000 – Provides a portion of salary for a case manager
- \$25,000 – Pays for crew-cab pickup truck used to transport material and crew to jobs
- \$5,000 – Covers comprehensive support services or wages for one new WorkExpress participant
- \$1,000 – Buys a floor buffer, lawn mower, and other vital tools

IN-KIND

- Customer leads
- Work supplies and equipment
- Residential space

LESSONS LEARNED

- Not building capacity fast enough, specifically in hiring a program coordinator, affected certain outcomes. While earned income and job placements increased over prior year, graduation rate decreased due to being understaffed. WorkExpress hired a coordinator in the Spring of 2013 and since that time revenue has increased by 50% and the graduation rate by 15%.
- Adding a Graduate Mentor component led to improved employment rates. Motivated grads still looking for work continued in a supervisory capacity and served as role models to other participants. One recent graduate was hired onto the WorkExpress staff as a crew supervisor.
- WorkExpress emphasized program quality over growth, as its program expansion to the Quincy site (and corresponding increases in staff) were delayed because a critical component of program success, private dormitory space for participants, was not available.



Program Performance and Organizational Capacity

Below is a summary of the key measures that WorkExpress is tracking to demonstrate progress, capture lessons learned, and make course corrections as needed. Note: Fiscal year is July 1 – June 30.

	FY 2012	FY 2013 (P)	FY 2013 (A)
PROGRAM PERFORMANCE			
New enrolment	35	45	50
Graduation rate	75%	80%	70%
Crews operating	1	2	2
ENTERPRISE PERFORMANCE			
Earned income	\$320,000	\$400,000	\$373,202
Fraction of enterprise expenses covered by earned income*	76%	64%	78%
Customer satisfaction	97%	97%	96%
Average revenue per customer	\$8,000	\$10,000	\$11,350
ORGANIZATIONAL CAPACITY			
Program director (% of time allocated)**	80%	50%	65%
Program coordinator full-time equivalent (FTE)	0	1	1
Crew supervisors FTE	1.5	2.5	1.5
Case manager FTE	0.5	1	.5
Training specialist FTE	0.5	1	.5
WorkExpress residential spaces	20	30	20
Program Budget	\$452,000	\$671,000	\$478,464

*WorkExpress projected a rate decrease due to investments in growth in FY 2013-2014, but percent covered by earned income actually increased slightly.

** As a newly hired, dedicated program coordinator takes on responsibilities for the program, this indicates reduction of time director allocates to WorkExpress relative to other responsibilities at Father Bill's & MainSpring.

Social Impact

Currently, WorkExpress uses the metrics below to measure its impact.

INDICATOR: RETENTION	
Percentage of graduates in housing 12 months out	100%
Percentage of graduates employed 6 months out	94%

SPOTLIGHT: WORK EXPRESS CUSTOMER

"As a real estate agent developer, being able to get projects completed quickly is critical for my business. My experience with WorkExpress has been so positive that I have referred them to colleagues who have also hired their crew for local projects."

- John Fossetti, Eastern MA Real Estate Investors Association

Report Card: Growth and Impact

ROOT CAUSE'S SOCIAL INNOVATION FORUM

With the support of leading local funders, Root Cause's Social Innovation Forum has been working since 2003 to create a social impact market that distributes resources to organizations based on performance in order to solve social problems in Greater Boston. Our aspiration is to build a community that will invest and re-invest resources in innovative, results-oriented nonprofits and social enterprises, thus advancing social impact.

Social Innovation Forum at a Glance

- Our rigorous selection process and intensive program bring together more than **1,500 philanthropists, foundation staff, businesspeople,** and **government officials** who are interested in supporting innovative, effective approaches to address important social issues
- The Social Innovation Forum has held nine Showcase events and recognized 59 "**Social Innovators**" across a variety of social sectors
- As of December 2012, we have directed **more than \$10 million in cash and in-kind services** to our Social Innovators

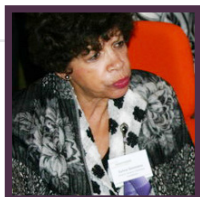


\$1 invested in the Social Innovation Forum corresponds to an average **\$3 increase in budget** for our Social Innovators within 24 months of the Social Innovation Forum engagement

“

It is all about impact. We continue to engage in the Social Innovation Forum because we know that when we invest in capacity-building, organizations are receiving the tools to work smarter and grow faster. For us, an investment in the Social Innovation Forum delivers a very high return.

SYLVIA SIMMONS
Anna B. Stearns Charitable Foundation

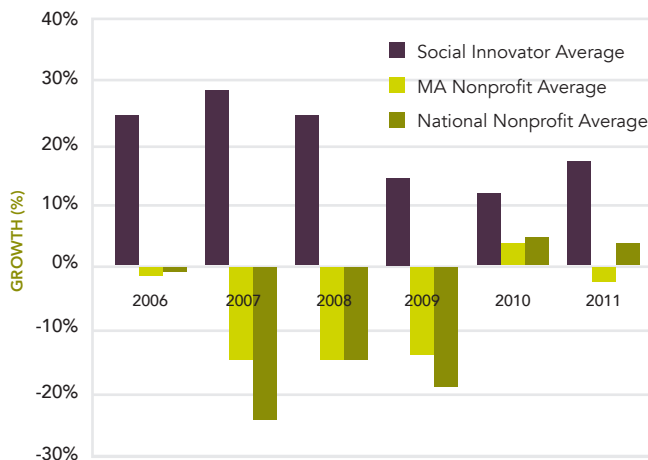


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Social Innovation Forum Accelerates Growth

AS COMPARED TO OTHERS

Social Innovators thrive and grow substantially faster than average nonprofits.



MEDIA PRESENCE:

10,068 Twitter followers

1,063 Newsletter subscribers

1,407 Facebook fans

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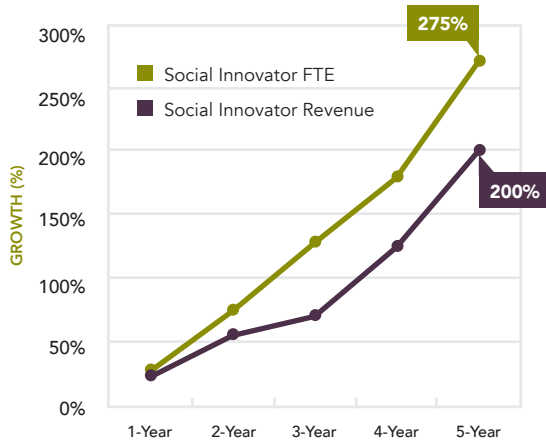
What we appreciate most about the Social Innovation Forum is that it affords us the opportunity to learn while giving and play a part in the cutting-edge of philanthropy. As a track sponsor, we feel that we have advanced understanding of the emerging field of impact investing and gained useful insights into how we can be better funders of these kinds of investments.

TONY HOWLAND
The Devonshire Foundation

”

SOCIAL INNOVATORS SUSTAIN GROWTH

Social Innovators increase their revenue 200% and their FTE's 275% within five years of their engagement with the Social Innovation Forum.



INNOVATOR SPOTLIGHT: FUTURE CHEFS



Future Chefs, a 2011 Social Innovator, prepares urban youth in Greater Boston for quality early employment and post-secondary education opportunities in the culinary field and supports them in developing a broad base of transferable skills as they transition into the working

world. Toni Elka, founder and executive director stated, "When we started working with the Social Innovation Forum, we were working out of a three-desk administrative office in Waltham. Within six months of wrapping up our Social Innovation Forum engagement, Future Chefs was able to move into a 2,400 square foot teaching kitchen in Boston's South End." This community based program space allowed Future Chefs to expand recruitment to 100 new students last summer and form a Boston citywide cohort. Future Chefs is also developing pop-up restaurant programming for 12-15 youth in summer jobs and opening this programming to court-involved youth through a new partnership with the Commonwealth Corporation.



FUNDER SPOTLIGHT: ANDY OFFIT



Andy learned about the Social Innovation Forum as he was beginning to transition out of his 25+ year career in the financial services industry. Looking for ways to apply his skills to the greater good, Andy met with the Social Innovation Forum team and agreed to step into a short-term volunteer role advising My Life My Choice, a 2010 Social Innovator, on presentation content and delivery. Andy's feedback has been instrumental to My Life My Choice. He now sits on the organization's advisory board and has watched My Life My Choice increase its budget almost three-fold in three years and make great strides in its mission to protect vulnerable, adolescent girls from commercial sexual exploitation. Andy remains an active supporter of both My Life My Choice and the Social Innovation Forum and continues to grow in his role as a community leader.

Social Innovation Forum by the Numbers

	2003	2004	2006	2007	2008	2009	2010	2011	2012
PROGRAM PERFORMANCE									
Number of applications received	26	45	54	62	85	127	135	109	119
Showcase event attendees	120	150	190	203	251	226	275	308	305
Total unique event attendees	n/a	n/a	220	319	456	430	513	498	587
Community members	n/a	n/a	285	405	759	1294	1383	1538	1650
ORGANIZATIONAL CAPACITY									
Social Innovation Forum staff (FTEs)	0	0	.75	1.5	3.0	4.0	4.0	4.4	5.0
Social Innovation Forum budget	\$6,300	\$8,000	\$148,000	\$326,100	\$363,300	\$358,300	\$348,800	\$401,900	\$400,300
Social Innovation Forum in-kind	\$0	\$0	\$40,000	\$75,000	\$155,700	\$174,700	\$273,600	\$274,100	\$278,100

Note: Social Innovation Forum did not select Social Innovators in 2005. Results are based on data reported by 48 of 50 Social Innovators.

Root Cause • 11 Avenue de Lafayette, Boston, MA 02111 • 617.492.2300 • rootcause.org • socialinnovationforum@rootcause.org • follow us on:



Notes

A series of horizontal dotted lines intended for taking notes, starting below the "Notes" header and ending above the footer area.



Root Cause's Social Innovators 2003–2013

2003

- Boston Learning Center
- Eagle Eye Institute
- Haley House
- Madison Park/Act Roxbury
- Social Capital, Inc.
- Year Up

2004

- Boston Children's Chorus
- Boston Health Care & Research Training Institute
- Close to Home
- Common Impact
- Rediscovery House
- Viet-AID

2006

- Boston Black Women's Health Institute
- Tacos Unidos
- Treehouse Boston
- WriteBoston
- ZUMIX, Inc.

2008

- CitySprouts
- Cradles to Crayons
- Girls' LEAP
- ReVision Urban Farm
- True Colors: Out Youth Theater
- United Teen Equality Center

2010

- Employer Partnerships
- Generations Incorporated
- Home & Healthy for Good
- Medicine Wheel Productions
- My Life My Choice
- Playworks

2012

- Cooking Matters MA
- InnerCity Weightlifting
- Science Club for Girls
- Tempo Young Adult Resource Center
- The LGBT Aging Project
- WorkExpress

2009

- Bessie Tartt Wilson Initiative for Children
- Hearth Outreach Program
- Maritime Apprenticeship Program
- More Than Words
- Raw Art Works
- uAspire

2011

- Fiscal Health Vital Signs
- Future Chefs
- Massachusetts Senior Action Council
- MathPOWER
- Smart from the Start

2013

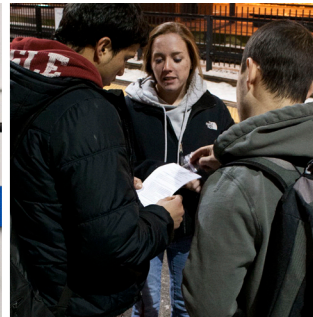
- AgeWell West Roxbury
- GRLZ Radio
- Groundwork Lawrence
- Safe City Academy
- Shelter Music Boston

Impact Entrepreneurs

- City Feed & Supply
- Global Research Innovation & Technology (GRIT)
- Green City Growers
- Project Repat

rootCAUSE 

accelerating performance *for* SOCIAL IMPACT



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