



At Harlem Children's Zone

OPPORTUNITY FOR ALL

EDREDESIGN

THE EDREDESIGN LAB

HARVARD



GRADUATE SCHOOL
OF EDUCATION

Transforming Place through Neighborhood Leadership

SUMMER INSTITUTE

JULY 12-14, 2023

#PowerOfPlace

Transforming Place through Neighborhood Leadership

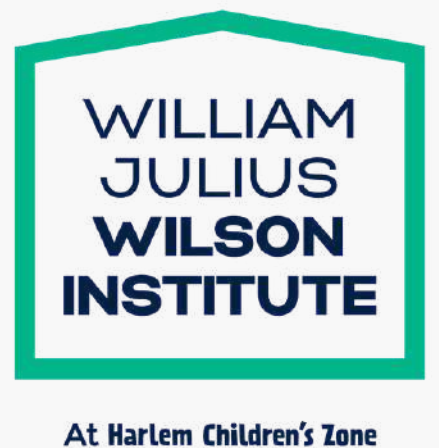
SUMMER INSTITUTE

JULY 12-14, 2023

Welcome Address begins at 9:00 AM

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Welcome

Masters of Ceremony

Arti Doshi, Director of Place, William Julius Wilson Institute at Harlem Children's Zone

Rob Watson, Deputy Director, EdRedesign Lab; Secondary Lecturer in Education, Harvard Graduate School of Education



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Key Programming Elements

- Keynotes
- Panel Discussions
- How to Sessions
- Team Time
- FSCS Office Hours

Event Themes

- Day 1: Cradle-to-Career Programming
- Day 2: Funding
- Day 3: Data, Evaluation and Accountability

Housekeeping

- **Restrooms:** Outside of the Gutman Conference Center doors to your left and on each floor of Gutman library.
- **Exiting the Room:** If you have to exit during any of our sessions please use the doors on the far end at each side of the room.
- **Table Mics:** Table mics are located at each table to be used during Q&A and participatory sessions. Press the button to speak and it will turn green. Please keep the mics on the table as you talk.
- **Parking:** If you are in need of parking for the event, please visit the registration table to obtain your vouchers before the end of the day.
- **Social Media:** See handles below
- **Webpage, Speaker Bios, Participant Bios:** One pager in your event folder with relevant QR Codes
- **Harvard Wi-Fi Login:** Instructions in your folder
- **Dietary Restrictions:** If it was noted in your registration form, catering has options available during meal time. Please check the signage on the serving tables each day. You can follow-up with Shoshana from the EdRedesign team with any questions.
- **CEO Dinner:** Guests with blue stickers on the back of their name tags are invited to attend the CEO Dinner this evening at the Loeb House. There will be a shuttle to the dinner leaving at 6:15 pm from the Charles Hotel.



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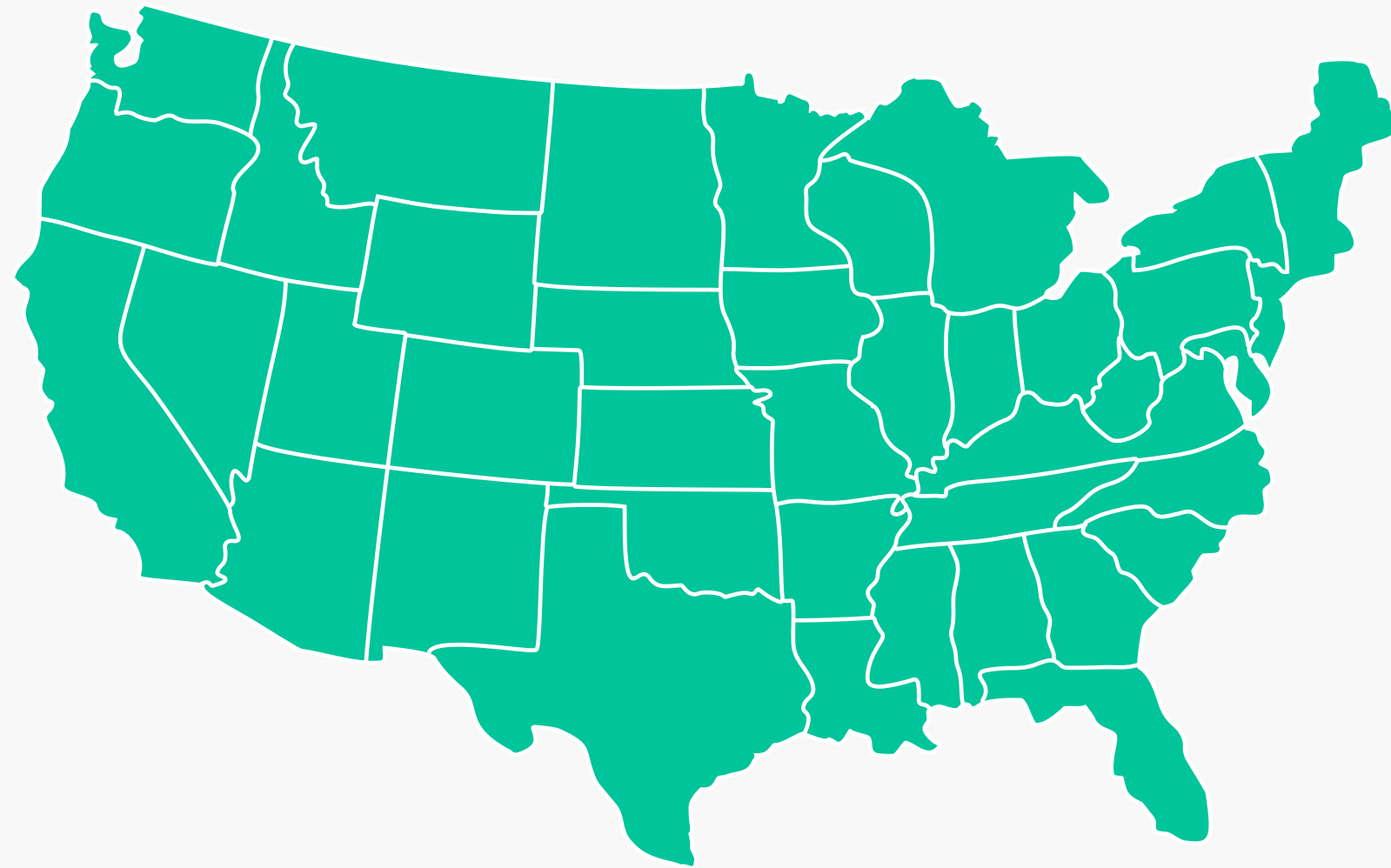
Harvard Wi-Fi Login

1. Select Harvard University network in your device's wifi network settings.
2. Open a web browser and type in getonline.harvard.edu in a new tab or window
3. Select: I AM A GUEST
4. Follow instructions



Communities

- ALICE Community Center
- Art Tatum Zone
- Atlanta Alliance
- Bachman Lake Together
- Brownsville Partnership
- Chattanooga 2.0
- Commit Partnership
- East Texas
- Evolve502
- For Oak Cliff
- Get Ready Guilford
- Harlem Children's Zone
- Hawaii
- Latin American Youth Center
- Learn to Earn Dayton
- Lift Orlando
- Mexico, MO
- Miami Foundation



- Mission Economic Development Agency
- Mosaic Family Zone
- North Hartford Ascend Pipeline
- Oakland Thrives
- Omega CDC
- ONE Neighborhood Builders
- Parramore Kidz Zone
- Partners for Rural Impact
- Poughkeepsie Children's Cabinet
- Promise Partnership Utah
- REACH Riverside
- Saint Paul Promise Neighborhood
- Seeding Success
- shift_ed
- Spartanburg Academic Movement
- Teach for America
- UP Partnership, San Antonio

Introductory Remarks and Keynote Address

Paul Reville, Francis Keppel Professor of Practice of Educational Policy and Administration
& Founding Director of EdRedesign, Harvard Graduate School of Education

Dr. Bridget Terry Long, Dean & Saris Professor of Education and Economics, Harvard
Graduate School of Education

Kwame Owusu-Kesse, CEO, Harlem Children's Zone

Cecilia Gutierrez, Managing Director, Portfolio Lead, Blue Meridian Partners

Geoffrey Canada, Founder & President, Harlem Children's Zone;
Founder, William Julius Wilson Institute



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Introducing 2023-24 By All Means Senior Fellows



Alan Cohen

Founder & CEO, Child Poverty Action Lab (CPAL)



Dr. Russell Booker

CEO, Spartanburg Academic Movement



Sonali Nijhawan

Director, AmeriCorps State and National



Richard Raya

Chief Strategy Officer, Mission Economic Development Agency



Libby Schaaf

50th Mayor of Oakland, California (2015-2023)

Introductory Remarks

Dr. Bridget Terry Long, Dean & Saris
Professor of Education and Economics,
Harvard Graduate School of Education



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Introductory Remarks

Kwame Owusu-Kesse, CEO,
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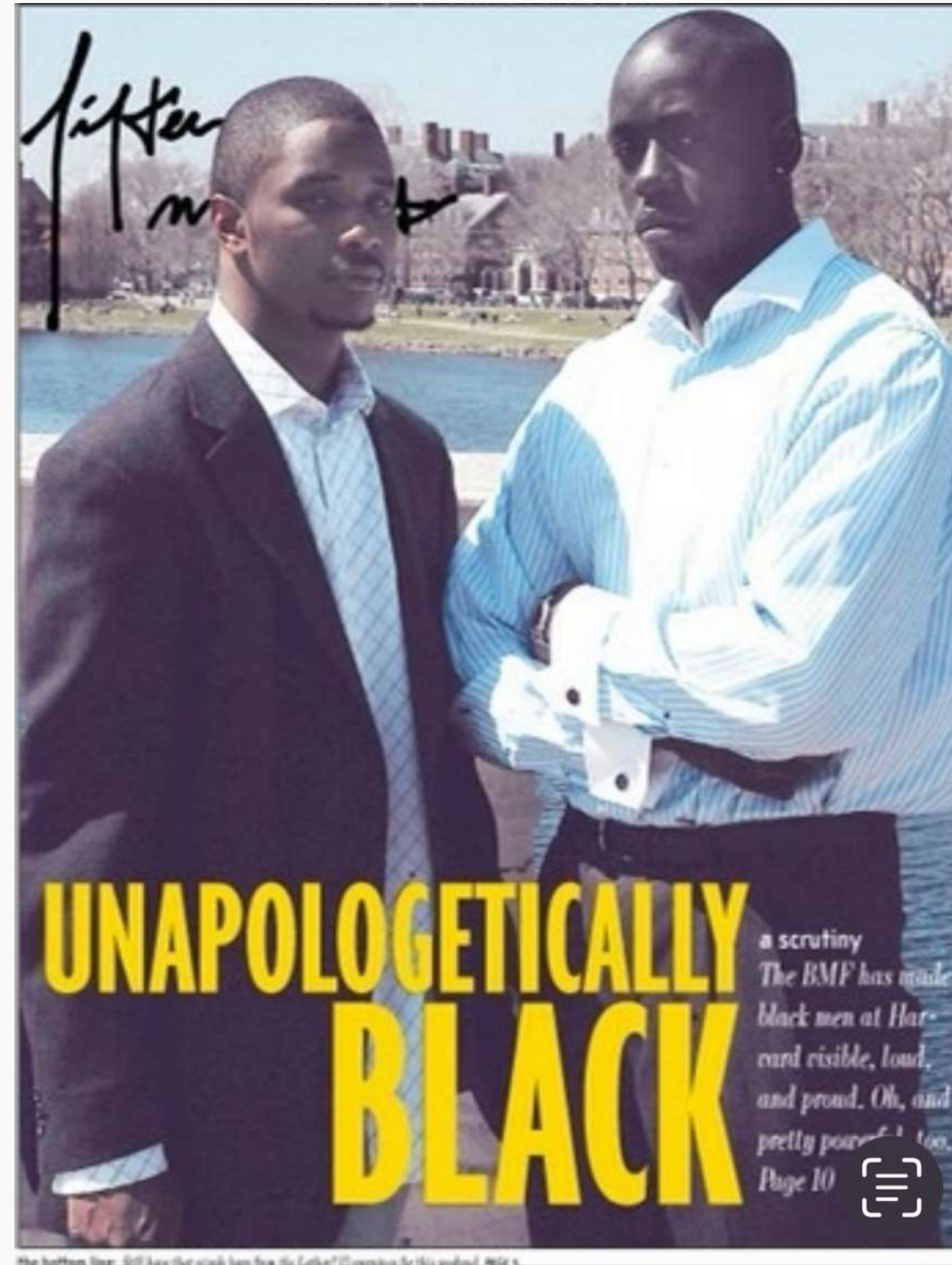
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Introductory Remarks

Cecilia Gutierrez, Managing Director,
Portfolio Lead, Blue Meridian Partners



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Keynote Address

Geoffrey Canada, Founder & President, Harlem Children's Zone;
Founder, William Julius Wilson Institute at HCZ



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Challenges in Leading Strong Interconnected Cradle-to-Career Systems

10:35-11:45 AM

Kwame Owusu-Kesse, CEO, Harlem Children's Zone

Christian Rhodes, Deputy Executive Director,
William Julius Wilson Institute at Harlem Children's Zone

Paul Reville, Francis Keppel Professor of Practice of Educational Policy and Administration;
Founding Director of EdRedesign, Harvard Graduate School of Education

Moderator: Bridget Rodriguez, Managing Director, EdRedesign Lab,
Harvard Graduate School of Education



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Break

Next session begins at 10:35 AM



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Challenges in Leading Strong Interconnected Cradle-to-Career Systems

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Principles for Community-Based Cradle-to-Career

Continuity

- Programming within a neighborhood **spans the full C2C continuum** with clear links between all developmental stages
- Services may be provided by a single organization or a collection of organizations, but they should be **coordinated and connected**

Accountability

- One organization / entity is **accountable for all C2C outcomes within the neighborhood**
- Though services may be delivered by multiple providers, there is a singular centralized body **taking responsibility across the continuum**
- Accountable entity **leverages data** to inform outcomes

Neighborhood-based

- The programming is **rooted in and designed for a particular neighborhood** with a focus on the most historically underserved communities, where outcomes are rarely impacted by systems change

Systems Change

- The effort **engages systems leaders and leverages conditions of systems change*** to support the formation and sustaining of contiguous, accountable, neighborhood-based strategies
- Systems change/related efforts provide access to **sustainable funding** for efforts over time

K-12 Engagement

- The approach includes a **focus on K-12 education**, given the central role the system plays in shaping children's outcomes
- This focus may involve working to **influence school systems**, operating / partnering with a **K-12 school**, or operating / partnering with **afterschool, weekend, and / or summer programs**

Proximate Leadership

- The effort is **led by members of the community** being served
- Leaders should have **deep connections and longstanding relationships** within the community

* Policies, practices, resource flows, relationships & connections, power dynamics, mental models (FSG, 2018)

Challenges in Leading Strong Interconnected Cradle-to-Career Systems

Christian Rhodes, Deputy Executive Director,
William Julius Wilson Institute at Harlem Children's Zone



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Cradle-to-Career in Context: Community Violence

12:45-1:45 PM

Greg Jackson, Executive Director, Community Justice Action Fund
Molly Baldwin, Founder & CEO, Roca

Libby Schaaf, 50th Mayor of the City of Oakland (2015-2023), Harvard EdRedesign By
All Means Senior Fellow

Moderator: Jamilica Burke, Chief Strategy & Impact Officer, Seeding Success



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Lunch

Lunch will be served in the Gutman Library
Gallery on the first floor

Next session begins at 12:45 PM



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2:00-3:00 PM

**How to Session 1:
Elevating Family &
Youth Voice**

Longfellow 319+320

**How to Session 2:
Engaging the Faith
Community**

Larsen 106

**How to Session 3:
Integrating Housing &
The Built Environment**

GCC 123



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Break

Next sessions begins at 2:00 PM



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How to Session 1: Elevating Family & Youth Voice

Logan S. Herring Sr., CEO, Reach Riverside

Ceasar McDowell, Professor of the Practice of Civic Design, MIT;
Associate Director, MIT Center for Constructive Communication

Latasha Morgan, Director of Parent and Community Engagement,
Harlem Children's Zone

Moderator: Esther Addo, Managing Director, Technical Assistance,
William Julius Wilson Institute, Harlem Children's Zone

Location: Longfellow 319+320



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A Few Thoughts About Community
and
Our Struggling Democracy

Public schools are the place where we have to confront the challenges of democracy in a demographically complex world.

[Democracy exist] when people who are interdependent, struggle with the traditions that bind them and the interest that separate them so that they can realize a future that is an equitable improvement on the past.

[Democracy exist] when people who are interdependent, **struggle** with the **traditions** that **bind** them and the **interest** that **separate** them so that they can realize a future that is an **equitable improvement on the past.**

How do we create the spaces where peaceful struggles that leads to equitable and just improvements, can happen?

Clarity on the Purpose of Conversations & Deliberate Design

6

ESSENTIAL PUBLIC CONVERSATIONS

6 Conversation

FRAMING

Creating Shared Understanding

IDEATION

Offering Possible Solutions

PRIORITIZING

Weighing the Value Choices

SELECTING

Agreeing on Path(s) Forward

IMPLEMENTING

Following Through on Commitments

MONITORING

Being Accountable

8

DESIGN CONSIDERATIONS

Design For:

THE MARGINS

COLLABORATION

EQUITY

SYSTEMIC CHANGE

NETWORK

ANALOG/DIGITAL

EXPRESSION

HEALING

the Civic Design Framework

from We Who Engage MIT



			Principles							
			Situated		Engagement			for Justice		
			Systemic Change	Ecological Networks	Collaboration	Multiple Forms of Expression	Analog + Digital	Equity	Healing	the Margins
Conversations	Reflect	Framing								
		Ideating								
	Plan	Prioritizing								
		Deciding								
	Act	Implementing								
		Monitoring								

Civic Design Framework

Design Principles	Design for	Design for	Design for	Design for	Design for	Design for	Design for	Design for
	The Margins	Collaboration	Equity	Systemic Change	Ecological/Network	Analog & Digital	Ways of Expression	Healing
Framing Creating Shared Understanding of the Problem/Opportunity	1	2	3	4	5	6	7	8
Ideating Generating Possible Solutions/Actions	9	10	11	12	13	14	15	16
Prioritizing Identifying Preference among viable Solutions/Actions	17	18	19	20	21	22	23	24
Deciding Agreeing on Path(s) Forward and Solutions/Actions to pursue	25	26	27	28	29	30	31	32
Implementing Participating in th implementation	33	34	35	36	37	38	39	40
Monitoring Participating monitoring and accountabiity	41	42	43	44	45	46	47	48

Civic Design Framework



Design For:

Design Phases		The Margins	Collaboration	Equity	Systemic Change	Ecological Networks	Analog & Digital	Ways of Expression	Healing
	Framing Creating shared understanding of the problem or opportunity								
	Ideating Generating possible solutions or actions								
	Prioritizing Identifying preferences among viable solutions/actions								
	Deciding Agreeing on paths forward and solutions to pursue								
	Implementing Collaborative implementation of solution/action								
	Monitoring Participating in monitoring and accountability measures								

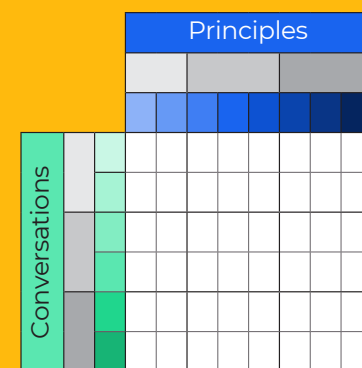
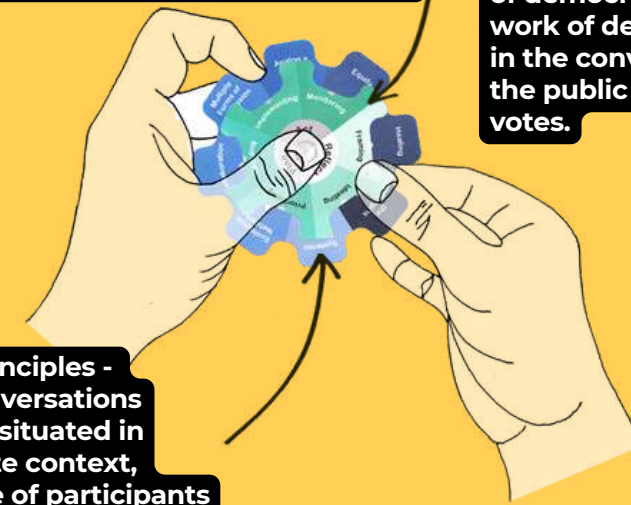
The Civic Design Framework: Principles for public conversations during a time of crisis

Democratic processes in the United States are failing to support inclusive and deliberative public conversations, challenge marginalization, and accommodate an increasingly complex public. We struggle to know how to talk to each other.

The Framework has two components: Conversation Types and Design Principles

Conversation Types - Voting is a manifestation of democracy. The real work of democracy lies in the conversations that the public has before it votes.

Design Principles - Public conversations should be situated in appropriate context, supportive of participants of different abilities, and center justice.



Civic Design Tools - the Civic Design Matrix and the Civic Spinner can help practitioners apply the Civic Design Framework.



Case Studies explore the the Civic Design Framework in action.

We Who Engage MIT, formerly The Move, is a movement to transform our democracy's civic infrastructure. The team is led by Professor Caesar McDowell, a professor of civic design and associate dean at the Massachusetts Institute of Technology's Department of Urban Studies and Planning.

Check us out on social media! @wewhoengage_mit
medium.com/wewhoengage



guidelines + resources from We Who Engage 2020
MIT Department of Urban Studies and Planning





A NEW WAY OF LISTENING

Real Talk For Change hosts community-led conversations about the future of Boston. Our team partners with local organizers to provide a space for residents to voice their concerns and ask questions to elected officials.

We believe that positive change is rooted in listening. *Real Talk* shares these lived experiences so we can better understand our neighbors and collectively shape the future of our city.

[Start Listening >](#)

[How It Works](#) 

305

Participants

61

Hours Of Conversation

66%

Black & Latino Participants

22

Different Neighborhoods

Dorchester & Roxbury

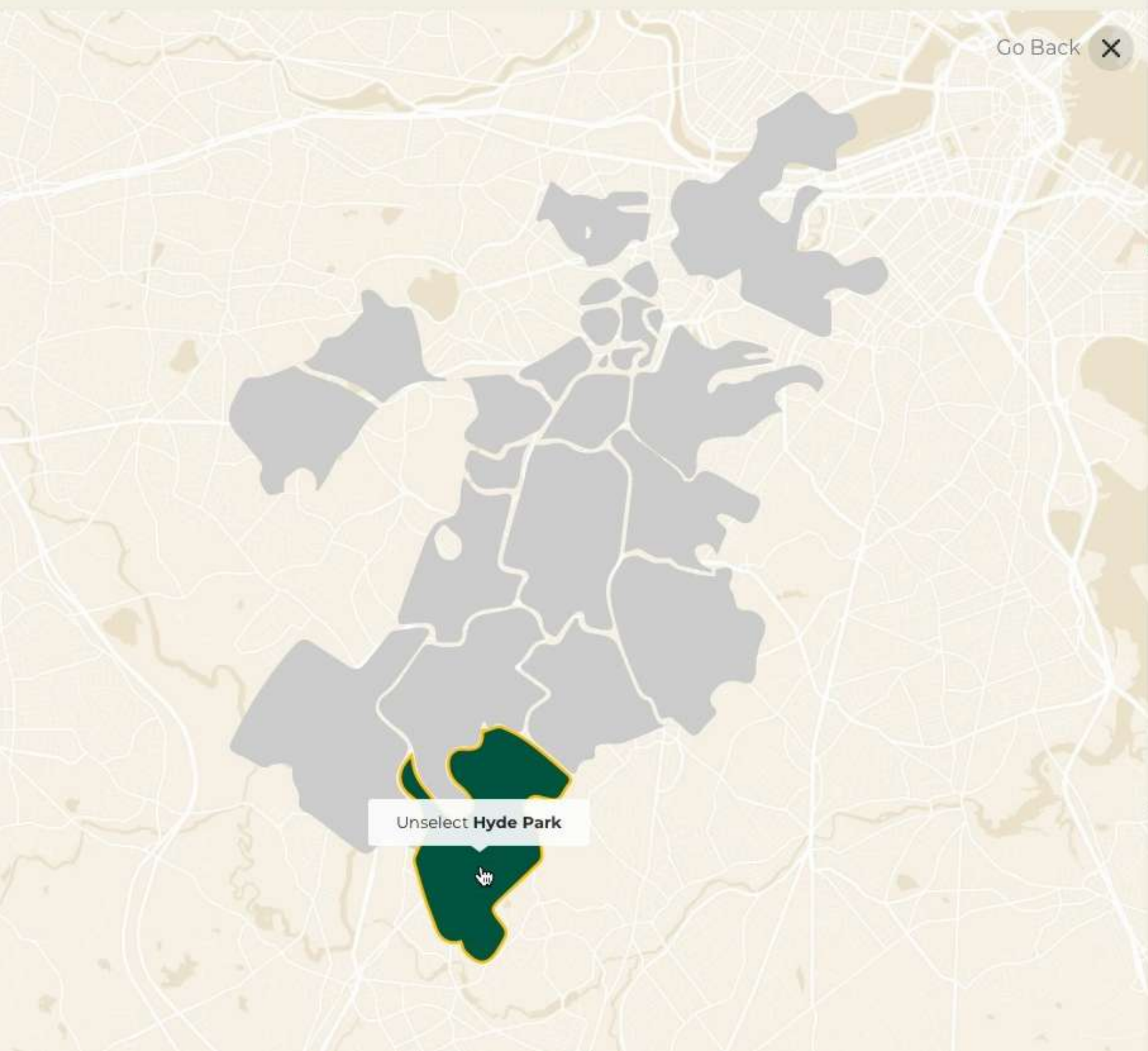
Highest Participation



The numbers above reflect conversations as of 11/3/21. The analysis below is as of 10/22/21.

HEAR HYDE PARK

We spoke to 10 people in **2021** from **Hyde Park** about **6 Topics** . [Reset Filters](#)



Real Talk conversations begin with two questions about living in Boston. Revealing the hopes and concerns of our city, we invite you to listen to the responses below.

- 1 What is your question about the future of Boston?
- 2 What experience led you to that question?

10/5/2021

Jesus's Question

Jesus's Experience



Jesus
Hyde Park | Oct 05, 2021

▶ Listen

So why isn't Boston preparing the youth to be financial literate?

Share

[View Full Transcript](#)

[What is this?](#)

● Economic Opportunity >

9/16/2021

Sedric's Question

Sedric's Experience



Sedric
Hyde Park | Sep 16, 2021

▶ Listen

The two questions I have for the future of Boston and my place in that future is, will I be able to own a home, and will I be able to live in Boston any longer.

How to Session 1: Elevating Family & Youth Voice

Latasha Morgan, Director of Parent and Community
Engagement, Harlem Children's Zone



At Harlem Children's Zone



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Elevating Family & Youth Voice

Latasha Morgan, Director Of Community Engagement



Tactical Approaches to elevating family and youth voice in programmatic decision-making and Leadership

Approaches for engaging youth and Families in Evaluation and Research

Approaches for engaging youth and Families with Evaluation and Research



- ☐ **Include community stakeholders in the conversation and development of the evaluation or research process. Be transparent and inform them of the WHY and the proposed outcome for the information gathered.**
- ☐ **Create innovative ways to engage families and provide incentives. You want people to recruit people and using resources that people need can help.**
 - ☐ Advertisement and Recruitment
 - ☐ Incentives
 - Food
 - Gift Cards
 - Raffles
 - Childcare
 - Transportation
 - ☐ Employment Opportunities
 - ☐ Ideas
 - ☐ Participation
 - ☐ Circle Back

Advertisement & Recruitment



- ☐ Person to person
- ☐ Door Knocking
- ☐ Door Tags with QR Codes – Short and quick feedback
- ☐ Location and people that can help seniors or others with filling out information
- ☐ Flyers
- ☐ Social Media Platforms
- ☐ Language – Translate information (Spanish, French, etc.)

Incentives

Food

- ☐ Be inclusive of cultures (Different types of food)

Gift Cards – Variety

- ☐ Amazon, Target, and Visa - allow them to shop for multitude of items and provide option
- ☐ Specific stores limit options

Raffles

- ☐ Identify your audience needs
 - ☐ Example – Families living in shelters need gifts that can be used at their residency and want to walk away with tangible items. Some places may not allow items to be delivered to the shelter.

Childcare

- ☐ Offer during Focus groups or meetings where you need their attention

Transportation

- ☐ Metro Cards
- ☐ Taxi's
- ☐ Van or busing

Employment opportunities

- ☐ Offer community members a role in helping to with the evaluation process – Administering the surveys

- ☐ Data Walking Tours w/ Community Discussions
- ☐ Block Party w/ Survey Stations (Community Building, Engagement, and Interactive way for people to give feedback during an event they enjoy)
- ☐ Drop Boxes for ideas or opinions
- ☐ Focus Groups w/ Leadership presences (A chance to engage with a CEO, CPO, MD, or Director)
- ☐ Community / Youth Retreats
 - Make it an event
 - Include high-level discussions (We invite our Research and Evaluation team to present and give an overview)
 - Include other offers during the retreat based on your theme
 - Give talking points they are included in the conversation
 - Allow for time to reflect and plan for the upcoming year or next event.

Participation Options

- ☐ Times
 - Morning, afternoon, evening, and weekends
- ☐ Locations
 - Via phone, text message, QR Codes, email, drop-in at a site or office

Participation Options

Time

- Morning, afternoon, evening, and weekends

Location

- Via phone, text message, QR Codes, email, drop in at a site or office

Circling Back



Follow up on the progress

- ☐ Keep the Community and youth informed on the process and setbacks
- ☐ Keep your word
- ☐ Ensure they receive any deliverables that we promised
- ☐ Remember to recruit and reward them for their efforts (We will need them again)

Thank You!

www.hcz.org



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William Julius Wilson Institute, Harlem Children's Zone

Location: Longfellow 319+320



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How to Session 2:

Engaging the Faith Community

Christine Sweeney, Executive Director, Art Tatum Zone

Calvin Sweeney, President & Founder, Art Tatum Zone

Dr. Russell Booker, CEO Spartanburg Academic Movement; Harvard EdRedesign Lab By All Means Senior Fellow

Vanessa Ward, President, Omega Community Development Corporation

Moderator: Rachel Ward, Director of Operations and Strategic Initiatives, Omega Community Development Corporation

Location: Larsen 106



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How to Session 3:

Integrating Housing & The Built Environment

Rosanne Haggerty, President & CEO, Community Solutions

Alan Cohen, Founder & CEO, Child Poverty Action Lab

Bryan C.Lee Jr., Design Critic in Architecture, Harvard Graduate School of Design; Founder/Principal, Colloqate Design

Moderator: Carol Naughton, CEO, Purpose Built Communities

Location: GCC 123



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How to Session 3: Integrating Housing & The Built Environment

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A stylized illustration of a city scene. In the foreground, there is a light blue building with a red roof and a white archway. A large green tree stands next to it. In the background, a person in a blue shirt and dark pants stands on a pink ledge of a building, pointing towards the sky. The sky is a light blue gradient.

Cradle to Career in Context: Housing and the Built Environment

July 12, 2023

**COMMUNITY
SOLUTIONS**

HOMELESSNESS IS **SOLVABLE**

Communities in the Built for Zero movement are proving it.

105

communities are
participating
in Built for Zero

161,000+

individuals housed
by Built for Zero
communities since 2015

14

communities have
functionally ended
homelessness for a
population

64

communities have achieved
quality real-time data

44

communities have achieved
a measurable reduction



Opportunity Atlas

In Hartford, A Few Blocks Can Make All The Difference For Children Growing Out Of Poverty

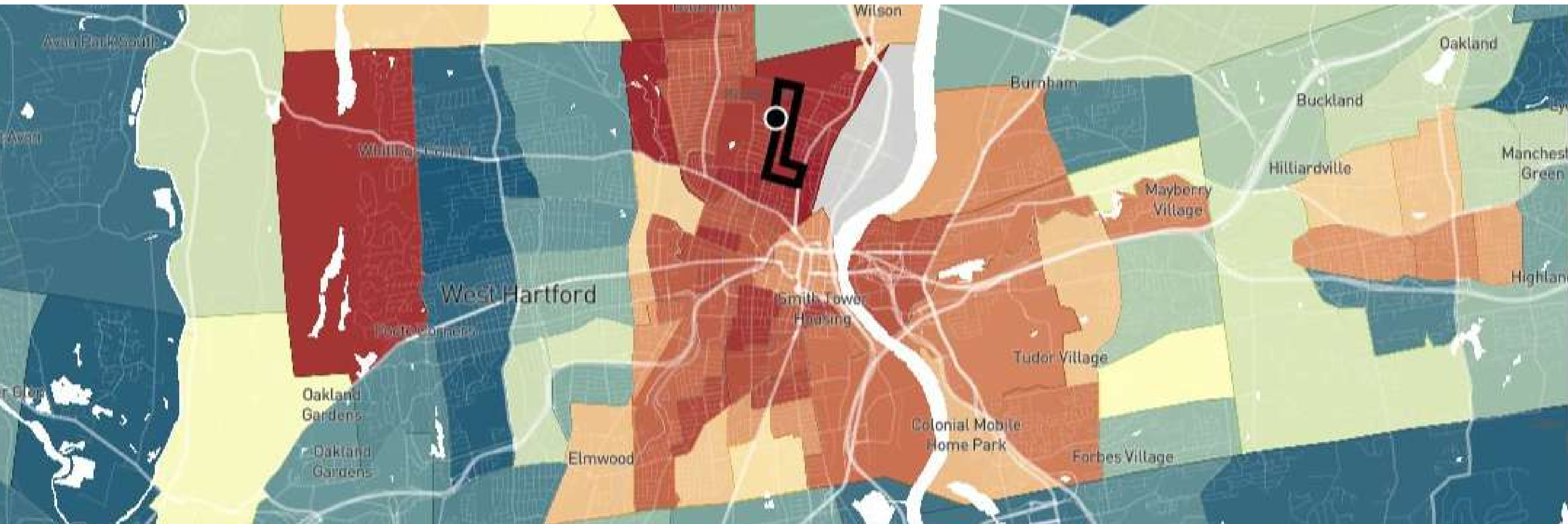


By REBECCA LURYE

| RLURYE@COURANT.COM

| OCT 05, 2018

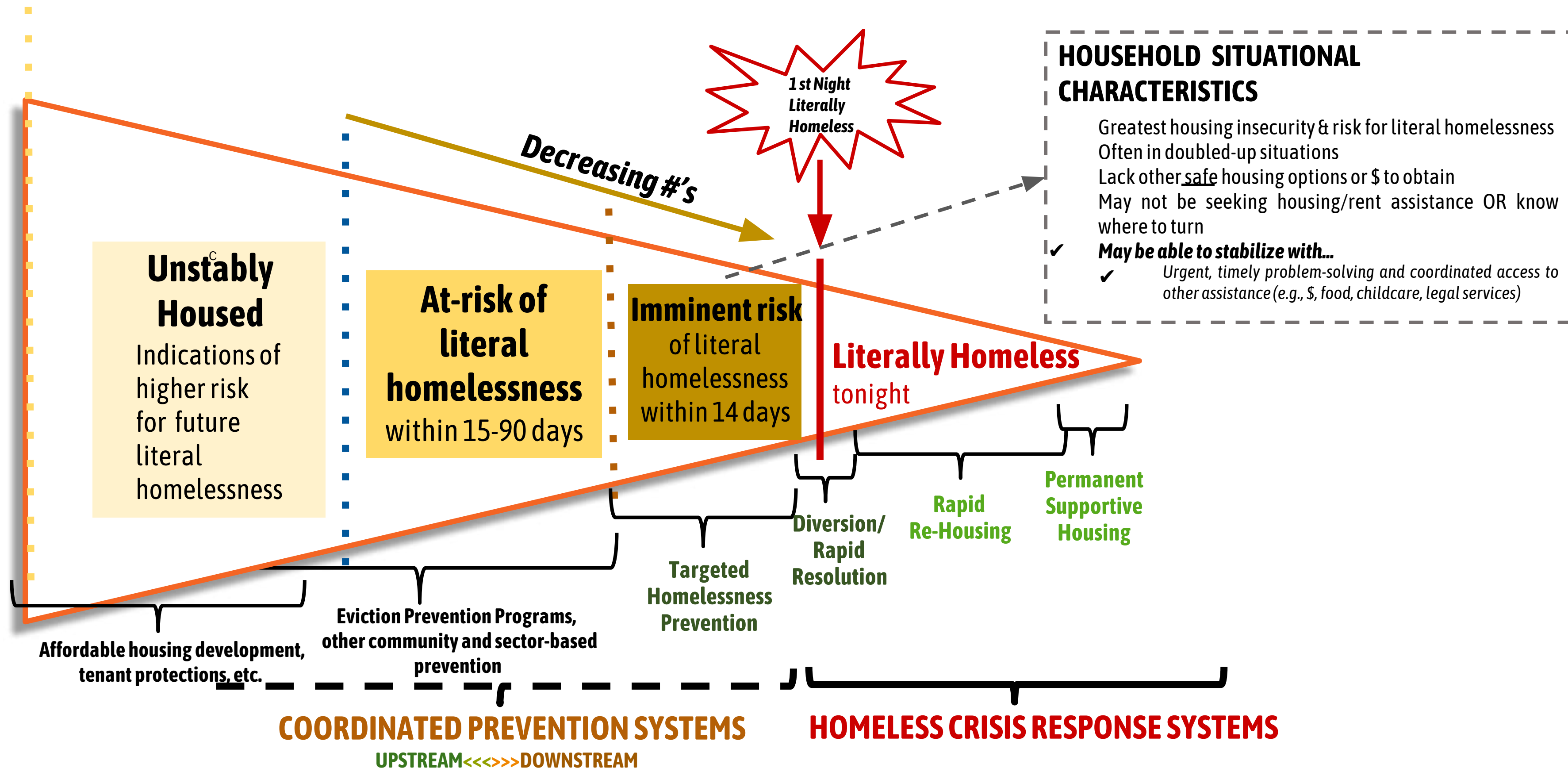
| 6:00 AM



**Household Income
for Children of Low Income Parents**



Community-Wide Housing Stabilization Approach



HSS Drivers

Behavioral Health

DOC/Re-entry

Eviction Prevention

Medical Liaison Position

CSSD Engagement/ Funding

NNPI Tenant Support

Technical Assistance/Consultation
with Ben Bradley and Lauran Hardin

Re-Entry Center Engagement and
Referral System

Landlord Engagement

Formal Partnerships with Hospital

DOC Data Sharing Proposal

Resource Mapping

North Hartford Portfolio

North Hartford Housing Trust has acquired and completed moderate rehab on 3 properties in the North Hartford Promise Zone.



Swift Factory

In the fall of 2020, CS completed construction on a \$35M rehabilitation of the historic Swift Factory in the heart of the North Hartford Promise Zone. Anchor tenants will create more than 150 long term jobs (targeted to local residents).



North Hartford Property Acquisitions

The North Hartford Housing Trust has acquired 3 properties:



34 Pliny St
Fully occupied
Built in 1920
6 Family Building



243 Capen St
Fully occupied
Built in 1915
6 Family Building



33 Bethel St
Fully occupied
Built in 1920
6 Family Building

How to Session 3: Integrating Housing & The Built Environment

Alan Cohen, Founder & CEO, Child Poverty Action Lab



At Harlem Children's Zone

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Before

Let's Make Dallas
Even Better



LOCAL NEWS

How Big Data Turned an Empty South Dallas Lot Into a Vibrant Plaza

An empty parking lot on Malcolm X Boulevard has been transformed into a plaza for the community. It's another way community organizations are addressing violent crime without traditional police interventions.

By Matt Goodman | June 8, 2022 | 10:11 am

CHILD
POVERTY
ACTION
LAB









How to Session 3: Integrating Housing & The Built Environment

Bryan C. Lee Jr., Design Critic in Architecture,
Harvard Graduate School of Design;
Founder/Principal, Colloqate Design



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FOUNDATIONAL

COLLECTIVE SHELTER

Spaces designed to cover and protect individuals, groups from external forces for and extended period of time.

FUNCTIONAL NEEDS OF THE BUILT ENVIRONMENT

Space is defined by its function and the boundaries that surround it. In our built environment, we formalize those spaces, name them in order to help us understand the context of the system. Understanding these relationships and the racialized biases and power structures that define them help us to better characterize the assets and deficiencies built into neighborhoods.

FUNCTIONAL

FOOD

Spaces designed to provide access points to general food and nourishment for individuals or groups in a community.

HEALTH

Spaces designed to support the health and survival of individuals or groups in a community.

EDUCATION

Public spaces designed to support the growth and knowledge of individuals and groups within a community.

SAFETY

Spaces intended to support efforts to protect the life and property of individuals and groups from harm.

SUSTAINING

MERCANTILE / LABOR / WORKFORCE

Spaces designed to support the commerce and general economy of individuals and groups within a neighborhood/city

PUBLIC

Spaces designed to support the health and survival of individuals or groups in a community.

RECREATION

Spaces designed to general health and social interaction of individuals and groups in community

CULTURAL

Structures designed to develop and strengthen the social fabric of the of neighborhoods and cities through a maintenance of the cultural condition of place.

PUBLIC ART + MEMORY

Public space designed to carry the stories and narratives of place in order to maintain a shared cultural consciousness.

ENTERTAINMENT

Spaces that serve the purpose of creating joyful shared experience shared experience .

CIVIC

Spaces designed to provide access to basic communal needs and encourage participation in the development of society.

INFRASTRUCTURE

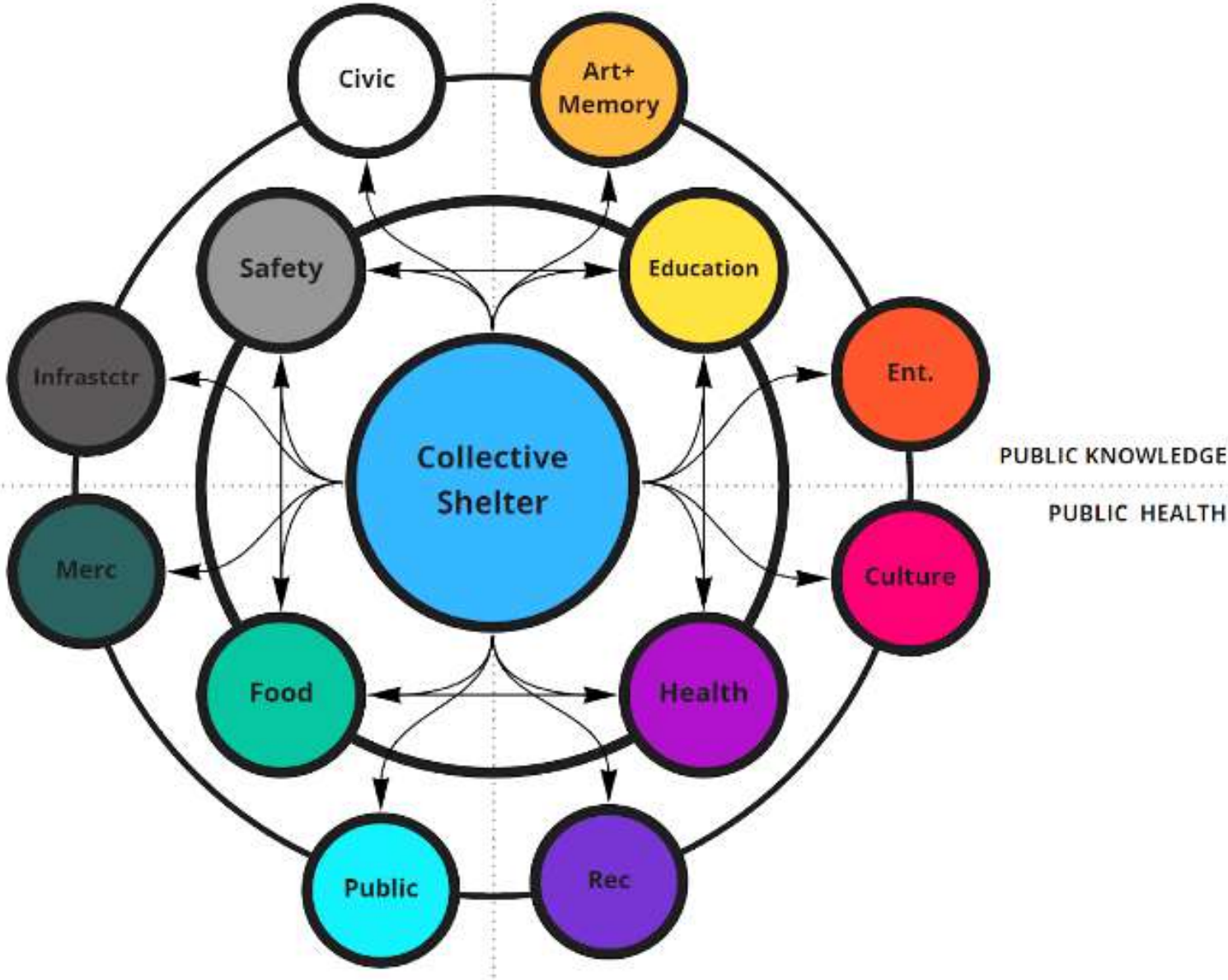
Public infrastructure that supports the functional operation of a city, neighborhood, block, or lot.

TRANSPORTATION

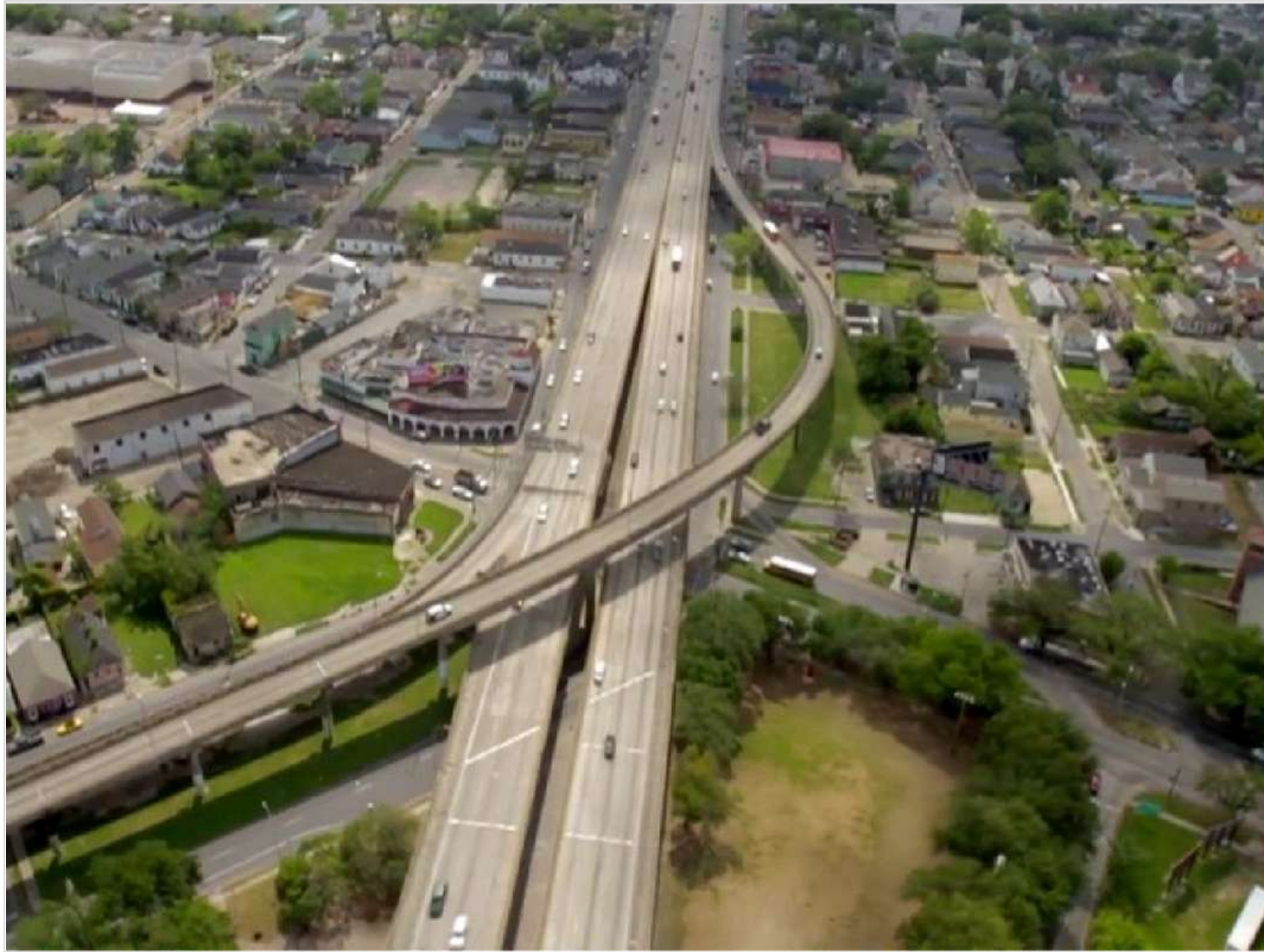
Structures designed to support the mass movement of individuals or groups within a neighborhood/city.

MOBILITY

Public spaces designed to provide safe and easy access to the pedestrian circulation of a neighborhood/city



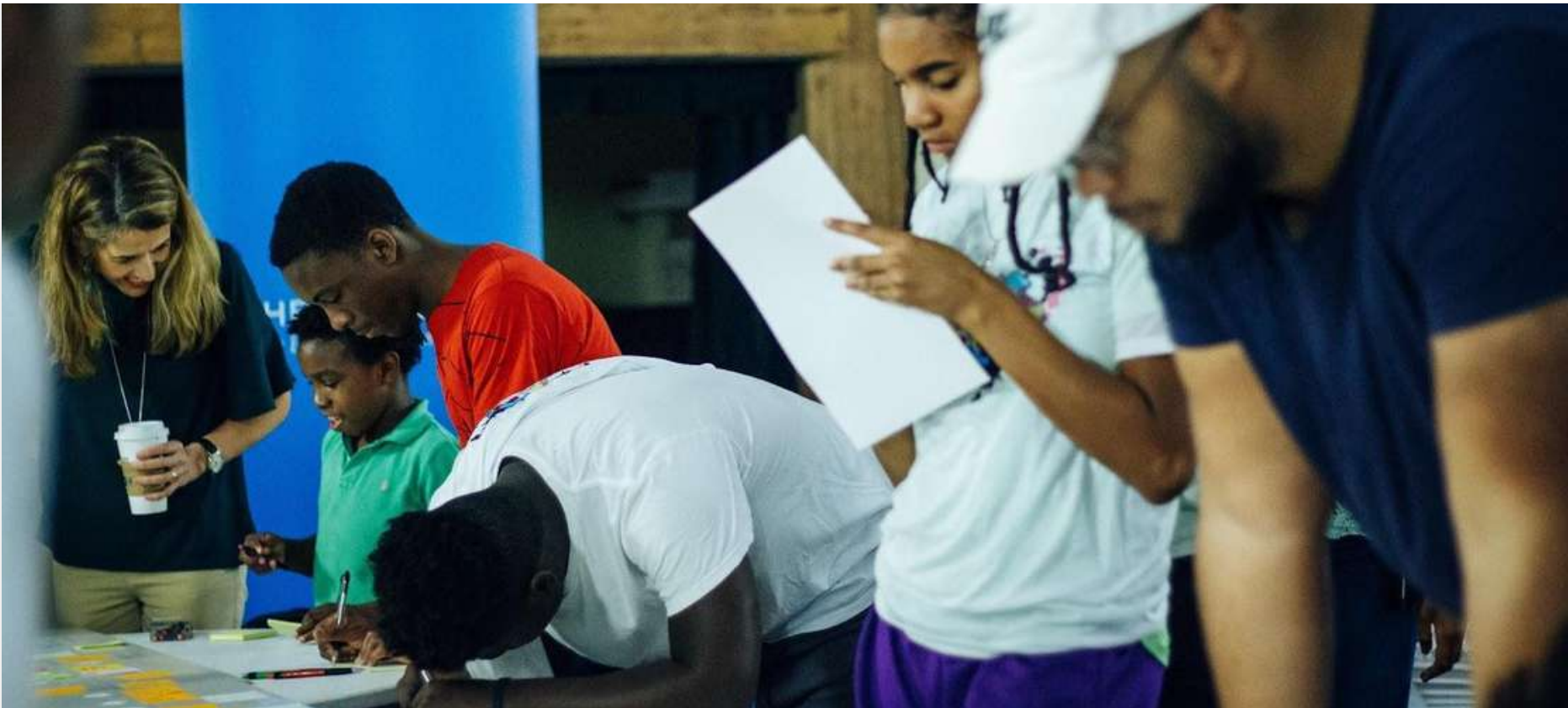
UNDER THE BRIDGE



CLAIBORNE CULTURAL INNOVATION DISTRICT | ARTIST WORKSHOP



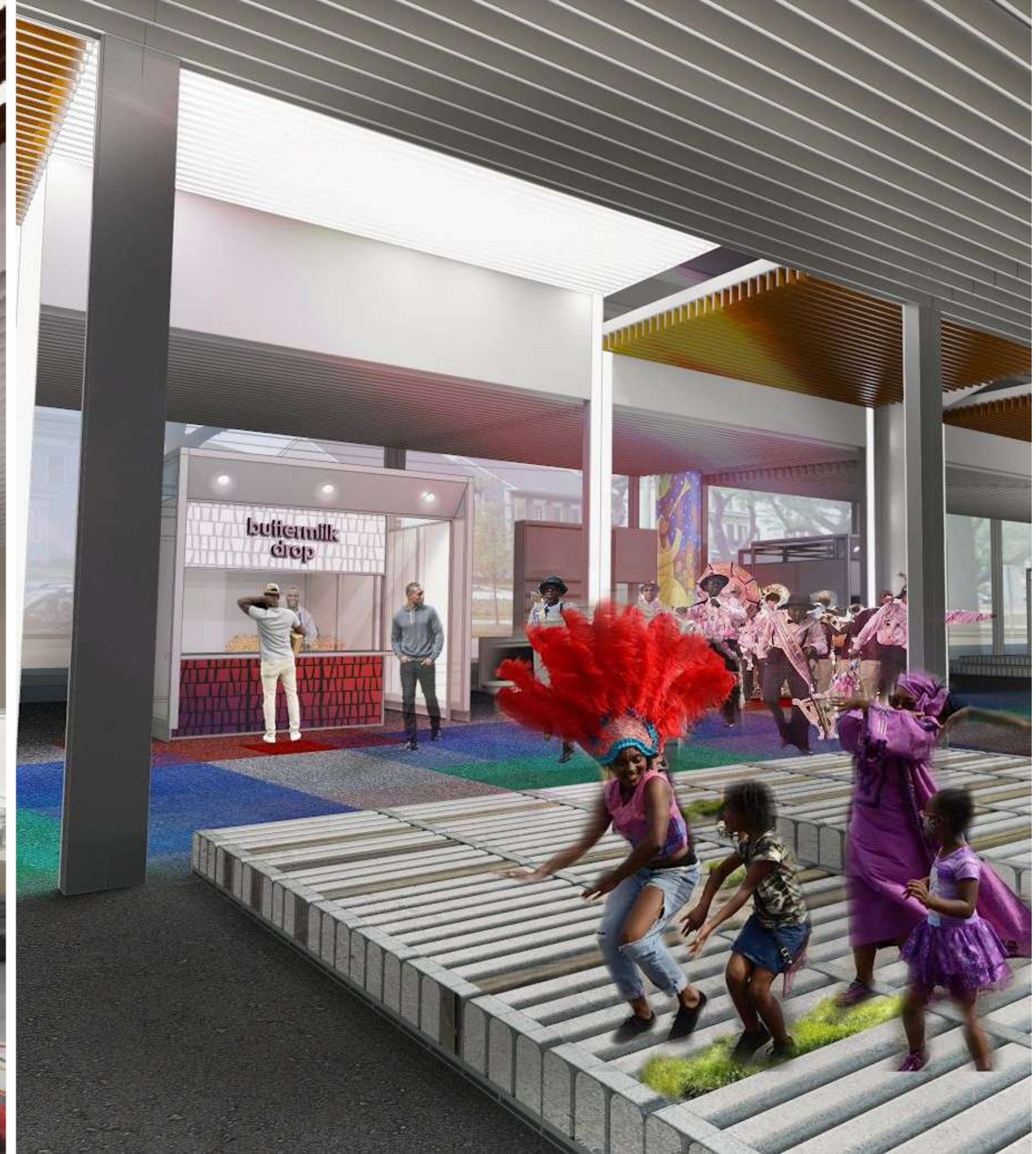
CLAIBORNE CULTURAL INNOVATION DISTRICT | YOUTH WORKSHOP





CLAIBORNE CULTURAL INNOVATION DISTRICT







How to Session 3:

Integrating Housing & The Built Environment

Rosanne Haggerty, President & CEO, Community Solutions

Alan Cohen, Founder & CEO, Child Poverty Action Lab

Bryan C. Lee Jr., Design Critic in Architecture, Harvard Graduate School of Design; Founder/Principal, Colloqate Design

Moderator: Carol Naughton, CEO, Purpose Built Communities

Location: GCC 123



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Team Processing

3:15-4:30 PM

Full-Service Community Schools Grant

Seeking Office Hours

(By Appointment in Gutman 133)

4:45-6:15 PM



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Team Time Room Assignments

GCC 123 (Facilitators: Wendy Viola, Marlene Fox, Erica Terrell, Alvina Jiao)

- Parramore Kidz Zone
- Atlanta Alliance
- ALICE Community Center
- Lift Orlando
- Evolve502
- Spartanburg Academic Movement
- Latin American Youth Center
- Get Ready Guilford
- shift_ed
- Seeding Success
- Chattanooga 2.0
- Hawaii
- Miami Foundation
- Teach for America

Longfellow 319+320 (Facilitators: Arti Doshi, Esther Addo, Dana Vera)

- East Texas
- For Oak Cliff
- Bachman Lake Together
- UP Partnership, San Antonio
- Commit Partnership
- Mission Economic Development Agency
- Promise Partnership Utah
- Partners for Rural Impact
- Oakland Thrives

GCC 5 (Facilitators: Brian McClendon, Nina Carter, Lynne Sacks)

- Northside Achievement Zone
- Saint Paul Promise Neighborhood
- Art Tatum Zone
- Mosaic Family Zone
- Omega CDC
- Learn to Earn Dayton
- Mexico, MO

Eliot Lyman (Facilitators: Ben Lewis, Fritz Bondoa)

- Brownsville Partnership
- Poughkeepsie Children's Cabinet
- ONE Neighborhood Builders
- Reach Riverside
- North Hartford Ascend Pipeline



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Break

Next sessions begins at 3:15 PM



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Team Time & Coaching

Connections:

1. Take 5 minutes to write down your reflections from the sessions you have experienced thus far.
2. For the following 5 minutes, we will have an open space during which anyone can voice any thoughts they would like to pose or share with the group. You do not have to address or respond to colleagues' comments.

Team Time & Coaching

Day 1 Debrief:

For each session you have attended thus far (listed below), each person can share i) two core ideas that stood out to them and ii) one question they still have.

- Welcome, Opening Remarks, Keynote
- Challenges in Leading Strong Interconnected Cradle-to-Career Systems
- Cradle-to-Career in Context: Community Violence
- Elevating Family & Youth Voice
- Engaging the Faith Community
- Integrating Housing & The Built Environment



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Team Time & Coaching

Intention Setting:

- Create a t-chart on chart paper
- On one half of the chart, write “Growth Areas” and on the other half write “Organizations or contacts we would like to connect with”
- Take some time to review the agenda and list of attendees and organizations present, and identify some collective intentions for the rest of the week

Day 2 Preview

9:00-10:00 AM	Building a Funding Pipeline
10:25-10:55 AM	Harvard & The Legacy of Slavery
11:00 AM-12:00 PM	Applying for and Managing Public Funding 101
1:00-2:00 PM	Workshop Tracks 1. Best Practices Around Private Funding 2. Organizational Finance 101
2:15-3:15 PM	How To Sessions 1. Building Your Development Machine 2. Securing Place-Based Infrastructure and Program Funds from Federal Agencies Outside of K-12 Education
3:30-4:30 PM	Team Processing
3:35-5:45 PM	Full-Service Community Schools Grant Seeking Office Hours
6:00-8:30 PM	Closing Reception & Dinner: Sustaining Ourselves in This Work



6:30-8:00 PM

General Participant Reception and Dinner

Location: Gutman Library
1st floor

CEO Dinner

Location: Loeb House: 17 Quincy
Street Cambridge, MA 02138
*6:15 PM Shuttle from Charles Hotel

*Participants with blue dots on the back of their name tags
are invited to attend the CEO dinner.*



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Breakfast

The first session begins at 9:00 AM



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Building a Funding Pipeline

Olivia Allen, Strategy Director, Children's Funding Project

Dreama Gentry, President & CEO, Partners for Rural Impact

Josh Davis, Vice President of Policy and Partnerships, StriveTogether

Cecilia Gutierrez, Managing Director, Portfolio Lead, Blue Meridian Partners

Moderator: Christian Rhodes, Deputy Executive Director,
William Julius Wilson Institute, Harlem Children's Zone



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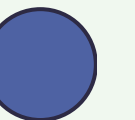
@EdRedesignLab

#PowerOfPlace

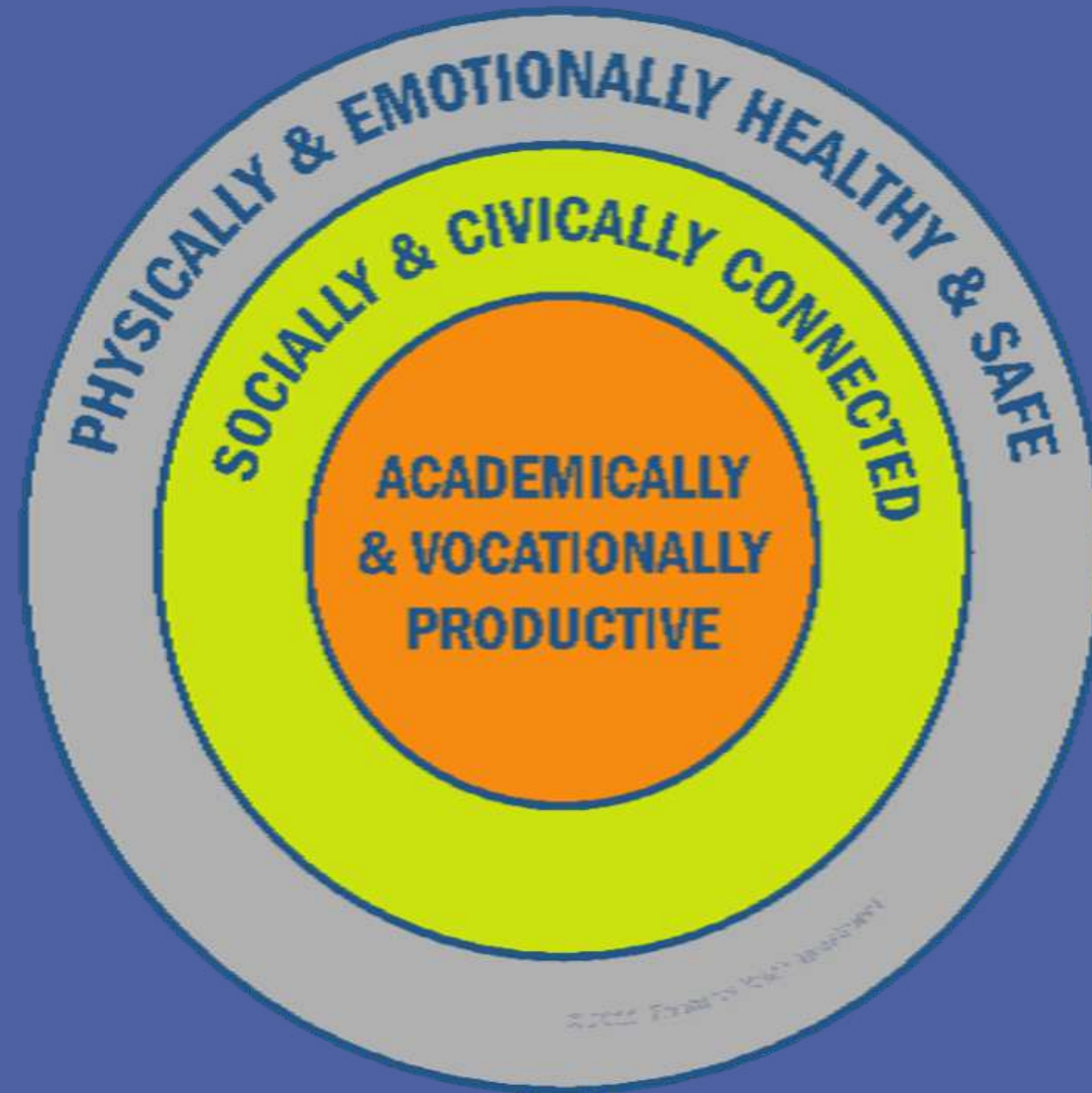
Children's Funding Project

"What gets budgeted, gets done"

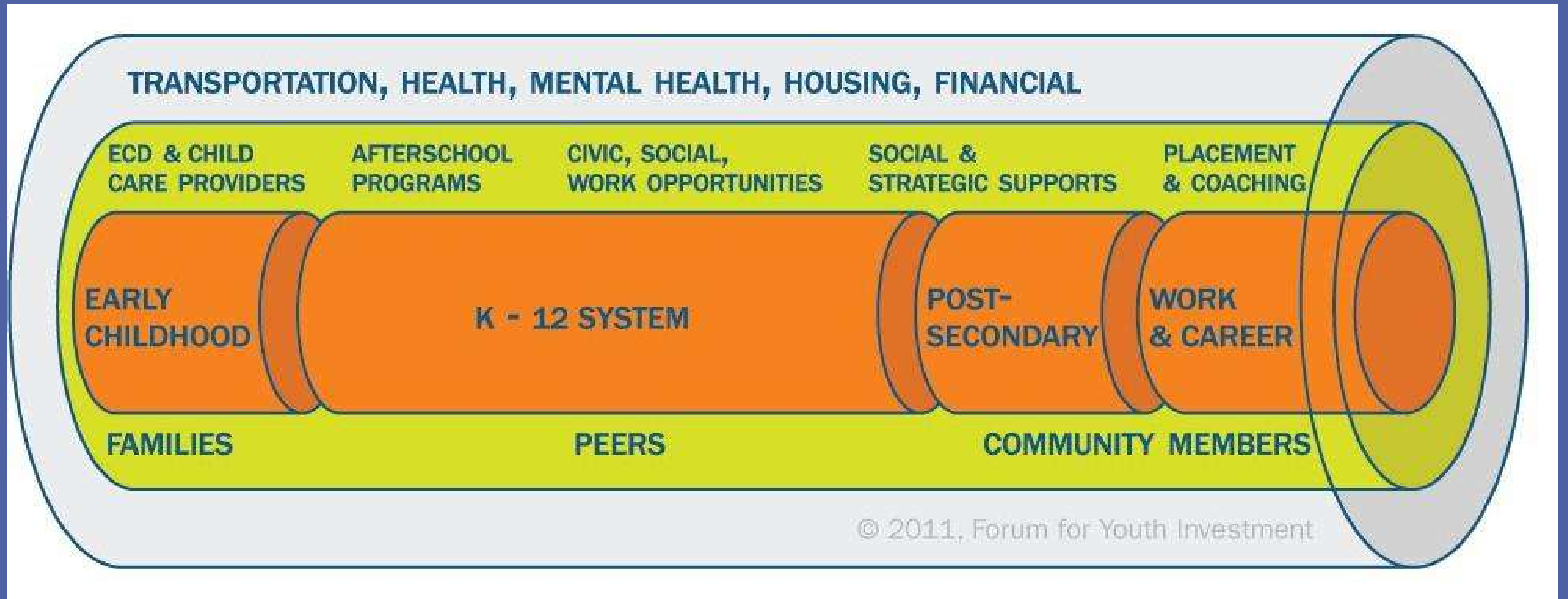
Olivia Allen, Co-founder & Strategy Director
July 13, 2023

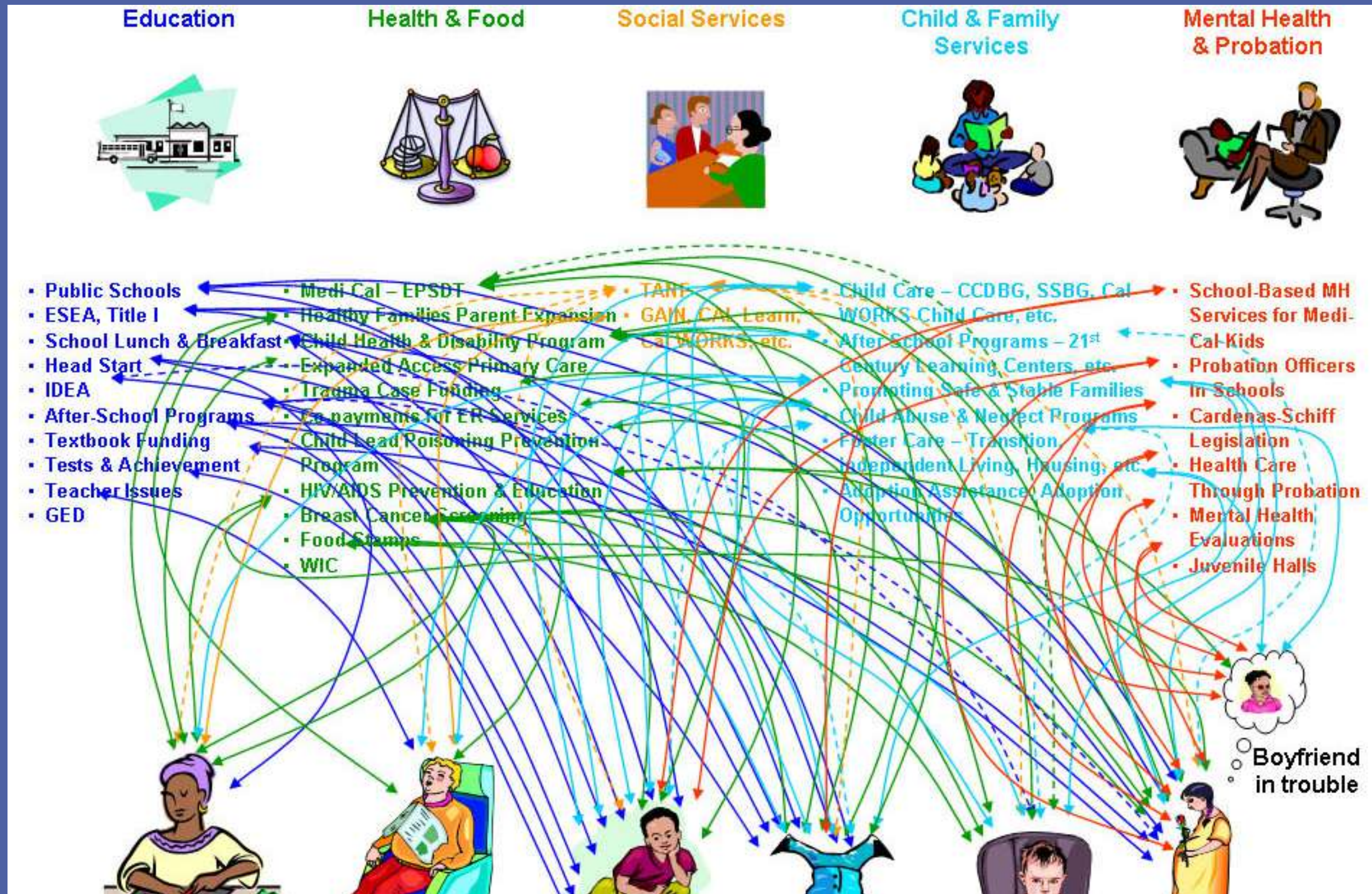


How do we support positive developmental outcomes for *all* children and youth?



How do we ensure all children & youth have access to the programs and services that support their development?





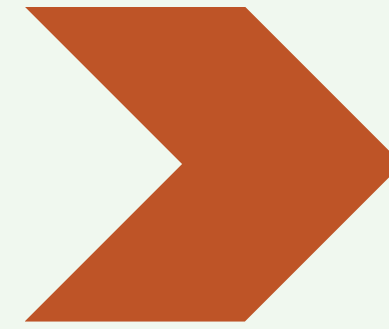
We envision a nation where all children and youth thrive because all communities maintain **equitable, coordinated, and sustainable** funding for **comprehensive** programs and services.

From Questions...

To Opportunities!

1. Current Funding

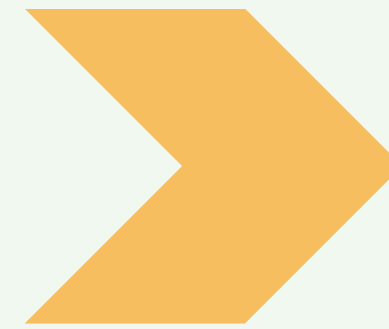
How much funding supports our goals right now?



Fiscal mapping

2. Needed Funding

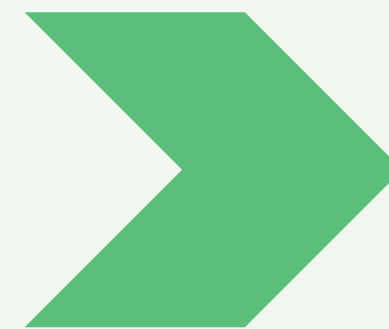
How much will it cost to fund our goals in full?



Cost modeling and estimation

3. New Funding

How do we fill the gap between current funding and fully funding our goals?



Sourcing additional funding



What Is Strategic Public Financing?

Strategic public financing picks up where strategic plans often leave off by

A

Putting a price tag on goals and policy priorities

B

Identifying ways to cover the cost

Children's Funding Project is a nonprofit social impact organization that helps communities and states expand equitable opportunities for children and youth through strategic public financing.

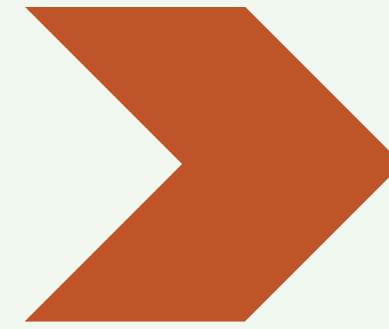
childrensfundingproject.org

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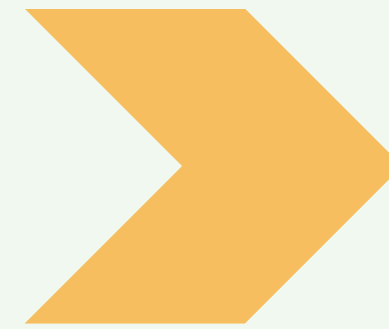
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Fiscal mapping

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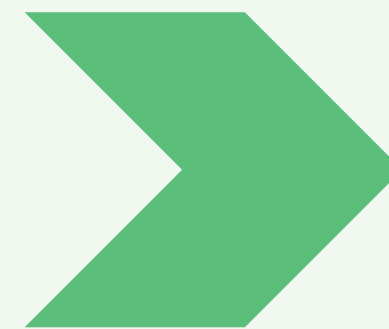
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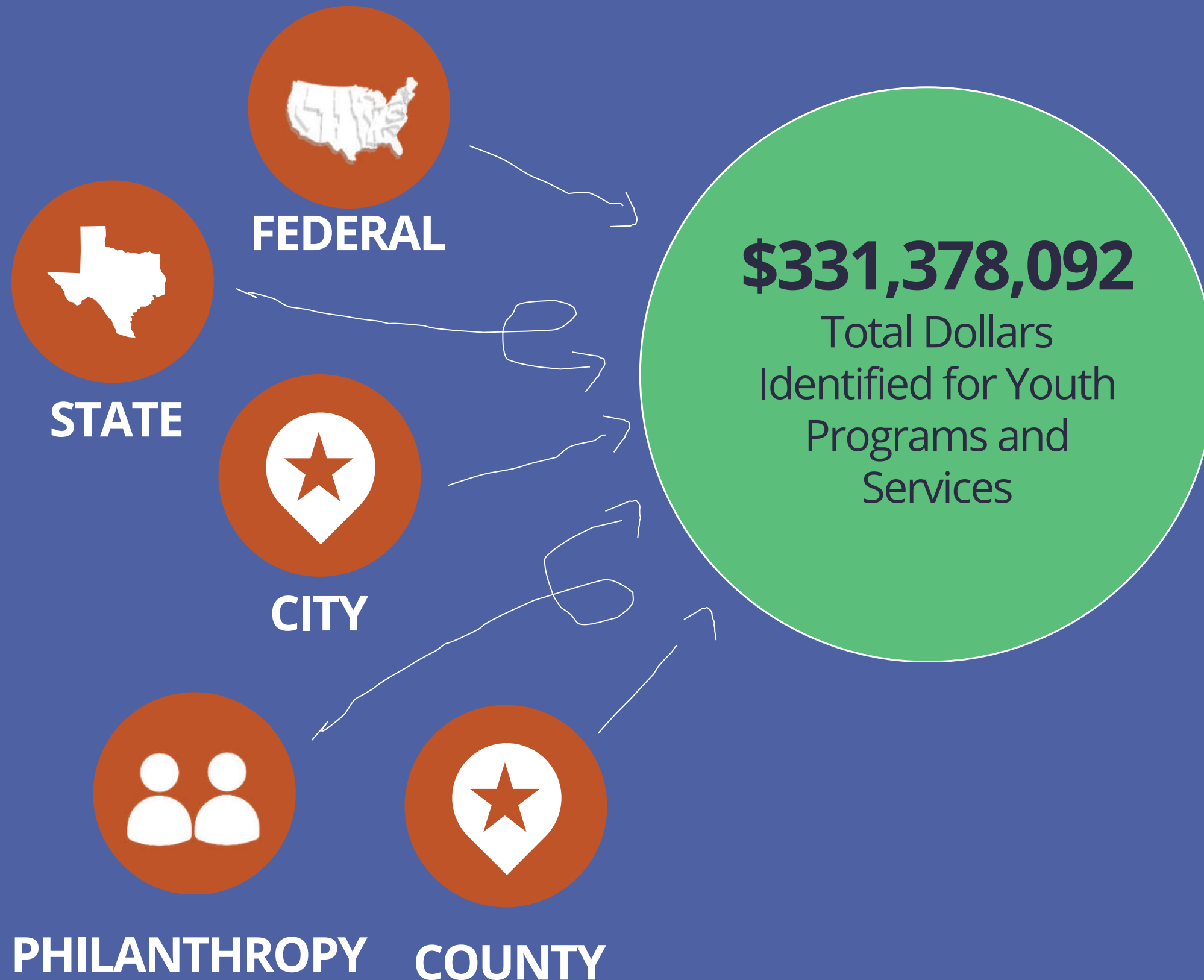


What Is a “Fiscal Map?”

- An analysis of the funding streams that finance child and youth services
- Can include public (federal, state, local) and private (philanthropy) dollars
- A fiscal map answers the question **WHO** invests **HOW MUCH** and in **WHAT?**

WHO Invested *HOW MUCH* and in *WHAT*?

Programs and Services for Children and Youth in San Antonio and Bexar County

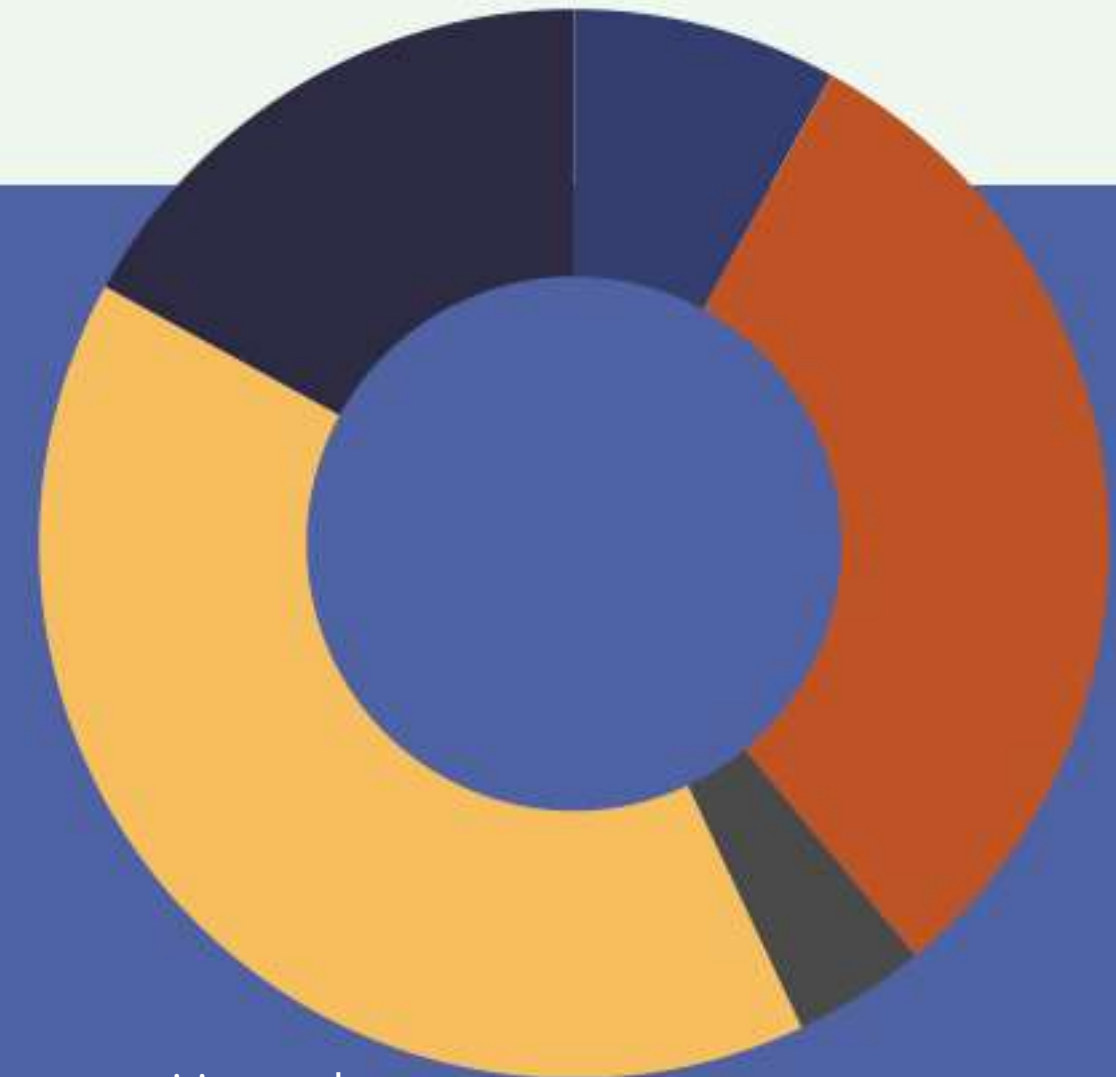
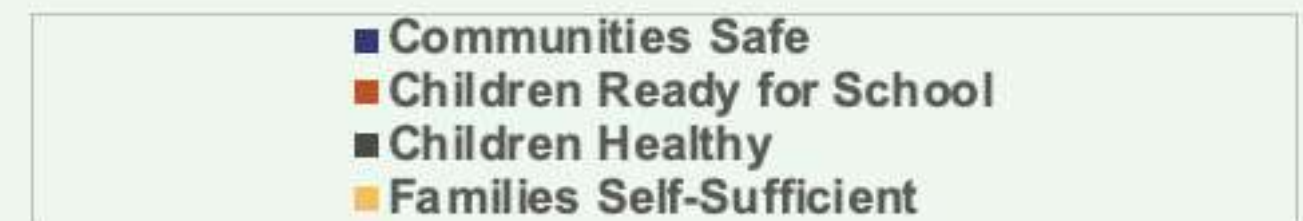
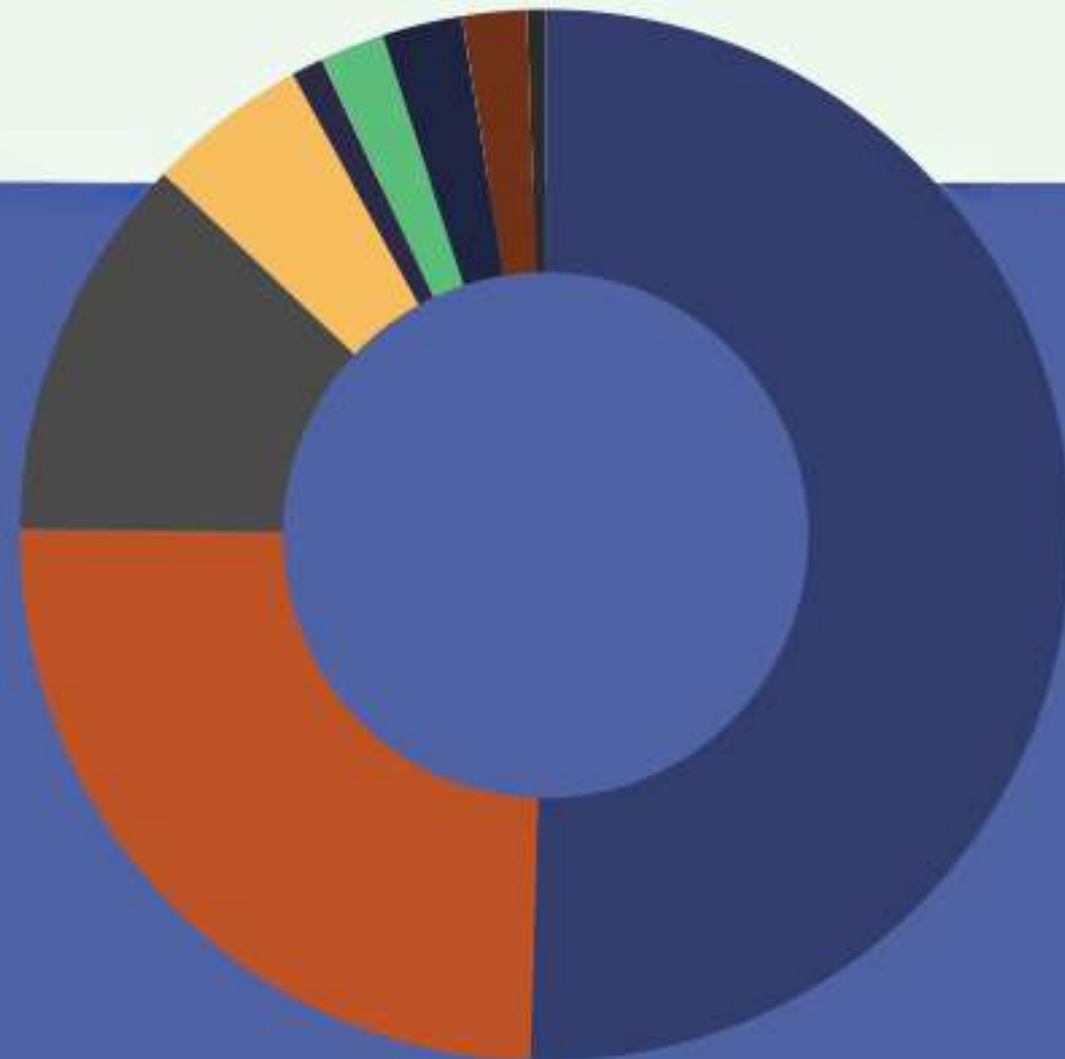
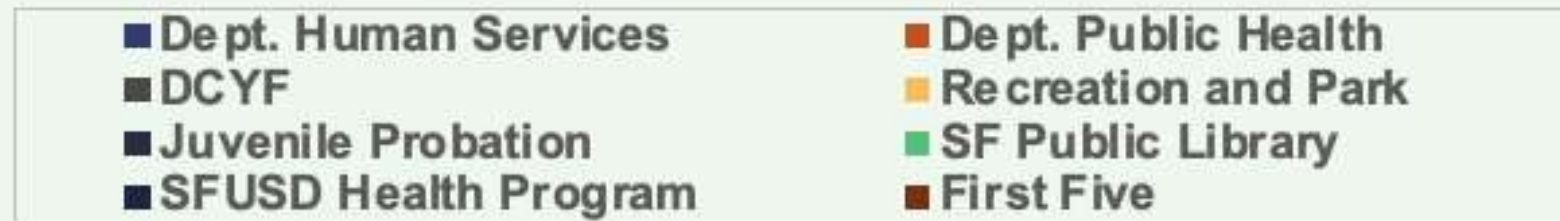


- apprenticeships
- academic supports
- college access services
- community based juvenile justice services
- cultural education
- dual generation
- early childhood
- Employment
- financial education
- foster supports
- gang prevention/ violence prevention
- health education
- health services
- health and wellness
- homeless youth services
- leadership development
- legal support
- mental/behavioral health
- mentoring
- provider outreach training and assistance
- recreational activities
- sexual health education or services
- sports
- street outreach services
- substance abuse
- STEM/technology

Traditional Department-Centered View of the Budget

VS.

Creating a Child-Centered View of the Budget



City of Poughkeepsie Fiscal Map

Poughkeepsie Children's Cabinet Fiscal Map - FY19

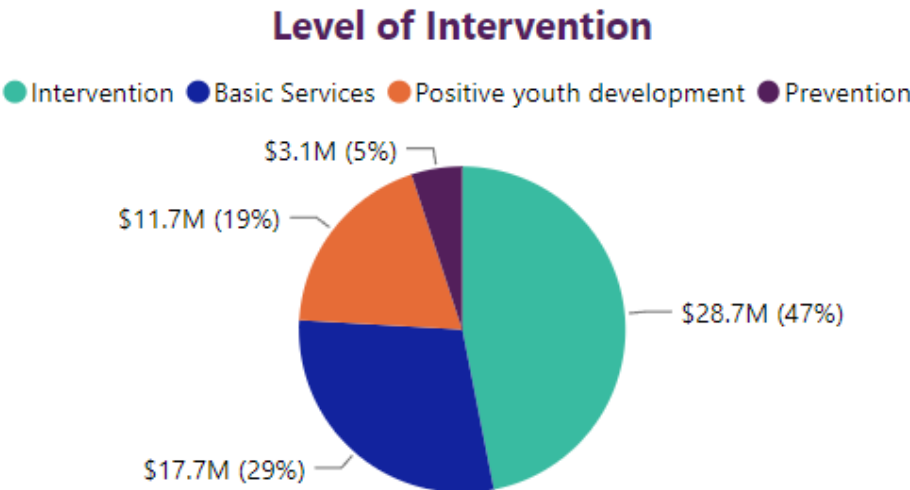
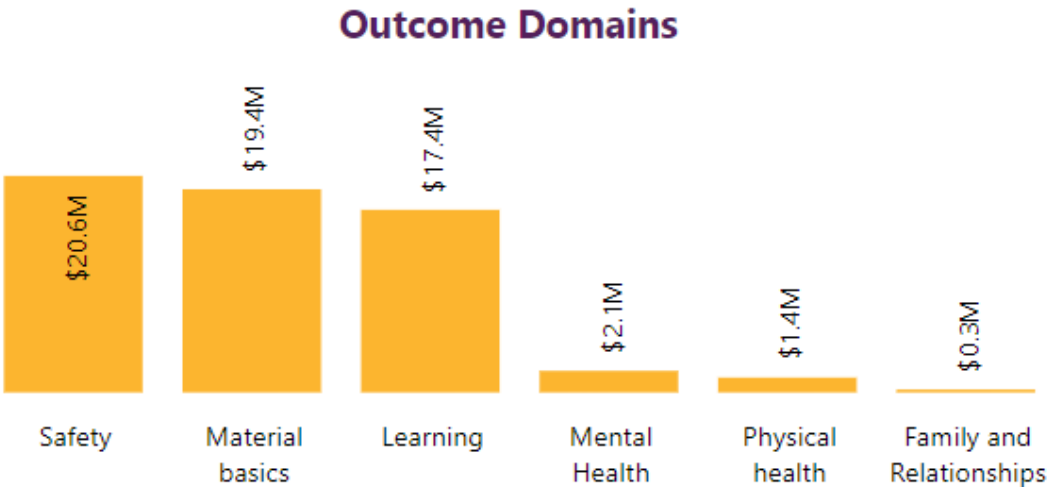
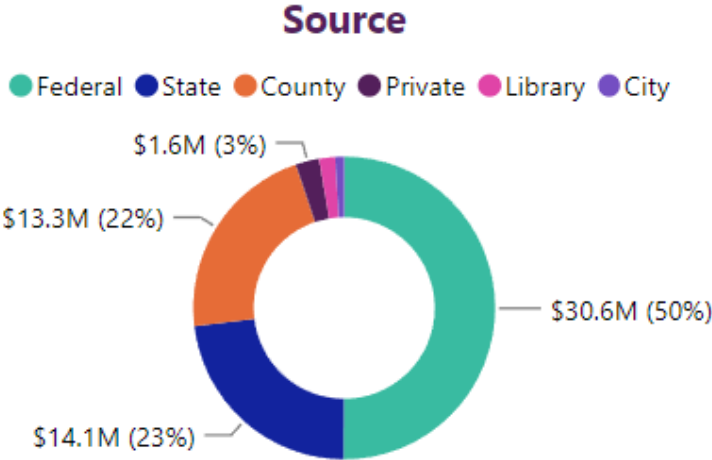
Investment in Children and Youth (0-19)

\$61M

The Poughkeepsie Children's Cabinet Fiscal Map is a comprehensive analysis of public and philanthropic investments in youth and children in Poughkeepsie. It is designed to be a resource for city leaders and youth services stakeholders seeking to visualize funding streams and align spending with priorities. In addition, nonprofits, residents, and community groups are encouraged to use the resource to better understand investments in youth and children. Through a data-driven process, the Poughkeepsie Children's Cabinet, in partnership with the national nonprofit Children's Funding Project, worked with public agencies, philanthropic donors, and nonprofits to obtain fiscal data related to youth, children and relevant family services. Fiscal data was organized into different categories to provide a more detailed analysis. For more information, please see the Appendix (Page 4). *This project was made possible through the generous support of the Poughkeepsie Alliance.*

How to Use: To take full advantage of the fiscal map's data visualization software, move your cursor and click on the segments of the data visualization elements (i.e. chart, pie, table) to view the specific information for that segment. Right-clicking over different elements and segments will provide additional data visualization options.

Funding Stream Name	Description	Amount	Granting Agency
Supplemental Nutrition Assistance Program (SNAP)	SNAP provides nutrition benefits to supplement the food budget of needy families so they can purchase healthy food and move towards self-sufficiency.	\$8,287,980	US Department of Agriculture
TANF Cash Assistance to Families	TANF stands for Temporary Assistance for Needy Families. The TANF program, which is time limited, assists families with children when the parents or other responsible relatives cannot provide for the family's basic needs.	\$6,399,746	US Department of Health and Human Services
Foster Care - County Funding	This unit provides services to children placed in care through voluntary surrender by parents, court order by Family Court, or removal of a child from his or her home due to abuse or neglect. Services provided include foster care, institutional care, adoption, non-secure detention, adoption subsidies and preventive care. This also includes Committee on Special Education school placements.	\$5,560,332	Dutchess County Department of Community and Family Services
Foster Care - Child Care	This unit provides services to children placed in care through voluntary	\$2,370,362	Office of Children



[Link here](#)

Why Create a Fiscal Map?

Understand
current
investments

Align
resources
with goals

Coordinate
supports and
services

Maximize
funding
opportunities

Identify new
areas for
attention and
innovation

NEW EMERGENT REASONS:

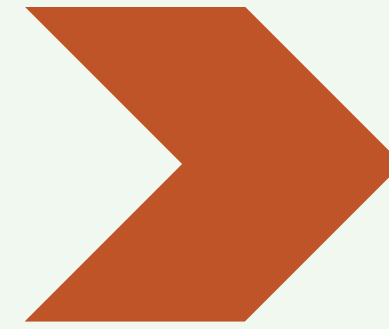
- Determine baseline funding pre-COVID-19
- As we recover, deploy funds more equitably

From Questions...

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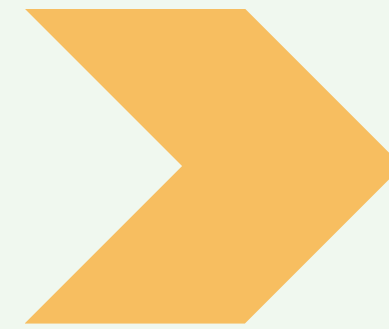
How much funding supports our goals right now?



Fiscal mapping

2. Needed Funding

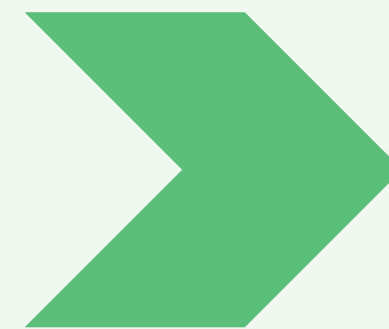
How much will it cost to fund our goals in full?



Cost modeling and estimation

3. New Funding

How do we fill the gap between current funding and fully funding our goals?



Sourcing additional funding

What Is a Cost Model?

A cost model is an approach to measuring the *true cost* of implementing and maintaining a service or program.

1

Aims to Understand

- Costs of providing early education (per child, per classroom, or total)
- How changes in wages or quality impact overall costs
- How geography or program size impacts overall costs

2

Useful for

- Determining true cost of care against market cost
- Improving child care wages
- Setting appropriate rates

3

Structural Cost Drivers

- Programmatic requirements and standards
- Ratios and group size
- Geography
- Minimum wage requirements

4

Operational Cost Drivers

- Wages and benefits
- Rent/utilities
- Food, supplies, and other nonpersonnel costs
- Professional development

Funding Sources Currently Supporting the Early Childhood Education System

- Head Start**
Provides funding for very low-income families
- Child Care Dev. Fund Block Grant**
Supports CCR&R
- Title 1 Funds**
Asheville City Schools use to support pre-k classrooms with eligible children in poverty
- NC Pre-K**
Supports admin costs & slots for qualifying families at a higher income level
- State subsidies**
Partially subsidizes child care for working families
- NC Public Schools**
Provides a per-child grant allotment for the Developmental Day Center Program
- Smart Start**
Helps working parents pay for childcare & supports quality improvement
- County funds**
Support CCR&R through the Buncombe PFC and provide in-kind services and buildings
- NC Pre-K**
Supports admin costs & slots for qualifying families at a higher income level
- Gifts & grants***
from private foundations, corporations, & other donors.
- Out-of-pocket tuition**

1,778

- Proposed new, fully-funded slots with reduced provider requirements and expanded eligibility

Unserved preschool-eligible children likely to enroll in new, funded slots.

2,719

- NCPC & Smart Start local partnership providers
- NC Pre-K Providers
- Southwestern Child Development Commission early education and pre school partners
- Buncombe PFC Direct Service Providers & Community Partners

3, 4 & 5-year-olds currently enrolled in licensed pre-K, funded at least in part by a variety of federal, state and private dollars

812

- Unlicensed local childcare providers

Children in unlicensed partial day care (paid for out-of-pocket)

Filling the Gap

What it would take for the Asheville-Buncombe Preschool Planning Collaborative to fill the high quality preschool gap with local funds.

Proposed new funding source to support an expanded early childhood education system

New Local Funds

Support new slots for children via the Asheville Buncombe Preschool Planning Collaborative

1,778

target eligible, available 3, 4 & 5-year-olds

x \$10,774

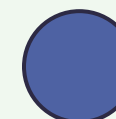
estimated cost per slot for ABPPC full day, full year quality pre-K

\$19,159,022

estimated cost to expand high quality pre-K to 1,778 additional children

+ \$25,000/NEW CLASSROOM

estimated per classroom start-up cost

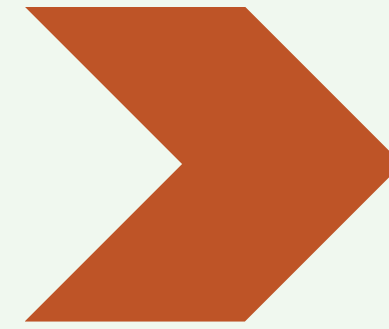


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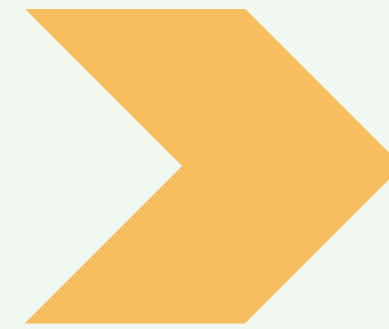
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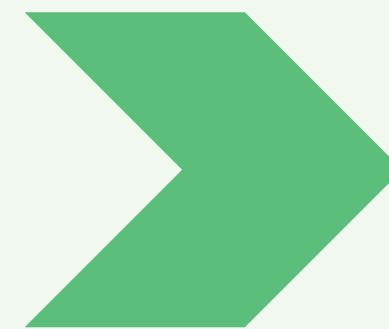
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Sourcing additional funding

Sources of Additional Funding to 'Fill the Gap'

What are your typical sources of funding for kids?

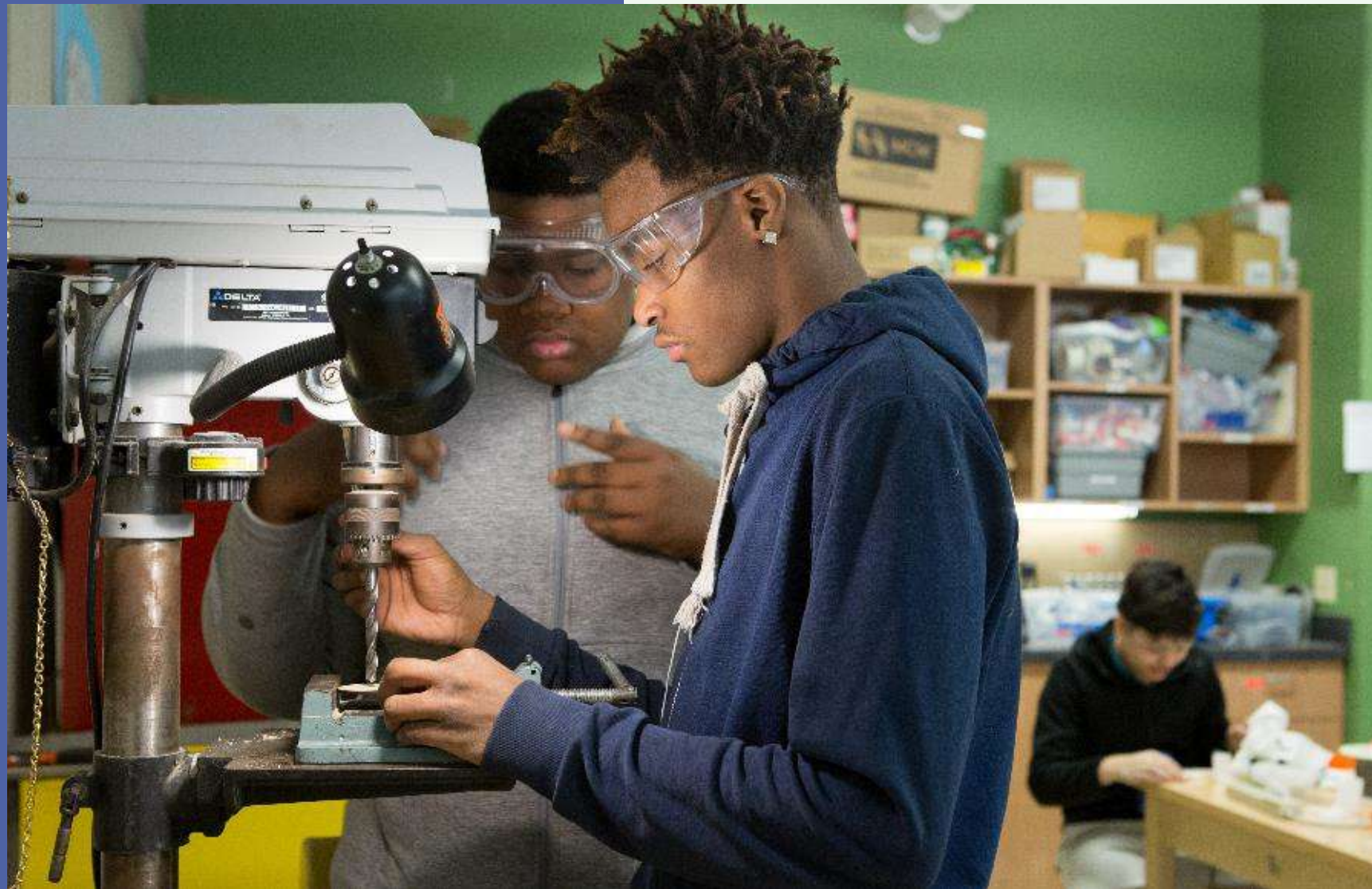
Federal grants	State budget allocations	City or County budget allocations
National foundations	Local foundations	Local United Way
Corporate giving	Individual donors	Fee-based services

What other sources of funding have been leveraged for kids?

Voter-approved children's funds	Community benefit agreements	Community development financial institutions
In-kind facilities usage	Opioid settlements	Social Impact Bonds
PILOT agreements	Revolving loan fund	General obligation bonds

[READ: Innovative Financing to Expand Services So Children Can Thrive](#)

In-Kind Facilities Usage



Governments can support child-serving providers by offering public facilities for youth services free of charge or at a discounted rate.

Topic

Topic

Nashville Afterschool Zone Alliance (NAZA):

Metro Nashville Public Schools matched \$400,000 of city funding with in-kind facilities usage, transportation and staff support to help the Nashville Afterschool Zone Alliance (NAZA) open a new 'zone' in 2010.

Community Reinvestment Act (CRA) Agreements

Agreements between community organizations or governing bodies and financial institutions that pledge a multi-year program of lending, investments, and/or services from the banks.

Farmers and Merchants Trust Company of Chambersburg, PA

F&M Trust provided a \$1.2 million loan to a community-based organization serving LMI individuals.

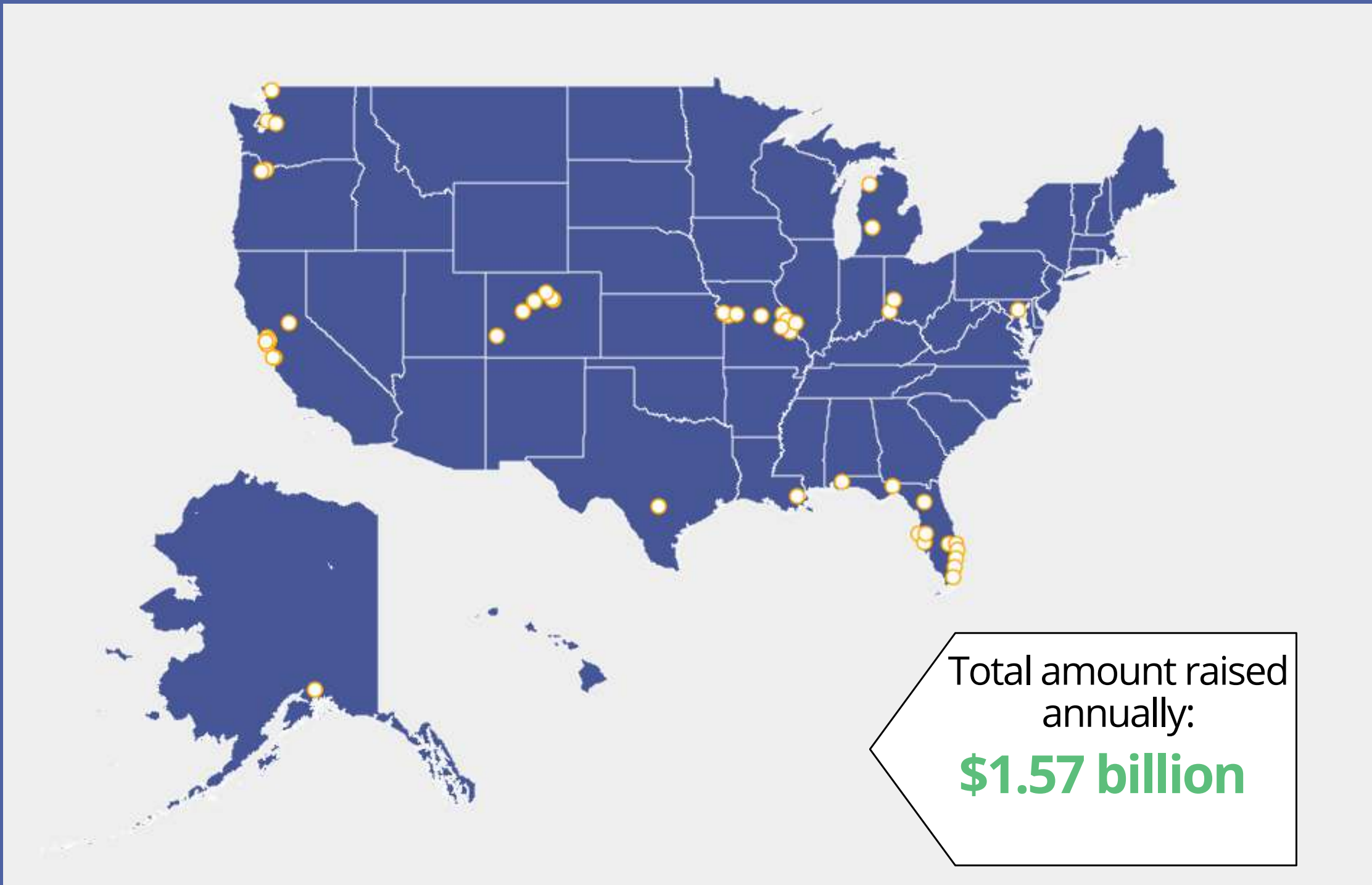
The loan was used to refinance a child care center offering day care and before and after school programs.



Voter-Approved Children's Funds

What is a voter-approved children's fund?

A portion of a specific source of city, county, or school district tax revenue that is levied and dedicated for a purpose related to children and youth (outside of k-12 education or child welfare).



Contact Information

Contact Us

Olivia Allen

olivia@Childrensfundingproject.org

About Us

Children's Funding Project is a nonprofit social impact organization that helps communities and states expand equitable opportunities for children and youth through strategic public financing.

Get In Touch with Us



2101 L St NW
Suite 800
Washington, D.C., 20037



(202) 331-4450



childrensfundingproject.org



[@FundOurKids](https://twitter.com/FundOurKids)



linkedin.com/company/childrens-funding-project/



Federal Funding Catalog



Federal Funding Streams for Children and Youth Services

HOW TO USE THIS TOOL
HOW TO DOWNLOAD DATA

CLEAR FILTERS OPEN ACTIVE FILTERS TRIBAL NATIONS Select a funding stream below to learn more about that funding stream.

Funding Stream Name

All

Outcome Category

All

Service and Program Category

All

Specific Eligible Services and Programs

All

Age Ranges

All

Level of Intervention

All

Typical Local Recipients

All

Designated COVID Relief Funding

All

There are 286 funding streams that match your current filters:

Funding Stream Name	Funding Program Description	FY 22 Federal Funding	FY Fui
21st Century Conservation Service Corps	Through this program, work and training opportunities are provided to young people and veterans in order to develop the next generation of lifelong conservation stewards and protect, restore, and enhance America's great outdoors.	\$47,000	
Academic Exchange Program - Educational Advising and Student Services	As authorized by the Fulbright-Hays Act, the Bureau of Educational and Cultural Affairs (ECA) seeks to increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange programs, including the exchange of scholars, researchers, professionals, students, and educators.	\$9,848,717	
Access and Visitation (AV)	Funding from Access and Visitation enables states to create programs that support and facilitate access and visitation by noncustodial parents with their children.	\$8,522,779	
Administrative Cost Grants for Indian Schools	These are grants to tribes and tribal organizations operating schools for the purpose of paying administrative and indirect costs.	\$21,907,536	

Select a funding stream above to activate this button for more information



Children's Funding Project is a nonprofit social impact organization that helps communities and states expand equitable opportunities for children and youth through strategic public financing.

childrensfundingproject.org

Building a Funding Pipeline

Olivia Allen, Strategy Director, Children's Funding Project

Dreama Gentry, President & CEO, Partners for Rural Impact

Josh Davis, Vice President of Policy and Partnerships, StriveTogether

Cecilia Gutierrez, Managing Director, Portfolio Lead, Blue Meridian Partners

Moderator: Christian Rhodes, Deputy Executive Director,
William Julius Wilson Institute, Harlem Children's Zone



At Harlem Children's Zone



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@EdRedesignLab

#PowerOfPlace

Harvard & The Legacy of Slavery

10:25-10:55 AM

Sara Bleich, Vice Provost for Special Projects,
Harvard University; Professor of Public Health Policy,
Harvard T.H. Chan School of Public Health



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Group Photo and Break

The next session will begin at 10:25 AM



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Harvard & the Legacy of Slavery Initiative

July 13, 2023
Sara Bleich, Vice Provost
for Special Projects



How did we get here?

Sven Beckert's undergraduate course and subsequent report



Drew Faust's committee on the University and slavery



Larry Bacow requests Harvard & the Legacy of Slavery Report led by Tomiko Brown Nagin

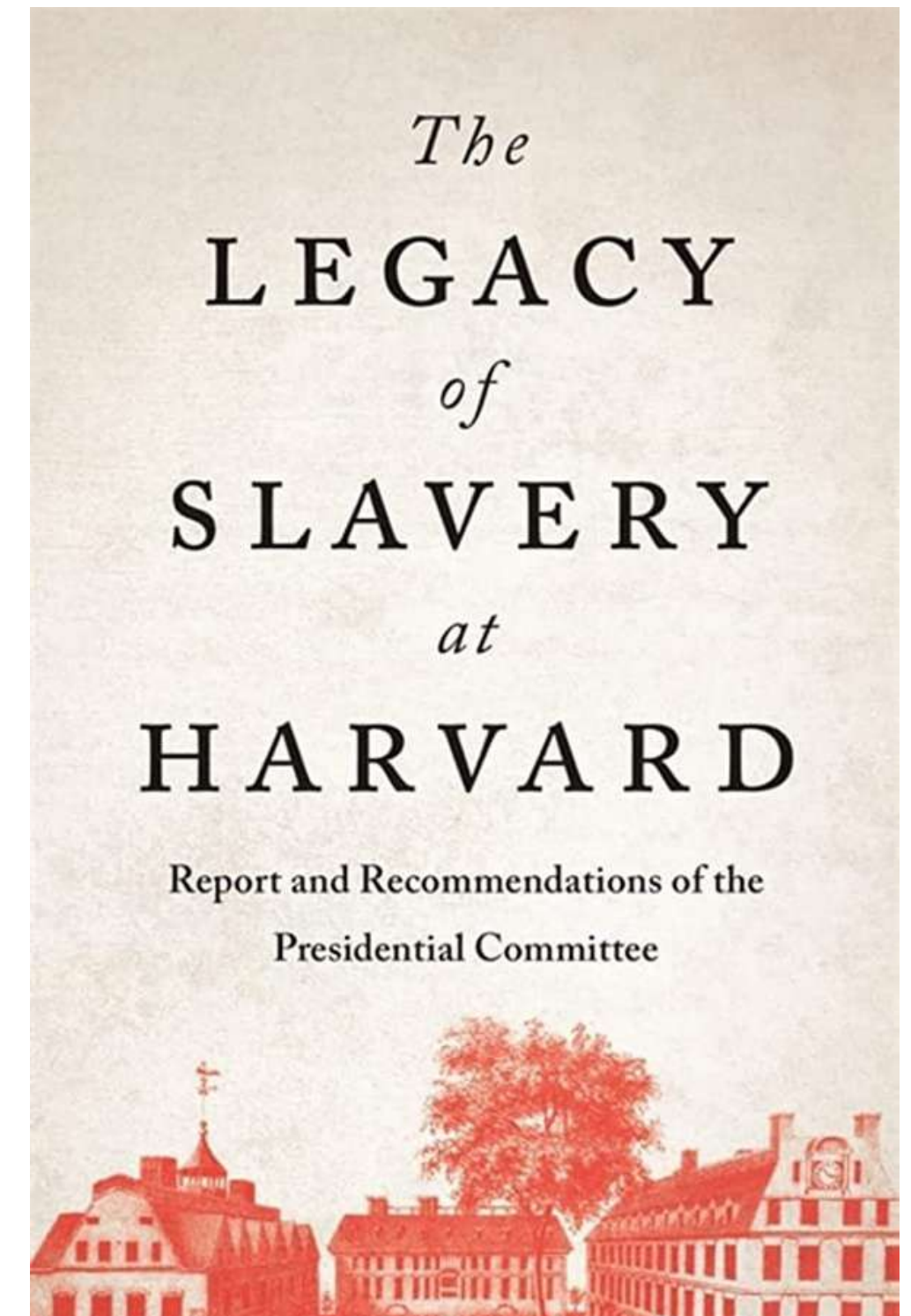
What did we Learn?

**Direct ties to
enslavement**

Financial ties

Intellectual ties

Examples of resistance



Where are we going?

1

Transform Harvard into an institution accountable for its past and active in advancing reparative efforts

2

Meaningfully engage direct descendants and communities harmed by the impacts of slavery

Our Leadership team





My orientation to this work

Guideposts

- Leverage the institution's educational and research resources to advance opportunities for communities proximate to Harvard and beyond
 - Strengthen and enlarge relationships with historically Black colleges and universities and other minority-serving institutions
 - Identify and engage direct descendants of individuals enslaved by Harvard personnel
 - Build a physical memorial on Harvard's campus to honor those who were enslaved
 - Ensure institutional accountability
-

Key accomplishments

- Developed new curricular resources and trainings to support Harvard community members in teaching/discussing slavery and legacies of slavery at Harvard, led by Meira Levinson
 - Launched the Harvard & the Legacy of Slavery Remembrance Project, led by Richard Cellini
 - Announced the Harvard & the Legacy of Slavery Memorial Project Committee, led by Dan Smith and Tracy Byers
 - Launched Harvard's partnership with the HBCU Digital Library Initiative, led by Jerome Offord and Suzanne Wones
 - Announced the appointment of Ruth Simmons
 - Launched a new website
 - Created institutional muscle to do the work
-

Common efforts around campus

- Creating space for conversation
- Screening the H&LS film
- Launching a lecture or lecture series
- Developing curricular offerings
- Leveraging the H&LS tour





More Unique efforts around campus

- Incorporating H&LS into orientation materials
 - Enhancing the content in the H&LS report
 - Including themes from the H&LS report in an annual conference or symposium
 - Creating opportunities for HBCU and MSI student and faculty exchanges
 - Strengthening research and education with external partners
 - Creating permanent opportunities for reflection
 - Digging into institutional history
-

Recent SCOTUS decisions

- Eroding access to education
 - Affirmative action
 - Student debt relief
- Pulling back on LGBTQ+ rights



How to Engage with H&LS



Leverage our website to
stay informed



Serve as ambassadors of
this work



Stay tuned for a RFP in
the fall to advance this
work



Reach out with good
ideas!



Wrap up

- This work is sobering but also very exciting
 - It represents a new era and has already unlocked enormous creativity and commitment
 - We very much look forward to learning from others and advancing this initiative in a way that is worthy of those whose lives were so constrained by slavery and its legacies
-



THANK YOU

sara_bleich@harvard.edu

Applying for and Managing Public Funding 101

11:00-12:00 PM

Elson Nash, Director, School Choice and Improvement Programs,
U.S. Department of Education

Teresa Wilke, Owner & Principal, Silver Arrow Strategies

Dreama Gentry, President & CEO, Partners for Rural Impact

Sonali Nijhawan, Director, AmeriCorps State and National;
Harvard EdRedesign Lab By All Means Senior Fellow

Moderator: Nina Carter, Managing Director of Place,
William Julius Institute at Harlem Children's Zone



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Break

The next session will begin at 11:00 AM



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Pillars of Full Service Community Schools

(A) *Integrated student supports* at a community school that provide in- and out-of-school support for students, address well-being, and address out-of-school barriers to learning through partnerships with social and health service agencies, including mental and behavioral health agencies and providers, and coordinated by a community school coordinator.

(B) *Expanded and enriched learning time and opportunities*, through evidence-based strategies (as defined in this notice), including before-school, after-school, during-school, weekend, and summer programs that provide additional academic instruction, individualized academic support, enrichment activities, or learning opportunities, for students at a community school.

(C) *Active family and community engagement.*

(D) *Collaborative leadership and practices* that build a culture of professional learning, collective trust, and shared responsibility for each community school.

Promise Neighborhoods Pipeline Services

(a) High-quality early childhood education programs.

(b) High-quality school and out-of-school-time programs and strategies.

(c) Support for a child's transition to elementary school, from elementary school to middle school, from middle school to high school, and from high school into and through postsecondary education and into the workforce, including any comprehensive readiness assessment determined necessary.

(d) Family and community engagement and supports, which may include engaging or supporting families at school or at home.

(e) Activities that support postsecondary and work-force readiness, which may include job training, internship opportunities, and career counseling.

(f) Community-based support for students who have attended the schools in the area served by the pipeline, or students who are members of the community, facilitating their continued connection to the community and success in postsecondary education and the workforce.

(g) Social, health, nutrition, and mental health services and supports.

(h) Juvenile crime prevention and rehabilitation programs.

Applying for and Managing Public Funding 101

Elson Nash, Director, School Choice and Improvement Programs,
U.S. Department of Education

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Dreama Gentry, President & CEO, Partners for Rural Impact

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1:00-2:00 PM

**Workshop Track 1:
Best Practices Around
Private Funding**

GCC 123

**Workshop Track 2:
Organizational
Finance**

Longfellow 319+320



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Lunch

Workshops begin at 1:00 PM



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Workshop Track 1:

Best Practices Around Private Funding

Jennifer Klein, Chief Development Officer, Harlem Children's Zone

Marland Cole, Executive Director, Evolve502

Melanie Moore, CEO, Oakland Thrives

Moderator: Brian McClendon, Managing Director of Place, William Julius Wilson Institute, Harlem Children's Zone



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Workshop Track 2: Organizational Finance 101

Tom Bartlett, Co-Founder & President, 20 Degrees



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William Julius Wilson Institute

Summer 2023

Revenue & Finance Training



Enterprise Capital 20 DEGREES

July 13, 2023

Meet the Team Enterprise Capital Team // Why are we here



Andrea Levere

Executive Fellow

International Center for Finance
Yale School of Management

President Emerita

Prosperity Now



Alexandra Sing

Incoming COO

Enterprise Capital Institute



Tom Bartlett

Co-Founder & President

20 Degrees



Sara Gibson

Co-Founder & CEO

20 Degrees

// Training Agenda

Introductions, Training Goals

- Organization representative introduces their organizations
- Agenda review

Financial Analysis and Enterprise Capital

- Keys to financial strength
- The 10 Questions: Balance sheet and revenue & expense statement analysis
- Enterprise capital: What it is and why it matters

Business Model and Revenue Generation

- Value Proposition
- Earned Revenue 101

Journey to Financial Sustainability

- Putting it all together



Introductions: Each Organization

- Organization Name
- Representative Name
- Answer Question Below

From a financial perspective, what is the greatest challenge and opportunity your organization is currently facing?

// What will you walk away with today?

- Financial management and capitalization strategies
- How to attract and/or invest Enterprise Capital and other types of funding
- How to create or strengthen your business model with earned revenue



Financial Analysis & Enterprise Capital:

Lessons from Financial Management

Keys to Financial Strength

Conducting Financial Analysis: The 10 Questions

Enterprise Capital: What It Is and Why It Matters



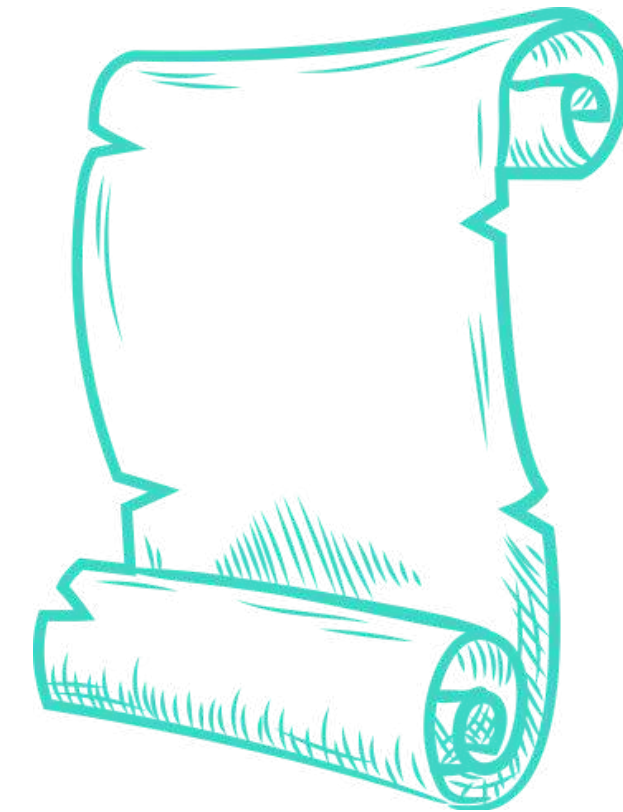
// Four Keys to Financial Strength

1. High quality financial information in a "user friendly" format: "Numbers don't lie, but they can hide the truth"
2. The ability to read and analyze financial information to assess your business and financial model and overall financial performance
3. The capacity to attract the amount and type of capital necessary for the organization to achieve the mission and meet performance goals
4. Access to the technical expertise needed to strengthen the financial model and operations



// Golden Rule of Finance: Matching Sources and Uses of Funds

- Organizations must identify their uses of funds and select their sources of funding to strengthen their financial condition: Short-term; Long-term; restricted; unrestricted.
- Net assets—or equity—is flexible funding that can be invested in any part of the enterprise, not just in delivering products or services.
- Enterprise capital builds net assets which also serves as equity to attract additional debt.



// The Art of Financial Analysis

- Financial analysis is trend analysis: “Getting better is more important than being good.”
- The financial analysis process is more art than science: no one number means anything by itself.
- The quality of your financial information determines the value of your analysis.



Resources:

- ***From Mystery to Mastery: A Practical Guide to Nonprofit Financial Management;***
- **[The Blueprint for Enterprise Capital: A Strategy for Aligning Capital and Capacity to Magnify Nonprofit Impact](#)**

// The Balance Sheet

Overview: snapshot of an organization's financial condition at ***one point in time***

- **Source and use statement** -- identifies where an organization gets its funds and how it uses its funds.
- **Used to assess financial management** -- how well does an organization manage its financial resources?
- **Shows where the cash is** – how much cash is available to cover operations?

How much is restricted vs. unrestricted?
- **Measures net assets**: the unrestricted, accumulated resources to fund the future



// The Balance Sheet Format

SOCIAL JUSTICE NOW!

Balance Sheet

June 30, 20XX

ASSETS

Uses of Funds

What an organization **owns**

Current-Assets

Turns into cash within 12 months (most like cash)

Long-term Assets

Turns into cash in more than 12 months (least like cash)

LIABILITIES

Sources of Funds

What an organization **owes**

Current Liabilities

Due within 12 months (nervous)

Long-term Liabilities

Due within more than 12 months (less nervous)

NET ASSETS

Patient Funds or Never Due (Enterprise Capital)

TOTAL ASSETS

TOTAL LIABILITIES & NET ASSETS

ALWAYS EQUAL

Social Justice Now!

Balance Sheet
as of June 30, 20XX

2019

ASSETS

Cash and cash equivalents		\$ 1,228,799
Government grant receivables		147,450
Private grant receivables, net		1,605,993
Accounts receivable		133,059
Prepaid expenses and other assets		86,042
Property and equipment, net	Long-term Assets	95,505

Current Assets

Long-term Assets

TOTAL ASSETS

\$ 3,296,848

LIABILITIES AND NET ASSETS

LIABILITIES:

Accounts payable		\$ 210,690
Accrued liabilities		99,857
Deferred revenue		55,985
Long term debt	Long-term Liabilities	1,146,807

Current Liabilities

Long-term Liabilities

Total liabilities

1,513,339

NET ASSETS:

Without donor restrictions	(202,542)
With donor restrictions	1,986,051
Total net assets	1,783,509

TOTAL LIABILITIES AND NET ASSETS

\$ 3,296,848

// **First Five Questions: How to Analyze the Balance Sheet**

1. Does the organization collect its bills?

- Days Receivable/Grants Receivable

2. Does the organization pay its bills?

- Days Payable

3. Does the organization pay its employees?

- Days Accrual; Any unpaid taxes?

4. Is the organization financially solvent?

- Is cash positive? Days Cash? Are net assets positive and growing?

5. Does the organization match its sources and uses of funds?

- Short-term/Long-term; Restricted/unrestricted



// The Revenue and Expense Statement

- Reports the revenues and expenses of the organization **over a period of time: month, quarter, year.**
- Shows the ability of an organization to deliver its programs and/or services at a cost which enables it to be financially viable.
- Illustrates the state of the financial model by the sources of funding and associated costs of product and service delivery.



// The Revenue and Expense Statement Format

Revenues or Income

-- Direct Costs

= Gross Margin

-- Operating Expenses

= Operating Margin

-- Interest/Depreciation

± Other Expense/Income

= Surplus /(Deficiency) or Change in Net Assets

REVENUES

Gross Revenues

EXPENSES

Materials

Subcontractors

Utilities

Advertising

// **Second Five Questions: How to Analyze the P&L Statement**

- 1. Is the organization growing?**
- 2. Does the organization control direct costs?**
- 3. Does the organization control fixed or overhead costs?**
- 4. Is the organization financially viable?**
- 5. What is the organization's breakeven point?**



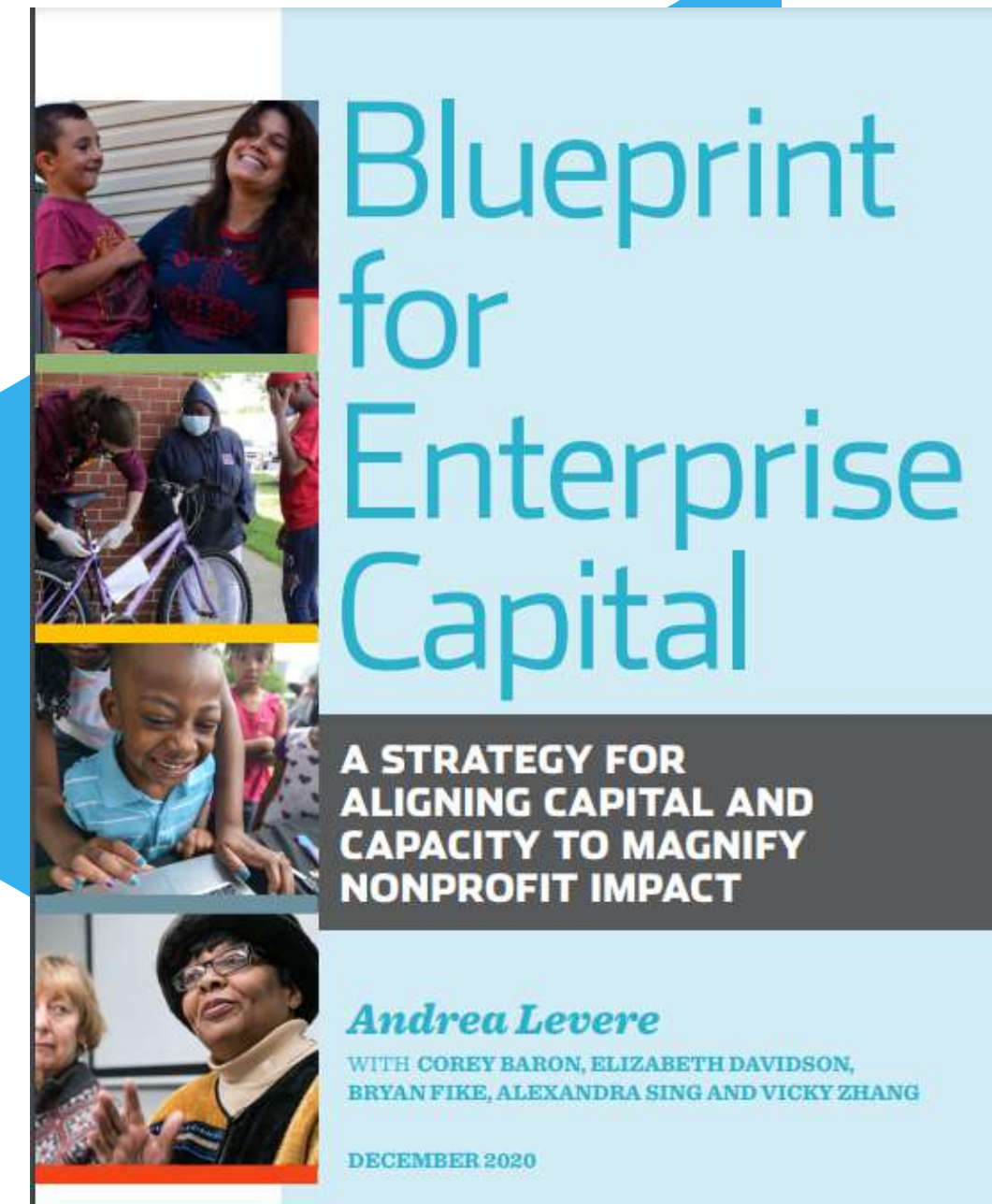
// What Can We Learn from Financial Analysis?

- ★ What do your financial statements tell you about how best to adapt your financial model for the future?
- ★ What are the innovative ways to fund program, policy, products, communications, research, organizing, or lending?
- ★ How can Enterprise Capital help to adapt your business model and meet your funding needs?

// Enterprise Capital: The High Value Fuel to build Financial Strength and Resilience

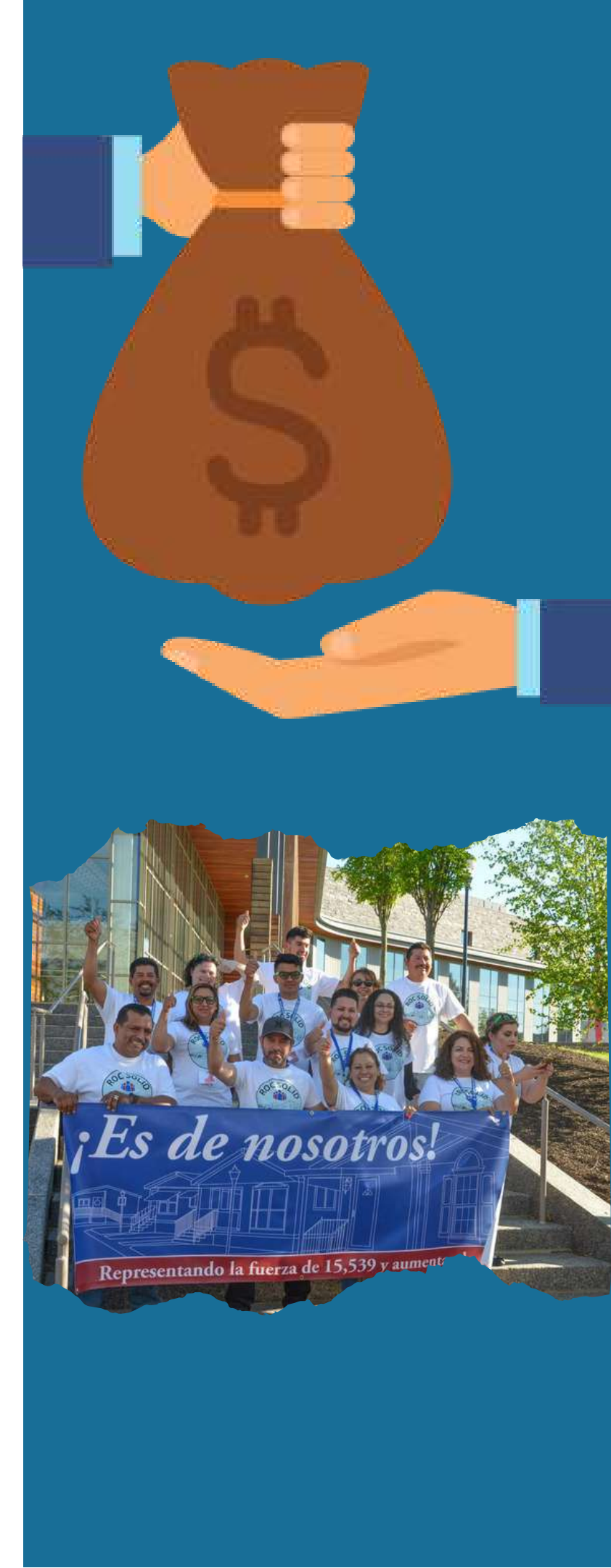
“Without access to some form of equity-like capital, nonprofits are pretty much sentenced to difficult, unhealthy or slow growth. Everyone wants the nonprofit to do more, especially when opportunity knocks and additional revenue pours in, and the organization struggles with extreme pressure, given a too small production capacity.”

Clara Miller, founder, Nonprofit Finance Fund and President Emerita, Heron Foundation



// What is Enterprise Capital?

- **Long-term, flexible capital** that targets the balance sheet (also known as philanthropic equity)
- **Builds the enduring infrastructure**—people, products, systems or innovation—that fuels an organization’s vision and mission
- **Can fund the launch, stabilization or scaling** of an organization—or recovery from the pandemic
- **Investment to address the racial wealth gap** in the nonprofit sector of systemic underfunding of organizations led by people of color



// Why Enterprise Capital Matters

Provides capital to directly pursue your mission with the security of planning for today and tomorrow—and eliminates operating risks of “reverse engineering” by funders.

- **Matches sources to uses of funds** to build financial strength and resilience and puts the nonprofit in control of the funding decisions
- **Provides the net assets necessary to leverage debt** to build a larger capital stack
- **Creates an alignment of interest between organizations and funders** (like seed and venture investors) with the delivery of aligned capacity-building services



// Aligning Capacity-Building with Capital

- Full value of enterprise capital realized with access to capacity-building services that align with the vision, mission and business model of the grantee
- The organization's business and financial model should determine the content and delivery method for services
- The Blueprint for Enterprise Capital recommends an “enterprise capital cabinet” to support growth and financial operations
- This alignment increases the funder's return on investment as it fuels greater nonprofit impact



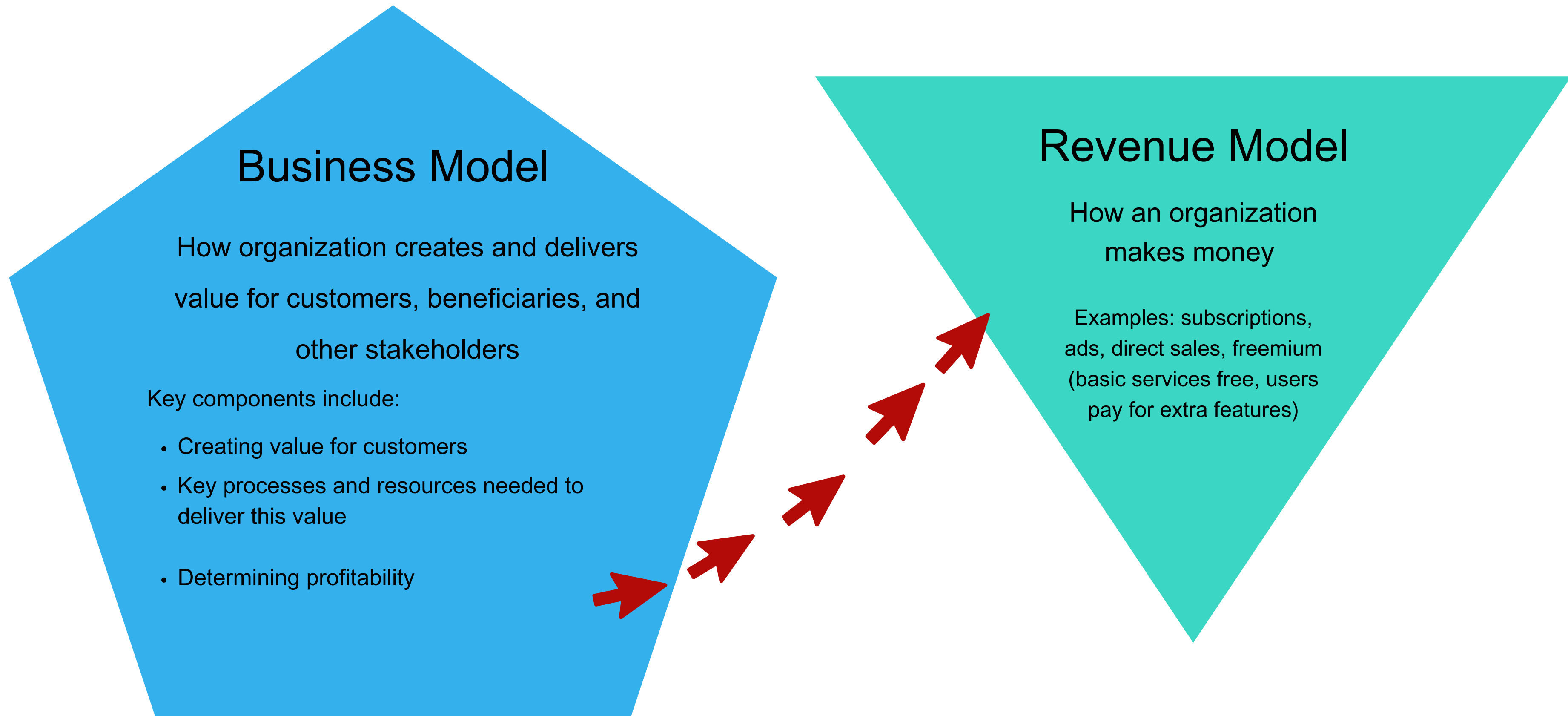
Refining Your Business Model

The Value Proposition Exercise

Revenue Models: Finding Your Mix & Earned Revenue Initiatives

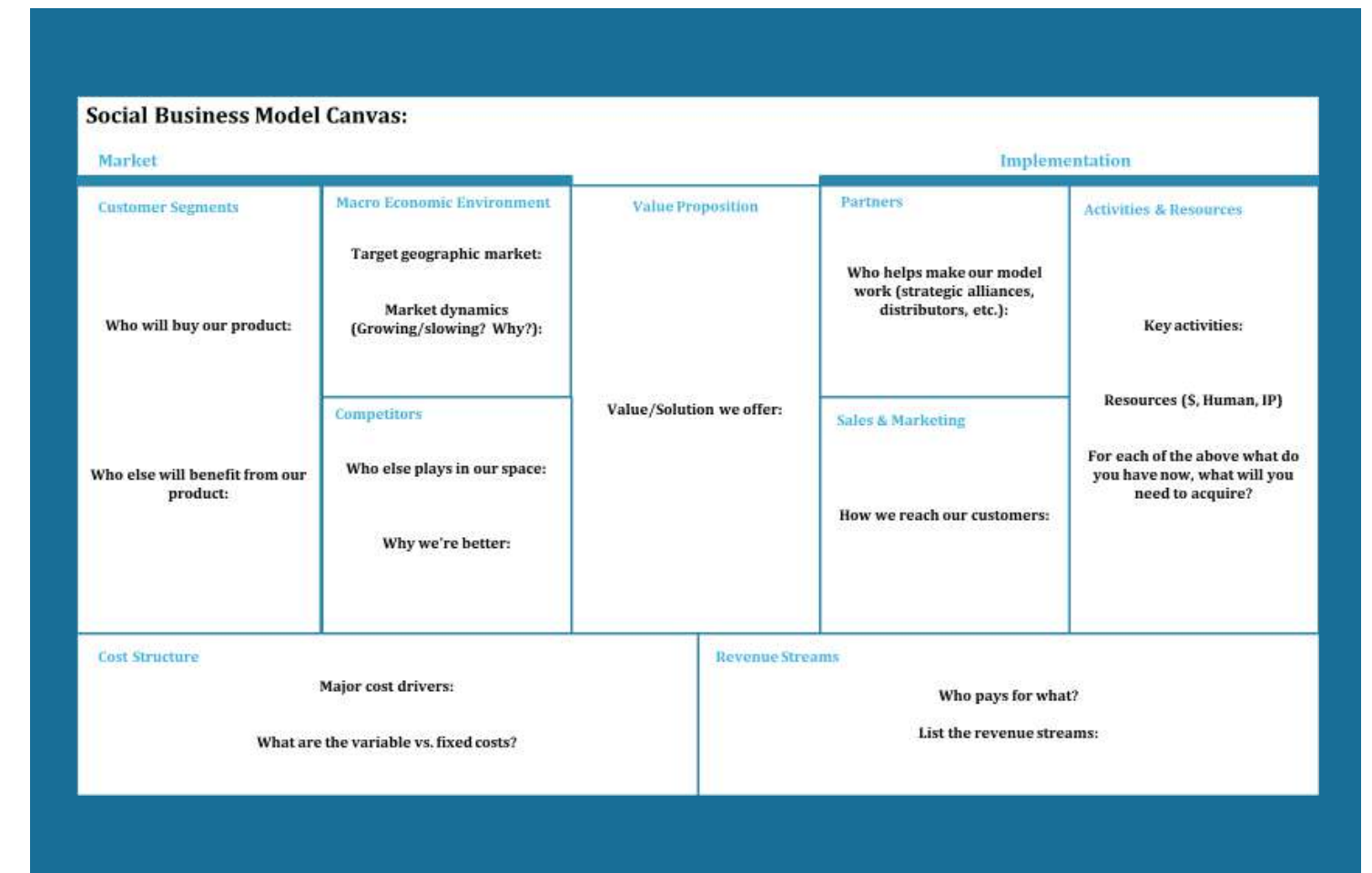


// Relationship between Business Model and Revenue Model



// Identifying your business model: Business Model Canvas

- The business model canvas is a tactical tool to help you and your organization's management team understand a business or product model in a structured way.
- The business model canvas can help gain insights about the customers or clients you want to serve, what value propositions are offered through what channels, and how your company makes money.



// Identifying your business model: Business Model Canvas

Market		Implementation		
Customer Segments Who will buy our product:   Who else will benefit from our product: 	Macro Economic Environment Target geographic market: Market dynamics (Growing/slowing? Why?): Competitors Who else plays in our space: Why we're better: 	Value Proposition Value/Solution we offer: 	Partners Who helps make our model work (strategic alliances, distributors, etc.):  Sales & Marketing How we reach our customers:  	Activities & Resources Key activities: Resources (\$, Human, IP) For each of the above what do you have now, what will you need to acquire? 
Cost Structure Major cost drivers:  What are the variable vs. fixed costs? 		Revenue Streams Who pays for what?  List the revenue streams: 		

// The Core of Your Business Model: Value Proposition

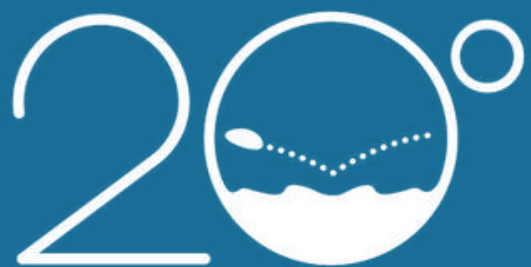
Your value proposition is the ***promise*** of the value your product or service will deliver to your customer, including the practical and emotional benefits they will receive upon purchase/use.

The value proposition answers:

Why should customers choose your firm?

Why should customers choose this service/product?

Value Proposition Exercise



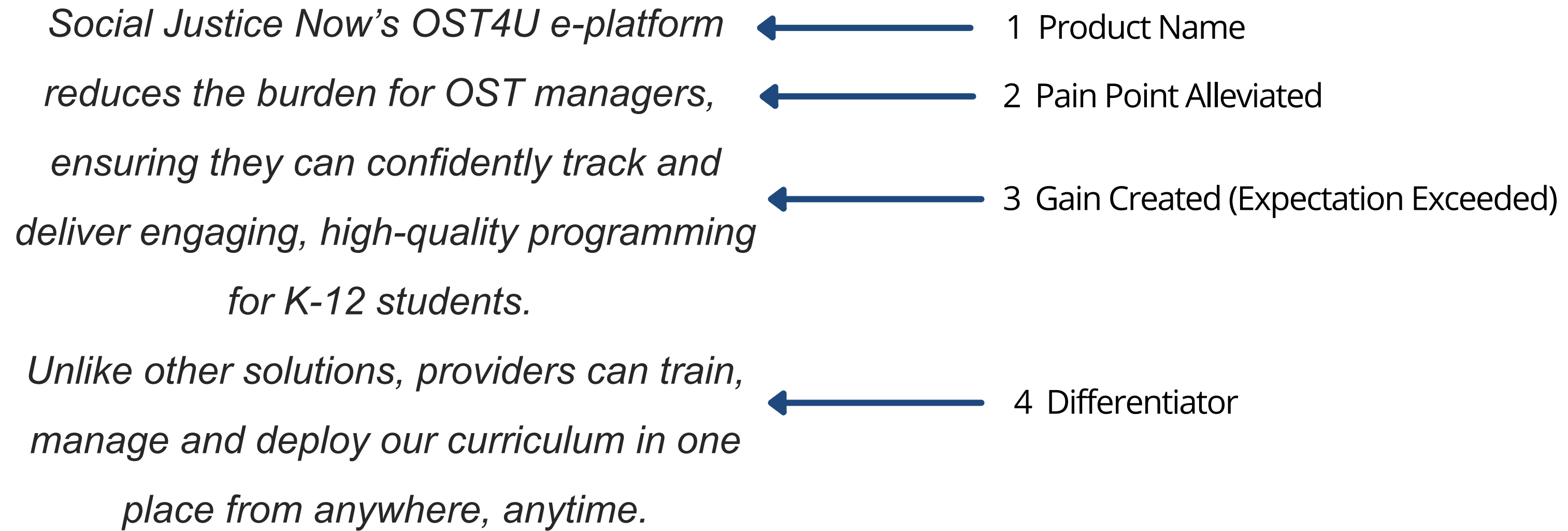
// Exercise Steps: Crafting a Value Proposition

1. Choose a Major Initiative or Program (preferably an earned income program) and consider a core customer (someone who buys / funds your product or service).
2. What problem would they say you solve for them? **Name a specific pain point you alleviate.**
3. How do you make your customer's/funder's life better? **Name a specific expectation you exceed.**
4. How is your program unique and different from others? **Name what makes it special.**
5. Put it all together.

// Value Proposition In Action

Social Justice Now - Out of School Time (OST4U) Product

An affordable, comprehensive OST program management, materials and curriculum solution.



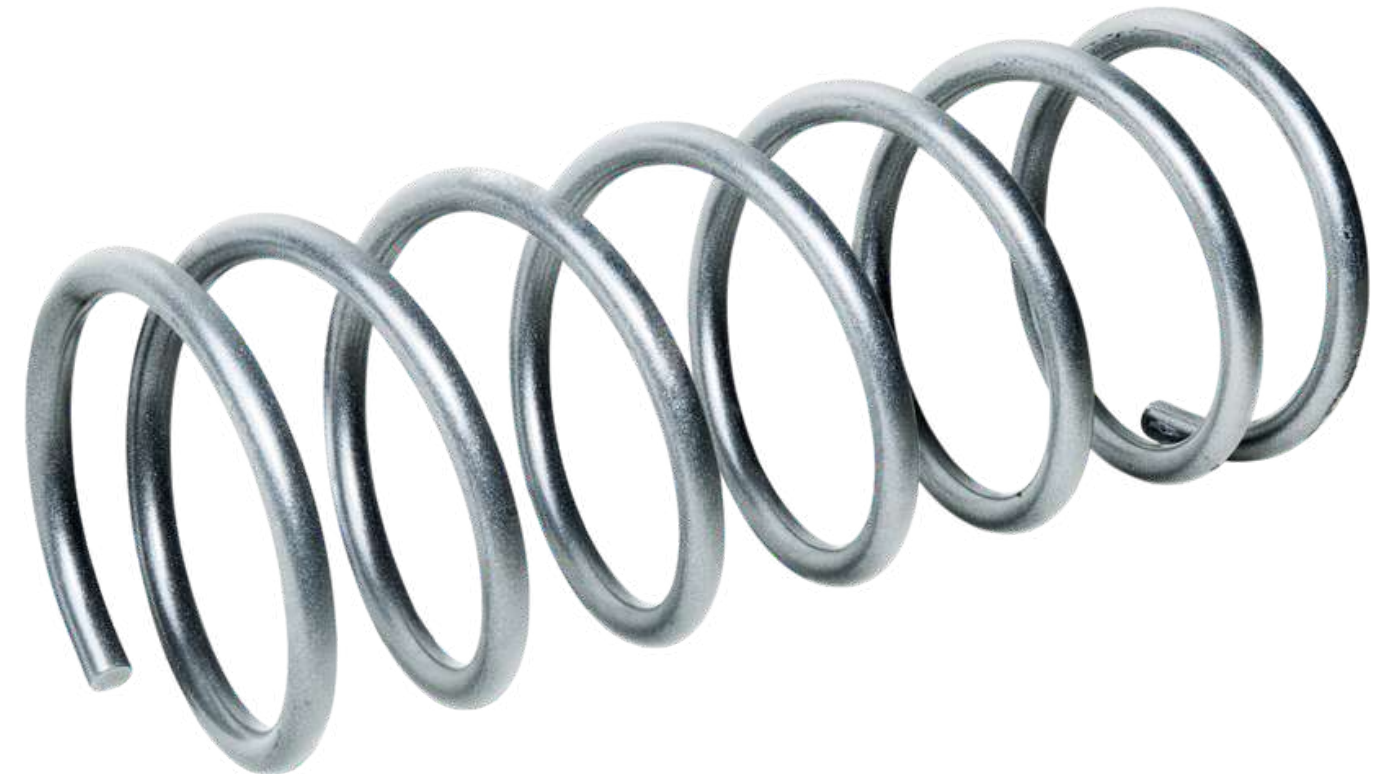
Identifying the Right Revenue Model



// Revenue Funding vs. Capital Funding



vs.



// The Revenue Mix “Sweet Spot”

The right revenue mix can differ widely across organizations, their audiences, industries, and more.

Establish your organization’s revenue mix “sweet spot” goals based on historical financial data, existing funding relationships, and predictability or autonomy of funding source.

Industry average: Only 20% of nonprofit funding is unrestricted ([source](#)).

Increasing unrestricted funding will better position your organization to invest in sustainability.

Earned revenue can help make that possible!

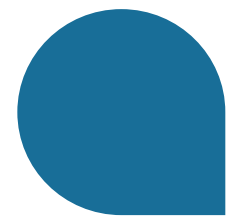
Figure 1: Characteristics of Common Revenue Sources

	Predictability	Autonomy
Endowment Income	high	high
Government Contracts*	high	moderate
Earned Income (3rd Party Payers)	high	low
Federated Gifts and Grants	high	low
Individual Contributions (small/ many)	moderate	high
Membership Dues	moderate	high
Earned Income (Individual Payers)*	moderate	high
Individual Contributions (large/ few)*	low	low
Foundation Grants	low	low

Adapted from Pratt (2004) and *Froelich (1999)

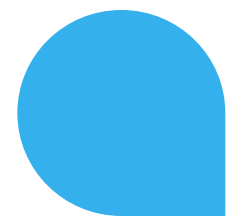
Source: [Finance Fundamentals for Nonprofits: Building Capacity and Sustainability](#).

// Common Earned Revenue Models



Mission Related Products

Program Goods | Events & Convenings



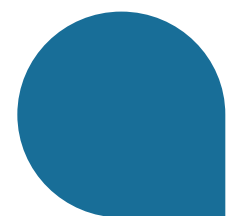
Fee for Service

B2B and B2G Contracts | Membership Programs



Harnessing Intellectual Property

Consulting & Technical Assistance | Licensing



Monetizing Fixed Assets

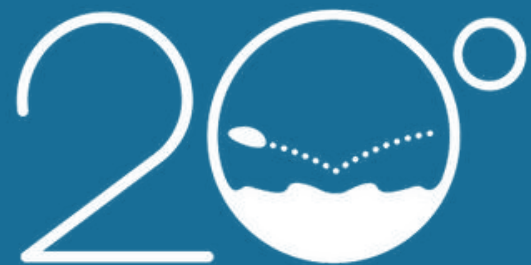
Space Rental | Equipment Rental



// Planning for New Growth/Revenue Opportunities



TAKEAWAYS



// Pillars of Financial Sustainability

In support of sustainability, organizations must have access to long-term flexible capital, invest in strategic tools and optimize predictability in their revenue streams.



STRATEGIC TOOLS

Scenario Planning
Financial Modeling



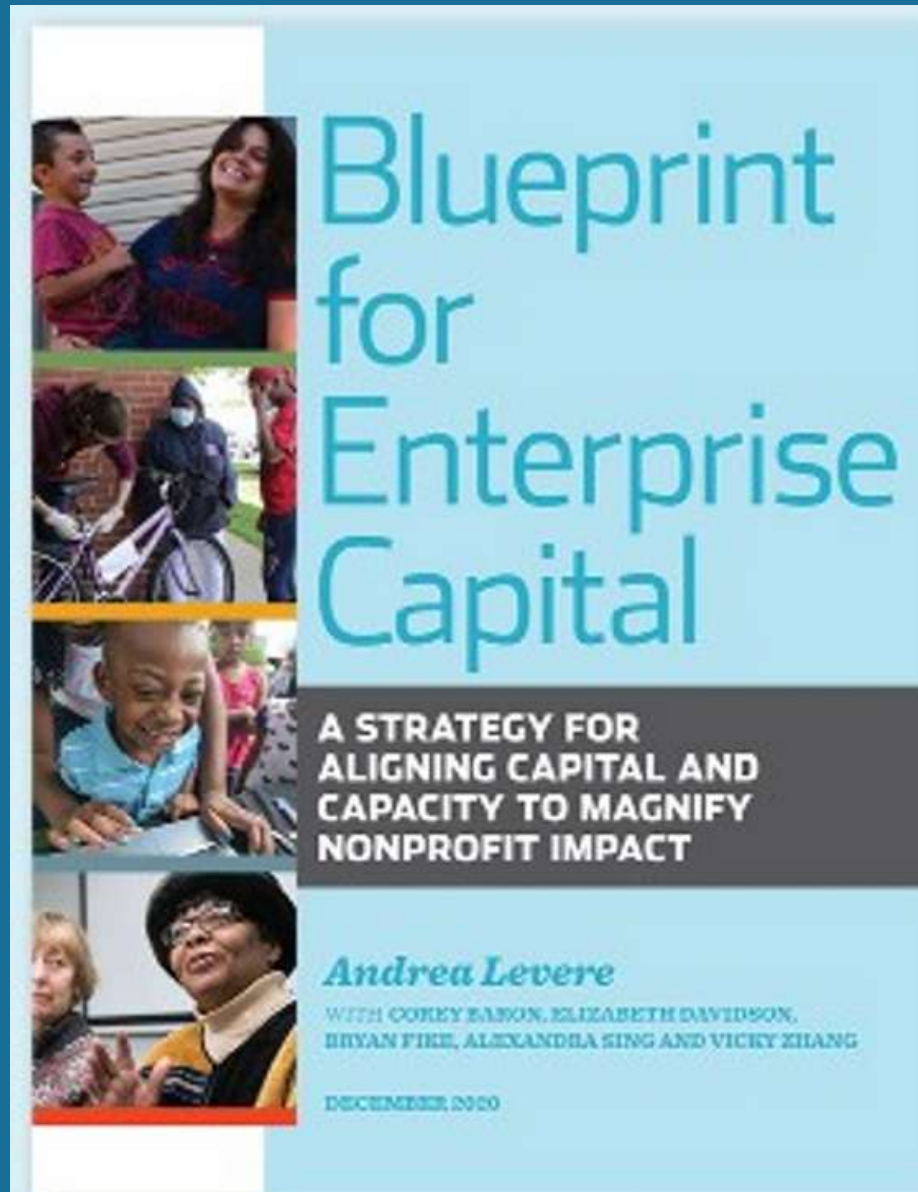
PREDICTABLE INCOME

Diversified Revenue Mix
Ongoing Value Creation
People



LONG-TERM FLEXIBLE CAPITAL

Endowment
Enterprise Capital

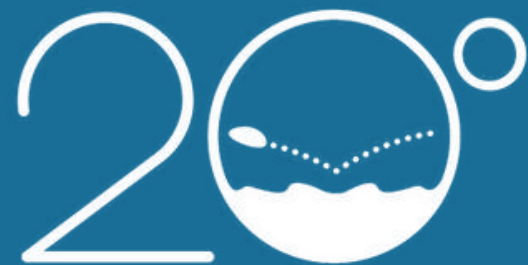


Together, we endure. Together, we rise.

Tom Bartlett: tom@20degs.com

20degs.com; [@20degsimpact](https://www.linkedin.com/company/20degrees/)
LinkedIn: 20 Degrees

THANK YOU!!



2:15-3:15 PM

**How To Session 1:
Building Your
Development Machine**

Longfellow 319+320

**How To Session 2: Securing
Place-Based Infrastructure
and Program Funds from
Federal Agencies Outside
of K-12 Education**

GCC 123



At Harlem Children's Zone



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Break

How To Sessions will begin at 2:15 PM



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How To Session 1: Building Your Development Machine

Jennifer Klein, Chief Development Officer,
Harlem Children's Zone



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Building Your Development Machine

Summer Institute
July 13, 2023

Agenda



- Introduction and Overview
- Key Components of a Best-in-Class Development Shop
- Breakout Groups
- Share Out for Discussion and Q&A

Introduction

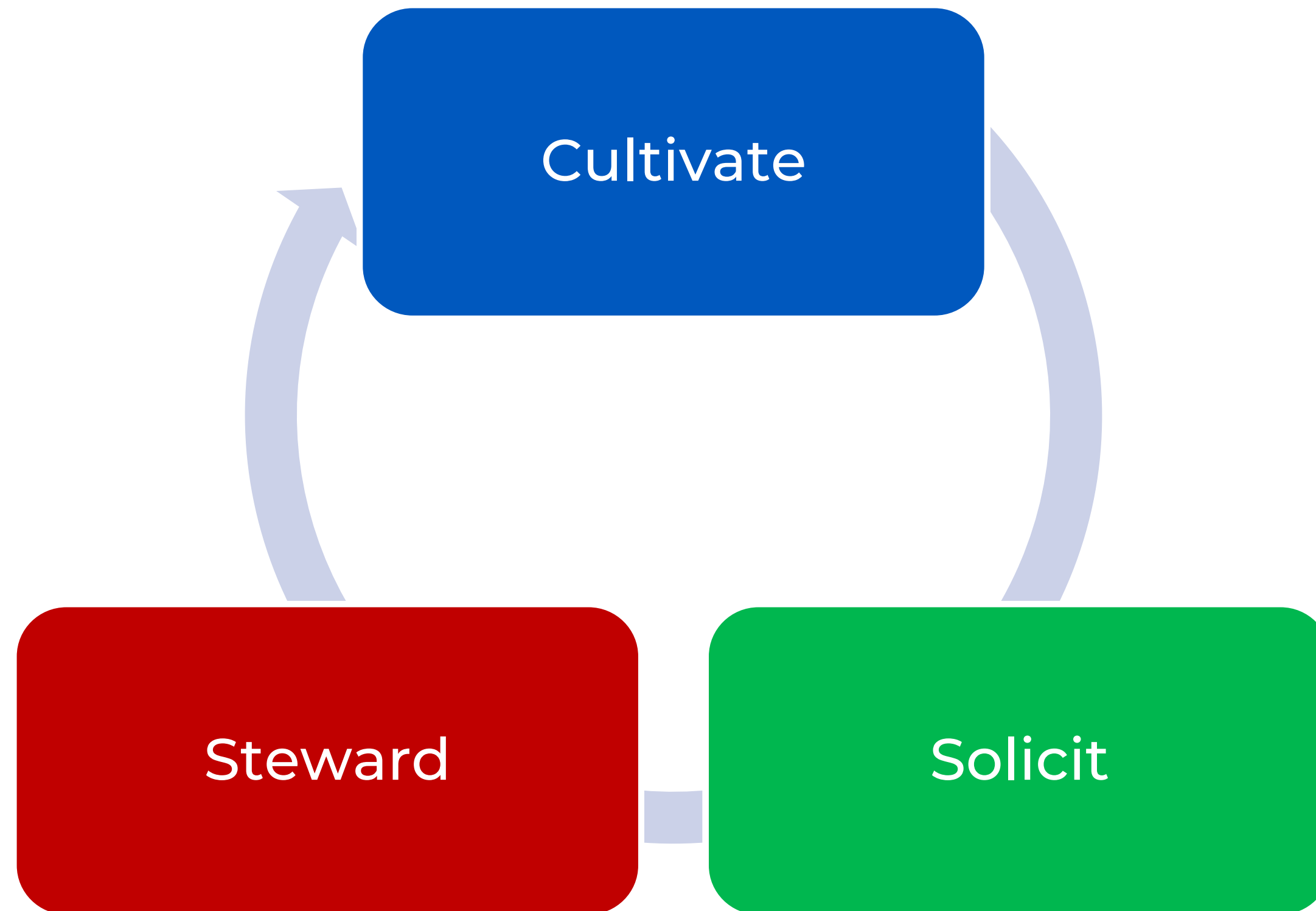


Jenn Klein

*Chief Development Officer
Harlem Children's Zone*

- Career Fundraising Professional
- 20+ years Frontline Fundraising Experience
- Fundraising Strategist
- Executive Thought Partner
- College Guidance Mentor
- Wife, Mother, Aspiring Interior Designer, Runner, Golfer

What does Development do?

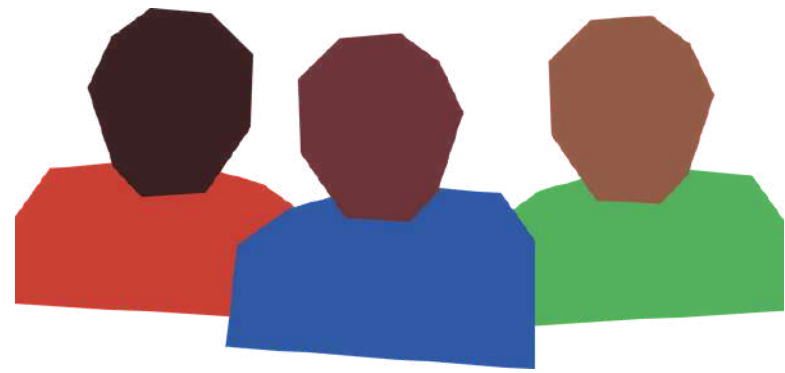


What does Development do?



- Board Relations
- Individual Giving
- Institutional Giving
- Public Funding
- Grants Management
- CRM Database
- Gift Processing
- Donor Communications
- Planned Giving
- Events & Site Visits
- Prospect Research
- Donor Engagement

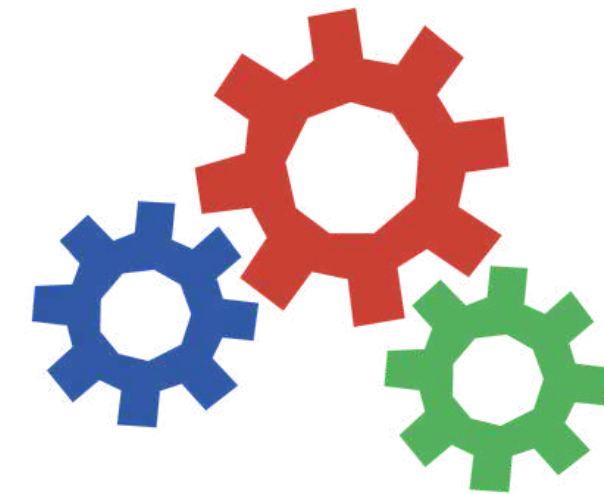
What are the Key Components Needed to Do it All?



**Individual Giving and
Board Relations**



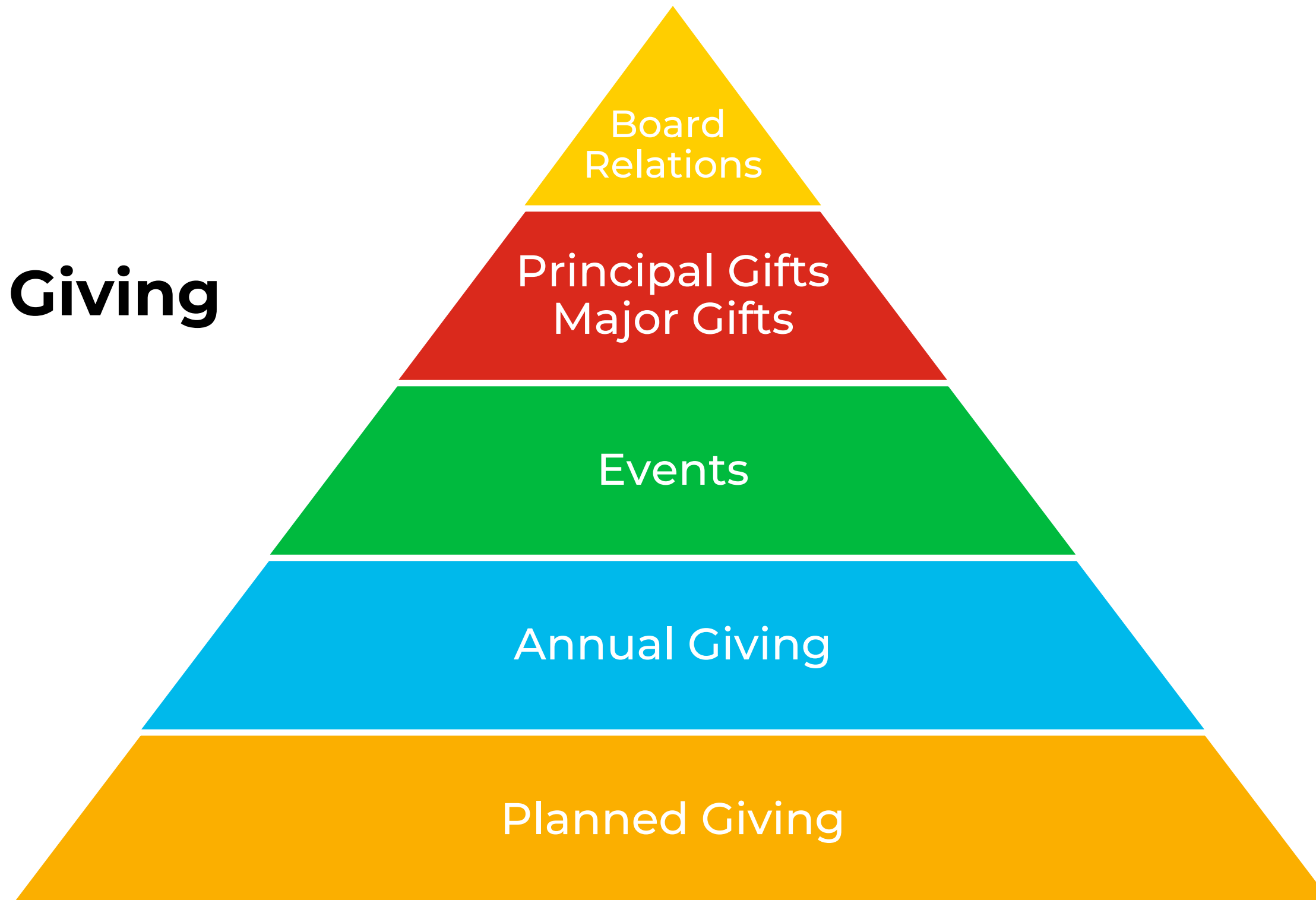
Institutional Giving



**Development
Operations**

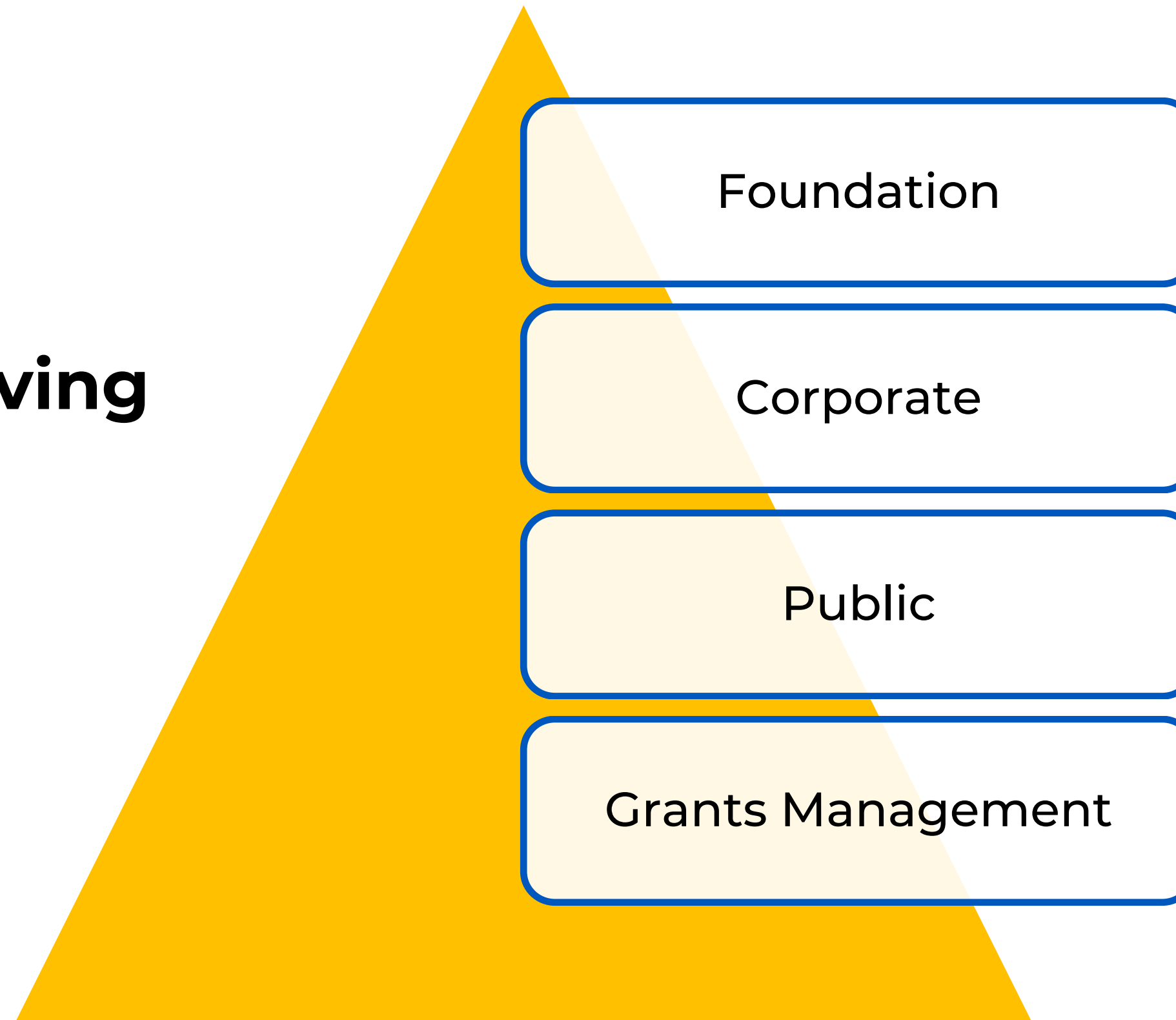
What are the Key Components Needed to Do it All?

Individual Giving



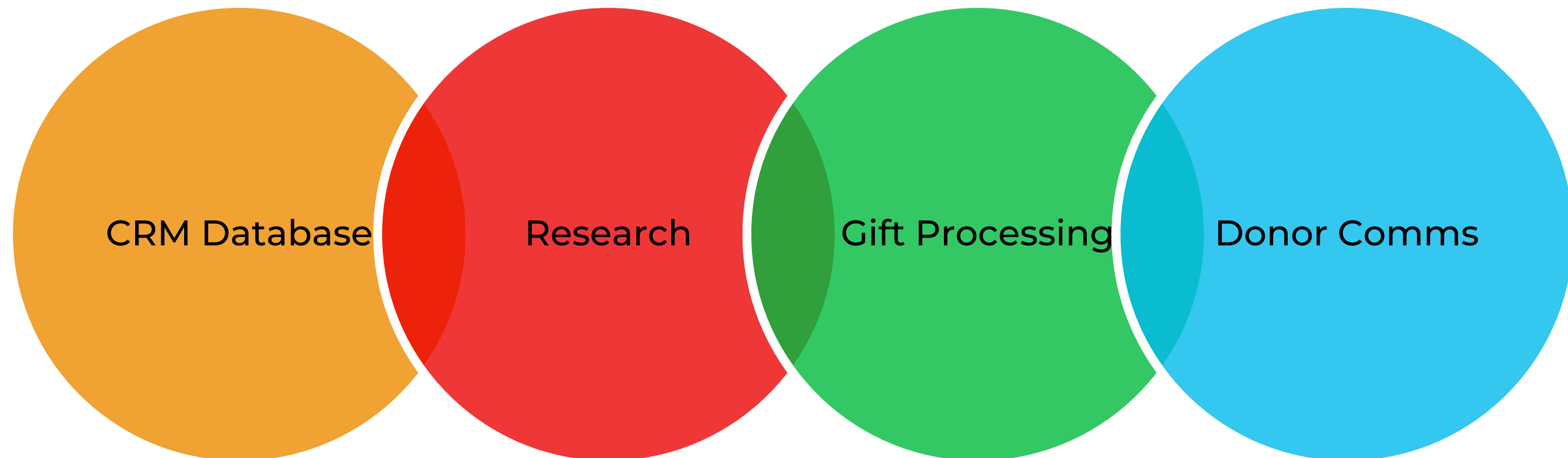
What are the Key Components Needed to Do it All?

Institutional Giving



What are the Key Components Needed to Do it All?

Development Operations



Breakout Groups

TURN INTO GROUPS OF THREE TO FIVE

Consider your current team structure:

- What areas are thriving?
- What areas need support or are not covered?
- What roles, if any, have capacity to take on more?
- Choose one area you are struggling with or want to learn more about for discussion with the full group.



10 MINUTES

Share Out



**DISCUSS AND STRATEGIZE 3-4 SHARE OUTS
FROM BREAKOUT SESSION**

15 MINUTES

Conclusion

QUESTIONS AND ANSWERS

10 Minutes



Thank You!



How To Session 2: Securing Place-Based Infrastructure and Program Funds from Federal Agencies Outside of K-12 Education

Teresa Wilke, Owner & Principal, Silver Arrow Strategies

Cara Pugh, CEO & Founder, Cara C. Pugh Consulting LLC



At Harlem Children's Zone



@WJWInstitute

@EdRedesignLab

#PowerOfPlace

Welcome!

1. Choose an #actuallycurious card from your table and **pair share answers with a neighbor.**



2. Then use this QR Code to access the **interactive Padlet** for this session on federal grants.

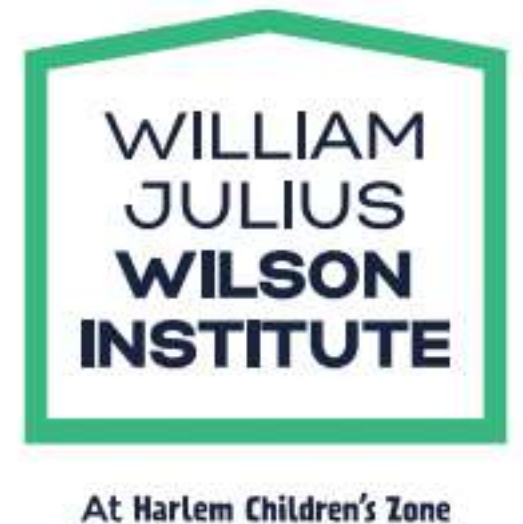
PS: Don't worry if you miss the QR Code, we'll show it again later.

Federal Funds for Place-Based Infrastructure and Programs



Cara C. Pugh
Cara C. Pugh Consulting

Teresa Wilke, MBA
Silver Arrow Strategies



July 13, 2023



➤ Teresa Wilke, MBA



- Early Career in Federal Government
- 20+ Years Grant Writing Experience
- Active Federal Grant Reviewer
- \$140M+ Grant Awards
- GPA Approved Trainer
- Specialize in large-scale, cross-sector proposals

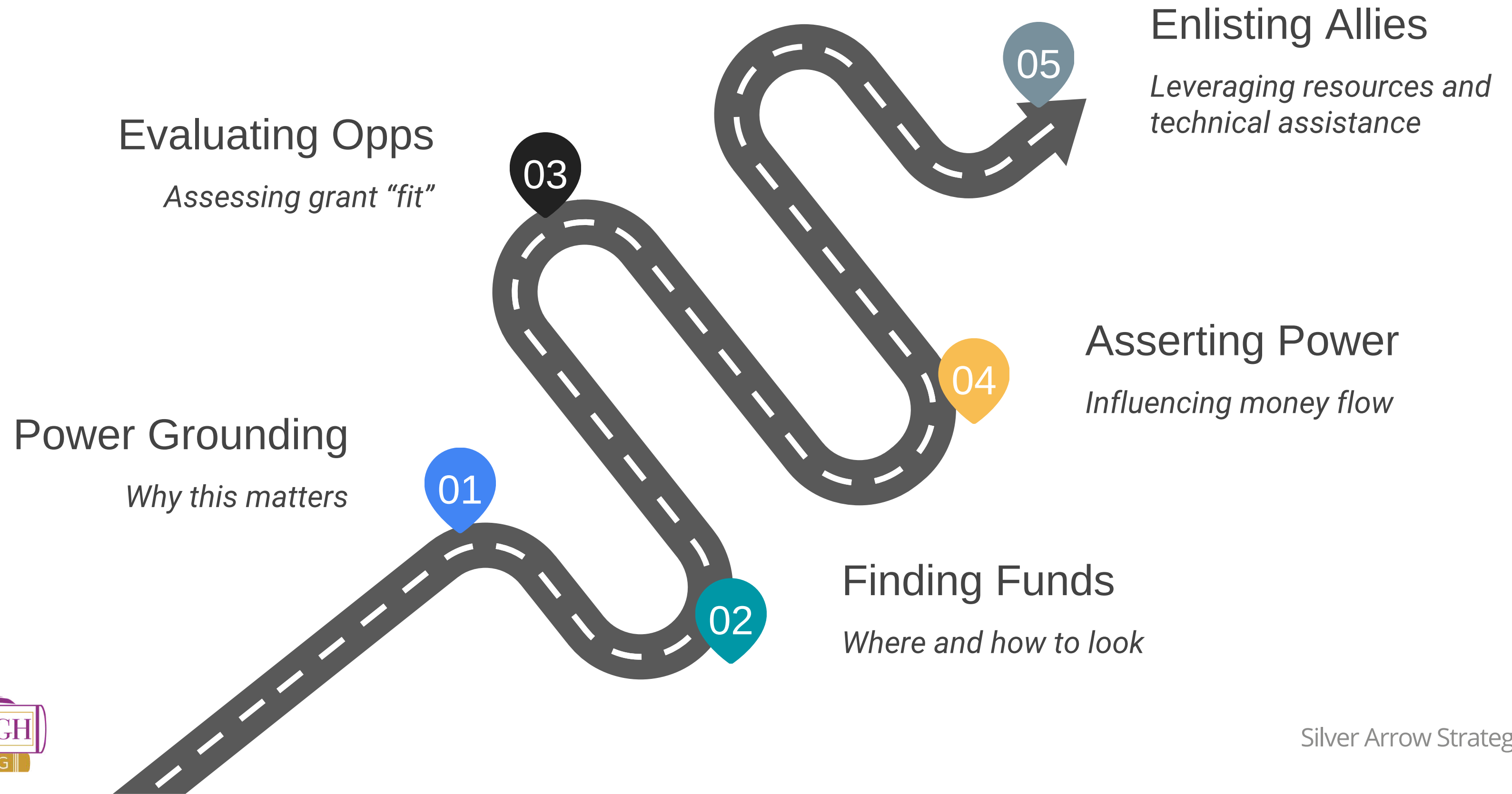


Cara C. Pugh

Educator
Organizer
Power Strategist
Learning Pathways Developer



➤ Learning Outcomes Pathway



➤ What is Power?

01

Power is the *ability* to act.

➤ Sources of Power

01

Organized People

Position /
Status



Organized Money

➤ What is Power?

01

Power is the ability to act.

Power + Focus = Impact

➤ What We Heard: Reflection

01



➤ Federal Grant Seeking Priorities

01

- Understand the **broader funding landscape** to plan for recurring grant competitions and demonstrate value (“expert power”) to partners across sectors
- Swiftly identify and prioritize **new grant programs** and assess “fit” for a lead applicant
- Design your pathway for **preparing, pursuing and managing federal grants**
- Improve **backbone sustainability** with infrastructure investments (e.g., staff, systems)
- Honor the **voice and priorities** of community leaders / youth / parents / teachers
- Drive **system indicators** aligned with your strategic plan or framework
- Communicate the value of your **model or framework** to maintain momentum, engage new partners and motivate institutions to **participate in collective action**

➤ Federal Grant Seeking Challenges

01

Discerning **Technical Language**

- Federal Regulations
- Financial Requirements
- Data Sharing Logistics
- Evaluation Benchmarks



➤ Federal Grant Seeking Challenges

01



Aligning New **Ideas** and Existing **Programs**

- 60-90 Day Timeline
- Limited Staff Bandwidth
- Fractional Grant Writing Support

➤ Federal Grant Seeking Challenges

01

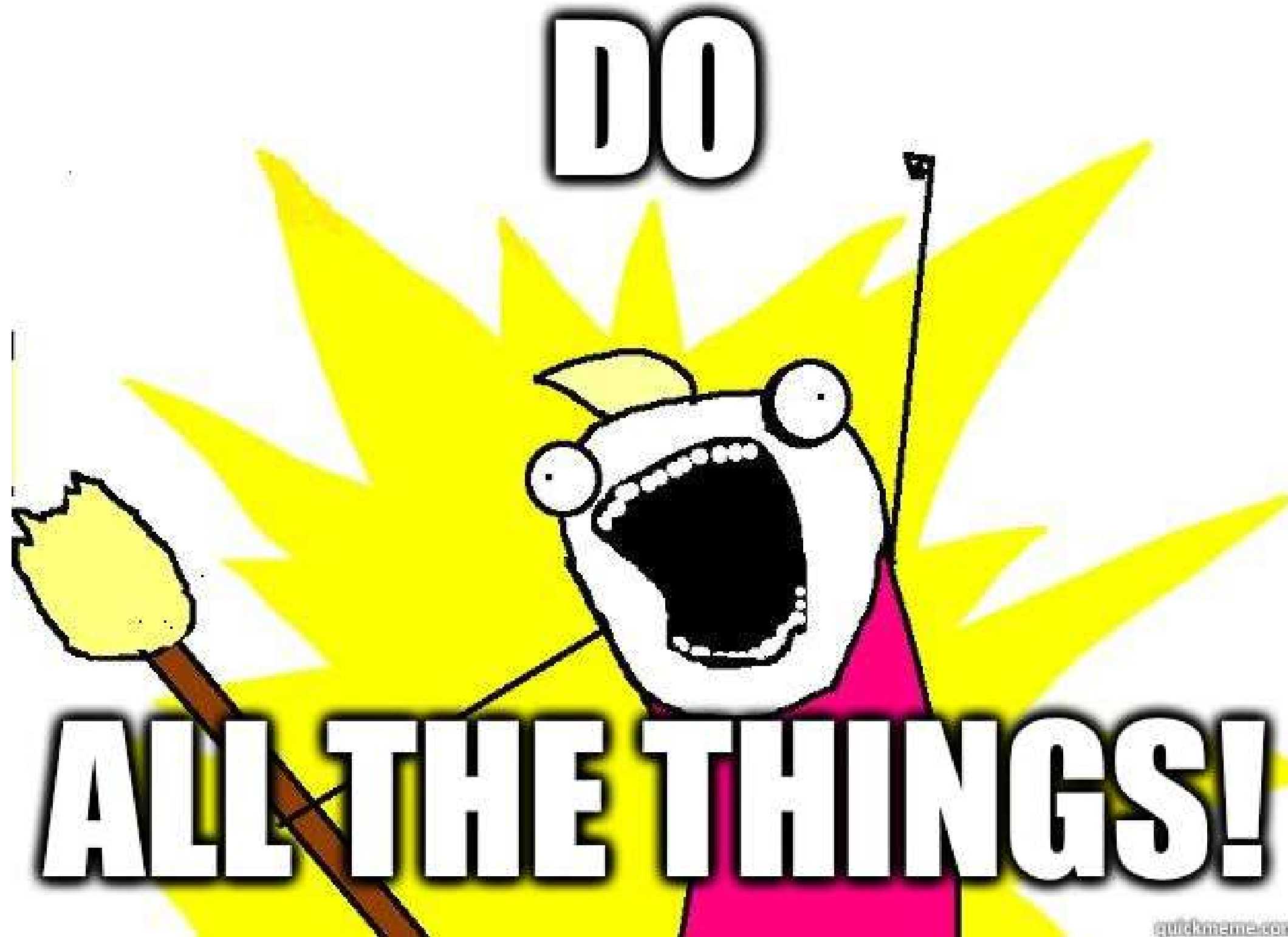


Managing Partner **Emotions**

- Disillusionment
- Inertia
- Exhaustion
- Fear
- Frustration
- Grief

➤ Federal Grant Seeking Challenges

01



➤ Federal Government = 25+ Unique Funding Silos

02



Funding Mechanism: Formula

02



Funding Mechanism: Formula

02



NOPE
→
Not Today



Funding Mechanism: CDS

02



Funding Mechanism: CDS

02



Your Senator
or Congress-
person

You



Funding Mechanism: CDS

02



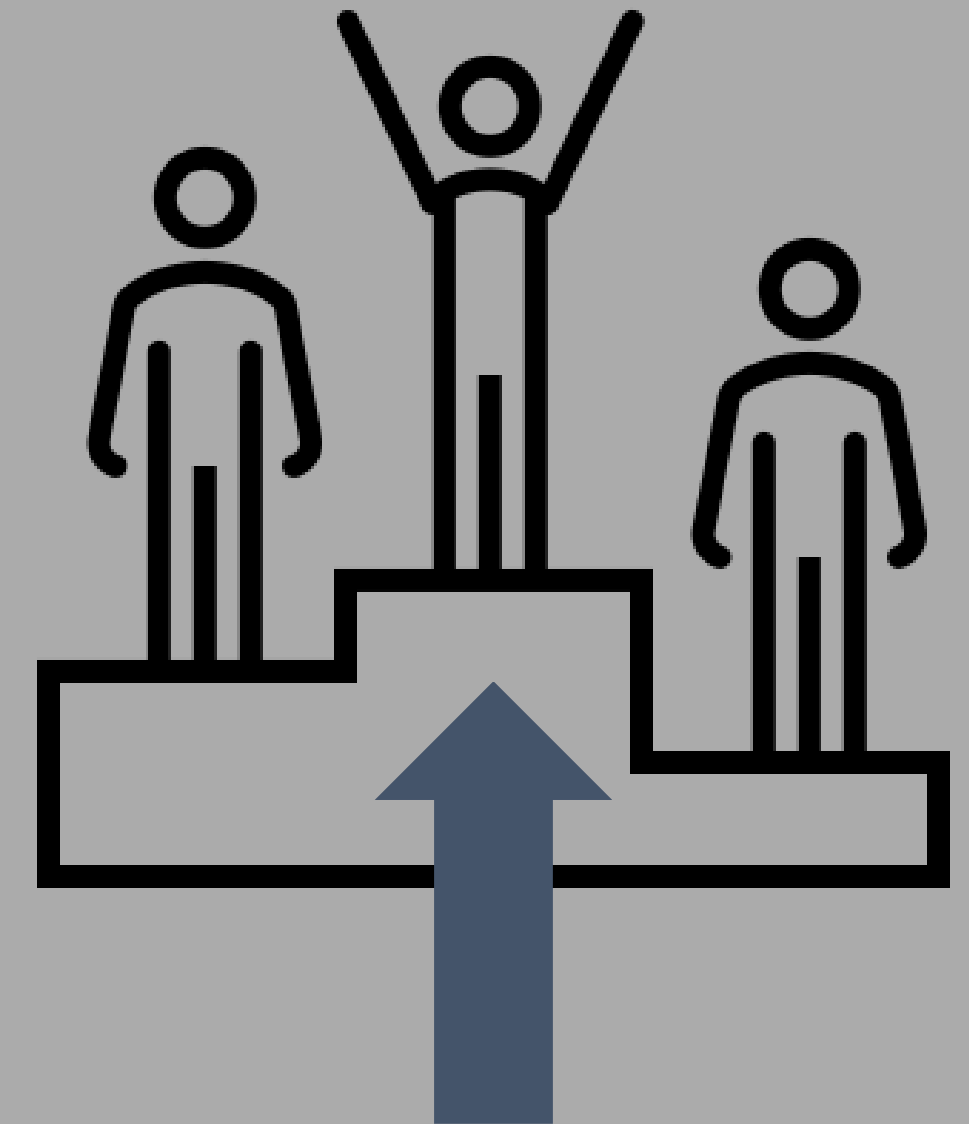
NOPE
→
Not Today



Funding Mechanism: Competitive 02



Funding Mechanism: Competitive 02



You!

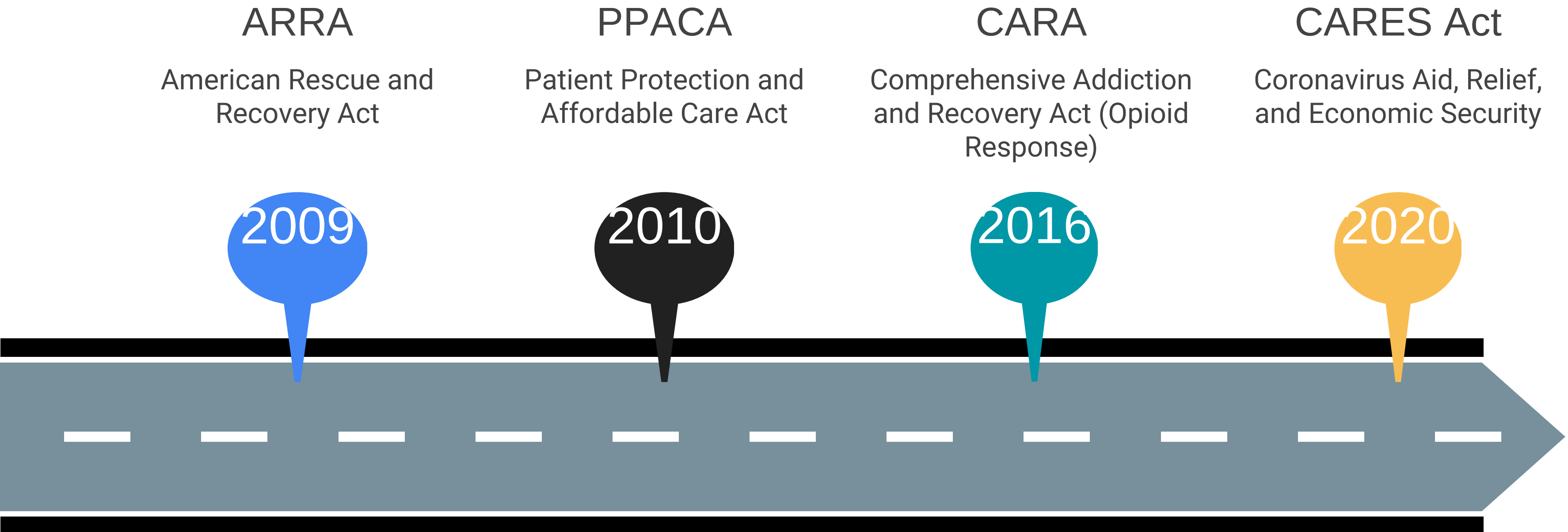


➤ Funding Strategy: Targeted Universalism 02

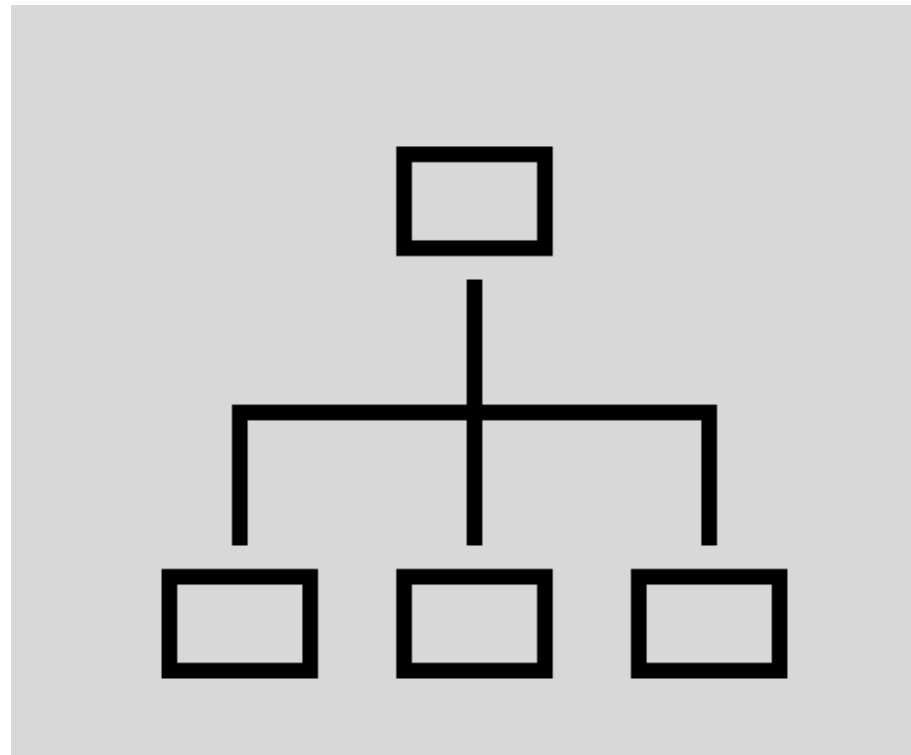


“Targeted Universalism” as policy and practice was developed by John A. Powell and colleagues at the Haas Institute for a Fair and Inclusive Society. <https://haasinstitute.berkeley.edu/targeteduniversalism>

➤ Stimulus, Recovery and Transformation 02

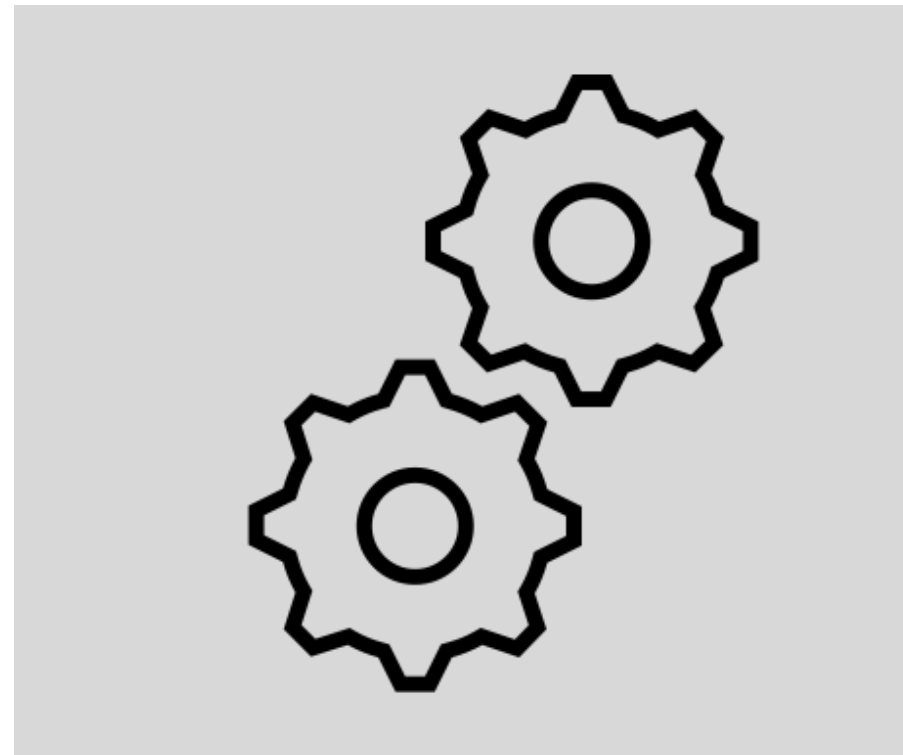


➤ Federal Grant Investments and Activities 02



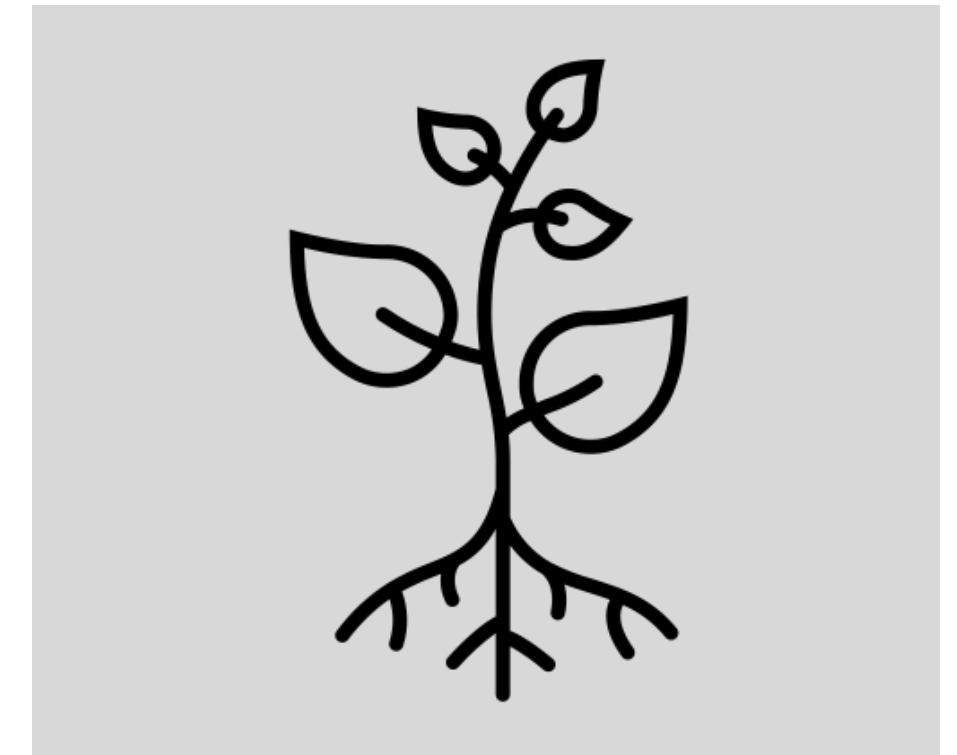
Strengthening Systems

- Workforce
- Broadband Access
- Data Infrastructure
- Transportation



Delivering Services

- Head Start Programs
- Federally Qualified Health Centers
- Youth Street Outreach



Learning/Piloting

- Demonstration Grants
- Research
- Early Phase Innovation

➤ Policies, Regulations and Guidance

02

Federal Administrative Regulations (OMB)

Authorizing Legislation and EOs (Statutes)

Congressional Appropriation Language

Federal Agency Guidance and Policies

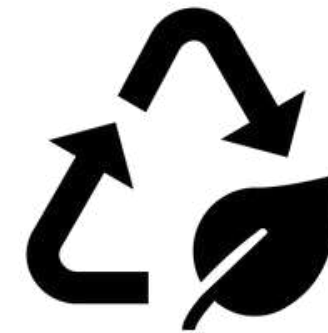
Grant Program Terms and Conditions (NOFO)

➤ Executive Orders

- Signed directive of the President of the United States.
- Published in the Federal Register.
- Have the force of law and are codified under CFR Title 3.
- Do not require congressional approval.
- Can only be overturned by a sitting President issuing another EO.

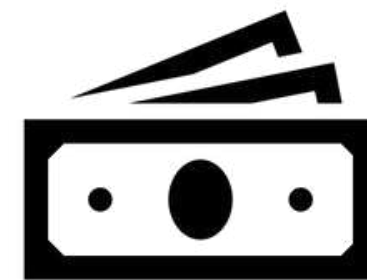


13985 - Advancing Racial Equity and Support for Underserved Communities Through the Federal Government



14008 - Tackling the Climate Crisis at Home and Abroad (Justice40 Initiative)

- 40% to Disadvantaged Areas
- 470 Federal Programs

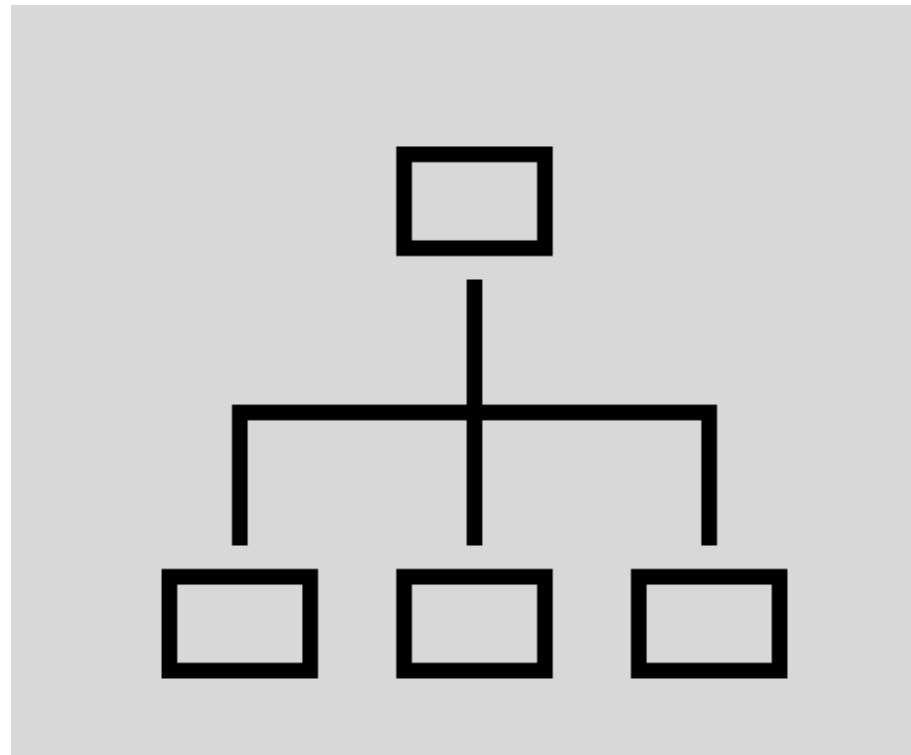


14091 – *Further* Advancing Racial Equity...

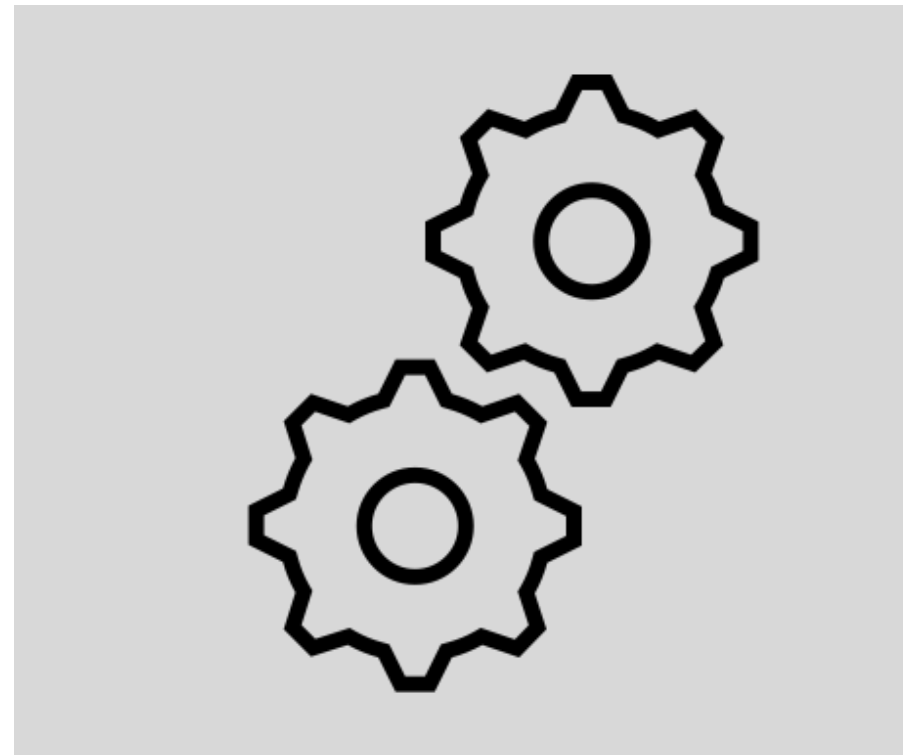
- Accountability through Annual Equity Action Plans
- Community Engagement
- 15% SDB by 2025
- Equitable Grantmaking to "Underserved Communities"

➤ Federal Grant Investments and Activities

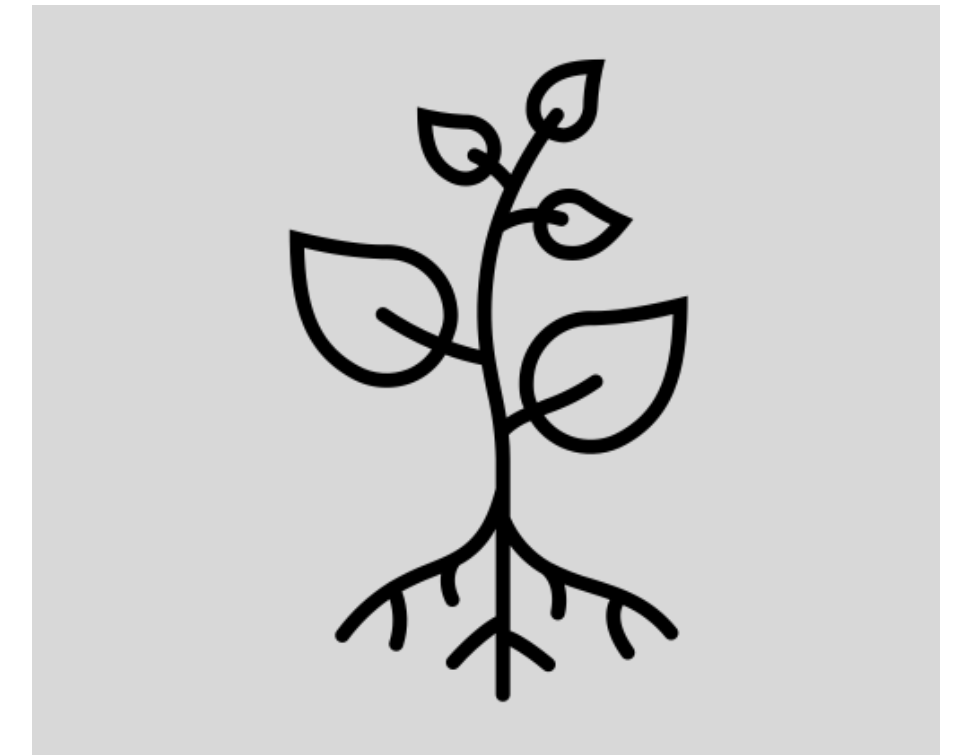
02



Strengthening Systems



Delivering Services

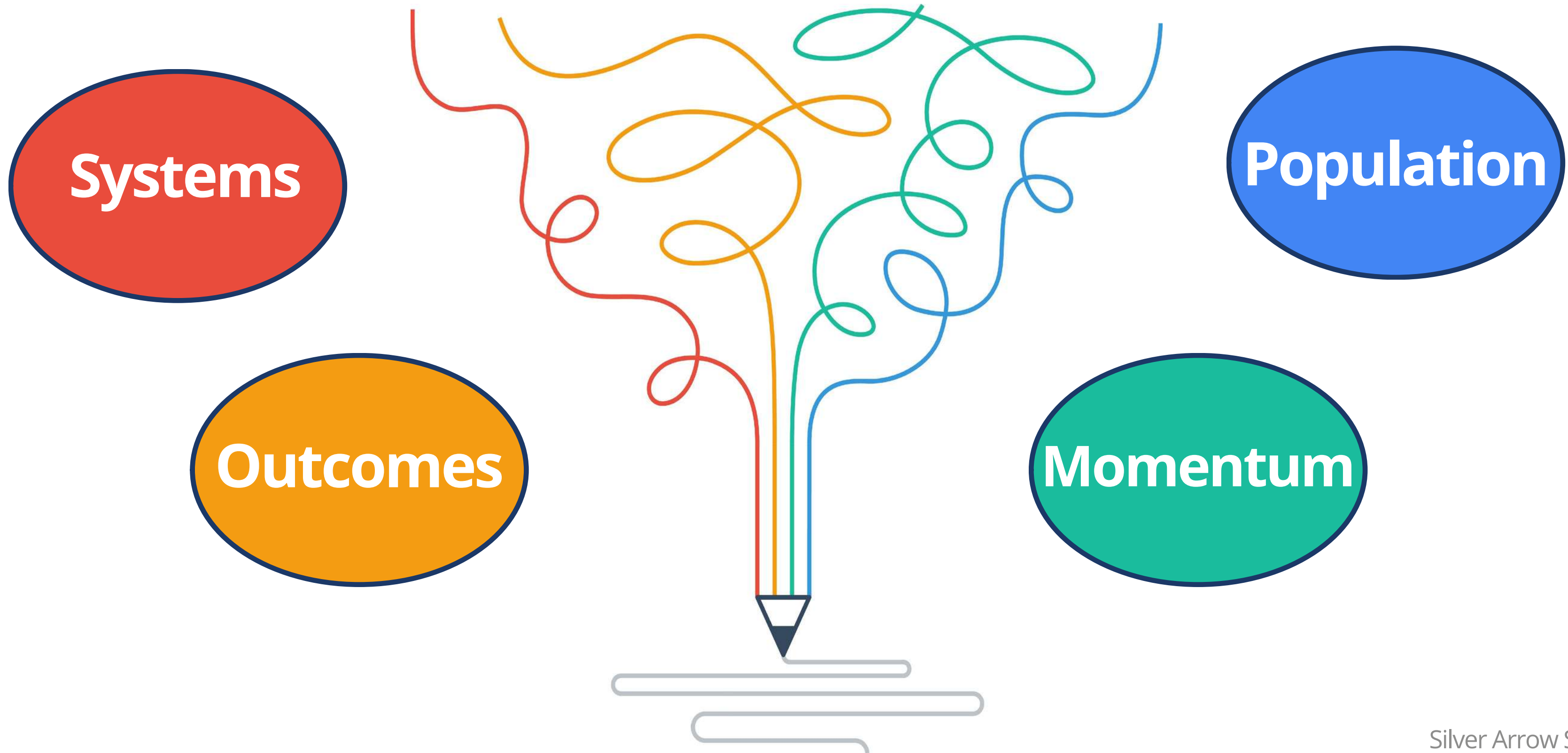


Learning/Piloting

Engage Community

➤ Narrowing Your Grant Search Focus

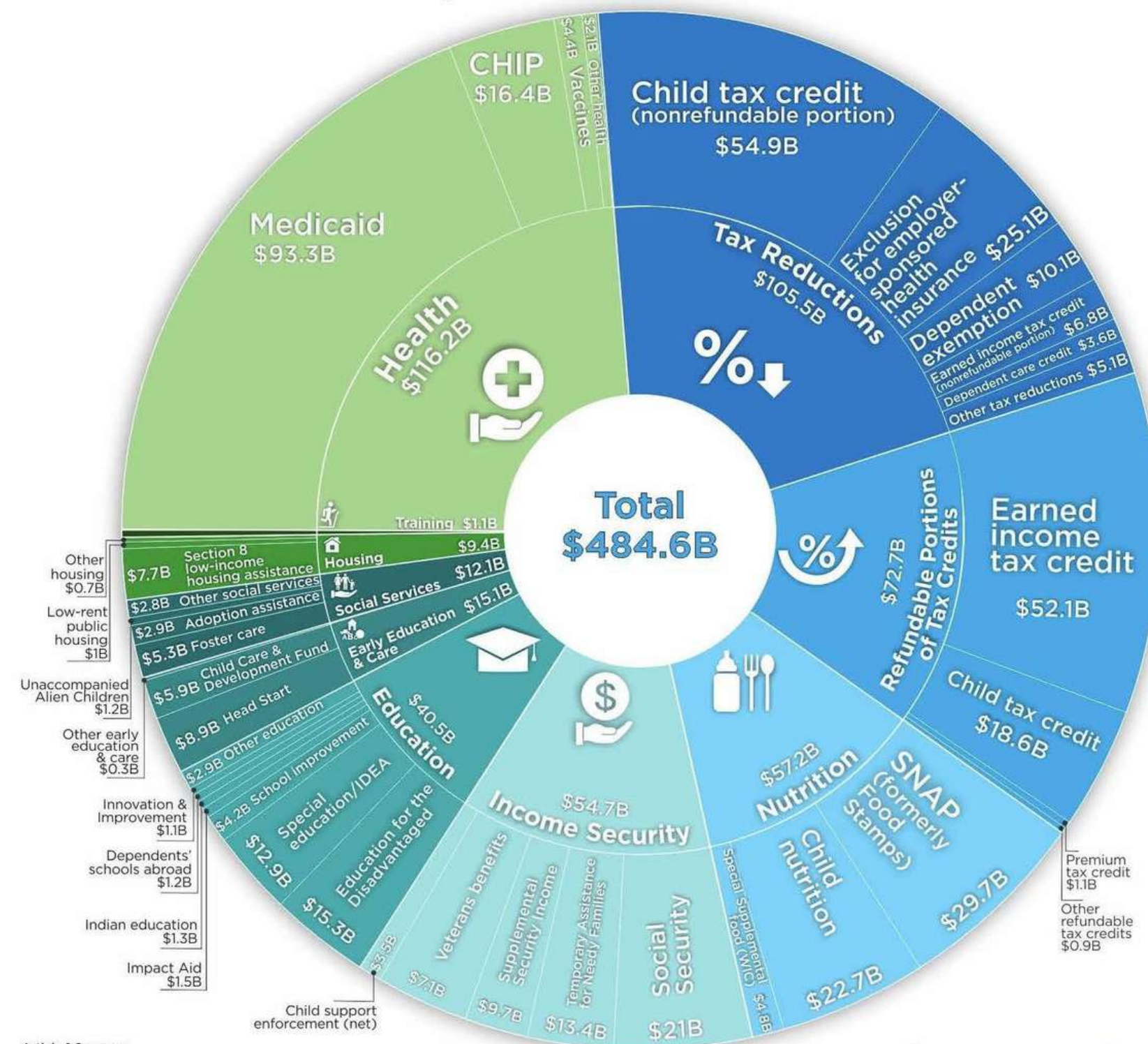
02



Population: Children and Youth

02

How Much Money Does the U.S. Spend on Children? Federal Expenditures on Children



Article & Sources:
<https://howmuch.net/articles/us-federal-expenditures-children-2018>
Urban Institute - <https://www.urban.org>

howmuch.net

➤ Systems: Social Determinants of Learning

02

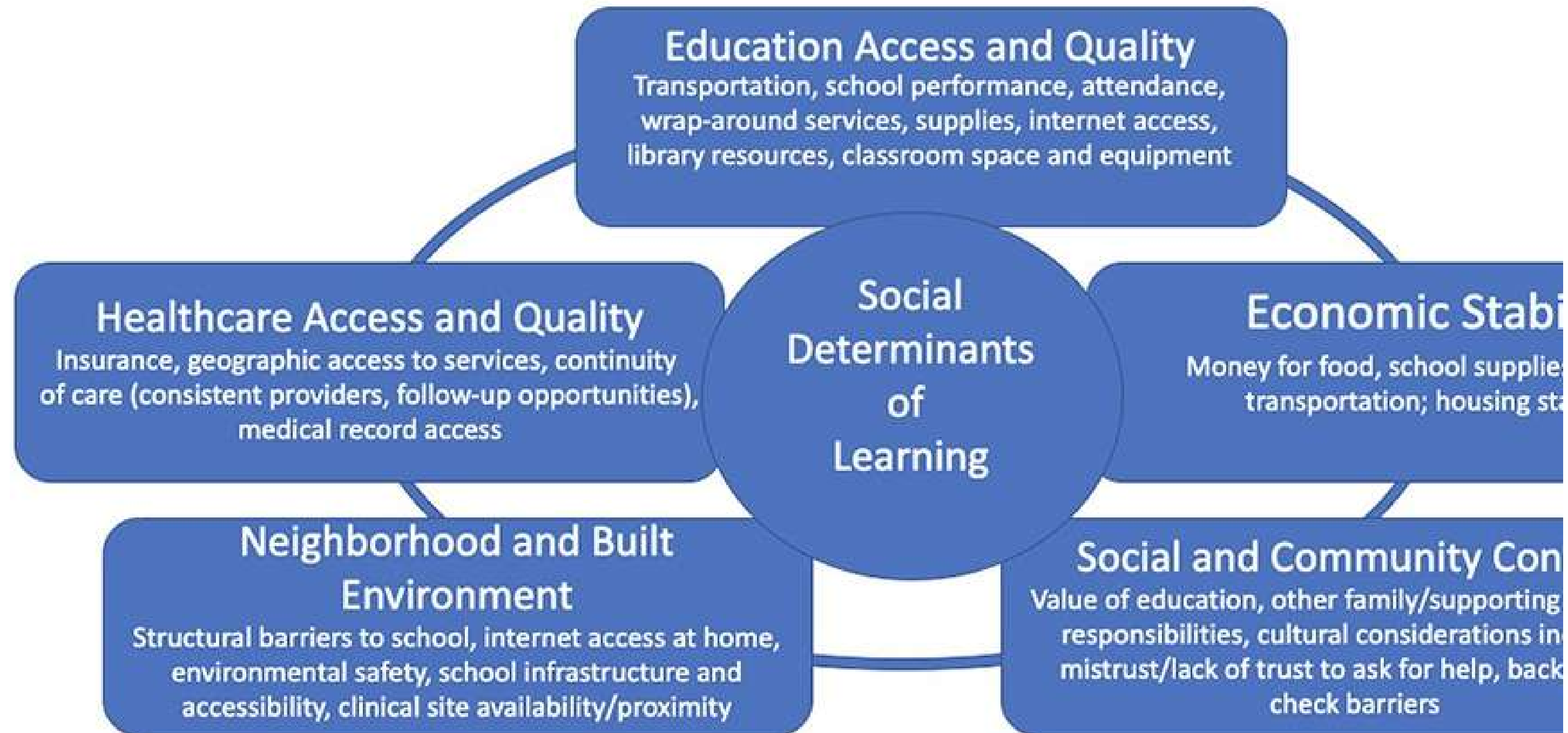


Source:

Chamberlain University.
(2021). *The Social
Determinants
of Health and the Pursuit
of Educational Justice.*

➤ Systems: Social Determinants of Learning

02



➤ Outcomes: Cradle-to-Career Indicators

02

Education



Children enter kindergarten ready to succeed in school



Students are proficient in core academic subjects



Students successfully transition from middle school grades to high school



Youth graduate from high school



High school graduates obtain a postsecondary degree, certification, or credential

Family & Community Support



Students are healthy



Students feel safe at school and in their community



Students live in stable communities



Families and community members support learning



Students have access to 21st-century learning tools

➤ Momentum: Climate, Workforce, Infrastructure 02

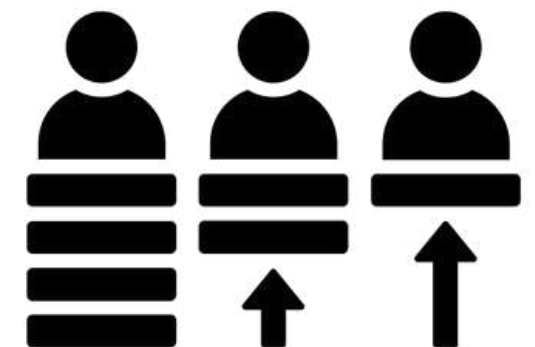
American Rescue Plan Act (ARPA)



Infrastructure Investment & Jobs Act (IIJA)



Inflation Reduction Act (IRA)



➤ Finding Funds and Identifying Grantees 02



Federal Grant Programs and Upcoming Competitions

Grants.gov - Forecasted, Posted, Closed and Archived Solicitations

Children's Funding Project - Federal Funding Database (2023)

White House Toolkit: Federal Resources to Support Community Schools (2023)

Federal Grant Alerts - Networks



Federal Grant Awards and Existing Projects

USASpending.gov – Federal Grant Awards and Contracts

TAGGS – Department of Health and Human Services

CFDA – Catalogue of Federal Domestic Assistance

FOIA – Freedom of Information Act

➤ Finding Funds: Grants.gov Alerts

02

GRANTS.GOVSM

FIND. APPLY. SUCCEED.™

HELP | MY ACCOUNT | LOGOUT

SEARCH: Grant Opportunities ▾ Enter Keyword... GO

HOME | LEARN GRANTS ▾ | SEARCH GRANTS | APPLICANTS ▾ | GRANTORS ▾ | SYSTEM-TO-SYSTEM ▾ | FORMS ▾ | CONNECT ▾ | SUPPORT ▾

GRANTS.GOV > Manage Saved Search

ADD SAVED SEARCH ?

Enter Saved Search Name:

*Saved Search Name:

Enter Saved Search Criteria:

BASIC SEARCH CRITERIA:

Keyword(s):

Opportunity Number:

CFDA:

OPPORTUNITY STATUS:

☒ Forecasted

☒ Posted

FUNDING INSTRUMENT TYPE:

☒ All Funding Instruments

☐ Cooperative Agreement

☐ Grant

☐ Other

☐ Procurement Contract

ELIGIBILITY:

☒ All Eligibilities

☐ City or township governments

CATEGORY:

☒ All Categories

☐ Affordable Care Act

☐ Agriculture

☐ Arts (see 'Cultural Affairs' in CFDA)

☐ Business and Commerce

☐ Community Development

☐ Consumer Protection

☐ Disaster Prevention and Relief

☐ Education

☐ Employment, Labor and Training

☐ Energy

☐ Environment

☐ Food and Nutrition

☐ Health

☐ Housing

☐ Humanities (see 'Cultural Affairs' in CFDA)

☐ Income Security and Social Services

☐ Information and Statistics

☐ Infrastructure Investment and Jobs Act (IIJA)

☐ Law, Justice and Legal Services

☐ Natural Resources

☐ Opportunity Zone Benefits

AGENCY:

☒ All Agencies

☐ All Advanced Research Projects Agency for Health [ARPAH]

☒ All Agency for International Development [USAID]

☐ All AmeriCorps [AC]

☐ All Appalachian Regional Commission [ACR]

☐ All Broadcasting Board of Governors [BBG]

☐ All Bureau of Reclamation - South Central CA Area Ofc [SCC800]

☐ All Christopher Columbus Fellowship Foundation [CCFF]

☐ All City of Orlando [ORD]

☐ All Consumer Product Safety Commission [CPSC]

☐ All Corporation for National and Community Service [CNCS]

☐ All Denali Commission [DC]

☒ All Department of Agriculture [USDA]

☒ All Department of Commerce [DOC]

☒ All Department of Defense [DOD]

☒ All Department of Education [ED]

☒ All Department of Energy [DOE]

☒ All Department of Energy - Office of Science



➤ Finding Funds: Children's Funding Project Database 02

CHILDREN'S
FUNDING PROJECT

Federal Funding Streams for Children and Youth Services

HOW TO USE THIS TOOL
HOW TO DOWNLOAD DATA

CLEAR FILTERS

OPEN ACTIVE FILTERS

TRIBAL NATIONS

Select a funding stream below to learn more about that funding stream.

HOW TO
DOWNLOAD
DATA

Click on a row to highlight content in the table.

To select multiple rows, hold the Control key on your keyboard and click on the rows you want to select.

NEXT➔

Funding Stream Name	Funding Program Description	FY 22 Federal Funding	FY Fui
Apprenticeship USA Grants: H-1B Training Grants	The primary goal of the Apprenticeship USA Grants: H-1B Training Grants program is to accelerate the expansion of apprenticeships to new industry sectors reliant on H-1B visas.		
Apprenticeship USA Grants: Office of Apprenticeship Grants	The purpose of the Apprenticeship USA Grants: Office of Apprenticeship Grants funding is to integrate Registered Apprenticeship into the mainstream as a viable career pathway option.	\$118,782,038	
Apprenticeship USA Grants: Women in Apprenticeship and Non-traditional Occupations Technical Assistance Grants	The Apprenticeship USA Grants: Women in Apprenticeship and Non-traditional Occupations Technical Assistance Grants program aims to provide technical assistance to employers and labor unions to encourage employment of women in apprenticeable and nontraditional occupations (A/NTO).	\$5,641,698	
Health Professions Recruitment Program for Indians	The Health Professions Recruitment Program for Indians program supports education and training for American Indians and Alaska Natives pursuing careers in the health professions.	\$2,794,564	

Select a funding stream above to activate this button for more information

➤ Finding Partners and Projects: USASpending.gov

02

Advanced Search



Filters

Learn which data elements are associated with certain search filters ⓘ

Submit Search

Reset search

> Keyword ⓘ

▼ Time Period ⓘ

Fiscal Year  Date Range

☐ All Fiscal Years

☒ FY 2023

☒ FY 2022

☐ FY 2021

☐ FY 2020

☐ FY 2019

☐ FY 2018

☐ FY 2017

☐ FY 2016

☐ FY 2015

☐ FY 2014

☐ FY 2013

☐ FY 2012

☐ FY 2011

☐ FY 2010

☐ FY 2009

☐ FY 2008

▼ Award Type

> ☐ Contracts

5 Active Filters:

[Learn how active filters work](#) 

TIME PERIOD

FY 2023

FY 2022

AWARD TYPE

All Grants

PLACE OF PERFORMANCE

CITY | SAINT LOUIS, MO

FUNDING AGENCY

Substance Abuse and Mental Health Services Administration (SAMHSA) | Sub-Agency of HHS

 TABLE

 TIME

 MAP

 CATEGORIES

Prime Awards ☒ Sub-Awards

Spending by Prime Award

What's included in this view of the data?

View a list of award summaries based on your selected filters. Click the Award ID, Recipient Name, or Awarding Agency to find more detailed information on individual awards including transaction history, subawards, and more.

[read more](#)

Contracts 0

Contract IDVs 0

Grants 5

Direct Payments 0

Loans 0

Other 0

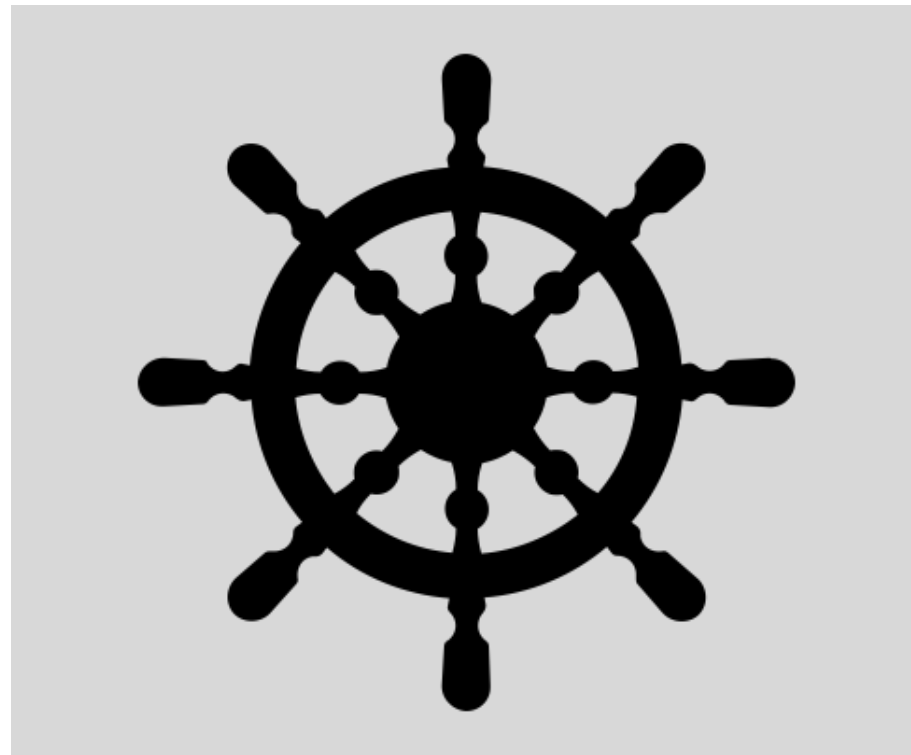
Award ID	Recipient Name	Start Date (Period of Performance)	End Date (Period of Performance)	Total Obligations to Date	Total Outlays to Date
H79SM063523	ST. LOUIS COUNTY, MISSOURI	9/30/2016	9/29/2021	\$2,220,918	\$432,833
H79TI080742	ERISE WILLIAMS & ASSOCIAT	9/30/2018	9/29/2023	\$2,108,719	\$501,962
H79SM085050	UNIVERSITY OF MISSOURI SYSTEM	9/30/2021	9/29/2026	\$1,199,044	\$759,924
H79SM084859	UNIVERSITY OF MISSOURI SYSTEM	9/30/2021	9/29/2026	\$780,512	\$586,823
H79SM084613	PREVENTED	12/31/2022	12/30/2026	\$250,000	\$29,122



Federal Agency Insights for Place-Based Organizations

Agencies, Stakeholders, Systems and Planning Tips

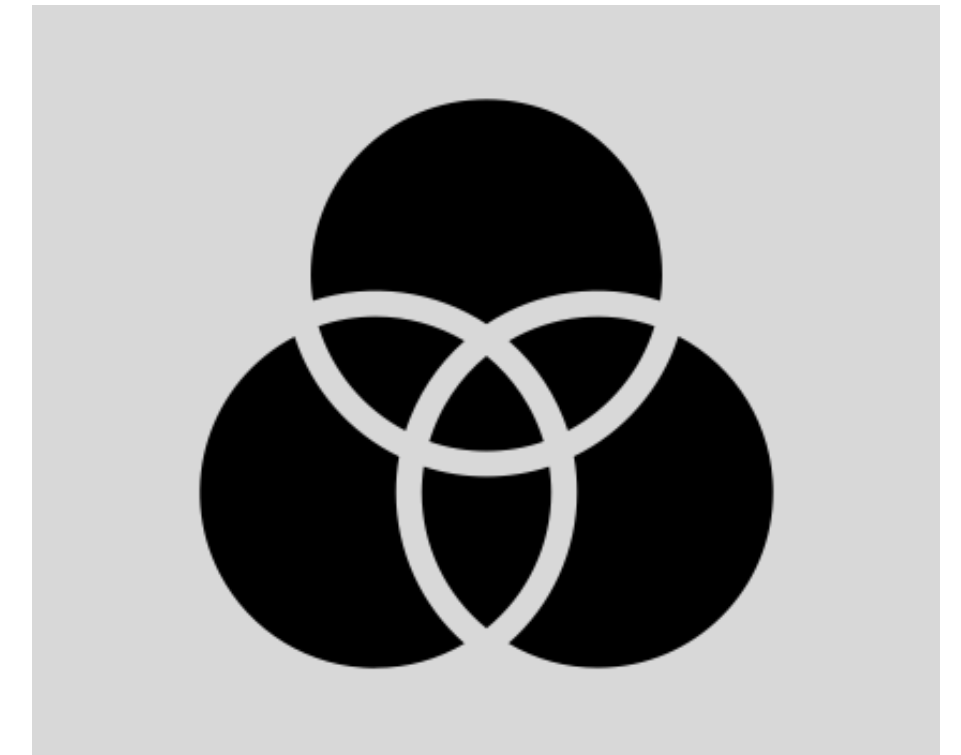
➤ Evaluating Federal Grant Opportunities 03



Control



Risk & Reward



Alignment

➤ Example: Old Money vs. New Money

03



Established Funding Programs

Pros

- Routine solicitations
- Known expectations
- Prior awards to examine/review
- Grant writers with specialized expertise

Cons

- Can feel like “Inside Ballgame”
- Entrenched grantees
- Entrenched peer reviewers
- Rigid approach and requirements
- Antiquated statutes

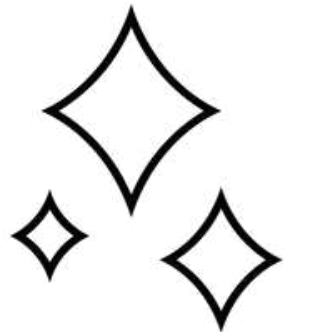
New Funding Programs

Pros

- Opportunity for new applicants
- Program staff learning alongside applicants
- Reflects latest context and policy environment
- Greater flexibility for use of funds and approach

Cons

- Unpredictable solicitation timing
- Unclear guidance or review criteria
- No prior awards to evaluate “fit”
- Potential for mission creep or distraction



➤ Evaluating Federal Grant Opportunities 03



Grant Opportunity Assessment Tool

1. Huddle with Your Team
2. Choose a Grant Summary
3. Review Grant Opp. Assessment Tool
4. Share Thoughts in Padlet

➤ Evaluating Federal Grant Opportunities 03



Padlet Prompts

- What **excites** or **intrigues** you about this grant program?
- How could this grant program **align** with your place-based strategy?
- What **concerns** or **challenges** do you anticipate with this grant program?
- Would you (1) jump in, (2) explore further, or (3) pass on this grant?

➤ Asserting Power

“Move at the speed of trust” does not always mean **slow**.

Organized People

04

*“Move at the speed of trust.” That’s one of the principles that has been articulated many times. If you don’t move at the speed of trust **when you can**, when you’re at the size in which you can, then it all falls apart when it gets bigger.*

- adrienne maree brown

➤ Asserting Power

Demonstrate Value

Existing Grantees



New Collaborative Partners and Expanded Project Scope

Service Providers



Capacity to Scale Services and Reach New Populations

Local Government



Connection with Proximate Leaders and Network Weavers

ARPA/IIJA/IRA



Convening Authority and Community Engagement Expertise



Contact:

Arti Doshi

Director of Place

William Julius Wilson Institute

adoshi@hcz.org



CREATIVE

Profiles in Black Creativity: Michael Tennant Is Ready to Spark Change Through Empathy

A card game embodies the former ad exec's passion for forging deeper connections



Tennant created **Actually Curious**, a conversation card game that builds deeper personal connections. Michael Tennant

Low Tech Connecting Tool: *Actually Curious* Card Decks

05

“...TRANSFORMATION SUCCESS IS ROOTED IN HUMAN EMOTIONS, WITH EMPATHY AT THE CORE.”

From the recently-released “Empathy in Business Survey” EY report. Which goes on to say, “To succeed, leaders must maintain a laser focus on the *emotional* and *human dimensions* of work.”

In addition, “US talent believe that mutual empathy between leaders and employees creates a safe, agile culture that can increase *efficiency*, *creativity*, *job satisfaction*, *idea sharing*, and *innovation*.”

C_r
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87%

of US workers say
empathy leads to
better leadership



Empathy in Business
Survey | Mar 2023



www.curiositylab.io



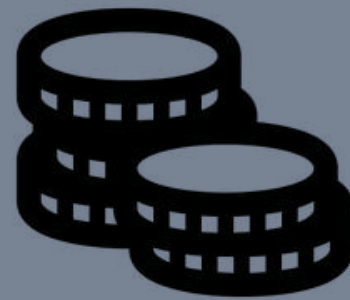
On-Demand Training: Grants Works Academy

Federal Grant Management Training Series

05



Module 1: Federal Grant Basics



Module 2: Notice of Award, Budgets and Subrecipients



Module 3: Federal Grant Management

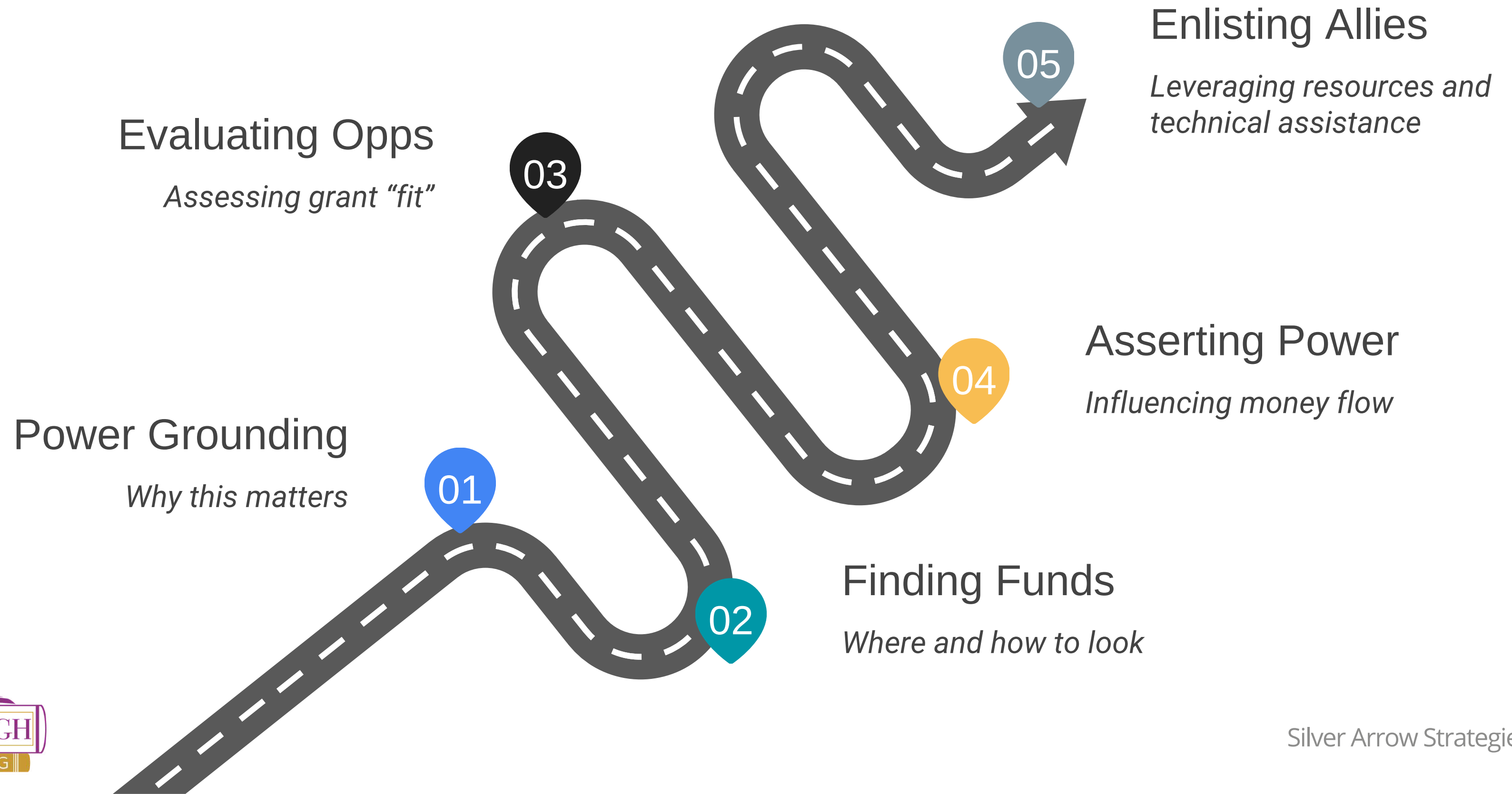


Patrice Davis, Founder and Managing Principal



GrantsWorksAcademy.com

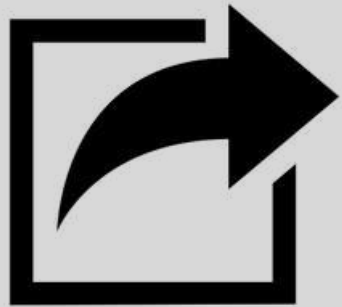
➤ Learning Outcomes Pathway



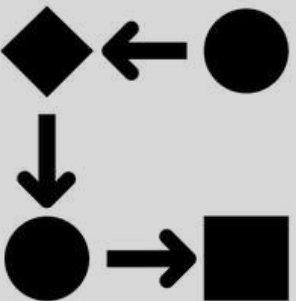
➤ Take 3 Next Steps in the Next 30 Days



1. Confirm your organization is **registered** and **active** in the federal **System for Award Management ([SAM.gov](https://www.sam.gov))** and in **[eRA Commons](https://www.eRA Commons)**.



2. Sign up for **federal grant alerts** – Grants.gov, Federal Agency, Networks.



3. Establish a **process** and **criteria** for reviewing and evaluating new grant opportunities using factors that are important to **your** community.

Power + Focus = Impact



Thank You!



Cara C. Pugh

Email: caracpugh@gmail.com

LinkedIn: <https://www.linkedin.com/in/carapugh>



Teresa Wilke

Email: teresa@silverarrowgrants.com

Website: <https://silverarrowgrants.com/>

LinkedIn: <https://www.linkedin.com/in/teresawilke>

Team Processing

3:15-4:30 PM

Full-Service Community Schools Grant

Seeking Office Hours

(By Appointment in Gutman 133)

3:45-6:15 PM



At Harlem Children's Zone

OPPORTUNITY FOR ALL
EDREDESIGN
THE EDREDESIGN LAB



@WJWInstitute

@EdRedesignLab

#PowerOfPlace

Team Time Room Assignments

GCC 123 (Facilitators: Wendy Viola, Marlene Fox, Erica Terrell, Alvina Jiao)

- Parramore Kidz Zone
- Atlanta Alliance
- ALICE Community Center
- Lift Orlando
- Evolve502
- Spartanburg Academic Movement
- Latin American Youth Center
- Get Ready Guilford
- shift_ed
- Seeding Success
- Chattanooga 2.0
- Hawaii
- Miami Foundation
- Teach for America

Longfellow 319+320 (Facilitators: Arti Doshi, Esther Addo, Dana Vera)

- East Texas
- For Oak Cliff
- Bachman Lake Together
- UP Partnership, San Antonio
- Commit Partnership
- Mission Economic Development Agency
- Promise Partnership Utah
- Partners for Rural Impact
- Oakland Thrives

GCC 5 (Facilitators: Brian McClendon, Nina Carter, Lynne Sacks)

- Northside Achievement Zone
- Saint Paul Promise Neighborhood
- Art Tatum Zone
- Mosaic Family Zone
- Omega CDC
- Learn to Earn Dayton
- Mexico, MO

Eliot Lyman (Facilitators: Ben Lewis, Fritz Bondoa)

- Brownsville Partnership
- Poughkeepsie Children's Cabinet
- ONE Neighborhood Builders
- Reach Riverside
- North Hartford Ascend Pipeline



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Break

Team Processing will begin at 3:30 PM



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#PowerOfPlace

Team Time & Coaching

Purpose and Objectives:

We want to offer your delegation the opportunity to leverage the knowledge and expertise that we have convened here this week, by soliciting and sharing feedback on challenges you are experiencing in your work.

Team Time & Coaching

Problem of Practice Consultancy

Directions:

1. Break off into community delegations. Within your delegation, identify a challenge or dilemma you are currently facing in your work. This can be a new, specific challenge, or an ongoing issue that you have yet to resolve. (10 minutes)

- Discuss the following questions to help you develop a scenario to present:
 - Why is this a challenge for your organization?
 - Why is this issue or challenge important to your organization?
 - What has already been done to remedy this challenge? What have been the results of these efforts?
 - What do you assume to be true about this challenge? How have those assumptions informed your approach to attempted solutions?

2. Return to the whole group. One delegation should present its problem of practice. The other delegations should focus on understanding the presenting delegation's challenge and should not ask questions. (5 minutes)



At Harlem Children's Zone

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EDREDESIGN
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Team Time & Coaching

Problem of Practice Consultancy

3. The remaining delegations pose clarifying and probing questions to the presenting delegation. (7 minutes)
 - Clarifying questions are surface level and refer to matters of fact. “How much”, “how many”, or “how often” are examples of clarifying questions.
 - Probing questions are deeper and intended to help the presenting delegation critically think about the challenge they wish to discuss. “Why do you think it is the case that”, “what do you think would happen if”, or “what is the connection between x and y” are examples of probing questions.
4. The remaining delegations discuss the problem of practice among themselves. The presenting delegation should not speak during this time. (5 minutes)
5. The remaining delegations offer feedback or recommendations to the presenting delegation. (4 minutes)
6. Repeat steps 2 through 6 with the remaining delegations.

Day 3 Preview

9:00-10:15 AM	Improving Economic Opportunity: New Insights from Big Data and Individualized Student Supports
10:30-11:45 AM	Data, Evaluation, and Accountability
12:45-1:45 PM	Closing: Tying it All Together and Remembering Why We Do This Work

Note: Due to our proximity to the Charles Hotel, we encourage guests to retrieve their luggage from the hotel at the conclusion of the day's programming if possible. There is minimum space in the GCC for luggage that is reserved for participants who need to travel to the airport right at the conclusion of the Summer Institute.

Closing Reception & Dinner

6:00–8:30 PM

Location: Charles Hotel Ballroom



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Closing Reception & Dinner

Sondra Samuels, President & CEO, Northside Achievement Zone

Cornell William Brooks, Hauser Professor of the Practice of Nonprofit Organizations; Professor of the Practice of Public Leadership and Social Justice, Harvard Kennedy School

Moderator: Marlene Fox, Managing Director,
William Julius Wilson Institute at Harlem Children's Zone



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Breakfast

The next session will begin at 9:00 AM



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Improving Economic Opportunity: New Insights from Big Data and Individualized Student Supports

Raj Chetty, William A. Ackman Professor of Public Economics,
Harvard University; Director, Opportunity Insights

Matthew Staiger, Research Scientist, Opportunity Insights,

Benny Goldman, Economics PhD Candidate, Harvard University; Linda G. Hammett
Ory Fellow, EdRedesign, Harvard Graduate School of Education

Jamie Gracie, Economics PhD Candidate, Harvard University; Linda G. Hammett Ory
Fellow, EdRedesign, Harvard Graduate School of Education

Moderator: Lynne Sacks, Research Director, EdRedesign; Lecturer in Education,
Harvard Graduate School of Education



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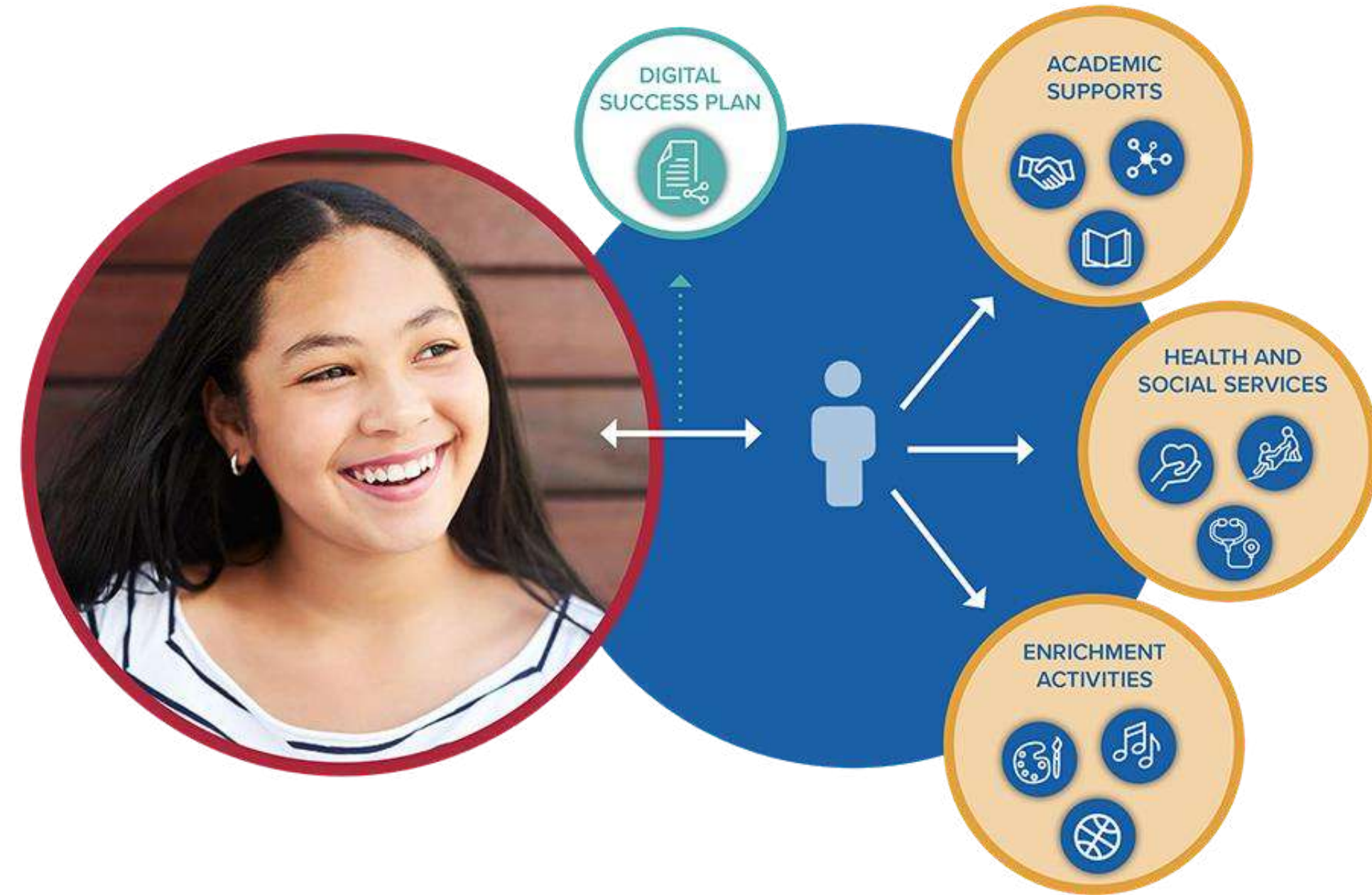
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Success Planning: Ensuring Every Child is Known and Supported

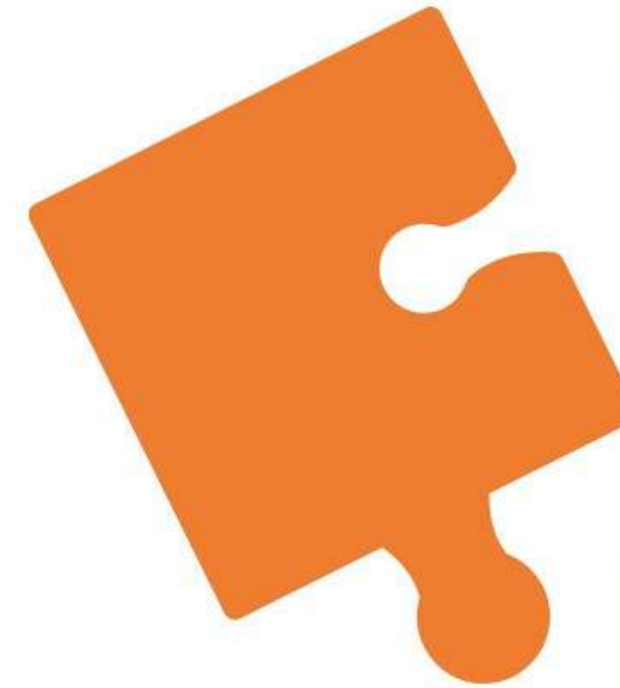
Why Success Planning?

Success Planning is a Practical Approach for School and Community Leaders

- Provides 360-degree view of each child's strengths, interests, goals, and challenges
- Fosters meaningful relationships between each student, their families, and a caring adult navigator who serves as a connector to supports and opportunities
- Ensures that these relationships, supports, and social and economic mobility aren't just luck of the draw



Success Planning Components

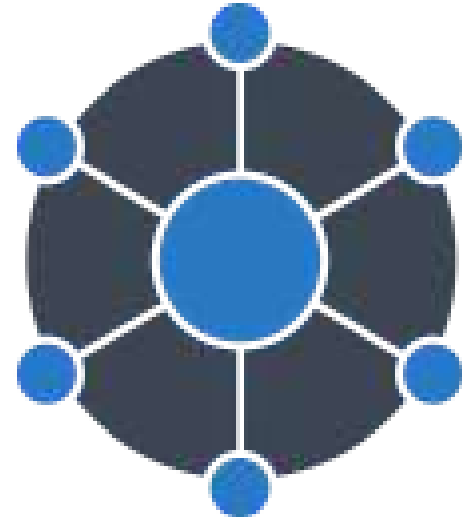


Coordinated by
a cross-sector
body such as a
Children's
Cabinet

Success Planning Principles



Equitable



Comprehensive



Student-Centered



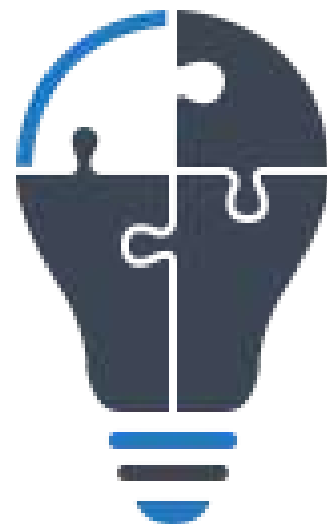
Relationship-Driven



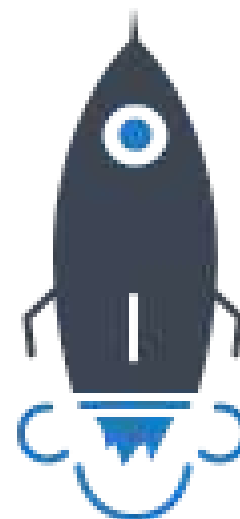
Personalized



Actionable



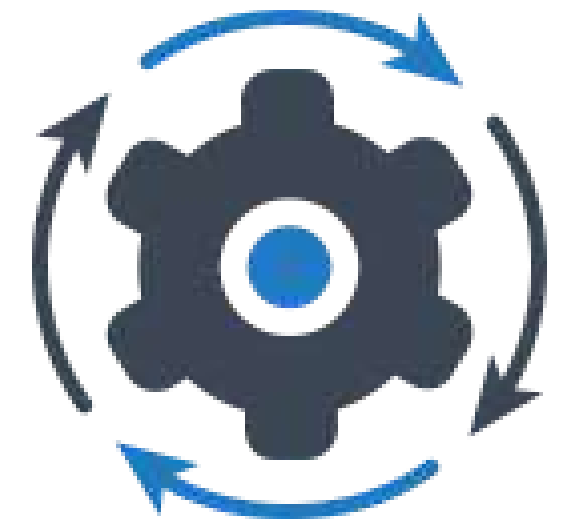
Cross-Sector



Information-Driven



Secure



Sustainable

2023 Cohort: Continuing Communities

Success Planning Community of Practice

2022 Cohort

Albuquerque, NM
Asheville and Buncombe County, NC
Baltimore, MD
Carbondale, IL
Chattanooga-Hamilton County, TN
Grand Island, NE
Long Beach, CA
Minneapolis, MN
Nashville, TN
New York City, NY
Poughkeepsie, NY
Unity Point, IL



2023 Cohort

Continuing:
Albuquerque, NM
Baltimore, MD
Carbondale, IL
Chattanooga-Hamilton County, TN
Long Beach, CA
Minneapolis, MN
Nashville, TN
New York City, NY
Poughkeepsie, NY
Unity Point, IL

New:
Cambridge, MA
Chelsea, MA
Dayton, OH
Memphis, TN
San Francisco, CA
Spartanburg, SC



Tauheedah Jackson

Director, Institute for Success Planning
EdRedesign Lab

Harvard Graduate School of Education

Email: tauheedahjackson@gse.harvard.edu

Website: edredesign.org

Data, Evaluation, and Accountability

10:30-11:45 AM

Rajni Banthia, PhD, Director of Evaluation, Mission Economic Development Agency (MEDA)

Amy Ahrens Terpstra, Chief Impact Officer, Promise Partnership Utah

Ashwina Kirpalani-Vasanjee, Vice President of Insights and Analytics, StriveTogether

Moderator: Wendy Viola, PhD, Managing Director, Knowledge and Awareness Building, William Julius Wilson Institute at Harlem Children's Zone



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Break

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Data, Evaluation, and Accountability

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Results Frameworks Definitions & Overview

Result

A condition of well-being for either individuals, organizations, and/or populations/communities.

Contributing Indicator

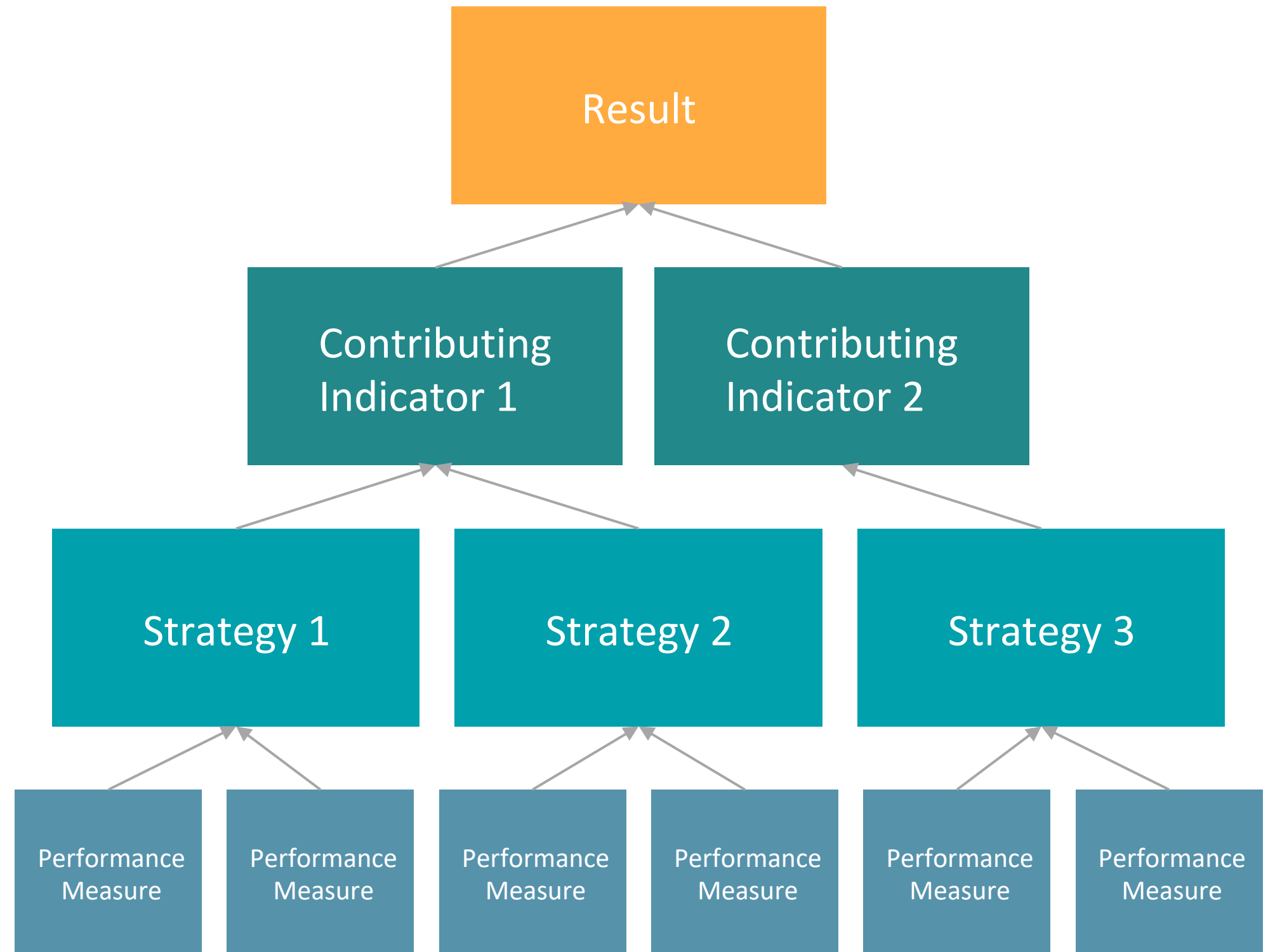
A measure that helps quantify the achievement of a result. In other words, what improvements, if achieved, would have considerable impact on improving the result? These should be measurable, often stated as a SMARTIE target.

Strategies

A coherent set of actions that have a reasoned chance of improving results. Every strategy has an associated performance measure that measures how well an agency, program, department or team is working.

Performance Measures

A measure of how well a program, department, system, strategy, tactic, or service is working.



Data, Evaluation, and Accountability

Ashwina Kirpalani-Vasanjee,
Vice President of Insights and Analytics, StriveTogether



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Data, Evaluation, and Accountability

Betina Jean-Louis, PhD, Principal Consultant, Arc of Evidence

Rajni Banthia, PhD, Director of Evaluation, Mission Economic Development Agency (MEDA)

Amy Ahrens Terpstra, Chief Impact Officer, Promise Partnership Utah

Ashwina Kirpalani-Vasanjee, Vice President of Insights and Analytics, StriveTogether

Moderator: Wendy Viola, PhD, Managing Director, Knowledge and Awareness Building,
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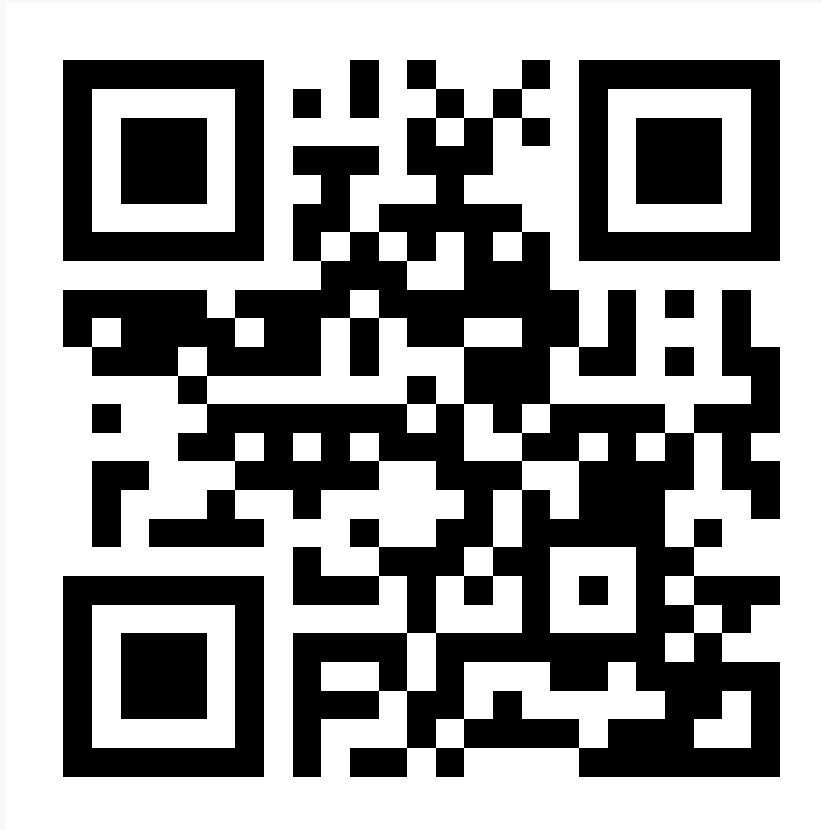


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Survey



Scan the QR Code on the screen or at your table to access the event survey.

Closing: Tying it All Together and Remembering Why We Do This Work

12:45-1:45 PM

Keynote Address: Paul Monteiro, Secretary of Service and Civic Innovation,
State of Maryland

Christian Rhodes, Deputy Executive Director,
William Julius Wilson Institute, Harlem Children's Zone

Paul Reville, Francis Keppel Professor of Practice Educational Policy and
Administration & Founding Director of EdRedesign,
Harvard Graduate School of Education



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Lunch

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Closing: Tying it All Together and Remembering Why We Do This Work

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