



# KEY INITIATIVES

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## Communities of Interest

In the past year, the Social Impact Exchange (SIE) has adapted its strategy for engaging funders in generating philanthropic capital for nonprofits scaling their impact. This shift grows out of the lessons learned from the implementation of our funder Working Groups, as well as our growing belief in the power of aligned collaboration.

We experienced that funders were not co-funding the scalable, evidence based initiatives that emerged from SIE's Working Groups at a pace sufficient to create transformative change. In addition, funding unrelated scale-ups was not creating as much impact as supporting a reinforcing portfolio of scaling investments.

Central to our revised strategy are **Communities of Interest** (COIs) — diverse funder networks that will learn together, map problems and solutions, and co-fund clusters of interventions that are going to scale. They will be formed around specific issues where there is shared interest. COI members will develop common strategies and co-fund clusters of scalable programs, practices and policies. While the size of COIs will vary, they will include foundations, philanthropists, corporations, government — and other stakeholders (e.g. nonprofits, thought leaders, etc.). We believe they will create deeper engagement among a broader group of funders and stronger collaboration within networks of funders.

SIE plans to launch several COIs in the next two years, each led by a core group of funders (i.e., Working Group members). The ones that have been identified for implementation are:

- 1) Prevention and treatment of chronic conditions — national health
- 2) Early childhood — national
- 3) Early childhood in New York City

In addition, we will explore a national COI in K-12 or college access/success and post-secondary career pathways with our Education Working Group members.

SIE is facilitating the COI development process and plans to serve as the backbone organization that manages the collaborative networks that emerge from the process and facilitate the due diligence for scaling initiatives identified by leverage teams.

As the model gains traction, SIE will also work to establish engagement and co-funding by a broader set of major family and individual donors who may not join COIs, but who care deeply about the same issues.

We hope you will be part of this exciting new evolution of our work. Please contact SIE if you are interested in learning more, joining an existing COI, or starting a new one.

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## Social Impact 100 (S&I 100)

Communities across America are struggling to overcome pressing problems in education, health, and poverty alleviation. Demand continues to grow while resources have become increasingly limited. At the same time, donors are seeking greater assurance that their charitable giving will make a difference. The studies have found that donors want third-party information about nonprofits' impact, financials, and legitimacy, yet they do not always have the time or specific expertise to do the research.

The **S&I 100** gives donors the confidence that they are contributing to organizations that consistently deliver impact.



The **S&I 100** is the first broad index of U.S. nonprofits that offer both evidence of their impact and a plan for growth. This web-based platform shows donors which nonprofits consistently deliver impact — featuring more than 100 top-performing nonprofits and over 16,000 local affiliates that are implementing their solutions. The index allows donors to leverage the knowledge and practices of leading philanthropic experts.

### A Wealth of Expertise, at Your Fingertips

- ▶ Nonprofits in education, health, poverty and youth development located across the U.S.
- ▶ Rigorous selection process developed and conducted by broad network of leaders from across the social sector
- ▶ Evidence of impact and rigorous plans for growth
- ▶ Information that facilitates decision making, including evaluation studies, growth plans, financial audits, and more
- ▶ Ability to support the local communities and issues donors care about with one easy online resource: [www.SI100.org](http://www.SI100.org)



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## Working Group Members

### Education

<b>Melissa Anguilla</b> <i>The Bank of America Foundation</i>	<b>Kristi Kimball</b> <i>Charles &amp; Helen Schwab Foundation</i>	<b>James Shelton</b> <i>Previous USDOE</i>
<b>Ilene Berman</b> <i>Annie E. Casey Foundation</i>	<b>Richard Laine</b> <i>National Governors Association</i>	<b>Terri Shuck</b> <i>National Public Education Support Fund</i>
<b>Paul Bernstein</b> <i>Pershing Square</i>	<b>Bruno Manno</b> <i>The Walton Family Foundation</i>	<b>Sara Sneed</b> <i>Hartford Foundation for Public Giving</i>
<b>Barbara Chow</b> <i>Hewlett Foundation</i>	<b>Kristen McDonald</b> <i>The Skillman Foundation</i>	<b>Jody Spiro</b> <i>The Wallace Foundation</i>
<b>Carlos Contreras</b> <i>Intel Foundation</i>	<b>Gregory McGinity</b> <i>The Broad Foundation</i>	<b>LaVerne Srinivasan</b> <i>Carnegie Corporation</i>
<b>Leslie Cornfeld*</b> <i>Department of Education</i>	<b>Richard McKeon</b> <i>Helmsley Charitable Trust</i>	<b>Barbara Sullivan</b> <i>Strategic Grant Partners</i>
<b>Nicholas Donohue</b> <i>Nellie Mae Education Foundation</i>	<b>William Moses</b> <i>The Kresge Foundation</i>	<b>TBA</b> <i>Lumina Foundation</i>
<b>Kristin DeVino</b> <i>Lucas Education Foundation</i>	<b>Jennifer Ng'Andu</b> <i>Robert Wood Johnson Foundation</i>	<b>Ana Tilton</b> <i>Grantmakers for Education</i>
<b>Cyrus Driver</b> <i>National Public Education Support Fund</i>	<b>Cheryl Niehaus</b> <i>Michael &amp; Susan Dell Foundation</i>	<b>Bill Tucker</b> <i>Bill &amp; Melinda Gates Foundation</i>
<b>Deepa Gupta</b> <i>Boeing</i>	<b>Sanjiv Rao</b> <i>Ford Foundation</i>	<b>Kelli Wells</b> <i>GE Foundation</i>
<b>TBA</b> <i>JPMorgan Private Bank</i>	<b>Cynthia Rivera Weissblum</b> <i>Edwin Gould Foundation</i>	<b>Ross Wiener</b> <i>The Aspen Institute</i>
<b>Jennifer Hoos Rothberg</b> <i>Einhorn Family Charitable Trust</i>	<b>Cassie Schwerner</b> <i>The Schott Foundation</i>	

Updated as of May 6, 2016

\* Not a member, serves as observer and liaison with the government department

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## Working Group Members

### Health

<b>Melinda Abrams</b> <i>The Commonwealth Fund</i>	<b>Laura Landy</b> <i>The Fannie E. Rippel Foundation</i>	<b>Anne Sorensen</b> <i>The Pew Charitable Trusts</i>
<b>Allison Bauer</b> <i>Boston Foundation</i>	<b>Amy Latham</b> <i>Colorado Health Foundation</i>	<b>Marion Standish</b> <i>The California Endowment</i>
<b>Brian Byrd</b> <i>New York State Health Foundation</i>	<b>Susan Mende</b> <i>Robert Wood Johnson Foundation</i>	<b>Shelley Stingley</b> <i>The Leona M. and Harry B. Helmsley Charitable Trust</i>
<b>Rachel Cahill</b> <i>The Nicholson Foundation</i>	<b>Faith Mitchell*</b> <i>Grantmakers in Health</i>	<b>TBA</b> <i>The John A. Hartford Foundation</i>
<b>Debbie Chang</b> <i>Nemours</i>	<b>Marian Mulkey</b> <i>California Healthcare Foundation</i>	<b>Nancy Zionts</b> <i>Jewish Healthcare Foundation</i>
<b>Allan Coukell</b> <i>The Pew Charitable Trusts</i>	<b>Michael Painter</b> <i>Robert Wood Johnson Foundation</i>	
<b>Patricia Doykos</b> <i>Bristol-Myers Squibb Foundation</i>	<b>Joan Randell</b> <i>The Nicholson Foundation</i>	
<b>David Fukuzawa</b> <i>The Kresge Foundation</i>	<b>Heidi Schultz</b> <i>The Leona M. and Harry B. Helmsley Charitable Trust</i>	
<b>Anu Gupta</b> <i>The Fannie E. Rippel Foundation</i>	<b>Stephen Shaya</b> <i>J&amp;B Medical Products</i>	
<b>Sheila Hanley*</b> <i>Centers for Medicare &amp; Medicaid Services</i>	<b>Amber Slichta</b> <i>Health Foundation for Western and Central New York</i>	
<b>Leslie Hardy</b> <i>Merck</i>		

Updated May 6, 2016

\* Not a funder, serves as liaison for their organization

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## Working Group Members

### NYC Early Childhood

**Steve Aresty**  
*Catherine & Joseph Aresty Foundation*

**Jacqueline Jones**  
*Foundation for Childhood Development*

**Elizabeth Olofson**  
*Stella and Charles Guttman Foundation*

**Susan Baer**  
*Flom Family Foundation*

**Patti Lieberman**  
*A.L. Mailman Family Foundation*

**Danielle Pulliam**  
*The Pinkerton Foundation*

**Debbie Breznay**  
*Shoolman Children's Foundation*

**Natasha Lifton**  
*The New York Community Trust*

**Maritza Arroyo**  
*United Way of New York City*

**Amalia Delicari**  
*Stavros Niarchos Foundation*

**Megan McAllister**  
*Altman Foundation*

*Updated May 6, 2016*

**Sarah Jankowski**  
*Viking Global Foundation*

**Sarah Needham**  
*Stavros Niarchos Foundation*

## Featured Nonprofits

Since launching our work to support the development of growth capital markets for the social sector, the Social Impact Exchange has had the opportunity to work with many effective nonprofits scaling their impact in the fields of health or education. We are pleased to share on the following pages, two ground-breaking initiatives working in health: YMCA's Y-DPP and Project ECHO. If you are interested in learning more about either initiative, contact information is provided, or be in touch with an Exchange staff member.

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## Featured Nonprofits

### YMCA of the USA's Diabetes Prevention Program (YMCA's DPP)

#### The Model

Today, nearly 29 million adults in the U.S. have diabetes; another 86 million adults are estimated to have prediabetes, and 5%-15% of them—**4-13 million adults in the U.S.**—will develop diabetes each year. One of every five health care dollars is spent caring for someone diagnosed with diabetes. And caring for a person with diabetes costs an average of \$11,700 annually compared with \$4,400 for someone without the disease.

The YMCA's DPP helps overweight adults at high risk for developing type 2 diabetes prevent or delay onset by taking steps to improve their overall health and well-being. It is a group-based program and takes place over a one-year period, delivered by trained lifestyle coaches at local Ys or community locations. Participants aim to lose 5-7% of their body weight by developing healthy eating habits and engaging in physical activity for 150 minutes a week.

Key elements of the model include:

- Twenty-five, one-hour sessions (19 sessions delivered weekly and every other week during the first 6 months and monthly during the second six months) facilitated by a trained Lifestyle Coach in a classroom setting that incorporate group discussions for problem solving and inter-group support.
- Weekly sessions focus on topics such as healthy eating, getting started with physical activity, setting goals, and staying motivated.
- Subsequent sessions build upon participants' success and teach strategies to help maintain the new lifestyle.
- Over the course of the program, participants aim to lose 7% of their body weight and increase physical activity to 150 minutes a week.

#### Results

By preventing or slowing the onset of type 2 diabetes, the YMCA's DPP will improve health outcomes for many of the 150,000 Americans the Y expects to serve by 2017, and substantially lower costs to the healthcare system. The YMCA

has demonstrated that the Diabetes Prevention Program intervention can be implemented in community-based settings as effectively as in clinical settings and at a fraction of the cost. Based on projected participation rates, the Y estimates that approximately 20,000 cases of diabetes could be prevented between 2013-2017.

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#### Growth Plans

By 2017, Y-USA plans to serve more than 50,000 participants annually at approximately 300 of its nearly 900 YMCA Associations delivering the program. To attain these benchmarks, Y-USA will do the following:

1. Increase recruitment of participants through developing new payor relationships.
2. Strengthen the capacity of national technical assistance and fidelity management infrastructure to support program quality at scale.
3. Ensure that the program's business model balances financial sustainability with access for individuals who cannot pay.
4. Implement a comprehensive 5-year plan for program measurement and evaluation.

#### More Information

If you are interested in learning more about the YMCA's DPP, please contact Joe R. Martinez, Sr. Manager, Strategic Philanthropy and Partnerships, YMCA of the USA, 312-781-3590 or [joe.martinez@ymca.net](mailto:joe.martinez@ymca.net).

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## Featured Nonprofits

### Project ECHO

#### The Model

Project ECHO is a lifelong learning and guided practice model that revolutionizes medical education and exponentially increases workforce capacity to provide best practice specialty care and reduce health disparities. This low-cost, high-impact intervention is accomplished by linking expert inter-disciplinary specialist teams with primary care clinicians through teleECHO™ clinics, in which experts co-manage patient cases and share their expertise via mentoring, guidance, feedback, and didactic education. Primary care clinicians develop the skills and knowledge needed to treat patients with common, complex diseases in their own communities, reducing travel costs, wait times, and avoidable complications. Technology is used to leverage scarce healthcare resources, and the specialists at Academic Medical Centers (AMCs) are better able to attend to the most complex, high-risk patients.

Through the teleECHO clinics, primary care physicians and other clinicians gain the specialty care knowledge they need to effectively treat these patients in their own communities. Interactive multi-participant knowledge networks are distinct from traditional telehealth or telemedicine models. The ECHO model has the potential to revolutionize the care of patients with complex chronic illnesses and, at the same time, empower primary care providers with specialized skills and knowledge.

Weekly clinics comprised of two core components:

- A “Hub” – an Academic Medical Center with a clinic manager and team of medical specialists who use technology (multipoint video conferencing and Internet) to leverage scarce healthcare resources and provide weekly virtual grand rounds focusing on specific illnesses.
- “Spokes” – as many as 80 individual primary care practitioners from rural health clinics seeking the latest research and best practices in specific disease areas. Using case-based learning and co-management of patients with specialists, practitioners present their most challenging cases for discussion by the participants.

ECHO is housed within the University of New Mexico Health Science Center (UNMHSC), and is led by Sanjeev Arora, M.D., ECHO’s founder and an internationally recognized expert in hepatology. It operates as a national office that drives the expansion of the ECHO model and its continuous improvement through research and development. ECHO at UNMHSC serves as a hub for clinicians throughout New Mexico as well as the national office for replication. Other hubs operated at AMCs across the country and around the world are independent entities that receive training, support and services from the ECHO Institute. The ECHO team has made significant investments in building its own organizational capacity to develop new products and services, keep up with external demand for the technical assistance requested to replicate its model, address infrastructure need.

#### Results

Evidence of ECHO’s effectiveness was first published in 2009 in the *Journal of Hepatology*. The article articulated ECHO’s potential for significant disruptive innovation in three major areas: 1) access to specialty healthcare; 2) expanded delivery of evidence-based best practice care; and 3) a new paradigm for team-based interdisciplinary professional development.

#### Growth Plan

Today, Project ECHO has 70 hubs worldwide, including 48 in the U.S. and 22 in 11 additional countries, covering more than 45 complex conditions. The ECHO model is applicable to fields other than medicine. The University of Wyoming is using the ECHO model to share expertise with assistive technologies with special education teachers in public schools. ECHO’s vision is to have an impact on 1 billion lives by 2015.

#### More Information

If you are interested in learning more about ECHO, please contact Erika Harding, Director of Replication Initiatives, Project ECHO/ECHO Institute, 505-272-6542 or eharding@salud.umn.edu.