



BULL CITY
FORWARD

INNOVATE FOR THE GREATER GOOD.

3-YEAR STRATEGIC PLAN

AUGUST 2010

© 2010 BULL CITY FORWARD

Table of Contents

- I. Executive Summary..... 3**
- II. Sector Analysis..... 5**
- III. Bull City Forward—A Brief History..... 7**
- IV. Leadership Team 8**
- V. Progress to Date 10**
- VI. Mission, Vision & Values 11**
 - Mission..... 11
 - Vision 11
 - Values 11
- VII. Strengths, Weaknesses, Opportunities & Threats..... 12**
 - Bull City Forward..... 12
 - Durham Social Innovation Cluster 13
- VIII. Activities..... 14**
 - Educate & Mentor..... 14
 - Recruit & Retain..... 14
 - Connect & Invest..... 14
 - Research & Advocate..... 15
- IX. Goals 16**
 - 3-Yr Strategic Goals..... 17
- X. Strategies..... 24**
 - Highest Priority Strategies 24
 - Supporting Strategies 25
- XI. Organizational Structure 27**
 - Permanent Board of Directors..... 27
 - 3-Year Staffing Plan..... 29
 - Staff Organizational Chart..... 30
 - Staff Positions 31
- XII. Financials..... 33**
- XIII. Risks & Mitigation Strategies 34**
- Appendix A—Executive Committee Members..... 35**
- Appendix B—Working Group Members 36**
- Appendix C—Working Group Recommendations 39**
 - Campus Build Out Recommendations 39
 - Impact Measurement Recommendations 40
 - Individual Development Recommendations 44
 - Investment & Scale-Up Recommendations 45
 - Organizational Development Recommendations 46
 - Outreach & Communications Recommendations..... 47
 - Policy & Advocacy Recommendations..... 48
 - Recruitment & Retention Recommendations..... 50
- Appendix D—Detailed Budget FY 2010 54**

I. Executive Summary

Bull City Forward is a community effort to dramatically increase the creation, scale, and impact of social enterprises in Durham, NC. We are guided by the conviction that in purposefully recruiting, enabling, and scaling social enterprises and socially driven entrepreneurs, Durham can create a robust cluster of innovation for the region that will spur economic development, improve the lives of citizens, and produce a new model of urban development. Thus, the mission of Bull City Forward is “*enabling local entrepreneurs to create world-changing solutions.*”

Bull City Forward envisions a transformation across Durham and the region, where a world-class cluster of creative minds is scaling for-profit companies and non-profit enterprises that are not only contributing thousands of jobs to the economy but are also improving the local and global community in meaningful and measurable ways. This cluster is supported by a robust talent pipeline of problem-solvers who are homegrown locally and recruited globally. This community is defined by collaboration, sustainability, diversity, and accountability and its success has attracted millions of new dollars in investment. Much like Research Triangle Park half-a-century before, Durham’s Bull City Forward is studied as a global model of economic and community development and the city is recognized as a global leader of social innovation and entrepreneurship.

In order to realize this vision, Bull City Forward has set clear and measurable goals for the next three years. Of highest priority are to:

- Raise the concentration of local entrepreneurial talent and connect talent with high growth social enterprises;
- Enable local entrepreneurs to start and scale enterprises that lead to measurable economic growth and social impact across the region;
- Attract new talent and capital to the region to accelerate this growth;
- Increase collaboration between sectors to realize a more comprehensive, effective and metrics-driven regional social change strategy.

To achieve these goals, Bull City Forward is implementing a set of strategic interventions designed to expand the local base of entrepreneurial talent and equip social innovators to thrive. These interventions will focus on the following areas of programming and services, in line with Bull City Forward’s mission:

Develop & Mentor our local talent at all ages and stages of life, comprising activities in:

- Middle and High School Partnerships: To inspire and prepare the next generation of social innovators in this community, Bull City Forward is partnering with Durham Public Schools to bring entrepreneurial leadership opportunities into the classroom and beyond.
- Bridging Higher Education: Connecting this area’s unparalleled pool of highly educated talent from Duke, NCCU, UNC-Chapel Hill, and Durham Tech with internship and research opportunities that match their interests and advance the greater good. Additionally, Bull City Forward will help enable student led ventures that show potential for growth and impact.
- Training/Mentorship for Mid-Career Entrepreneurs: Recognizing that innovators take many different paths before launching their first venture, and connecting those mid-career women and men who are ready to act on their bold idea with the community, mentors and networks of support they need to realize their dreams.

Recruit & Retain, so that Durham becomes recognized as “the best place in the world for people who want to change the world.” This effort will include:

- Publicity: Boosting Durham’s state and national profile as the center for social innovation by targeting key national players in entrepreneurship, business incubation, and social enterprise creation.
- Recruitment Package: Creating dynamic recruitment materials that will attract best-in-class social enterprises, leaders and investments to Durham.
- Targeted Retention Campaign: Collaborating with local universities to build on the “brain gain” of young people who are excited about contributing to Durham’s bright entrepreneurial future.

Connect & Invest, to build the organizational capacity of social enterprises:

- Community Building: Creating a comprehensive and open-source directory of all available resources for social entrepreneurs in the community, and following up with a needs analysis to clarify areas of greatest opportunity.
- Venture Enabling: Offering social innovators targeted resources, including: capacity-building programs offered through strategic partnerships; subsidized co-working space and discounted business services; connections to local talent; access to capital; and robust measurement tools that supply clear metrics for success.

Research & Advocate, including:

- Regional Collaboration: Convening social enterprises around the Triangle—in conjunction with the NC Fourth Sector Working Group—to collectively determine the best policy climate for the continued development of this cluster.
- Research: Analysis of the role of social ventures in the economic development of a region and distribution of those results.
- Policy Advocacy: Political and legislative advocacy that will support Bull City Forward’s agenda of social innovation and entrepreneurship at the city and state levels.

To date over 400 people from across the local community have been involved in this effort, sustained by an initial \$100,000 planning grant from the City of Durham, the Durham Chamber of Commerce, and several private institutions. Bull City Forward has recently incorporated as a 501(c)3 non-profit and attracted a strong interim board and initial staff. Bull City Forward’s social innovation campus has recently opened in downtown Durham and is incubating its first wave of entrepreneurial talent. With 31 current members, weekly workshops, feedback sessions, and lunch speakers, Bull City Forward’s social innovation campus is a dynamic and creative convening ground for the city’s social change makers. It is now time to take this effort to the next level. To build on existing momentum, Bull City Forward now seeks an additional \$200,000 in investment to expand its operations team and execute against its strategic plan.

II. Sector Analysis

Bull City Forward believes that social innovation and entrepreneurship provide Durham and its surrounding region with the ability to pursue economic development while simultaneously addressing the social challenges and opportunities of our present and future. As a sector, “Social Innovation and Entrepreneurship” has not adopted a uniform definition. Bull City Forward views social innovation and entrepreneurship as the merging of public and private practices that creatively combine disciplined business metrics with the drive to enact positive social change.

The Case for Social Innovation in Durham, NC

Durham residents share more than a geographic location. They are intrinsically linked by a rich entrepreneurial past, entrenched modern challenges, and commitment to a future of opportunity and progress. The building blocks for a social innovation cluster are already in place throughout Durham, Chapel Hill, and Raleigh, as reflected in the region’s emerging entrepreneurial climate, Downtown Durham revitalization, non-profit incubators, after-school entrepreneurship programs, rapidly expanding non-profit lending institutions (e.g. Self-Help and the Latino Community Credit Union) and national leadership in scaling social and green technology enterprises. Now is the time to intentionally and dramatically strengthen our entrepreneurial foundation while uniting around a bold vision for the region’s future.

Breakthrough Potential for Cluster-Driven Development

How can we create the ideal conditions for social innovation to thrive? There are initiatives under way across the United States that aim to stimulate social innovation using some combination of incubators, social innovation funds, talent development and recruitment efforts, and advocacy activities. But there is no other city developing a truly comprehensive approach to the creation and acceleration of a *social innovation cluster*. Now is Durham’s time to rise to this leadership challenge.

Growing from Deep Roots

Durham’s rich history of entrepreneurship, innovation, and social action continually informs and inspires our work at Bull City Forward. After the Civil War, Durham became a significant center for African American businesses, many of which placed a high value on community by investing profits in community initiatives and social programs, and cultivating a sense of stewardship and responsibility among employees. This focus on social responsibility was unprecedented at the time, and Durham-based businesses played a substantial role in creating social and economic change in the region.

Durham’s economy grew dramatically during the late 18th and 19th century, driven by the world-famous tobacco sector and a thriving African-American business sector. The world’s oldest and largest African-American owned life insurance company, North Carolina Mutual, was founded on downtown’s Parish Street in 1898. In 1907, the M&F Bank was founded, and became the largest African American owned bank in the country. Parrish Street was nicknamed Black Wall Street, and Booker T. Washington called Durham the “City of Negro enterprise”. The Hayti District was home to theaters, community initiatives, churches, and successful small businesses. NC Mutual’s first motto, for instance, was “merciful to all,” and they were a catalyst for racial, social, and economic improvements in the community.



Sixty years ago, as North Carolina's primary industries eroded, a handful of public and private sector visionaries recognized an opportunity to create a new economic engine for the state—a vision that was realized in Research Triangle Park. As RTP celebrates the beginning of its sixth decade, Bull City Forward is drawing on its important lessons. Specifically, RTP built a successful cluster by:

- Leveraging existing assets including a rich pool of intellectual activity and talent found primarily among the region's universities;
- Attracting new talent and resources to build upon the cluster;
- Garnering critical political and private sector support as an important growth engine for the state; and
- Seizing upon its role as one of the first research parks in the country, which provided a critical first-mover advantage and allowed RTP to emerge as a true national model.

The Triangle—with Durham as its hub—is once again uniquely positioned to emerge as a national model of development through the intentional creation of a social innovation and entrepreneurship cluster. Durham boasts a deep talent pool at all education levels, a thriving creative class, and a substantial and established technology industry, all of which feed innovation.

Furthermore, Durham's civic leaders not only recognize the importance of the social innovation cluster for the Durham economy, but also actively support it. Accessible training services, a vibrant and diverse entrepreneurial community, and inexpensive office space ease the tribulations of launching a new venture in the region. Finally, Durham can build off the already-strong sense of civic engagement in our community as we take on entrenched challenges in education, housing, environmental stewardship, and economic justice.

The existing critical mass of local social enterprises speaks to the conductivity of Durham as a promising environment for a social innovation cluster, and signifies the potential impact of a denser concentration of social enterprises in our region. For example, Triangle Residential Options for Substance Abusers (TROSAs) has created six different profitable businesses that provide therapeutic jobs for its residents and channels money back into its treatment programs: a win for the economy and for the community. TROSA has built the largest privately owned moving business in the Triangle area, grossing \$3-4 million in annual revenues. It's estimated that TROSA has saved North Carolina and other states at least \$6 million annually in reduced incarceration costs. Durham has all the requisites to exponentially increase the creation and impact of more ventures like TROSA.

By creating a robust support system for entrepreneurs and social innovators Durham can become *the best place in the world for people who want to change the world*. To do so, we must commit to a comprehensive approach, increase our collaboration across sectors, increase the amount of capital to invest in high-impact, scalable ideas and acknowledge the economic and moral imperative to act. Now is the time to invest in Durham's next economic engine by enabling local entrepreneurs to create world-changing solutions.

Bull City Forward exists to drive this change.

III. Bull City Forward—A Brief History

In 2005, Durham community leader Henry McKoy convened a group of likeminded individuals to discuss the increasing role of social innovation in The Triangle. By fall 2008 the group transitioned from discussion to action. They raised money for local consultants to create a community map of local organizations and a best practice analysis of community development initiatives around the world focused on promoting social innovation. After completing a gap analysis, they concluded that there is a robust social innovation community in The Triangle but it lacks cohesion, common programming space, ready access to talent and capital, and recognition as an important driver of economic growth in the region.

A set of recommendations emerged, centered on the creation of a social innovation campus in downtown Durham. This campus would serve as the hub of a cohesive movement – with “spokes” emanating into every corner of the community to engage a diverse range of stakeholders in activities and programs designed to intentionally and dramatically accelerate social innovation in the region.

In Fall 2009, a diverse group of city leaders stepped forward with a \$100,000 planning grant to invest in this vision under the new name of Bull City Forward¹. In January 2010 BCF convened a 20-person executive committee and strategic working groups comprising over 150 citizens and community leaders. They began a three-month process that culminated in recommendations within each of their respective eight topic areas: Individual Development, Organizational Development, Campus Build-out, Policy and Advocacy, Recruitment and Retention, Investment and Scale-Up, Impact Measurement, and Outreach and Communications. For a list of BCF’s executive committee members, working group members, and to read the initial recommendations, please see *Appendices A, B, & C, respectively*.

¹ Investors included the City of Durham, The Durham Chamber of Commerce, the Triangle Community Foundation, Duke University, The NC Institute for Minority Economic Development, The Latino Community Credit Union, Downtown Durham, Inc, Burt’s Bees Charitable Foundation, and Greenfire Development.

IV. Leadership Team

Christopher Gergen

As Founding Executive Director of Bull City Forward Christopher Gergen is leading the organization's strategic implementation locally and raising awareness of the effort nationally. Bull City Forward complements Christopher's role as Director of the Entrepreneurial Leadership Initiative at Duke University within the Terry Sanford School of Public Policy's Hart Leadership Program as well as his position as "Innovator in Residence" at the Center for Creative Leadership. Christopher is also a founding partner of Life Entrepreneurs, LLC, a leadership development and consulting firm, and co-author of the nationally acclaimed book *Life Entrepreneurs: Ordinary People Creating Extraordinary Lives* (Warren Bennis Leadership Series; Jossey-Bass). Furthermore, Christopher co-authors a bi-weekly column on social innovation for the Raleigh News & Observer and the Charlotte Observer titled "Doing Better at Doing Good."

Christopher's entrepreneurial credentials include co-founding and serving as a current board member of SMARTHINKING, the leading online tutoring provider in the United States—serving over 200,000 students from more than 1,000 universities, colleges, and high schools. Other entrepreneurial ventures include starting a coffeehouse/bar dedicated to promoting the arts and music in Santiago, Chile and helping to launch the "Entrepreneur Corps"—a national service initiative sponsored by AmeriCorps*VISTA that placed 400 full-time business volunteers for a year of service in over 90 non-profit organizations across the country. Previously, Christopher started LEAD!, a non-profit leadership, entrepreneurship, and service program for Gonzaga College high school students in Washington, D.C. and is a founding board member of the E.L. Haynes Public Charter School, also in D.C.

Further professional experience includes serving as Vice President of New Market Development for K12 Inc. and Chief Operating Officer and Vice President of Business Development and Strategy for New American Schools. Christopher received a Bachelor of Arts with honors from Duke University, a Master's Degree in Public Policy from the George Washington University, and his M.B.A. from Georgetown University. He lives with his wife and two children in Durham, NC.

Alison Dorsey

As the Director of Community and Strategy at Bull City Forward, Alison focuses on fostering a creative and welcoming environment in the Forward Space, building partnerships, and implementing capacity building services for members. In the summer of 2009, Alison took leave of Bull City Forward to work for The Hub in London, analyzing the conditions of innovation in potential expansion cities around the world and learning to manage a co-working space. The study revealed that with its diverse community, highly educated population, cultural amenities, financial and human capital, low cost of living, and social challenges, Durham is a hot bed of social innovation. Alison's work at The Hub came as a result of an independent study on urban development through entrepreneurship, a part of her undergraduate studies in public policy at Duke University. While at Duke, Alison also launched the Woman's Water Polo Program and Durham Community Consulting, a summer internship experience with the aim of integrating Duke students into the Durham community while demonstrating that business skills are useful, valued, and cultivated in the citizen sector. Previous employers include Ashoka, the Silicon Valley Social Venture Fund, and the Durham Volunteer Center.

Lee Miller

Within the Bull City Forward team Lee coordinates the work of BCF's eight working groups and also manages the daily operations (i.e. keeping the lights on and the coffee hot) in the Forward Space. His work rebuilding neighborhoods in post-Katrina New Orleans and his experience teaching and living in the townships of Durban, South Africa bore his longing for social justice and belief in community interdependence. Lee graduated from Duke, summa cum laude with a B.S. in Economics, in 2009, and will return to Duke this fall to pursue his Masters of Environmental Management from the Nicholas School of the Environment.

Liz Linzer

Liz is a Durham, NC native and a passionate contributor to the Bull City Forward Team. She spent her formative years in Massachusetts, Wisconsin, and Holland, and returned to Durham to earn a Bachelor of Arts in Public Policy from Duke University in May 2009. Throughout her life, Liz has demonstrated her dedication to Durham and the overarching mission of Bull City Forward. She focused her academic career on social entrepreneurship and leadership development, spent her time working with start-ups and nonprofit organizations locally and abroad, and has always approached business with a strong commitment to social impact. After leaving North Carolina to move to France post-graduation, Liz discovered an insatiable need to play an active role in the social innovation movement in Durham. Now, in addition to working with Bull City Forward in numerous capacities, Liz manages Duke University's undergraduate Social Entrepreneurship Program, the Entrepreneurial Leadership Initiative, where she works with students pursuing social enterprise development in Durham. She is fascinated by the challenge of social enterprise impact measurement, and inspired by the opportunity to help empower the next generation of social innovators in the Bull City.

V. Progress to Date

To date over 400 people from across the local community have been involved in this movement, sustained by an initial \$100,000 planning grant from the City of Durham, the Durham Chamber of Commerce, and several other public and private institutions. Over 100 experts, residents and community leaders gave over 750 hours in eight topic-focused working groups, developing community recommendations for the strategic planning process. Bull City Forward has recently incorporated as a 501(c)3 non-profit and attracted a strong interim board and staff.

In March of this year, Bull City Forward opened a 5,500 square foot social venture co-working space in the Kress Building in downtown Durham, a step towards its long-term vision of building a social innovation campus that is a dynamic and creative convening ground for the city's social change makers. We are incubating our first wave of entrepreneurial talent. In its beginning stages, the campus currently features:

- 32 current members; local entrepreneurs are working alongside students interning at local organizations and social innovators from all backgrounds.
- Weekly capacity-building workshops and monthly office hours led by partner organizations and professionals attended by Bull City Forward members and community members from The Triangle, Charlotte, Cary, Greensboro and Wake Forest.
- Upcoming community events, including “Structure Lab” (co-sponsored by SJF Ventures and Center of Entrepreneurial Development) and “Innovation Café” (sponsored by the NC Museum of Life and Science and BULLWORKS).
- Community-building events including weekly lunch speakers, bi-weekly happy hours, networking events open to the public, and monthly feedback sessions featuring Bull City Forward members.
- A list of local service providers committed to offering discounted services to members of Bull City Forward, including accounting, graphic design, videography, social media, PR, legal services, and bookkeeping.
- Wall space featuring donated art from Duke University's Center for Documentary Studies and a growing space dedicated to whiteboard and magnetic walls for creative brainstorming.

Bull City Forward has also forged partnerships with numerous community organizations, educational institutions and businesses in preparation for upcoming programs. This effort includes:

- Engaging the leadership of Durham Public Schools and the Center for Creative Leadership in adopting entrepreneurial leadership education programs for Durham's high schools.
- Working with Duke University Law School to prepare and provide legal counseling and workshops for early-stage and adolescent enterprises.
- Working in conjunction with the Durham Chamber of Commerce to recruit social innovators and enterprises to the region.
- Collaborating with Green Plus and B Corps interns to develop workshops, coaching and measurement systems to help members implement or improve social impact, triple bottom line and accountability practices.

Additionally, Executive Director Christopher Gergen co-authors a bi-weekly column on social innovation in the Raleigh News & Observer and Charlotte Observer, generating regional awareness of both Bull City Forward and Durham as hubs of social innovation. It is time to take this effort to the next level. To build on existing momentum, Bull City Forward now seeks an additional \$200,000 in investment to expand its operations team and execute against its strategic plan.



VI. Mission, Vision & Values

Mission

Bull City Forward's mission statement encapsulates the overarching purpose guiding all our activities and strategic interventions. It is Bull City Forward's mission:

“To catalyze a community of local entrepreneurs to create world-changing solutions.”

Vision

Our vision statement is a progressive conception of the future created by Bull City Forward and the City of Durham by the year 2020:

Bull City Forward envisions a transformation across Durham and the region, where a world-class cluster of creative minds is scaling for-profit companies and non-profit enterprises that are not only contributing thousands of jobs to the economy but are also improving the local and global community in meaningful and measurable ways. This cluster is supported by a robust talent pipeline of problem-solvers who are homegrown locally and recruited globally. This community is defined by collaboration, sustainability, diversity, and accountability and its success has attracted millions of new dollars in investment. Much like Research Triangle Park half-a-century before, Durham's Bull City Forward is studied as a global model of economic and community development and the city is recognized as a global leader of social innovation and entrepreneurship.

Values

Our values reflect the collective beliefs and expectations of our team, our members and our partners. By practicing our values on a daily basis, at every level of our organization, we strive to create a community of principled and compassionate action.

Sense of Place – We honor Durham's entrepreneurial history, prize the diversity of our cultural context, and actively seek to engage all members of our community in pursuing a common vision for the region's future.

Diversity Breeds Innovation – We foster a highly creative and inclusive work environment where entrepreneurs from a variety of industries and backgrounds collaborate to diversify the perspectives and experiences that inform each of our ideas and organizational models.

Irreverence for the Status Quo – We actively seek to improve all sectors of our community, appreciate that bold new ideas can tackle entrenched challenges, and champion the development of creative solutions.

Collaboration Amplifies Impact – We strive to help change-makers work across sectors and develop synergistic solutions to our society's toughest problems. We are committed to tearing down the barriers to cooperation and enhancing communication channels to encourage collaboration.

A Culture of Accountability & Excellence – We use measurable outcomes to evaluate our progress, gather and apply data to perfect our best practices, and build an identity of personal accountability.



VII. Strengths, Weaknesses, Opportunities & Threats

As an early-stage venture and movement, Bull City Forward acknowledges present and future challenges to both our organization and the greater vision of creating a nationally recognized social innovation cluster in Durham and the surrounding region. These are presented in full, in separate SWOT Analyses below.

Bull City Forward

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong brand equity and growing brand recognition in community • Political/financial/in-kind support from community leaders across all sectors • Centrally located visible space in Downtown • Broad community engagement and buy-in • Early wins including launching campus, building membership, and growing programming • Alignment with Durham’s brand as home of strong creative class • Dynamic and dedicated team • Reputation for delivering on expectations • Access to deep pools of talent from NCCU, Durham Tech, Duke and other local schools • Strong, inspiring message and delivery 	<ul style="list-style-type: none"> • Lack of clarity about “social innovation” among the public • Lack of clear, data-driven correlation between social innovation and economic development • Shared office services not yet meeting professional requirements • Evolving membership model and associated member benefits lacking precision • No precise understanding of members’ needs from a thorough market analysis • Fragility inherent in early-stage venture • Limited staff experience and staff time • No well-established venture anchoring the physical space
Opportunities	Threats
<ul style="list-style-type: none"> • First-mover advantage • Building a national model • Sector/regional collaboration • Significant impact, economically and socially • Enhance political/community support (especially in disenfranchised communities) • Create a robust pipeline of talent • Produce break-out members • Accelerate speed to market for break-through ideas through technology transfer (especially with university partners) • Become central hub of social innovation for the city/region • Demonstrate relationship between social innovation and economic development • Enhance Durham’s brand & contribute to Downtown Durham renewal 	<ul style="list-style-type: none"> • Lack of financial security • Potential members/partners do not buy in • Over-promising/under-delivering • Social innovation concept not understood or embraced • Inability to communicate mission and impact • Eroding political support • Committing to activities that do not build on strengths and mission drift • Sequencing programs misaligned with demand • Lose first-mover advantage • Transient Staff • Staffing capacity

Durham Social Innovation Cluster

Strengths	Weaknesses
<ul style="list-style-type: none"> • Critical mass of social innovators • Culture of diversity and tolerance • Robust pipeline of emerging talent • Knowledge base • Financial resources – particularly among lending agencies such as Self-Help, LCCU • Precedent for innovation in the region and in Durham, specifically • Welcoming political climate • Low cost of living/high quality of life • Resurgent downtown area • Available/affordable office space • Outstanding creative class • Strong Durham pride/civic engagement • Proximity to State Capitol 	<ul style="list-style-type: none"> • Missing angel investment sector • Limited private equity activity relative to other entrepreneurial cities • Fragmentation in social sector • Lack of alignment in investment community • Public transportation • Economic disparity • Lack of data/culture of accountability/consistent measures • Economic insecurity • Limited understanding of social innovation • High degree of talent transience • Limited industry in urban center • Lack of direct flights to/from RDU
Opportunities	Threats
<ul style="list-style-type: none"> • First-mover advantage • Improved technology transfer • Increased talent recruitment and retention • Better job visibility/networking efficiencies • Improve state of Durham Public Schools • Spark collaboration across social sector and the region • Enhance brand of Durham as hotspot of creativity and entrepreneurship • Increase visibility of community enterprises • Establish consistent measures and a culture of accountability • Correlate social innovation with economic growth • Define urban center as social innovation hub • Increase awareness and support for social innovation • Build on critical mass • Spotlight emerging social enterprises and value to the city • Economic disruption leads to entrepreneurial diversification 	<ul style="list-style-type: none"> • Loss of first-mover advantage • Insufficient capital investment • Erosion of political support • Downtown Durham development stalls • Deterioration in trust across sectors • Worsening social and economic challenges • Social innovation activities fail to produce measurable change • Cooperation with universities stalls • Deterioration in cooperation between regions and sectors • Loss of creative brand



VIII. Activities

Bull City Forward believes in intentionally committing its resources to developing opportunities with the highest impact potential. Based on our community mapping, best practice surveys, market research, and SWOT analyses above, Bull City Forward is focusing its activities in four areas. The following activities have been strategically designed to comprehensively develop the most critical channels of social innovation in Durham. Each is designed to meet explicit, measurable and ambitious goals that align with the vision of Durham as a national leader in social innovation.

Educate & Mentor

- Middle and High School Partnerships (1-8): To inspire and prepare the next generation of social innovators in this community, Bull City Forward is partnering with Durham Public Schools, local independent schools, and the Center for Creative Leadership to bring entrepreneurial leadership opportunities into the classroom and beyond.
- Bridging Higher Education (9-11): Connecting this area's unparalleled pool of highly educated talent from Duke, NCCU, UNC-Chapel Hill, and Durham Tech with internship and research opportunities that match their interests and advance the greater good. Additionally, Bull City Forward will help enable student-led ventures that show potential for growth and impact.
- Mid-Career Entrepreneurial Education (12): Connecting this community's pool of aspiring entrepreneurs with the resources and support to transition from traditional careers into innovative entrepreneurial opportunities.

Recruit & Retain

- Marketing (29): Boosting Durham's state and national profile as the center for social innovation by strategically targeting key national players in entrepreneurship, business incubation, and social enterprise creation through a multi-media outreach effort.
- Recruitment (13): Creating a dynamic recruitment campaign and national competition that will attract best-in-class social enterprises, leaders and investments to Durham.
- University Retention Campaign (14): Collaborating with local universities to build on the "brain gain" of young people who are excited about contributing to Durham's bright entrepreneurial future, and connecting mid-career professionals with job opportunities in local social enterprises.
- Transitional Professional Retention (15): Utilizing the *Opportunities Board*, personal introductions, and BCF networking events to connect mid-career professionals with opportunities in local social enterprises.
- Technology Transfer: Developing strategic partnerships with inventors, researchers, and faculty members at area universities to assist in bringing bold new ideas to a global marketplace within the local economy.

Connect & Invest

- Community Building (Goal 18): Creating a comprehensive and open-source directory of all available resources for social entrepreneurs in the community accompanied by a needs analysis to clarify areas of greatest opportunity.
- Venture Enabling (Goals 17-23): Offering social innovators targeted resources, including capacity-building programs offered through strategic partnerships; mentorship and coaching; networking opportunities; subsidized co-working space and discounted business services;



connections to local talent; access to capital; and robust measurement tools that supply clear metrics for success.

Research & Advocate

- Regional Collaboration (Goal 24): Convening social enterprises around The Triangle—in conjunction with the NC Fourth Sector Working Group—to collectively determine the best policy and collaborative climate for the continued development of this cluster.
- Research (Goals 25-26): Analysis of the role of social ventures in the economic and community development of a region and distribution of those results.
- Policy Advocacy (Goal 21): Political and legislative advocacy that will support Bull City Forward's agenda of social innovation and entrepreneurship at the city and state levels.



IX. Goals

In order to successfully implement the programs and services outlined above, Bull City Forward has committed to a set of three-year goals. They are intended to be clear, measurable and within grasp of an ambitious but focused organization. In order to promote accountability, it will be the responsibility of Bull City Forward's executive team and board to measure, assess and in some cases revise the metrics attached to each goal. Goals are distributed among Bull City Forward's four areas of intervention: Educate & Mentor; Recruit & Retain; Connect & Invest; and Research & Advocate. We have also established internal goals for our organization to ensure that we have the resources and capacity to deliver outputs through a sustainable operation.

Priority Outcomes

- Raise the concentration of local entrepreneurial talent and connect talent with high-growth social enterprises.
- Enable local entrepreneurs to start and scale enterprises that lead to measurable economic growth and social impact across the region.
- Attract new talent and capital to the region to accelerate this growth.
- Increase collaboration between sectors to realize a more comprehensive, effective and metrics-driven regional social change strategy.
- Establish Durham and The Triangle as a nationally recognized hub of social innovation and entrepreneurship.



3-Yr Strategic Goals

Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
EDUCATE & MENTOR				
1. Durham Public High School Entrepreneurial Leadership Pilot			(Jan) Engage/support 60 high school students across 3 schools	Engage/support 90 students across 4 schools
2. Durham Private High School Entrepreneurial Leadership Pilot			(Sep) Engage/support 10 high school students in 1 school	Engage/support 40 high school students in 2 schools
3. City Jobs Program for Youth (such as Mayor's Job Program)			Train/place 15 students into innovative social enterprises	Train/place 30 students into innovative social enterprises
4. Young Leaders Start-Up Scramble (2-day intensive capacity-building experience)			Two high schools, two universities participating; 30 student teams	Four high schools, three universities participating; 60 student teams
5. Youth Innovation Day		Two age ranges, 50 students	Three age ranges, 80 students	Three age ranges, 100 students
6. Youth-Oriented Membership at Bull City Forward (ages 12-22)	1 student-led enterprise member	2 student-led enterprise members	5 youth members; 3 youth organization partners; 5 student-led enterprise members	15 youth members; 5 youth organization partners; 12 student-led enterprise members
7. Opportunity Matching (internships, research, volunteers, jobs) through BCF <i>Opportunity Board</i>		<i>Opportunity Board</i> online and populated	50 matches made through <i>Opportunity Board</i>	125 matches made through <i>Opportunity Board</i>

Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
8. Workshops Targeting College Students	4 workshops at BCF	2 workshops at BCF	6 workshops at BCF; 4 workshops at local colleges/ universities	12 workshops at BCF; 6 workshops at local colleges/ universities
9. Networking/ Meet-Ups	2 events; 20 college students per event	Monthly meet-ups; average 10 students at each	Monthly meet-ups; average 10 students at each	Monthly meet-ups; average 15 students at each
10. Educational Events/ Panels/ Speakers		Average of 5 students at each BCF event (see below for "community-building" events)	Average of 8 students at each BCF event	Average of 10 students at each BCF event
11. Spring Break Challenge				30 MBA Students from across 5 schools supporting 5 start-up teams
12. Mid-Career Entrepreneurial Education		Average of 2 transitional professionals at each capacity-building workshop	Average of 4 transitional professionals at each capacity-building workshop	Average of 6 transitional professionals at each capacity-building workshop
RECRUIT & RETAIN				
13. Recruit Promising Social Enterprises to Relocate/ Replicate in Durham			3 social enterprises locate headquarters in Durham; 2 scaling social enterprises establish new satellite offices in Durham	5 social enterprises locate headquarters in Durham; 3 scaling social enterprises establish new satellite offices in Durham; National competition launched to recruit best-in-class social entrepreneurs to Durham

Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
14. Retain Entrepreneurial Talent from Area Universities (i.e. Duke, NCCU, Durham Tech, UNC, and NC State)			Retain 15 highly entrepreneurial students from area universities through the explicit efforts of BCF and its partners	Retain 25 highly entrepreneurial students from area universities through the explicit efforts of BCF and its partners
15. Retain Mid-Career Talent in Local Social Enterprises	Connect 2 mid-career professionals with jobs in local social enterprises	Connect 4 mid-career professionals with jobs in local social enterprises	Connect 10 mid-career professionals with jobs in local social enterprises	Connect 20 mid-career professionals with jobs in local social enterprises
CONNECT & INVEST				
16. Community Building	6 networking/ community events (happy hours, community days, Forward Space member breakfasts/ lunches, etc.) per month; average of 10 community attendees	6 networking/ community events per month; average of 15 community attendees; 1 Triangle-wide event (100 people)	2 regular events per week (average of 15 attendees); 2 large community events per month (average of 30); 1 Triangle-wide event (200 people)	2 regular events per week (average of 15 attendees), 2 large community events per month (average of 30); 1 Triangle-wide event (250 people)
17. Capacity Building	3 workshops/ month (average 8 members)	1 workshop/ wk (average 12 members)	1 group workshop/ wk (avg. 12 people); 50% members receive business coaching	1 group workshop/ wk (avg. 12 people); 80% members receive business coaching

Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
18. Access to Discount Support Services (i.e. accounting, legal support, bookkeeping, etc.)	5 business needs met by discounted service providers; 5 members using discounted services	8 business needs met; 10 members using discounted services	Top 10 discounted business needs met by vetted preferred providers; 30% of members using vetted preferred providers	Top 10 discounted business needs met by vetted preferred providers; 50% of members using vetted preferred providers
19. Member Measurement	60% of Forward Space members have taken B Corps survey	90% of Forward Space members have taken B Corps survey; 50% of members have performed narrative impact assessment	All Forward Space members have taken B Corps survey; 70% of members have performed narrative impact assessment and logic model	All Forward Space members have taken B Corps survey; 80% of members have logic model and performed quarterly narrative impact assessment
20. Self-Measurement	Finalized BCF logic model	Taken B Corp survey and performs own narrative impact assessment	Impact assessment and community indicator tracking performed quarterly	Impact assessment and community indicator tracking performed and published quarterly
21. Membership	15 Forward Space members; 20 community members	25 Forward Space members; 30 individual and 10 business/org community members	35 Forward Space members; 50 individual and 30 business/org community members	50 Forward Space members; 75 individual and 100 business/org community members
22. Investment				\$2 million in Social Innovation Fund; \$500,000 in loans made to social enterprises in Durham

Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
23. Contributive Impact on Growth and Sustainability of Members		50% Forward Space members cite BCF as significant contributor	2 social enterprises outgrow BCF space; 70% Forward Space members cite BCF as significant contributor	5 social enterprises outgrow BCF space; 80% Forward Space members cite BCF as significant contributor (30% as critical)
24. Convene Social Sector		Host 1 large meeting to convene key players in the social sector	Host 1 large meeting (Spring); host 6 ongoing meetings throughout the year	Host 15 meetings to convene the social sector
RESEARCH & ADVOCATE				
25. Data Gathering & Analysis		Compile baseline data for regional social innovation cluster and key economic and social indicators in Durham (from logic model)	Conduct comprehensive analysis of size and impact of social innovation cluster in The Triangle	Conduct comparative analysis of Durham/Triangle versus other cities/regions with emerging social innovation clusters
26. Publishing/Thought Leadership			2 white papers on social innovation including an initial study of BCF lessons learned	4 white papers on social innovation; replication guide for other cities



Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
27. Policy Advocacy		5 strong advocates in city/county government	Majority of Durham City Council supports BCF vision; Governor's office recognizes BCF as player in Statewide economic development; Social Innovation recognized as an important economic development cluster in NC	Durham and Triangle cited by White House as top 5 city/region for social innovation; BCF and regional social innovation cluster is recipient of significant state and federal funding to support its efforts
28. Regional & State Collaboration			BCF contributes to a well coordinated social innovation cluster across The Triangle; supports the creation of a partner social innovation community in Charlotte, NC	Supports the creation of a partner social innovation community in Greensboro, NC and helps to create a state-wide social innovation cluster positioning NC as a national leader for social innovation
PR/MARKETING & OUTREACH				
29. National Recognition	BCF Executive Director co-authors bi-weekly social innovation column in Raleigh N&O and Charlotte Observer	Durham is recognized in three national publications for its social innovation activities; launches bi-weekly social enterprise profiles in Herald-Sun; three national speaking opportunities for BCF leadership	Durham launches first ever juried-film festival award for social innovation in partnership with Full Frame; Triangle recognized in 10 national publications for social innovation work; 10 national speaking opportunities for BCF leadership	NC recognized in national press for social innovation work; 15 national speaking opportunities for BCF leadership

Goal Area	July-Sept. 2010	Sept-Dec 2010	2011	2012
30. Community Engagement		Community outreach campaign launched; needs analysis survey completed among entrepreneurs across every sector of Durham Community	Surveys reflect that 75% of social innovators in the Durham Community are aware of BCF and feel welcome; 40% attend at least one BCF event	Surveys reflect that 90% of social innovators in the Durham Community are aware of BCF and feel welcome; 70% attend at least one BCF event
ORGANIZATIONAL SUSTAINABILITY & CAPACITY				
31. Sustainability & Revenue Growth	Raise \$100K in growth capital	Hit revenue target of a total of \$365,400 for 2010; 25 % in earned income; 68% in philanthropic support	BCF hits revenue target of a total of \$625,726 for 2011; 58 % in earned income; 40% in philanthropic support	BCF hits revenue target of a total of \$879,885 for 2012; 60% in earned income; 37% in philanthropic support
32. Organizational Leadership and Staffing Capacity	Establish Board of Directors; hire 2 additional staff	Establish NC and National Leadership Councils; hire one additional staff	2 more team members hired; lines up 3 AmeriCorps volunteers to support growth; BCF earns a national capacity-building award (such as Ashoka or Echoing Green fellowship)	All executive leadership is retained and staff is grown to 9 total; 5 AmeriCorps volunteers support growth
33. Space Capacity		Make minor modifications to Forward Space to optimize co-working space	Open temporary retail space; identify and open temporary training space with capacity-building partners; establish private office option with dev. partner	Move to buy/lease permanent 25,000-30,000 square foot campus for move-in by early 2013

X. Strategies

In light of the goals identified above, each strategy below is designed to help us prioritize our interventions with respect to financial and staff resource limitations. Given the uncertainty of Bull City Forward's funding timeline, the strategies are designed for adaptability. *Specifically, in a more optimistic funding scenario our strategic framework would accelerate and would be moderated should funding be realized slower than anticipated.*

Highest Priority Strategies

- 1. Establish a robust social innovation cluster in Durham and dramatically expand it across the region.** Clearly define the characteristics of a social enterprise, identify organizations that fit that description within the region, help build the community into a well-delineated cluster, and become a vocal advocate and catalyst for the community's expansion. Bring a broad audience into the Forward Space and into the BCF community for events, gatherings and workshops. Create a Bull City Forward membership model to generate greater community involvement and inclusivity. Employ an outreach campaign that targets Durham/Triangle audiences who are diverse in geographic location, age, race, sector and industry. Intentionally locate, engage and support mid-career individuals interested in transitioning from traditional job sectors into entrepreneurial and innovative roles. Develop a marketing strategy and materials that are accessible, and inspire everyone who comes into contact with Bull City Forward a passionate evangelist of social innovation as a driver of economic and community development.
- 2. Systematically and energetically build a community of social innovators in the Forward Space and through BullCityForward.org.** Work with local business consultants such as Change & Course to build a membership/revenue model that leverages our strengths and highlights what we do best. Optimize our physical space to make it a compelling invitation to join the Bull City Forward community and the social innovation movement. Develop and implement a marketing campaign based on our new model for membership, primarily by showcasing the stories of our members through public profiles, video storytelling, and social media. Continue to build our website to make it an indispensable resource for a growing regional social innovation community and a source of thought leadership that contributes to the national conversation.
- 3. Deepen Bull City Forward's connection to local universities and professional networks to facilitate both student and mid-career entrepreneurial development, creating a "Brain Gain" of graduating students and a "Brain Retain" of transitioning professionals who stay to work in Durham.** Develop and implement a web-based, interactive "Opportunities Board" for volunteer, internship and job postings, which will complement face-to-face interactions, coaching, and personal matchmaking introductions to connect mid-career individuals to opportunities within Durham's social innovation cluster. Solidify relationships with social enterprise programs at Duke, UNC-CH and NCCU and solidify a pipeline for graduating entrepreneurs to incubate their social ventures at BCF. Partner with organizations such as Net Impact and Students in Free Enterprise and recruit a volunteer "BCF Ambassador" at each university (and within each of its undergraduate and graduate schools) to publicize events, recruit student members and involvement, and build greater awareness on campus. Actively identify, support, and recruit promising student-led enterprises and work with schools and funding partners to subsidize membership costs for students and student-led enterprises at BCF.

4. **Ensure that Bull City Forward’s programming addresses and meets the needs of social entrepreneurs at all development phases.** Solidify programming partnerships with local organizations and coordinate capacity-building workshops and assistance to be held at—and outside of—the Forward Space (with a goal of partnering for more than 90% of total programming offered at BCF with organizations such as Good Work, the Center for Entrepreneurial Development, and the Small Business Development Center). Establish high quality standards for program offerings as a way to build BCF’s reputation as a reliable and valuable resource, while continuously responding to changing member needs. Additionally, BCF will seek to identify, vet, and connect members to professionals who have agreed to provide discounted services (graphic design, bookkeeping, PR, videography, etc.) to members. Solicit additional input from city leaders, investors, and national leaders in social innovation to maintain cutting-edge program and service offerings.

5. **Ignite a culture of accountability by implementing a data collection system for tracking the progress and impact of Bull City Forward and all BCF members, while clearly correlating social innovation cluster development with economic growth and community improvement.** Compile baseline data that reflects the present state of the region’s social innovation cluster and the current economic and social environment in Durham, to be tracked longitudinally. This data will be collected and organized to align with other cluster data (such as bio-tech) and be conducted in keeping with regional economic development agencies, particularly the Durham Chamber of Commerce and Research Triangle Research Park (RTRP). Building on the baseline data, track the growth of the region’s social innovation cluster and its impact on the region’s economy and community wellbeing against other control cities. Generate greater awareness of the triple bottom line among members and the broader community by providing Green Plus workshops, implementing B Corporation’s B Lab Survey for all Forward Space adolescent ventures, and supporting members with corresponding technical assistance. Establish strong academic partnerships with Duke’s Center for the Advancement of Social Entrepreneurship (CASE) to perform research, publish white papers, attend national conferences, deliver presentations, and maintain relationships with a global network of colleagues who share information and best practices.

Supporting Strategies

6. **Engage, inspire and support high school students to become social innovators and entrepreneurial leaders.** Develop, plan, and implement entrepreneurial education programming in Durham public and private secondary and middle schools with financial investment from corporate partners and programmatic support from the Center for Creative Leadership and other curriculum/training partners. Coordinate mentorship opportunities between local entrepreneurial leaders and students. Provide space and events for students to network with each other and the broader social innovation community. Recruit promising student-led ventures to the Forward Space and seed student ventures with micro-capital to assist in enterprise launch in partnership with organizations like Youth Venture. Support faculty development programs that strengthen local capacity to advise and mentor promising social innovators within the school system. Work through City Government to prepare students for summer internships so they are more prepared, engaged and contributing members of host organizations and enterprises, reducing attrition and improving outcomes for both students and local hosts. Plan and run school and citywide events, such as Youth Venture’s Start-Up Scramble, that expose the greatest number of students to the concept of social innovation, and connect their passions to skills and opportunities at the university level.

- 7. Solicit partnerships with national organizations and target key social ventures to propel and scale the social innovation cluster in Durham.** Strengthen partnership with the Durham Chamber of Commerce to launch a targeted outreach campaign to social ventures considering Durham as their next home. Conduct annual analysis of social needs that are not being met by local enterprises. Based on needs assessment, strategically identify and recruit best-in-class social ventures to relocate their headquarters to Durham, or replicate their venture in our city to address these needs. Deepen partnerships with national organizations focused on social innovation (such as Echoing Green, Ashoka, etc) and make Bull City Forward and Durham a natural destination for their fellows and trainings. Similarly, solidify a deeper relationship with the White House Office of Social Innovation in an effort to be recognized as a national demonstration site for the creation and development of a vibrant social innovation eco-system. By FY12, launch an annual national competition that will recruit three best-in-class social enterprises to Durham by providing two-years of office space, salary, and professional development (ideally in partnership with a national fellowship organization such as Echoing Green).
 - 8. Build a broad coalition of political support for social innovation at the regional, state, and federal levels.** Develop strong and effective messaging clearly defining social innovation and establishing the connection between social innovation and economic development. Demonstrate the potential of social innovation to decrease the burdens of government and increase the tax base. Recruit civic and business leaders to deliver a simple, clear and unified message of support. Identify and engage supportive legislators and executive leadership to develop them as champions of our mission through face-to-face contact, data-driven research and education, and broad demonstrations of public support. Analyze and prioritize proposed legislation that aligns with our mission; lobby state and local legislators on behalf of bills that would significantly improve the social innovation climate; seek and secure state and federal funding to support our work
 - 9. Build-out Social Innovation Fund to support and scale Durham's most promising social ventures.** By FY12, partner with a strong, regional financial partner (such as SJF Ventures) to raise and manage a \$5 million evergreen revolving loan fund from local and national philanthropies, foundations and individuals (ideally with a partner who will agree to under-write the risk of defaulted loans). Build relationships with local funding partners to manage deal flow and provide financial capacity building services. Recruit and coordinate network of volunteer advocates to assist loan applicants in preparing applications. Recruit and manage an underwriting committee to represent partner institutions and serve as the Funds underwriting committee. Work with financial partner to hire fund manager to administer fund, manage underwriting committee, and execute loans. Target funds at early-stage enterprises (0-2 years) and earmark 10% of total fund for higher-risk micro loans.
 - 10. Create a robust and sustainable social enterprise that exceeds expectations.** Hire and develop a world-class staff, board, and advisory committee dedicated to bringing BCF's ambitious vision to life. Establish a diverse mix of revenue driven by membership fees, contracts with city and state agencies, federal appropriations, and philanthropic support, with an increasing percentage from earned income. Set clear internal growth and impact metrics, rigorously assess progress through a transparent process, and constantly innovate to improve on outcomes.
-

XI. Organizational Structure

At present, Bull City Forward operates under an interim Board of Directors and a larger Executive Committee that will lead the transition to a full, permanent Board during summer, 2010.

Interim Board of Directors

President

Farad Ali

Durham City Council; Senior Vice President, North Carolina Institute for Minority Economic Development

Vice President

John Parker

Director, Good Work

Treasurer

Luis Pastor

CEO, Latino Community Credit Union

Secretary

Matt Nash

Managing Director, Center for the Advancement of Social Entrepreneurship, Duke University

The interim Board of Directors is supported by an Executive Committee, and comprises leaders from across Durham's many sectors:

- Tucker Bartlett, COO, Scientific Properties
- Andrea Bazan, President, Triangle Community Foundation
- Tom Bonfield, Durham City Manager
- Anita Brown-Graham, Director, NC State's Institute for Emerging Issues
- Starla Huggins, Director of Government and Community Relations, NC Central University
- Bill Kalkhof, CEO, Downtown Durham, Inc.
- Daniel Kimberg, Founder and Executive Director, Student U
- Maria Kingery, Founder and Owner, Southern Energy Management
- Michael Lemanski, Managing Partner, Greenfire Development
- Henry McKoy, CEO, Fourth-Sector Financial; NC Economic Development Board
- Chuck Nolan, Principal, Durham Tech Middle College High School
- Michael Page, Chair, Durham County Commission; Pastor of Antioch Baptist Church
- Ivan Parra, Lead Organizer, Durham Congregations, Associations, and Neighborhoods
- Casey Steinbacher, President & CEO, Greater Durham Chamber of Commerce
- Thomas Stith, Economic Development Director, UNC's Kenan Institute of Private Enterprise
- Barry Van Deman, CEO of NC Museum of Life and Science
- Phail Wynn, Vice President of Durham and Regional Affairs, Duke University

Permanent Board of Directors

The permanent board will include 11-17 members and will be supported by two advisory committees, one local and the other national. Board members will be chosen for their diversity in

expertise and influence across various sectors that represent key strategic partners for Bull City Forward. Specifically, those partners are:

- The Business & Investment Communities
- The Investment Community
- Non-Profit Organizations & Community Groups
- The City and County of Durham
- Philanthropic Organizations
- Regional Universities (Duke, NCCU, Durham Tech, UNC-CH, NC State)
- K-12 Education

Local Advisory Committee

The Local Advisory Committee will recruit representatives from the following communities:

- Social Innovation
- Social Impact Measurement
- Start-Up
- Big Business
- Social Enterprise
- Durham City/ County Government
- Greater Durham Chamber of Commerce
- Regional Economic Development
- State Government
- Capacity Building Organization
- Research
- Local Philanthropy
- Local Bank/ Venture Capital/Local/State Policy Advocacy
- Tech Transfer
- Durham Marketing Cluster
- Durham Tech Cluster

National Advisory Committee

The National Advisory Committee will include thought leaders and influencers from the following communities:

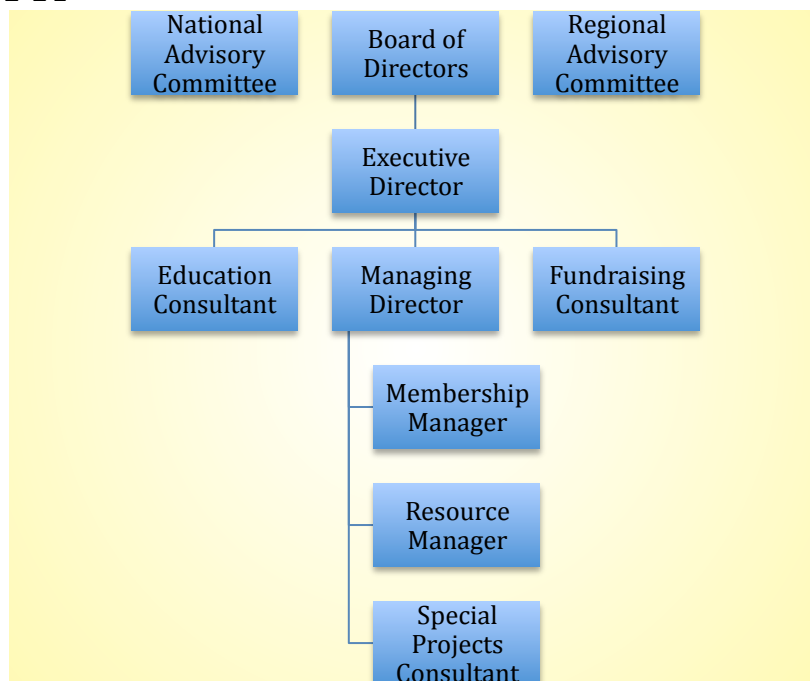
- Economic Development
- Social Impact Measurement
- Social Enterprise
- State/federal policy
- Private Investment/ Philanthropic
- Corporate
- Cities with similar economic development strategies

3-Year Staffing Plan

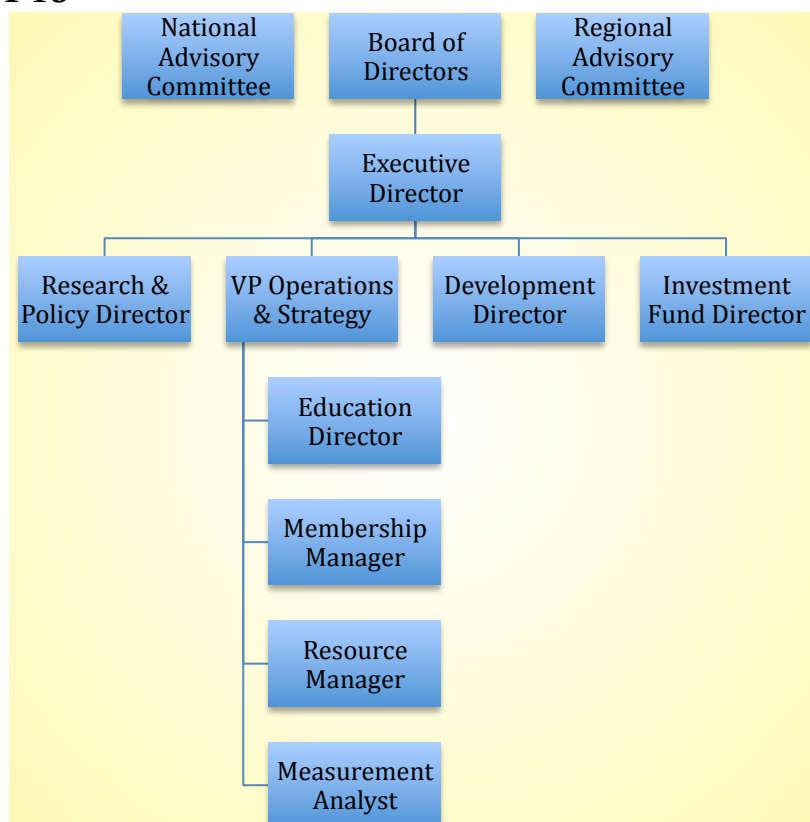
Year 1	Year 2	Year 3
<ul style="list-style-type: none"> • Executive Director • Managing Director • Membership Manager • Resource Manager • Special Projects Consultant • Fundraising Consultant 	<ul style="list-style-type: none"> • Executive Director • Managing Director • Membership Manager • Resource Manager • Education Director • Development Director (P/T) • Measurement Analyst (P/T) • Research & Policy Consultant 	<ul style="list-style-type: none"> • Executive Director • VP Operations & Strategy • Development Director • Research & Policy Director • Education Director • Investment Fund Director • Membership Manager • Resource Manager • Measurement Analyst

Staff Organizational Chart

FY1



FY3



Staff Positions

Executive Director (FY1)

- Reports to Board of Directors
- Oversees and coordinates efforts of all BCF activities and resources
- Oversight and development of fundraising sources and resources
- External spokesperson for BCF and an ambassador for social innovation locally, state-wide, and nationally
- Financial and accounting oversight
- Strategy development and implementation
- Strategic partnership development
- Policy formulation and outreach

Managing Director (FY1)

- Reports to Executive Director
- Directs membership recruitment and outreach activities with support from Community Manager and serves as primary internal contact for members within BCF
- Works closely with Executive Director on strategy development and implementation
- Strategic partnership development
- Oversees recruitment and retention strategies with support from Special Projects consultant
- Supports fundraising efforts
- Liaise between Executive Director and public officials, the media and critical contacts
[In FY3 this position is broken out to create a VP of Operations & Strategy who assumes more management responsibility and a new position, Membership Manager who will support all membership activities.]

Resource Manager (FY1)

- Reports to Managing Director
- Schedule, market, and track workshops
- Plan, market, and execute BCF social events
- Recruit and manage relationship with event sponsors
- Actively convene social sector through events/relationship building
- Manage member office services (printing, internet, hours, payment, etc)
- Connect members to discounted services (negotiate rates and make introductions)
- Manage website and BCF's social media strategy

Membership Manager (FY1)

- Reports to Managing Director
- Membership recruitment
- Customer service to all members
- Connects members and builds relationships with/between members
- Survey members programming needs and set schedule accordingly

Education Director (FY2)

- Report to VP Operations & Strategy
- Oversee all education programs
- Recruit and manage education partners (K-20)
- Manage education partnerships

- Develop and deploy entrepreneurial education programs with program partners
- Support relationships with funding partners
- Regularly assess progress
- Convene school leaders

Development Director (FY2)

- Reports to Executive Director
- Structure and manage fundraising campaigns
- Research prospective donors to Bull City Forward
- Arrange meetings between the ED and prospects
- Serve as development resource for BCF members

Measurement Analyst (FY2)

- Reports to VP of Operations & Strategy
- Track progress of BCF against internal and external goals
- Track social and environmental sustainability of members with B Corp aggregation
- Use aggregated data to keep BCF executive team informed of member strengths and weaknesses
- Work with all members to get performance goals and steps to achieve those goals
- Contribute to research and publications related to BCF and region's social innovation cluster

Research and Policy Director (FY3)

- Reports to Executive Director
- Gather and analyze regional economic and sector data
- Coordinate regional convening and collaboration
- Build relationships with policy makers at the city, state, and national levels
- Develop and help implement BCF's local and national policy agenda

Investment Fund Director (FY3)

- Reports to Executive Director
- Principal liaison to funding partners
- Lead Underwriting Committee
- Coordinate volunteer advocates and partner institutions
- Identify potential investments and lead due diligence efforts
- Support loan process (set terms, draw up necessary documents, collect payments) in potential partnership with principal lending partner (such as SJF Ventures)

XII. Financials²

	FY 2010		FY 2011		FY 2012	
REVENUES						
Starting Cash	\$0	0%	\$10,963	2%	\$40,301	4%
Grants	\$210,000	77%	\$275,000	39%	\$350,000	33%
Appropriation	\$0	0%	\$0	0%	\$100,000	9%
Investment Management Fee	\$0	0%	\$0	0%	\$60,000	6%
Membership Fees (office space)	\$48,450	18%	\$124,500	18%	\$196,000	18%
Community/ Group Membership Fees	\$8,000	3%	\$65,400	9%	\$149,600	14%
Corporate Sponsorships	\$5,000	2%	\$70,000	10%	\$28,000	3%
Licensing & consulting	\$0	0%	\$12,000	2%	\$55,000	5%
Contracts	\$0	0%	\$110,000	16%	\$50,000	5%
Retail Revenue Share	\$0	0%	\$6,000	1%	\$12,000	1%
Programming/ Events Revenue	\$1,500	1%	\$24,000	3%	\$30,000	3%
TOTAL	\$272,950		\$697,863		\$1,070,901	
COSTS						
Staffing	\$56,775	22%	\$320,577	49%	\$543,748	53%
Salary Benefits	\$12,870	5%	\$57,704	9%	\$97,875	9%
Consulting	\$60,000	23%	\$30,000	5%	\$30,000	3%
Marketing Collateral & Support	\$17,500	7%	\$12,500	2%	\$12,000	1%
Website tools and support (virtual community	\$0	0%	\$14,000	2%	\$24,000	2%
Social Media	\$4,000	2%	\$6,000	1%	\$18,000	2%
K-12 Entrepreneurial Leadership Dev.	\$11,492	4%	\$53,082	8%	\$100,180	10%
Community Convening & Facilitation	\$2,000	1%	\$20,000	3%	\$24,000	2%
Architect	\$0	0%	\$0	0%	\$0	0%
Legal	\$1,000	0%	\$3,000	0%	\$3,000	0%
Rent (incubator)	\$42,500	16%	\$60,000	9%	\$60,000	6%
Rent (training space)	\$0	0%	\$0	0%	\$19,200	2%
Utilities & COA	\$13,600	5%	\$22,800	3%	\$30,000	3%
Janitorial	\$2,250	1%	\$4,500	1%	\$6,000	1%
Insurance	\$2,000	1%	\$9,000	1%	\$9,000	1%
Build-out	\$10,000	4%	\$0	0%	\$10,000	1%
Office Eqmt	\$4,500	2%	\$6,000	1%	\$1,000	0%
Travel & Entertainment	\$3,400	1%	\$6,000	1%	\$6,000	1%
G&A	\$1,600	1%	\$2,400	0%	\$2,400	0%
Miscellaneous	\$11,000	4%	\$30,000	5%	\$36,000	3%
Total	\$261,987		\$657,563		\$1,032,403	
NET INCOME	\$10,963		\$40,301		\$38,498	

² A detailed budget for FY 2010 can be found in *Appendix D*.

XIII. Risks & Mitigation Strategies

Key Risks Facing Bull City Forward in the Next 3 Years:	Risk Mitigation Strategies
<ul style="list-style-type: none"> Community members do not perceive adequate value in Bull City Forward program and space offerings to compel membership. 	<ul style="list-style-type: none"> Build flexible membership options (diversifying services, space options, levels/types of membership); develop clear recruitment strategy; survey interest in various programming and adapt to meet those needs; build strong relationships with entrepreneurial networks to use for member recruitment.
<ul style="list-style-type: none"> Roll-out of programming is not sequenced to align with programming needs of members. 	<ul style="list-style-type: none"> Maintain flexibility in contracting instructors; conduct regular analysis of market needs
<ul style="list-style-type: none"> Program offerings are limited because existing local organizations, instructors and programming sponsors do not recognize the value of BCF's member network. 	<ul style="list-style-type: none"> Demonstrate the scope and value of our membership; create defined but dynamic marketing and co-branding; design and build a great space; create a persuasive value proposition for partner organizations
<ul style="list-style-type: none"> Fiscal sponsors do not invest in Bull City Forward operations and programming. 	<ul style="list-style-type: none"> Build aggressive but disciplined funding campaign; prove ROI; cultivate revenue stream from fee-for-service activities and government/Chamber contracts.
<ul style="list-style-type: none"> The local, state Government de-value the contributions of social innovation to the community and cuts innovation funding. 	<ul style="list-style-type: none"> Support emerging enterprises and measurement/promote their impact; collaborate with regional governments, Chambers and private businesses to multiply influence/visibility on the state level.
<ul style="list-style-type: none"> Durham struggles to recruit and retain best-in-class social innovators. 	<ul style="list-style-type: none"> Strengthen robust partnership with the Chamber; reach out to global networks of social entrepreneurs; work with local universities to create best-in-class programs in social entrepreneurship.
<ul style="list-style-type: none"> Key supporters do not see social innovation as strong driver of economic development. 	<ul style="list-style-type: none"> Dedicate a research staffer to measure impact of social enterprises; publish white papers that demonstrate correlation between social innovation and development.
<ul style="list-style-type: none"> Transient staff limits build-up of institutional knowledge and experience. 	<ul style="list-style-type: none"> Create thorough systems across the organization that establish best practices and mitigate the learning curve; adopt best knowledge management practices
<ul style="list-style-type: none"> Durham loses first mover advantage as a national model of social innovation cluster development. 	<ul style="list-style-type: none"> Implement strategic plan with expediency; share learning with other cities and national partnerships; measure and promote progress.

Appendix A—Executive Committee Members

Twenty community leaders comprise the Bull City Forward Executive Committee. They serve to bring together the goals of each working group and drive forward a cohesive vision of Durham as a center of social innovation and entrepreneurship:

- Farad Ali, City-Councilman; NC Minority Economic Development Center
- Tucker Bartlett, COO, Scientific Properties
- Andrea Bazan, President, Triangle Community Foundation
- Tom Bonfield, Durham City Manager
- Anita Brown-Graham, Director, NC State’s Institute for Emerging Issues
- Starla Huggins, Director of Government and Community Relations, NC Central University
- Bill Kalkhof, CEO, Downtown Durham, Inc.
- Daniel Kimberg, Founder and Executive Director, Student U
- Maria Kingery, Founder and Owner, Southern Energy Management
- Michael Lemanski, Managing Partner, Greenfire Development
- Henry McKoy, CEO, Fourth-Sector Financial; NC Economic Development Board
- Matt Nash, Mng. Director, Center for the Advancement of Social Entrepreneurship, Duke
- Chuck Nolan, Principal, Durham Tech Middle College High School
- Michael Page, Chair, Durham County Commission; Pastor of Antioch Baptist Church
- Luis Pastor, CEO, Latino Community Credit Union (LCCU)
- Ivan Parra, Lead Organizer, Durham Congregations, Associations, and Neighborhoods
- Casey Steinbacher, President & CEO, Greater Durham Chamber of Commerce
- Thomas Stith, Economic Development Director, UNC’s Kenan Institute of Private Enterprise
- Barry Van Deman, CEO of NC Museum of Life and Science
- Phail Wynn, Vice President of Durham and Regional Affairs, Duke University

Appendix B—Working Group Members

Campus Build-Out Working Group

Co-Chairs:

Bill Kalkhof
Downtown Durham Inc.

Bill Stevenson
The Elevator

Craig Merrigan
Inventive Branding

Daniel Feinglos
Brown University

Jai Singh
Duke University

Jessica Finelt
Harvest in the City

Michael Goodmon
Capital Broadcasting

Michael Lemanski
Greenfire Development

Scott Harmon
Center Studio Architecture

Will Rhodenhiser
Center Studio Architecture

Impact Measurement Working Group

Co-Chairs:

Matthew Nash
Center for the Advancement of Social Entrepreneurship

Suzanne Stephens
Social Impact Architects

Atrayus Goode
NCIMED

Beth Richardson
B Corp

Chris Carmondy
Green Plus

Devin Brown
Durham Black Chamber of Commerce

Grace Dzidzienyo
City of Durham

Jason Wares
RTI

Jenni Owen
Duke Center for Family and Child Policy

Juan Carlos Canal
Latino Community Credit Union

Justin Acciavatti
Business Consultant

Matt Kopac
Business Consultant

Nate Goetz
United Way

Individual Development Working Group

Co-Chairs:

Dan Kimberg
Student U

Ronnie Chaterji
Duke

Ari Zandman-Zeman
Rubberbanditz, LLC.

Ashley Ascott
Cary Madison Partners

Bahari Harris
Urban Hope

Barry VanDeman
Museum of Life and Science

Brandon Hoe
Matchucation

Brandon Hudson
Good Work

Charlotte Phillips
Teach for America

Chuck Nolan
NCCU & DPS

Dr. Elwood Robinson
NCCU Social and Behavioral Sciences

Henry Kaestner
Bandwidth

Joy Javits
In the Public Eye

Justin Cooper
Engineering World Health

Micah Gilmore
UNC

Monique McNellie
8 Rivers Capital

Reginald Hodges
Durham Literacy Center

Richard Harrill
UNC Campus Y

Ted Hall
ShopBot Tools Inc

Investment & Scale Up Working Group

Co-Chairs:

Henry McKoy

4th Sector Financial

Napoleon Wallace

Kenan-Flagler Business School

Alejandro Sanches

Latino Community Credit Union

Ben Blankenship

Be Active NC

Bonny Moellenbrock

SJF Ventures

Brian Schneiderman

Self-Help Credit Union

Chris Wedding

Cherokee Investment Partners

Dawn Trembath

Good Work

Ed Skloot

Duke

Josh Hawn

Toffler Associates

Lori O'Keefe

Triangle Community Foundation

Luis Pastor

Latino Community Credit Union

Matt Kopac

Business Consultant

Michael Lemanski

Greenfire Development

Neill Gosling

Self-Help

Rick Larson

Natural Capital Investment Fund

Organizational Development Working Group

Co-Chairs:

Farad Ali

City Council & Institute for Minority Economic Development

John Parker

Good Work

Anna Koltchagova

BASE

Ben Feit

Duke Law

Ben Quinn

Action Coach

Bill Stevenson

The Elevator

David Dodson

MDC

DeLynda Stockwell-Cook

DeLynda Low Fee Realty

Dub Gulley

NC Real & Durham Tech

Joan Siefer Rose

CED

Lee Cook

Software Consultant

Maria Kingery

Southern Energy

Martha Pritchett

Bennett Pritchett Realty

Matt Kopac

Business Consultant

Melissa Beard

Engineering World Health

Monique McNellie

8 Rivers Capital

Scottie Seawell

Leading and Governing Associates Inc

Susan Ross

MossandRoss

Susan Sachs

Starfire Consulting

Timothy McIntosh, Jr.

Park West Barber School, LLC.

Vicky Garcia

Latino Community Credit Union

Outreach & Communications Working Group

Co-Chairs:

Andrea Bazan-Manson

Triangle Community Foundation

Sam Miglarese

Duke Durham Neighborhood Partnership

Adriana DiFranco

Paragraph Project

Al Huntoon

Catalyst Consulting

Ashley Ascott

Cary Madison Partners

Bob Ashley

Herald Sun

Charlotte Phillips

Teach for America

Dan Carlton

Paragraph Project & Bull Works

Dave Alsobrooks
*Paragraph Project &
 BULLWORKS*

David Burney
New Kind

Gaston Warner
Duke Chapel

Gustavo Arriaga
Duke Neurobiology

Ivan Para
Durham CAN

Jim Soukup
City/County of Durham

Kevin Davis
Bull City Rising

Matt Munoz
New Kind

Michael Lemanski
Greenfire Development

Nathaniel Goetz
United Way

Phail Wynn, Jr. Ph.D.
*Duke-Durham & Regional
 Affairs*

Reyn Bowman
*Durham Convention and
 Visitor's Bureau*

Richard Hart
MDC

Ted Hall
ShopBot Tools Inc

Timothy McIntosh, Jr.
Park West Barber School, LLC.

Wil Weldon
Videographer

Policy & Advocacy Working Group

Co-Chairs:
Starla Huggins
NCCU

Tim O'Shea
Duke Law and MPP

Anita Brown Graham
NC State

Ashley Ascott
Cary Madison Partners

Beth Richardson
B Corp

Bijoy Sahoo
NCCU, Dean of Business School

Bill Holman
*Nicholas School, Duke
 University*

Chris Carmondy
Green Plus

Daniel Feinglos
Brown University

Farad Ali
*City Council & Institute for
 Minority Economic
 Development*

Keith Chadwell
Deputy City Manager

Melissa Norton
Downtown Durham Inc.

Michael Page
Durham County

Monique McNellie
8 Rivers Capital

Phail Wynn, Jr. Ph.D.
*Duke-Durham & Regional
 Affairs*

Tom Bonfield
Durham City Manager

Recruitment & Retention Working Group

Co-Chairs:
Casey Steinbacher
Durham Chamber of Commerce

Larry Moneta
Duke, VP of Student Affairs

Carver Weaver
Durham Chamber of Commerce

Henry Kaestner
Bandwidth

Kevin Trapani
Redwoods Group

Kirsten Weeks
Cisco

Rachael Wheately
Duke Alumni Association

Appendix C—Working Group Recommendations

Campus Build Out Recommendations

The goal of the Campus Build Out Working Group is to build a space that enables spontaneous interactions and serves as a meeting ground for all actors engaged in the advancement of social innovation and entrepreneurship in the Durham community. Given the leasing arrangement with Greenfire Development at the Kress Building, our committee's focus is how to best utilize the first floor and basement space at Kress for an approximate 2-year time frame for BCF.

Qualification: The recommendations of this group are limited by an uncertain array of programming and concomitant space needs, as well as the lack of a firm budget for the short term and long-term space.

Status of Current Space

- a. First floor planning is well underway given the very limited budget available for space reconfiguration, furniture and equipment.
- b. Current use of space is cost and space efficient. Using an open space plan, with large and small conference rooms which allow for interactions of clients; conference room for meeting space and privacy; with some offices being sub-leased to Greenfire in order to produce much-needed revenue.
- c. Current furniture needs are being met by the Greenfire lease, and purchase of used furniture at low prices.

Recommendations for the First Floor of the Kress Building

(1) Increase visibility from front area to back area. Start with removing film on glass panels, but consider going farther. Some visual connection from the street all the way to the back area is desirable.

(2) Alter Signage. The window decal just needs to be smaller, and/or we need projecting signs on Main and Mangum that will get as much attention, with no cost to transparency of storefront.

(3) Create Retail Space. Plan to put a small retail space in the front, and also have a cool “welcome area” for people walking in off the street. These are not mutually exclusive.

- i. Scott Harmon is willing to do a couple of sketches to show the concept. He thinks the retail space is more important than we realize. If played right, it can serve other functions easily while we wait for the right retail incubator client.

(4) Design for maximum flexibility. Have an idea of where and how to create more private offices if needed, or more conference spaces if needed. Let the market steer the current space. Some of these things can expand in the basement if there’s a profitable market nudge to provide more private spaces.

Recommendations for the basement of the Kress Building

(5) Multi-Use. Understanding that BCF would like to create flexible space which allows for larger social gatherings, larger educational programs, and have the ability to be subdivided into smaller space configurations for various sized meetings, the basement offers opportunities for inexpensive up-fit to meet these multi-use needs.

(6) Charrette. The concept of a planning charrette to design the basement space to meet the aforementioned multi-use requirements should be developed and executed by BCF.

d. Charrette can be applied to the main level as well as the basement, if we wanted some fast ideas on what to do up there.

e. CSA could certainly conduct this charrette proficiently, and quickly.

Recommendations for aligning BCF Build Out Plans with City Policy Incentives

(7) Retail. Develop the street-level current reception area into a revenue-producing retail space for social entrepreneurs.

(8) Perpendicular Signage. There has been much discussion about the BCF signage in the window—some folks like it, others do not. The soon-to-be-announced downtown signage program will allow for a matching grant to create perpendicular, lighted signage in the building facade which could improve the building's recognition as the home of BCF.

Moving Forward

- 1) The development of space in downtown Durham over the past decade has proven that there is a healthy market for quality space. As the future direction of BCF comes into focus over the next year, decisions need to be made about the quality of the Social Innovation Campus (Class A, Class B, Class C, combination of A-B-C?).
- 2) Planning on the main campus should begin in about 6 months, using experience gained from this first phase of BCF at Kress. We will know much more about the need, the market, constraints and opportunities at that point. This assumes we have the luxury of waiting that long before we start defining space needs with regard to lease negotiations for the next space.
- 3) As the success of the BCF concept is tested over the next 6 months, there may be value in dividing the Campus Build Out committee into two groups --- one to focus on the Kress space for the next 2 years; and, a separate group which considers the future "Campus" in downtown with an open approach to working with any of the several developers in downtown Durham.

Impact Measurement Recommendations

KEY RECOMMENDATIONS

Bull City Forward should adopt an outcomes orientation, incorporating leading practices in impact measurement, performance management, and evaluation. To this end, BCF should:

- Develop and use for management, governance, and reporting a robust logic model, outcomes framework, set of performance measures, and relevant statistical data on the

Durham community. *(Working group has created a draft of the initial logic model and identified potential metrics. All other working groups have contributed to this initial draft.)*

- Set annual performance targets for the coming year in line with the overall strategy of Bull City Forward; the board of directors should approve these targets.
- Develop and present to the board on a quarterly basis a dashboard of key performance indicators; the board and senior staff should use this information for planning and performance improvement.
- Task one or more staff members with specific responsibilities for managing the impact measurement system.
- Appoint an advisory committee to provide input on impact measurement, to be chaired by a board officer (e.g., vice president or secretary) or other board member who serves as the board's point person in facilitating the oversight of the BCF impact measurement system.
- Acquire or create, if financially feasible, software to track and report on indicators and make this available to members and, where appropriate, other organizations in the community. Consider the Social Solutions [Effort to Outcomes](#) software or the Salesforce.com [Pulse Impact Metric Reporting](#) app. *(Working group has been evaluating these two software packages.)*

Bull City Forward should support the capacity development of member organizations in their ability to adopt an outcomes orientation. To this end, BCF should:

- Adopt a portfolio management approach similar New Profit, Inc. or REDF
 - Encourage members to use a [balanced scorecard](#) (to include metrics related to social and environmental outcomes, stakeholders, financial performance, internal business processes, and learning and growth) and corresponding [strategy map](#), [outcomes framework/results framework](#), [logic model](#), or other graphical representation of their [theory of change](#).
 - On an annual basis, assess the *organizational capacity* of targeted members (full time and half time) using a tested assessment tool, such as the [McKinsey Organizational Capacity Assessment Tool](#) (preferred method), World Learning's [Participatory Institutional Analysis Instrument](#) (or earlier version, the [Institutional Assessment Instrument](#)), [Urban Institute capacity building framework](#), or TCC Group's [nonprofit organizational capacity framework](#).
-

- Encourage full and half time members to become [B Corporations](#) or to achieve [GreenPlus certification](#); incorporate their annual assessments into the portfolio performance management system
- Require applicants for financing to discuss their theory of change and identify targeted outputs and outcomes in their application.

BCF should serve as an advocate for strengthening the impact measurement and evaluation within the community by convening relevant dialogues, leading efforts to establish shared measurement systems and common or comparable metrics, supporting capacity building in impact measurement, and integrating with other major efforts to identify community-wide goals, establish community-wide action plans, define metrics and indicators. To this end, BCF should:

- Convene a dialogue among leading local organizations, funders, and other key stakeholder to address the need for transparent, accessible, shared impact measurement systems within the local social sector.
- Draw upon [lessons learned in community-wide shared measurement systems](#) identified by FSG Social Impact advisors and the [Urban Institute Outcome Indicators Project](#).
- Refine and update the list of reference materials and best practices compiled by the working group and post these on the BCF website.
- Identify local organizations with advanced practices in impact measurement as well as local consultants skilled in coaching organizations in the development of effective impact measurement systems.

HELPFUL REFERENCES

- Hatry, *Performance Measurement: Getting Results*, Urban Institute Press ([purchase online](#))
- Colby, Stone, Carttar, “Zeroing in on Impact,” *Stanford Social Innovation Review*, ([read online](#))
- Kramer, *Measuring Innovation: Evaluation in the Field of Social Entrepreneurship*, Pgs. 1-28 ([read online](#))
- Clark, Rosenzweig, Long, Olsen, *Assessing Social Impact in Double Bottom Line Ventures: Methods Catalog*, ([read online](#))
- Trelstad, “Simple Measures for Social Enterprise,” *Innovations*, MIT Press, Summer 2008, ([read online](#)).
- Kramer, Parkhurst, Vaidyanathan, *Breakthroughs in Shared Measurement and Social Impact*, FSG Social Impact Advisors, ([read online](#)).

- Hatry, Cowan, Weiner, Lampkin, *Developing Community-wide Outcome Indicators for Specific Services*, Urban Institute Press, ([read online](#)).
- McKinsey & Company, *Effective Capacity Building in Nonprofit Organizations*, ([read online](#)).
- De Vits & Fleming (eds), *Building Capacity in Nonprofit Organizations*, Urban Institute press ([read online](#)).
- United Way of America, *Connecting Program Outcome Measurement to Community Impact* ([read online](#)).
- U.S. Agency for International Development, *Performance Management Toolkit*, ([read online](#))
- Olsen & Galimidi, “Managing Social and Environmental Impact: A New Discipline for a New Economy” *Brown Journal of International Affairs*, Spring/Summer 2009 ([read online](#)).
- *Global Social Venture Competition Social Impact Assessment Guidelines*, ([read online](#)).
- Gair, "A Report From the Good Ship SROI," ([read online](#))
- Javits, “REDF’s Current Approach to SROI,” 2008 ([read online](#))
- Olsen and Brett Galimidi, *Catalog of SROI Approaches* ([read online](#))
- Bearse, “A Question of Evaluation: NBIA's Impact Assessment of Business Incubators,” *Economic Development Quarterly* ([read online](#))
- NBIA, *Measuring Your Business Incubator’s Impact* ([read online](#))
- Links to numerous other performance measurement resources available at:
 - CASE (<http://www.caseatduke.org/knowledge/generalresources/index.html#pm>)
 - NewProfit (<http://www.newprofit.com/cgi-bin/iowa/learning/47.html>)
 - REDF (<http://www.redf.org/learn-from-redf/tools>)
 - Social Edge “Impact Assessment” wiki (<http://www.socialedge.org/features/resources/social-entrepreneurship/impact-assessment>)
 - SVT Consulting (<http://www.svtconsulting.com/solutions/publications>)
 - CDC Evaluation Working Group (<http://www.cdc.gov/eval/resources.htm>)
 - TCC Group resources on evaluation (<http://www.tccgrp.com/pubs/evaluation.php>) and capacity building (<http://www.tccgrp.com/pubs/capacity.php>)
 - Free Management Library for Nonprofits on evaluation (<http://www.managementhelp.org/evaluatn/evaluatn.htm>) and capacity building (http://www.managementhelp.org/org_perf/capacity.htm)

Individual Development Recommendations

Definition – Individual Development:

Create a local pipeline of innovative change-makers by working with Durham public and private k-12 schools, local community colleges and universities, and community organizations serving youth and career shifters that encourages entrepreneurial skills, including creativity, personal empowerment, opportunity recognition, vision creation, strategic planning, resourcefulness, action orientation, adaptive persistence, civic engagement, and personal responsibility and accountability.

Target Outcomes:

1. Increase the numbers of youth prepared with 21st century skills
2. Increase the number of youth involved in entrepreneurial ventures
3. Diversify the city's start-up enterprises providing entrance opportunities for new talent
4. Deepen the level of engagement of youth in local organizations

Overview: The Individual Working Group met four times over the course of the past two months to discuss the best ways to achieve the above desired outcomes. The majority of conversations at the meetings focused on adult education because of a perceived lack of social innovation programming available for adults in Durham. However, the decision was made that BCF is best equipped to first create successful middle school and high school programming and to explore adult programming at a future date.

Recommendations:

Short Term

Phase 1:

a) Partner with existing organization serving middle school and high school students. Implement entrepreneurial programming (ie. day long workshops, weekly classes, seminars) within the framework of the existing organization's schedule. This programming should take place at the organization's home space to limit transportation challenges. Organizations to consider partnership with include *Community in Schools*, *Citizen Schools*, *Student U*, *Emily K Cetner*, *Partner's for Youth*.

b) Create day long school wide entrepreneurial workshops at local public and private schools. Following the model used at the Carolina Friend Schools, begin session with a large panel discussion about social innovation and entrepreneurship. Students will then break into smaller groups and meet with panel members and other industry experts. This will lead to the formation of "Bull City Forward Clubs" at schools.

Phase 2:



a) When training space is available at BCF, invite middle and high school leaders from local schools to bi-monthly on-site workshops regarding entrepreneurship and how to spread social innovation in schools. Create a system of mentorship/communication between school leaders and BCF in order to support students in their efforts to promote social innovation.

b) Consider possibility of making services available for adult population. Many working group members believe it is important to target adults for whom these services are not readily available. After programming is implemented with middle and high school students, a separate task force should be assembled to research the need for adult programming.

Long Term:

Explore the possibility of creating a new high school in Durham with a focus on social innovation and 21st century skills

Investment & Scale-Up Recommendations

- 1) **Stage of Company:** Seed/Early Stage (0-2 years or older enterprise still in “early stage” phase)
- 2) **Size of Fund:** \$2-5M (10% of Fund dedicated to Microloans)
- 3) **Type of Fund:** Evergreen Revolving Loan Fund (flexible debt/debt with equity-like features/warrants)
- 4) **Investment Ranges:**
 - \$2K-35K Microloans
 - \$35K-\$100K
 - \$100K-\$250K Co-Loan
- 4) **Process:** Two Doors into BCF Fund
 - Scenario 1:* One of Fund Partners Direct Enterprise to BCF
 - Scenario 2:* An Entrepreneur/Enterprise joins BCF and walks through front door

Steps to BCF Fund:

- a) Enterprise is paired with volunteer advocate (with investment background) to assess their stage and readiness for capital (via agreed upon Readiness Scorecard)
- b) The Volunteer Advocate works with Enterprise until they are deemed ready for capital (could be fast or slow depending on individual enterprise)
- c) Volunteer Advocate may direct Enterprise to one of our Official Partners, another source of appropriate capital, or to the BCF Fund
- d) Volunteer Advocate would work with BCF Investment staff to create a preliminary term sheet and ensure that all relevant paperwork³ is complete and in file

- e) BCF Investment staff would work to get Enterprise pitch onto monthly docket for consideration by Underwriting Committee
 - f) Volunteer Advocate, BCF Investment staff (and Entrepreneur) may be required to attend a portion of underwriting meeting (maybe or maybe not)
 - g) If yes to loan, deal is passed back to BCF Investment Staff to execute
If no to loan, Enterprise may go back through process
- 5) **Representative Partners:** SJF, Good Work, Self Help, etc
 - 6) **Representative Investments:** For-profit Impact Enterprises/Non-profits that can utilize loans
 - 7) **Underwriting Committee:** Representative group of skilled professionals (5-7 people)
 - 8) **Underwriting Frequency:** Monthly Meetings (up to 10 deals on a Docket)
 - 9) **Support Elements:** Underwriting Committee may draw on support of experts from time to time as they analyze deals
 - 10) **Final Authority:** Underwriting Committee has final authority
 - 11) Terms we may use to Brand “Bull City Forward” Enterprises’ readiness for Funding: **Rare** = *not ready*; **Medium** = *almost ready*; **Well Done** = *Ready*
 - 12) Terms we may use to Brand “Bull City Forward” Enterprises’ expected impact/scalability: **Calf** = *small scale*; **Heifer** = *medium scale*; **Bull** = *high growth potential*

Organizational Development Recommendations

- 1) **Community Building:** Continue the role as a convener and facilitate relationship and community building among the various stakeholders in the private, civic, and public sectors that serve social entrepreneurs.
- 2) **Maximize Collaboration:** Facilitate collaboration among various stakeholders that serve social entrepreneurs.
- 3) **Leverage What Exists:** Do not recreate the wheel. Leverage the existing capacity of the existing stakeholders that serve social entrepreneurs.
- 4) **Strengthen What Exists:** Identify opportunities to strengthen the capacity of stakeholders that serve social entrepreneurs, particularly by maximizing collaboration.
- 5) **Communicate Opportunities:** Leverage BCF’s communications role and disseminate information regarding education and training opportunities to BCF’s constituencies.
- 6) **Focus BCF’s Social Innovation Mission in Places that Need It:** Focus BCF’s activity in Durham’s redevelopment areas and neighborhoods that border downtown. Culturally appropriate collaboration with local residents and area stakeholders is recommended in order to build and strengthen local and neighborhood leadership around social innovations.

These recommendations reflect the involvement of participants from the BCF organizational development subcommittee and the City of Durham's Small Business Advisory Committee. Committee co-chairman Farad Ali and I look forward to shaping this work as we continue to help steward Bull City Forward.

Outreach & Communications Recommendations

I. The four main goals of the Outreach and Communications strategy are:

- 1) To generate **widespread community understanding** of what Bull City Forward and Social Innovation & Entrepreneurship are. This should occur across different community groups, industries and sectors, and the Durham and regional **community should view BCF as a positive community resource**, one that is inclusive, accessible, and effective.
- 2) To help shift the traditional paradigm that defines much of our business culture. Ultimately, this group's purpose is to enable Bull City Forward to **inspire our community to consider a culture of more socially conscious businesses more effective and sustainable nonprofits**.
- 3) To ensure that **Durham's community of social innovators is diverse** (in race, gender, sector, industry, age, religion, sexual orientation, etc...)
- 4) To ensure that **BCF solicits feedback and adjusts its programming and services according to community input**. BCF must be viewed as a community-wide initiative to improve our economy.

II. We recommend that BCF pursue four programmatic strategies:

1) Promotion

- a. Increasing awareness and use of BCF's mission, message and offerings
 - i. Translating the BCF/SI&E jargon into easy-to-understand layman's terms
 - ii. Disseminating the message and BCF offerings in handouts, outreach 'script' that can be used by anyone who wants to spread the word, website and overall BCF branding.

2) Re-tooling/re-framing awareness campaign

- a. Outreach to local businesses with the purpose of :
 - i. Increasing awareness of importance/benefits of social benefit built into business model.
 - ii. Generating awareness of BCF support and offerings to members who wish to integrate greater social benefit into their practices.
- b. Outreach to local nonprofit organizations with the purpose of:
 - i. Increasing awareness of impact measurement opportunities.
 - ii. Increasing interest in creating sustainability plan or earned-income revenue model.
 - iii. Generating awareness of BCF services that can help do this.

3) Diversity campaign

- a. Outreach to specific diverse groups
 - i. Hold informational meetings at BCF and other local organizations
 - ii. Outreach coordinator to spread message, handouts, literature, programming opportunities to different local businesses, organizations,

associations, groups. This should involve a database of community groups to establish/maintain relationships with and track over time.

- b. Directly target leaders of local groups with specific focus
 - i. (i.e. focus on specific minority, gender, industry, age group, schools, neighborhood, political orientation, sector) to represent and advocate for involvement in SI&E or BCF.
 - ii. Outreach coordinator should attend quarterly/annual meetings for prominent groups and associations in Durham, such as the quarterly neighborhood association meeting.

4) Feedback loop

- a. Streamline a feedback loop between community group leaders and BCF planning and outreach team.
- b. Generate community member awareness of ability to contribute to BCF's future planning and programming
 - i. Designate outreach coordinator as go-to person when individuals have suggestions, ideas or complaints.
 - ii. Outreach coordinator increases awareness of and responds to all suggestions in the online "suggestion box" on BCF's website.
 - iii. Outreach coordinator works with individuals who have ideas or suggestions to make them happen (see 4c for example)
- c. Showcase community input, adjusted programming and community interaction on website (for example, "Billy John from NCCU had this great idea for a BCF workshop to be held on how to manage your budget—thanks to Billy, this Saturday 27 social innovators from around our community showed up to...")

Policy & Advocacy Recommendations

1. Funding Opportunities from the Durham City Council

BCF should seek funding to provide two types of activities: educational training and capacity building for nonprofits. Seeking program funding, rather than general operational funding, is more likely to be successful and also would provoke less animus from the local community. And these services can be broadly defined as "Workforce Development" – investments in making Durham a hub of entrepreneurialism, which by definition entails creating local, sustainable jobs.

These activities would meet two City priorities identified by the Working Group: generating jobs (especially for youths), and improving the capacity of local nonprofits and for-benefit corporations to provide social services (relieving the city's burden).

Training local youths to be more entrepreneurial is, by definition, an investment in future job creation. And in the short-term, BCF could supplement educational training by connecting youths with area social enterprises. The City is focused on educational programs that help connect students with local high-growth industries that offer plausible career paths; students,

especially from NCCU and the public schools, do not see social enterprise as a viable career path. By animating this career path, BCF could meet both of the City's priorities. A direct partnership with NCCU or public schools would help BCF's application for these funds.

Capacity-building is another service BCF could offer, by positioning itself as a "force multiplier" that increases the output of existing programs while injecting them with accountability and innovation. These existing programs are politically powerful, and BCF should avoid competing with them for support. But proposing to work with them and inject innovation into their organizations would make them partners, and allow the Council to continue funding entrenched interests while also making them more effective – maximizing city spending in this climate of budget cut-backs.

BCF's proposal should be as specific as possible, highlighting the connections BCF has with local social entrepreneurs and its ability to convene them for a variety of purposes. It should the City budget for two reasons: first, to understand what existing programs it might partner with, and second, to ensure that its request is reasonable given the current budgetary shortfalls – one Working Group member noted that Durham is firing teachers. And BCF should seek to raise outside funding for its programs which the City could match; programs that allow the City to leverage funds are, of course, very attractive.

Further, BCF must cultivate relations with Council Members and relevant City Staff – especially Keith Chadwell and Kevin Dick. This process has already begun. When BCF seeks an appropriation, it should first court the support of the City Manager and the Mayor – the Mayor, for instance, brings a voting coalition with him.

BCF should not, however, seek ongoing operational funding, for several reasons: First, it is more likely than program funding to bring BCF into direct competition with the dozens of nonprofits that already rely on the City for annual operational grants. These groups are politically powerful, and potential partners, and BCF should avoid competing with them and provoking their animus. Second, the Council is facing a steep budget shortfall, and in that environment finds it much easier to provide programming, rather than operational, funding.

The interviews also revealed two additional sources of funding that BCF might eventually compete for: TANF - the reformed welfare law, Temporary Assistance for Needy Families - gives states funding (subject to a state match) for three activities, including Diversion Programs. Diversion Programs are designed to prevent people in at-risk populations from entering into such poverty that they need welfare. BCF should work with a contact in the State Department of Social Services to better understand how it could compete for these funds.

Second, Americorps funding flows to NC nonprofits through the NC Commission on Volunteerism and Community Service in two ways: First, a general state allocation based on population, and second, a Competitive Fund. Both offer little to small start-ups, but would be attractive options for larger nonprofits. BCF should impress upon the City its ability to help

local nonprofits become better candidates for both of this funding, pulling more money from both the state and the federal government (applications for the Competitive Fund are channeled through the Commission but funded entirely by the federal government). And BCF should learn more about the programs that win this funding, and the Commission, to position itself as a medium-term contender for both the state and Competitive Fund monies.

The Americorps program may also offer an opportunity for a BCF contract with the State. BCF should explore whether it could sell the state on this proposition: NC receives only about \$3 – 3.5 million in state competitive funds, a figure even the Commission suggests is low, given the state’s wealth of vibrant nonprofits. The Commission seeks to strengthen NC nonprofits so they are better candidates for the Competitive Fund, but is limited by staff and budget concerns. A small investment in BCF could help NC increase significantly its annual pull from the federal government.

2. BCF should support the B Corp. Legislation

The Working Group was considerably less expert on the B Corp. legislation. But BCF should support it in two ways: First, offering B Lab (the legislation’s sponsor) access to BCF’s political connections; and second, mobilizing the regional business community to the B Corp. cause. In Philadelphia, this community was instrumental in securing tax benefits for B Corps – increasing the number of socially-minded local businesses, which in turn generate more local, sustainable jobs and relieve the burden on government to fund certain services.

A primary reason to support B Lab is that it would be relatively low-cost, especially in the near future; the State is currently in its short session, and the B Corp legislation will not be considered until January, when the legislature’s Long session begins.

BCF could support B Lab by developing BCF’s connections with the Offices of the State Treasurer (such as Rodney Maddox), Secretary of State, and Department of Commerce. BCF could initiate a general conversation, and then highlight B Lab as one of its partners.

BCF is also planning several conferences in the coming months: A follow-up to the January convening at the governor’s office – possibly held at the Research Triangle Regional Partnership – a regional meeting of the social innovation community, and a statewide meeting of social innovation groups that BCF would attend. To the extent possible, BCF could use these as opportunities to highlight the B Corp. legislation.

Recruitment & Retention Recommendations

The Recruitment and Retention Working Group has come up with recommendations of strategies for how Bull City Forward could approach its goals of

- 1) Recruiting best-in-class and promising social innovators and entrepreneurs to Durham and the surrounding region, and

- 2) Retaining existing best-in-class and promising talent in Durham and the surrounding region.

This should be pursued by:

- 1) Creating a robust level of ongoing activity and opportunity**

Bull City Forward needs to be the go-to place for anyone in or outside of Durham to connect to what they need—talent, resources, community, a sounding board, labor, potential partners, and information on relevant news, organizations, events and opportunities. Our strategy must engage multiple target communities, and BCF must be the hub where individuals of different sectors, ages, geographic locations and expertise connect. We must make this accessible (this includes using layman’s language), user-friendly, and ultimately above and beyond the status quo.

- **Activities n-campus activities at the BCF Social Innovation Campus:** programming, workshops, and networking events open to interested non-members.
- **An interactive website** – eBCF – available for BCF’s local and greater community. This website must be the hub of all new media options for advancing social innovation based in Durham: voice, video and data elements, social networking and more. Specifically, it needs to include:
 - **Events Calendar:** calendar that synthesizes all entrepreneurial events in the area while highlighting the specific offerings happening at BCF.
 - **Idea Junction:** Where ideas, needs, networks and resources can be discussed and exchanged. There should be an emphasis on collaboration, the opportunity for live interaction between social entrepreneurs all over the world. BCF should discuss with Unique Projects the possibility of combining forces.
 - **Job Board:** An easily accessible and sophisticated entry-point into the Durham community. Talent seekers should be personally connected to talent (graduating students, potential recruits, Durham residents in career transition). BCF should look into the possibility of Bill Brown’s recent Enasso job board software as a potential resource to leverage.
- **A constant influx of student social ventures:** Bull City Forward must establish solid relationships with local academic institutions (in Durham and in the surrounding region), so that every graduating student with a social venture is funneled directly into Bull City Forward and downtown Durham.
 - **Student advocates** at each campus will campaign and represent for BCF over the course of each year, making it known.
 - **Holding classes at the Social Innovation Campus.**

- **Direct funnel from existing incubators** at local institutions—UNC’s BASE, Duke’s DUHatch—that potentially sponsor graduation to BCF.
 - **Develop a relationship with NCICU**, that could serve as a ‘brokering firm’ for social enterprises statewide to be directed BCF and Durham as ‘where to go’ for launching and scaling a social venture.
- **A direct pipeline from national social innovation and entrepreneurship fellows programs**—Ashoka and Echoing Green—that will be placed in Durham and specifically at BCF.

2) Pointing the spotlight on Durham with an annual celebration of social innovation culture.

An annual event must communicate and emanate the social innovation culture of Bull City Forward and Durham. We must showcase and call attention to what we offer to promising and existing social innovators and entrepreneurs: community, collaboration, progress, and opportunity.

- **Partnering with an existing event:** Setting a theme or creating a sub-festival for Social Innovation in partnership with the annual event of a nationally or locally recognized organization.
- **Potential partners:** Full Frame Film Festival and American Dance Festival, or local events such as the NC Beer Festival.
 - **Full Frame has expressed interest** in creating a social innovation sub-festival for 2011.
 - **This may or may not include a business plan competition** where one social venture is awarded space in BCF. All contestants will need to submit a short narrative film as part of their proposal.
 - **This has the potential to**
 - Bring national attention to Durham’s scene of social innovation
 - Larger audience than if BCF pursued this alone.
 - Low-cost for a national event: The cost of a juried award for a social innovation sub-festival is estimated at \$15,000. Other costs could be covered by sponsorships.
 - Bring potential recruits to the area
 - Encourage Durham’s existing social ventures to submit films for the festival that require collaboration with Durham’s large creative class.

3) Working toward long-term audacious goals that will establish Durham as the social innovation capital of the nation

We encourage bold thinking about how to make Durham the number one destination for social innovators. This involves branding Durham as “too good to turn down,” and a “get your spot while you still can.” As mentioned above, Durham needs to emanate social innovation culture.

➤ **Our suggestions at this point include:**

- Establishing a \$50M Social Innovation Fund—National Business Plan Competition award includes investment and incubation at BCF.
- Making a “Social Innovation Corridor” in Durham—signage and a tangible outdoor showcase of social innovation’s presence downtown.

Appendix D—Detailed Budget FY 2010