



Miller Center
for Social Entrepreneurship

INNOVATION
WORKS

From Global to Local:
Strategic Insights for IW GSBI®



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EXECUTIVE SUMMARY

Innovation Works aims to create sustainable neighborhood economies through accelerating social entrepreneurship to reduce Baltimore's racial wealth divide. IW emphasizes collaborative efforts for greater impact, including implementing GSBI® programs to accelerate social enterprises in Baltimore. The GSBI curriculum has evolved to mainly support product-based, global SEs with earned income at a later stage of development. However, many promising entrepreneurs in Baltimore are running early-stage, nonprofit, service-based, hyper-local or citywide social enterprises.

At the inaugural IW GSBI Boost in June 2019, I gathered ethnographic data, then analyzed post-Boost survey feedback and conducted follow-up interviews in order to evaluate the efficacy of GSBI methodology in Baltimore and identify necessary adaptations.

I found that Boost was a successful workshop, and an inspiring demonstration of the collective power of social impact leaders in Baltimore. However, many of the factors that made it uniquely successful (such as the diverse group of participants and the hyper-local nature of the workshop), also posed challenges to implementing a curriculum and style of delivery that was not necessarily developed with this specific audience in mind. Social entrepreneurship is a new concept in the U.S., and my recommendations involve ways of meeting people where they are, through clarifying expectations, facilitating preparation beforehand and networking during the event, and extending the time frame, so that IW can create a fully inclusive pipeline for social impact. Additionally, documenting the content of the presentation that is not on the slides, and setting guidelines for future Boost presenters will engage diverse attendees and prepare for future replication. All of these recommendations were all developed with the future replication of the IW GSBI partnership in mind.

I also found ways in which the curriculum content could be continuously improved to include and accommodate the forms of social entrepreneurship that are commonly found in the urban U.S. Based on the feedback, I directly modified the main Boost slide deck and the Online accelerator modules, and expanded upon two example enterprises for the Online program. These practical changes, along with the strategic recommendations in this document, can improve the efficacy of the GSBI model in a domestic, urban context.

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Preface

INNOVATION WORKS

Innovation Works was founded on the novel idea that fostering local social entrepreneurship is exactly what Baltimore needs. And this conclusion was not reached lightly; because Baltimore has seen its fair share of efforts fail to sustainably bridge the racial wealth divide. Redlining and gentrification have created systemic barriers to success for disinvested black communities. But the community members, small businesses, and nonprofits in these same neighborhoods hold the greatest opportunity.

Founder and CEO Frank Knott envisioned a fully inclusive pipeline for social entrepreneurship, from fostering the smallest inkling of an idea, to supporting organizations that are already making great impact. He saw the need for collaboration, not competition, and IW had to match this need. So he completed over 15 months of due diligence first. He thoroughly investigated the social enterprise model, analyzed the existing social enterprise landscape in the city, and most importantly, went straight to the people to ask what their communities need. The result: he found that social entrepreneurship is an untapped opportunity in Baltimore that has the potential to disrupt some of the city's most deep-rooted challenges. Thus, Innovation Works was born.

MILLER CENTER

Miller Center is the largest and most successful university-based social enterprise accelerator in the world. Founded in 1997, Miller Center is one of three Centers of Distinction at Santa Clara University, located in the heart of Silicon Valley. Miller Center leverages this entrepreneurial spirit with the University's Jesuit heritage of service to the poor and protection of the planet.



Mr. Frank Knott sought to leverage the gold standard of Miller Center's global programs locally in Baltimore. The two organizations with shared missions began a long-term partnership, and launched a pilot experiment with the GSBI Boost program in Baltimore in June 2019. If GSBI can be successfully and sustainably replicated in Baltimore, there is the potential to replicate the model across the United States in various areas of need. This document analyzes the strengths and opportunities revealed by that pilot.



Part I: Delivery of GSBI Boost in Baltimore

INTRODUCTION

The heart of Innovation Works' theory of change is connection and collaboration. IW facilitates mutually beneficial cooperation among neighborhoods, entrepreneurs, social innovation assets, and investors with the common goal of building sustainable neighborhood economies in Baltimore. Even beyond Baltimore, the IW GSBI model is paving the way for replication of place-based social entrepreneurship acceleration across the urban United States. Preparing for this replication by documenting IW's current processes and making GSBI better in the context of Baltimore is creating a path to an even broader form of connection and collaboration.

At the inaugural IW GSBI Boost workshop in June 2019, I gathered ethnographic data, then analyzed post-Boost survey feedback and conducted follow-up interviews. Based on the feedback I found five main constraints present that limited the potential for collaboration. Drawing from these findings, I make several recommendations for improving the implementation of the Boost program in Baltimore, in order to increase the efficacy of the GSBI model here and in further domestic, urban contexts. Implementing these recommendations will facilitate an increase in collaboration among participants, between Innovation Works and participants, and between Innovation Works and Miller Center.

Problems	Recommendations
1. Social entrepreneurship is widely misunderstood in Baltimore.	Define social entrepreneurship more broadly throughout the program.
2. Time constraints hindered learning, networking, and collaboration.	Adjust the time frame of Boost to four days, and facilitate networking more intentionally.
3. Participants begin Boost with widely varying levels of preparedness.	Clarify expectations, distribute a pre-Boost questionnaire, and hold pre-Boost workshops.
4. Presentation methods crucially influence participation from diverse attendees.	Develop a training for Boost presenters.
5. The current IW follow-up process may become unsustainable with a growing number of alumni.	Decrease the number of follow-up interviews over time, and dedicate one staff member to supervise alumni engagement, with the help of volunteers or mentors.



PROBLEM: Social entrepreneurship is widely misunderstood in Baltimore to be commercial entrepreneurship.

SOLUTION: Define social entrepreneurship more broadly throughout the program.



Observations

Social entrepreneurship is a relatively new concept to at least half of the 28 organizations that participated in Boost. Even the founder of the Chill Station, which is a prime example of the social entrepreneurship model in the urban United States, expressed that they only started identifying the business as a social enterprise during Boost. At its best, the newness of the concept led to excitement about the possibilities of implementing social enterprise (SE) methodology, and at its worst, to a misunderstanding of the concept as profit-focused rather than impact-focused, which led to distrust of the entire SE model.

Findings

The concept of social entrepreneurship was not fully explained to participants prior to or during the workshop, in a way that was relevant to their particular context. With Baltimore having a relatively young social enterprise ecosystem, these misunderstandings prevented many participants from getting the most out of the program.

Recommendations

- a. At the start of Boost Day 1, clarify that there are many different ways to imagine the SE model. Including examples of urban, U.S. social enterprises are especially compelling when explaining this concept. Many participants could use the SE mindset to reduce the cost of operations, decrease reliance on donations and grant funding, or fully explore partnership opportunities with like-minded organizations in the city. Regardless of the form, social entrepreneurship is rooted in the notion that financial sustainability allows you to scale your social impact, whether that impact grows depth-wise in a hyper-local context, or geographically across the city and beyond.
- b. Corroborate the SE model with outside testimony from Day 1 by bringing in guest SEs who have benefited from embracing the SE label, and investors who are specifically interested in SEs.
- c. Continue to explain social entrepreneurship within the context of each curricular module, so that participants become familiar with the intent and practice of social entrepreneurship throughout the workshop.



PROBLEM: Time constraints hindered learning, networking, and collaboration.

SOLUTION: Adjust the time frame of Boost to four days, and facilitate networking more intentionally.



Observations

- a. The three days went by very quickly, and it was more mentally draining for participants than expected. The ten-minute working periods proved difficult, it was described by one person as “a college course in 2.5 days,” and most participants needed more time to digest the content and prepare for the next day[1]. Participation tended to increase when there were exercises and breakout sessions, but there was too much material to get through to include an adequate amount of these throughout the entire day. Participants frequently expressed the need for a “brain break.” 65% of mentors who filled out the Post-Boost online survey thought there should be more independent work time, and so did 41.7% of participants.
- b. Connection among participants was limited to within each individual table, at neighboring tables, or none at all before the excitement of the third and final day. Many connections involved expanding a product line to include another organization, sharing space, and sharing resources, all of which are helping to advance IW’s mission. However, in many cases,

entrepreneurs made even more significant connections after Boost that were non-facilitated, but perhaps inspired by the event. This was particularly evident for nonprofits rooted in their communities (ex. Urban Farm, S.A.F.E., St. Francis Neighborhood Center). In the follow-up meetings, Jay recommended many more substantial and plausible connections than were organically made at Boost.



I never got a chance to meet everyone personally. I would have liked to. At the end of each day I was too exhausted and needed to still do work as well as process everything. I was working until 11pm every day. Not sure where to fit it all in, tried at breakfast and lunch, but needed time to check emails and messages, take a mental break, take a walk, etc.

- Christi Green, St. Francis Center





Findings

- a. Three days felt very rushed for both mentors and participants. However, for many participants, it would be impossible to take time off work for a week-long conference.
- b. In the U.S., Miller Center and IW will continue to encounter larger groups like the 28 organizations at Boost. It is important to consider how the structure of the event can more intentionally and effectively facilitate collaboration, particularly considering the localized nature of the Baltimore Boost.

Recommendations

- a. Extend Boost to from three to four days (still shorter than an entire week, but more than 3 days). Each day, begin with the same format of lecturing with short breakout sessions throughout to apply the material learned to your own organization. Then, allow for 2 hours of work time to further apply the material to your organization, work with mentors, and collaborate with others at the same table. During the last half hour of the day, the group can re-convene as a whole and report out on what they did. This allows for further connection, hearing from other people's journeys alongside your own, and better digestion of the material.

Day 1:

- Welcome, Introductions, Goals and Context
- Social Impact Model
- Target Market and Value Proposition
- Work time, collaboration, and sharing with the group

Day 2:

- Marketing, Sales, and Partnerships
- First half of Business Model module
- Work time, collaboration, and sharing with the group

Day 3:

- Second half of Business Model module
- Growth Strategy
- Work time, collaboration, and sharing with the group

Day 4:

- Executive Summary Presentations
- Resources, Next Steps, and Closing
- Reception



Funding a fourth day can theoretically be supported by the same sources of IW funding as before, particularly after the proven success of the inaugural Boost. Additionally, planning ahead for zero-waste catering can save money.

b. Integrate facilitated networking into the above model:

- At the top of the first day, before the speakers begin, add a brief “scavenger hunt” style exercise designed to get people talking with similar interests. The format would include questions such as “get a business card from someone who works in the same neighborhood as you or nearby,” or “find someone who works in the same sector as you and share three challenges you currently have”.
- During the “Welcome, Introductions, Goals, and Context” part of the presentation, there is already a great exercise included, that goes around the room and has each person share their answers to four brief questions. (Name, Company name, One word that describes what you are passionate about, and What you hope to get from this workshop). I would combine and slightly modify the first two to the question “Who are you,” to be interpreted any way the participant would like.
- During breakfast on days 2-4, have participants grouped at tables by parts of the city.
- During the lecture portion of each day, participants should remain at the same table; but each day during the individual and collaborative work time, the seating arrangement should be intentionally switched up, with different groups of people at each table, including different mentors. This allows for flexibility (you’re not stuck with the same organizations and the same mentor all day every day if it’s not working out), while preserving the consistency of a specific mentor guiding you through the presentation material.
- Provide a directory with photos of each participant before the start of the program.



PROBLEM: Participants begin Boost with widely varying levels of preparedness.

SOLUTION: Offer pre-Boost workshops to participants.



Observations

- a. Several participants expressed that the program was far more intense than expected. Others expected clear answers to their specific problems and strategy questions; however, Boost was not intended to find solutions to problems today. The goal is to know what you don't know by the end of the workshop, and then come back to the helpful framework of the material over time.
- b. Several organizations came in without a clear idea of what area of their business they wanted to focus on, or how the social entrepreneurship mindset would come into play. Those who had gathered relevant documents ahead of time had an easier transition when dropping information into the Miller Center templates. Additionally, the most eager, open-minded, and prepared organizations got the most out of Boost. These SEs also tended to naturally fit the social entrepreneurship model the best. It was difficult for program managers that are part of a larger organization to feel comfortable fully exploring strategic initiatives. Even for those with the passion and motivation to pursue SE methods, there was still the concern that such efforts would be futile or limited without approval from the top.
- c. Some SEs had difficulties with the use of technology involved, which hindered their participation. Others were not very familiar with using financial spreadsheets, or were not the correct person from their organization who had access to that type of information.

Findings

- a. Boost clearly broadened participants' perspectives and allowed them to think about the big picture rather than day-to-day logistics, but many people would have benefited from doing some more preparation and ideation beforehand, so that they could come in to Day 1 with a better sense of direction.
- b. Organization leaders should come into the program with a plan or intention, and share that with their mentors beforehand. Some may need help formulating that plan, or they will not know where to start. Others may not have that type of decision-making power within their organization.



- c. The skills gap needs to be addressed and overcome as much as possible beforehand, in order to allow for the most inclusive and collaborative environment possible. Additionally, applicants must have at an appropriate position within their organization that allows for full participation, and/or be made aware of what they need to bring beforehand so they can have relevant documents on hand.

Recommendations

- a. When recruiting organizations to participate in Boost, clarify what they can expect to get out of it, and what they will need to bring into it. This will be easier to explain now that IW has held the inaugural Boost, and it will allow people to prepare more, both individually and with their Boost mentor.
- b. Assess each entrepreneur's readiness for Boost by adding relevant questions to the existing application survey. These may include: what is your title within the organization? Do you have these particular documents and this type of knowledge available to bring to Boost? Are you comfortable using PowerPoint and Excel? This will give a better sense of how to meet each participant where they are, and what they may need from a pre-Boost workshop. For selected participants, communicate what they should bring to Day 1, including a mission statement, a list of income and expenses, and other important information to have readily available.
- c. As resources become available, offering pre-conference workshops (for a fee) the week before Boost would make it easier to meet participants where they are. These could include: a session advising how to get the most out of Boost if you are running a program within a larger organization; and a workshop on financial terminology.



PROBLEM: Presentation methods crucially influence participation from diverse attendees.

SOLUTION: Develop a training for Boost presenters.

Observations

- a. Feedback on Pamela and Steve's presentation of the Boost program was highly positive, with particular emphasis on the way they were able to keep everyone engaged throughout the process. However, while observing the event I did notice some nuances that could be continuously improved, and



- a. both participants and mentors expressed the need for more engaging presentation tactics that draw out participation from everyone in the room.
- b. A lot of the information and explanation of the presentation relies on the knowledge and charisma of the speakers. There's a lot of material in their heads that's not written on the slides, and therefore difficult to pass on to future presenters in Baltimore.

Findings

- a. In order to actively engage all participants, it is necessary to develop a consistent set of guidelines for future Boost presenters from Baltimore. The documented moments of disconnect from the inaugural Boost and how to avoid them in the future provide an appropriate start for a protocol sheet, but are by no means all-encompassing.
- b. Formalizing the parts of the presentation that are unwritten would greatly ease the transition of training Baltimore presenters to take over leading Boost.

Recommendations

- a. Develop a training for future Boost presenters, starting with a concise protocol sheet with examples of what to avoid, and ways to fix it. See Appendix C for a sample protocol sheet template that can be revised to include additional guidelines for presenters.
- b. Record the entirety of the presentation during the second IW GSBI Boost, and have the presenters use clip-on lavalier microphones so that the recording can be captured while being minimally cumbersome to the presenters. This recording will help inform what can be said outside of the slides, which are only meant to be guidelines and launch points for the presenters.



PROBLEM: The current IW follow-up process may become unsustainable with a growing number of alumni.

SOLUTION: Decrease the number of follow-up interviews over time, and dedicate one staff member to supervise alumni engagement, with the help of volunteers or mentors.



Observations

At the time of the follow-up interviews, most participants hadn't re-visited the material due to playing catch-up at work, or being in the middle of a busy season. Additionally, several were still unsure about how to implement social entrepreneurship methodology within their current business model. While nothing earth-shattering has changed for many participants, others completely re-evaluated their impact model, target market, business model, and/or scaling strategy. The weeks following Boost were therefore a crucial time for personally visiting each participating organization to check in and offer support moving forward.

Findings

Currently, conducting interviews with every participating organization is a necessary feedback loop (particularly the first couple of times conducting Boost in Baltimore) and another vehicle for Jay to disseminate valuable advice and information. Jay provided crucial business and strategy expertise during the post-Boost interviews. He offered big ideas, crucial

questioning, and refocusing, all of which were invaluable and impactful for the organizations beyond what they got directly from Boost. Follow-ups were also helpful in evaluating who is ready for the Online program. However, it may become unsustainable and expensive to continue this for all participants after every future Boost.

Recommendations

- a. The need for 1:1 post-Boost interviews with all participants will gradually decrease over the next few years, particularly as there starts to be a small cluster of returning participants that IW staff is already familiar with. These returnees can become a resource for new participants, presenters at pre-Boost workshops, speakers giving testimony at the reception, and leaders of the "interest groups" at breakfast tables during Boost. Keeping this in mind, I propose a plan to slowly migrate away from 1:1 interviews by the sixth Boost, or by the third year if there are two per year.



- After the second Boost, continue the same process of interviewing everyone afterwards.
 - After the third Boost, decrease it to two-thirds of the organizations, prioritizing new participants.
 - After the fourth Boost, interview half of the organizations, prioritizing new participants.
 - After the fifth Boost, interview a random sample of 6-7 organizations.
 - After the sixth Boost, just distribute the online survey, with no personal follow-up visits.
- b. Alumni engagement is a crucial aspect of the SE pipeline. Especially as the 1:1 follow-up process is slowly phased out, it will be crucial to have each alumni cohort continue to meet and interact in some structured way. IW does not necessarily need a dedicated alumni engagement position on its staff yet; interviews and outreach could be conducted by volunteers or mentors, and supervised by a staffer. Here are some examples of activities to engage alumni of IW GSBI programs:
- Refining the lengthy assortment of resources on the “SE Toolkit” spreadsheet that was distributed at Boost
 - Conducting an annual alumni survey
 - Facilitating alumni meet-ups for conversation and support
 - Facilitating peer mentoring opportunities
 - Providing a curated list of investors
 - Providing market intelligence about which investors and funders to target
 - Creating a group on LinkedIn, Slack, or WhatsApp for each cohort to share updates with each other
 - Compiling a list of what each organization is looking for, to help match potential partners intentionally during GSBI programs
 - Adding all alumni to a Facebook group

Part II: Proposal for GSBI Curriculum Adaptations for a U.S. Audience

INTRODUCTION

My observations at this Boost confirmed many findings from the 2018 Catholic Charities accelerator in Santa Clara, and will help inform replication of the IW GSBI model across the U.S. Replication will not only be informed by the Innovation Works model, but also help IW continuously improve. With every new program comes a unique set of learnings and blind spots; watching GSBI play out in other cities will allow for stepping outside of those blind spots. As with any experiment, a much larger data set yields a much larger chance of discovering what is taking place and how it can be improved. Replication is beneficial to all parties, and documenting the successes and challenges of implementing GSBI methodology at Innovation Works is a crucial step in the replication process.

It is clear that the GSBI® curriculum has evolved to support mainly product-based, global social entrepreneurs with earned income at a later stage of development. However, many promising entrepreneurs in Baltimore are running early-stage, nonprofit, service-based, hyper-local or citywide social enterprises. The impact of the curriculum is slightly diluted in its current form; a wider impact requires the flexibility to accommodate a larger audience.

Based on observations and feedback from the inaugural IW GSBI Boost (See Appendix A for methods), **I found three main shortcomings of the curriculum that constrained its applicability to the domestic US context.**

The following recommendations are for Miller Center to alter the main GSBI curriculum appropriately, which will benefit all future U.S. cohorts.

I have already applied some of these learnings to direct adaptations of the Boost and Online curricula, but some of the necessary changes that I identified were too ingrained in the framework of the curriculum for me to complete at this time. A chart detailing the adaptations I've made and what still needs to be done will be sent to Miller Center staff as a separate memo.

Problems	Recommendations
1. The curriculum is currently geared towards for-profit social businesses, not non-profit organizations.	Incorporate nonprofit-inclusive language, and develop a nonprofit example enterprise that does not sell a product.
2. The curriculum is almost strictly product-based.	Incorporate service-based language, and modify the framework of specific sections.
3. The PowerPoint presentation is not sufficiently visually stimulating for a domestic US audience.	Incorporate videos, quizzes, and other interactive elements.



PROBLEM: The curriculum is currently geared towards for-profit social businesses, not non-profit organizations.

SOLUTION: Incorporate service-based language, and develop a nonprofit example enterprise that does not sell a product.

Observations

Many non-profit organizations found it difficult to utilize certain parts of the curriculum. Practically speaking, financial projections become difficult when you are reliant on donations, and it is often difficult to imagine growing, scaling, or changing the business model due to bureaucratic structures within larger nonprofits.

“ The program felt re-engineered for nonprofits, like it’s not really for us...I appreciated how it was adapted where it could be, but it was definitely geared towards for-profit organizations more.

- Mereida Goodman, Garwyn Oaks Northwest Housing

Findings

More explicitly sharing how the SE model could be utilized even by nonprofits that do not charge for their services is crucial in holding their attention, and in allowing them to gain something practically useful from the workshop.



Recommendations

On a basic level, altering the product-based language to be more inclusive of nonprofits where possible is necessary, as I did on the Online adaptations (see below). On a more fundamental level, it would be helpful and encouraging to nonprofits to develop a fully nonprofit example slide deck--an example that is not selling a product, but still uses the social entrepreneurship mindset to expand their impact in the ways that a longstanding nonprofit might do so in Baltimore. The example could be incorporated into the IW Boost slide deck, and added to the GSBI library of example enterprises as a separate example deck.



PROBLEM: The curriculum is almost strictly product-based.

SOLUTION: Incorporate service-based language, and modify the framework of specific sections.

Observations

There is a strong need for a curricular framework that is not strictly product-based. Many SEs, particularly in the U.S., provide services, work on community development, hold classes, provide a subscription service, and more that do not fit into a strictly product-based framework. Additionally, the examples that involved clean cookstoves were not conducive to the Baltimore audience.

- Sections where this is particularly apparent: Competitive Advantage, Value Propositions, Marketing 5 P's, and Value Chain

Findings

Replacing the cookstove examples with more relevant examples should not be too difficult; however, the product-based nature of the framework of Marketing 5 P's, for example, is too ingrained in the curricular framework to just alter the wording.



Recommendations

Include “product or service” in the language of the slides when applicable, and replace all cookstove references with an urban example relevant to Baltimore. If Miller Center was able to re-work the framework of the sections mentioned above in “observations,” then the effects would be transformative, not only for accommodating non-product-based SEs in Baltimore, but for making the program feel more inclusive to these types of organizations globally.



PROBLEM: The PowerPoint presentation is not sufficiently visually stimulating for a domestic U.S. audience..

SOLUTION: Incorporate videos, quizzes, and other interactive elements.

Observations

Both participants and mentors expressed the need for more engaging and visually stimulating components on the slides themselves, such as more videos and pictures.

Findings

The existing ten-minute breakout sessions were engaging, and participants were able to apply the information to their own organizations. Additionally, the presenters spoke in an engaging manner and departed from the slides themselves, using them as guidelines and not restrictions. However, further engaging formats on the slides themselves would promote greater interaction among participants, among participants and the presenters, and between participants and the material.

Recommendations

Incorporate videos, quizzes at the end of each module, and other interactive elements throughout. These should not be too time-consuming during the presentation itself, but the additional day will allow for a buffer.

Appendices

A. Methods

Research Questions

I gathered data in two phases: Phase One took place during the 3-day Boost workshop, and was directed by the first research question. Phase Two took place over seven weeks following Boost, and investigated the second research question. These goals served as a baseline from which to assess the missing links between the Boost learning tools and the impact on the social enterprises.

Phase 1: *What parts of the curriculum were effective in accelerating social enterprises in the Baltimore Boost, and what parts were not effective?*

Phase 2: *What is missing, and what changes or new curricular components need to be added?*

Data Collection

I gathered both qualitative and quantitative data through interviews, surveys, and ethnographic observations. The interviews and online surveys will be an accessible and useful tool to gather self-reported feedback. Where self-reported data falls short, ethnographic observation opens up the possibility of discovering data that respondents did not see themselves, did not realize would be useful feedback, or did not initially report, because it was assumed knowledge for a non-outsider.

Phase 1: At Boost, I conducted ethnographic observations of how the program functioned for participants, mentors, and IW personnel. After Boost, I analyzed the key findings from the online survey that Innovation Works distributed.

Phase 2: Jay, Sally, and I conducted follow-up interviews with 22 of the 28 social enterprises at their sites of operation in Baltimore.



B. Description of Data

Each document title is linked to the accompanying file on Google Drive.

Document Title	Description	How Collected	How Much
Boost participation & understanding	During Boost, I observed the participants' active engagement with the material and their grasp of the knowledge, and rated each on a scale of 1-5 to track it over the 3 days. This gave some quantitative reference to my qualitative observations.	Ethnographic observation and informal interviews, collected via handwritten notes, then transcribed	For active participation : complete entries for 27 out of 28 orgs and 1 incomplete entry. For knowledge of material : 21 incomplete entries
Boost: Notes on Intentionality	I compiled all of the non-curricular Boost notes I had from the 3-day Boost that were observations and suggestions related to: <ul style="list-style-type: none"> - Format & delivery - Problematic language - Diversity & inclusion 	Ethnographic observation and informal interviews, collected via handwritten notes, then transcribed	3 days of observation. 2 typed pages (bullet points) of qualitative data and interpretations / recommendations
Boost: Notes on Curriculum Adaptation	Descriptive notes on the strengths and weaknesses of the Boost curriculum based on participant and mentor feedback during Boost	Ethnographic observation and informal interviews, collected via handwritten notes, then transcribed	3 days of observation. 2 typed pages (bullet points) of qualitative data and interpretations / recommendations
Post-Boost Quotes	I pulled positive quotes from the post-Boost survey for marketing & funder relations.	JotForm online survey	17 narrative quotes



Doc. Title	Description	How Collected	How Much
Boost Expectations	I qualitatively coded for key themes of participants' expectations of Boost, to compare how they relayed what their expectations of Boost were beforehand, during day 1, and afterward.	JotForm online survey; IW Airtable applicant data; and typed notes from spoken expectations at Boost day 1	12 different categories were coded for over 3 sources of data: applicant data, speaking day 1 of Boost, and online post-Boost survey
Post-Boost Interviews	I took notes during all of the post-Boost 1:1 interviews with the participants who scheduled follow-up meetings with us. They are organized based on the date and time that they met with us (us = me, Jay, and Sally).	In-person interviews (interview notes were either typed, or handwritten & transcribed)	22 of 28 participating organizations were interviewed while I was in the field.
Catholic Charities Post-Boost Meeting	In addition to the optional 1:1s, all the Catholic Charities programs who participated in Boost convened with the CEO and VPs in a larger de-brief meeting. Jay presented using these slides, which I created by compiling, organizing, and summarizing data from both the online survey and in-person follow-up interviews, specifically paying attention to CC trends.	JotForm online survey; and in-person interviews (interview notes were either typed, or handwritten & transcribed)	Data from in-person meetings with 4 of the 5 participating CC programs, and from the online survey that 5 out of 5 filled out.
Analysis of Post-Boost Survey; and Mentors Analysis	I compiled, organized, and summarized data from the online post-Boost participant survey and presented it to IW staff at a team meeting. It also serves as an analytical summary for future reference.	JotForm online survey; IW Airtable applicant data; and typed notes from spoken expectations at Boost day 1	36 participant respondents, 16 of them were anonymous. 8 mentors filled out the survey, and 22 of 28 organizations were referenced



C. Sample Protocol Sheet for IW GSBI Presenters

- We don't use gendered language here. When giving an example, use "person" or "he or she." Avoid using the phrase "guys" as an all inclusive term, and instead use "you all" or "folks".
- Do not use the term "Ex-convict". Instead, always refer to "returning citizens".
- The Boost presentation is interactive, not a straight lecture; in any given 60 minutes, we expect that you pose a question to the audience, have them talk to their peers at their table, or use some of the SEs present in your examples at least 3-5 times. This is in addition to, not including the breakout work time and quizzes that will already be included in the presentation slides.
- When presenting, do not stay in the same spot at the front of the room. Be sure to walk down both aisles of the tables, and avoid favoring one aisle over the other so that you can actively engage all tables, and none of them are left out.
- You will receive a list of the participating organizations beforehand, including their mission statements and a brief description of their what they do. We do expect you to review this list prior to Boost, so that you can become familiar with the organizations that will be present. We also expect you to spread your comments around, and not solely talk to the same SEs that participate the most, that you get to know the best.
- When a participant is confused and asks a question, do not give responses such as "It's simple," that negate the validity of their question. Instead, show that you respect the validity of their question by carefully explaining the concept in a different way than the first time you explained it, checking in with them for understanding before moving on, and avoiding dismissive language.
- After each breakout session where participants apply the knowledge to their organizations, ask people to share what they came up with. If the same organizations are more willing to share their work than others, begin calling on participants who have not spoken thus far. Be sure that everyone in the room shares what they worked on, or had a chance to ask a question or speak at some point during each day's presentation.