

## Social Enterprise Alliance Award Winners 2004-2009

### 2004

*(Lifetime Achievement Award)*

#### **Earl Copus, Jr., President & CEO of Melwood**

Melwood began in 1963 under the auspices of the Arc of Prince George's County. A group of concerned parents wanted to establish meaningful work for their adult children with developmental disabilities. They received six acres of donated land in Upper Marlboro and set up a canvas tent as their base of operations. From these humble surroundings, they began a horticultural training center.

In 1966, Earl Copus was recruited as the first program director. Mr. Copus graduated from the University of Georgia with a degree in Forest Management and had served in the Peace Corps in the northeastern region of Brazil. There he developed an innovative system for crafts production and distribution that had an immediate economic impact on the citizens of an impoverished area. Thus, his commitment toward the economic empowerment of disadvantaged persons began over 40 years ago.

parents of Melwood hired Mr. Copus to lead an organization that consisted of six participants and one other staff person. When he first heard them mention a figure of \$18,000, he thought he could exist on that salary – only to learn that was the entire budget. But he quickly transformed Melwood into a social enterprise by selling flowers in the community and taking on small contracts for grass cutting and landscaping. Within two years of his arrival, Melwood was financially sustainable and was incorporated as a separate entity.

Now serving in his 37th year as President and CEO over the 40-year history of Melwood, Mr. Copus presides over an organization that annually impacts the lives of 2,800 persons with developmental and other disabilities. Melwood's current budget is \$64 million, of which 95% is comprised of self-earned income. Mr. Copus has pursued a vision of making Melwood more than "a service provider" to persons with developmental disabilities. His commitment has been to a broader, holistic vision of Melwood as a place for each person to reach their potential in every aspect of life.

#### **He has pursued his vision in three primary ways:**

**Vocational Training and Employment** Mr. Copus wanted Melwood to train its participants with the necessary skills to be productive and competitive in the marketplace. With an aggressive, entrepreneurial spirit, Melwood now provides over 1,000 job opportunities, paying competitive salaries and most of which also include benefits.

**Residential Alternatives** Meaningful work must be coupled with a meaningful sense of community to provide a quality of life for persons with disabilities. Melwood maintains 24 group homes for assisted living and has recently added another nine homes designed for more independent living.

**Travel and Recreation** Opportunities for recreation and travel are also important for the quality of life. Mr. Copus established a travel program at Melwood to assist persons with disabilities to travel to vacation areas, historical sites, and amusement parks.

In 1983, Melwood acquired a 108-acre property in Nanjemoy, Maryland and transformed it into a Camp and Retreat Center. The Center operates year round and offers a wide variety of fully accessible recreational activities, including an equestrian arena, swimming pool, ropes challenge course, climbing wall, and boating area.

While Mr. Copus has led Melwood through four decades of phenomenal growth according to social entrepreneurial principles, the "social" part of Melwood's mission has always taken priority over the "entrepreneurial." Every program is first evaluated according to its effectiveness for mission. If a program is found effective, but not profitable, then new strategies are developed in order to sustain it. The entrepreneurial skills of Mr. Copus have been instrumental in Melwood's capacity to continue serving greater numbers of persons, and with growth projections of a \$100 million budget within the next five years. Furthermore, the quality of these services has been consistently evaluated as superior by the Commission on the Accreditation of Rehabilitation Facilities.

Mr. Copus' leadership and the Melwood organization have received many forms of international recognition. Melwood maintains partnerships with sister agencies in Australia, Brazil, Ecuador, and Japan, and trains international interns in the fields of rehabilitation and social enterprise. Mr. Copus has also founded the Melwood Institute to teach social entrepreneurial principles to leaders of nonprofit organizations within the United States.

## **2005**

*(SOCIAL ENTERPRISE AWARD FOR LEADERSHIP IN INNOVATIVE IDEAS, SOCIAL ENTERPRISE AWARD FOR LEADERSHIP IN FINANCING)*

### **SOCIAL ENTERPRISE AWARD FOR LEADERSHIP IN INNOVATIVE IDEAS**

#### **Benita Singh and Ruth DeGolia, Mercado Global**

Mercado Global is a non-profit fair trade organization whose mission is to empower economically-disadvantaged communities abroad by connecting their local cooperatives to the U.S. market while fostering a generation of globally-conscious leaders and socially-responsible consumers.

While students at Yale University, Mercado Global's co-founders Benita Singh and Ruth DeGolia spent a total of nine months in Guatemala's western highlands working with rural communities struggling to find a sustainable strategy for development. In the course of their work, community members expressed their need to overcome political and economic isolation by promoting local development through community cooperatives. After consulting with local NGOs that provided technical support to cooperatives in the region, the founders decided to launch an initiative to link six women's cooperatives to the U.S. market.

Three on-campus sales at Yale University in fall of 2003 earned in excess of \$5,000 in revenue for six women's cooperatives in Guatemala, providing 30 cooperative members with fair wage employment for one month and additional revenues to send 10 of their girls to school for one year.

Realizing the potential of the initiative to empower cooperative members abroad while at the same time promoting fair trade's principles among young people, Ruth and Benita created a strategic plan to bring the project to campuses across the country. Their youth-driven marketing strategy would advance the fair trade movement and educate youth in the U.S. while at the same time exponentially expanding the market available to Mercado Global's partner cooperatives abroad.

In March 2004, Mercado Global won its first significant funding commitment from the Yale Entrepreneurial Society (YES), winning the grand prize in their Y50K Business Plan Competition. Since winning the YES business plan competition, Ruth and Benita were named among "the World's Best Emerging Social Entrepreneurs" by the Echoing Green Foundation, which provided them with a \$90,000 grant to launch Mercado Global.

On November 18, 2004, Mercado Global launched its first catalog that brought products from 14 community-cooperatives to individual consumers and stores across the country. On February 1, 2005, Mercado launched its e-commerce website. As of January 2005, Mercado Global has 11 operating chapters across the country that are exponentially expanding the market available.

### **SOCIAL ENTERPRISE AWARD FOR LEADERSHIP IN FINANCING**

#### **Ed Skloot, Executive Director, Surdna Foundation**

##### **A man of vision**

"A serious, incremental shift toward commercialization is underway and many nonprofits are unprepared to compete. They are undercapitalized, short of basic management and technical skills and rooted in a non-commercial culture. Some are becoming subcontractors to business as much as partners with local government. This is not necessarily a bad outcome; it could become a very healthy one."

*Aspen Institute Nonprofit Sector Strategy Group, August, 1999*

### **A man of leadership**

“These are the markers of distinguished philanthropy: going after root causes of poverty, inequity and disadvantage, and, by doing it, making lasting institutional and social change.

“We need to be knowledge builders and knowledge sharers.

“We must be investors, not just grantmakers.

“We must be resolute advocates in the service of our mission.

“We must be capacity builders.”

*Minnesota Council of Foundations, December, 2002*

It should be no surprise that the man who wrote a book called “The Nonprofit Entrepreneur: Creating Ventures to Earn Income” in 1988 is the Executive Director of one of the very first investing foundations of Social Enterprise Alliance. Under the leadership of Ed Skloot, The Surdna Foundation has earned a national reputation for entrepreneurial grantmaking, collaborative approaches with other funders and grantees, and aggressive solution-finding for highly complex problems. (Surdna makes grants in five fields; the environment, neighborhood revitalization, youth organizing, arts and nonprofit sector issues. Established in 1917, today it is one of the country’s 75 largest foundations. Ed was its first professional employee, hired in 1989.)

When Ed wrote “The Nonprofit Entrepreneur”, there was nothing resembling a field of social enterprise. Yet, his early vision coupled with the risk-taking and leadership he and his Surdna team (Vince Stehle) showed were critical in building the infrastructure of this nascent yet burgeoning field. Surdna’s role model clearly demonstrates the importance of investing in capacity building for the nonprofit sector. Even more so, Surdna’s leadership in embracing social enterprise as an important strategy for building nonprofit capacity is nothing short of courageous. Ed has been a vocal proponent of earned income development for almost a generation. He has generously shared his knowledge with funders and nonprofits alike. It is with great honor and gratitude that we recognize this most worthy individual and Foundation with Social Enterprise Alliance’s inaugural “Leadership in Financing” award.

## **2006**

*(ENTERPRISE AWARD FOR LEADERSHIP IN INNOVATIVE IDEAS, SOCIAL ENTERPRISE AWARD FOR LEADERSHIP IN FUNDING, SOCIAL ENTERPRISE AWARD FOR MEMBER EXCELLENCE)*

### **ENTERPRISE AWARD FOR LEADERSHIP IN INNOVATIVE IDEAS**

#### **Katherine Freund, Founder and CEO, ITNAmerica™**

Independent Transportation Network® and ITNAmerica™ began as a graduate school project in Portland, Maine. Inspired by personal experience when someone in her family was involved in an automobile crash, ITN’s founder, Katherine Freund, realized that crashes are not the problem—they are the symptom.

The problem: the U.S. transportation system does not meet the mobility needs of normally aging people. If older people do not have good transportation options, they cannot make safe transportation choices.

Katherine set out to solve the underlying mobility problem. That simple goal—to meet the mobility needs of America’s aging population—led to solving problems in resources, logistics, technology and policy.

Equally important, if the Independent Transportation Network® could effectively solve the problem in one community, creating the ITN model in another community could replicate that solution. The outcome: creating a national nonprofit transportation solution for older people who wish to limit or stop driving without losing their independence or compromising their community activity – and doing so with a financially sustainable model for the nonprofit.

### **SOCIAL ENTERPRISE AWARD FOR LEADERSHIP IN FUNDING**

#### **The UPS Foundation**

Throughout its corporate history, UPS has found that it grows by investing in both its business and in the communities they serve. This belief led to the establishment of The UPS Foundation in 1951 to develop and champion innovative solutions to social problems. The Foundation made its first philanthropic investment in the nascent field of social enterprise in 2003, supporting a funder conference sponsored by SEA in cooperation with Grantmakers for Effective Organizations. The UPS Foundation professionals used the event as a learning experience for themselves as much as other funders in attendance, all there to better understand effective ways of contributing to the earned income development of nonprofits.

Having liked what they heard, The UPS Foundation subsequently invested in growing the infrastructure of the field of social enterprise. They decided to become the Lead sponsors of the 5th Gathering and then made a two year grant to Social Enterprise Alliance to strengthen and improve its own organizational infrastructure and outreach efforts. More recently, they made a decision to invest in individual social enterprises and have provided a grant to REDF to serve as their intermediary in doing so.

Through its continually growing commitment to social enterprise development, The UPS Foundation embodies the qualities of funding leadership, vision and innovation highlighted by this award.

## **SOCIAL ENTERPRISE AWARD FOR MEMBER EXCELLENCE**

### **Dave McDonough, Volunteer Center of Orange County**

This award is given to an SEA member who has helped advance the field in partnership with Social Enterprise Alliance. In 2004, Dave approached SEA to work with them to develop its Center for Social Enterprise at Volunteer Center Orange County. Its mission is to provide leadership and support to the nonprofit community and its business partners in developing successful social enterprises. SEA provided guidance around program development for both a conference and ongoing learning offerings. The Center's members are affiliate members of SEA and many of the online resources it offers are those of SEA.

Two new programs have launched in relation to the Center, furthering the field in Southern California – the SELFund (Social Enterprise Loan Fund) providing financing to promising social ventures and the Social Enterprise Institute which facilitates leadership forums where peers share best practices, seek confidential help, build a regional network and access a private brain trust.

## **2007**

*(SOCIAL ENTERPRISE LEADERSHIP AWARD, SOCIAL ENTERPRISE COMMUNITY VISIONARY AWARD, SOCIAL ENTERPRISE INNOVATION AWARD)*

## **SOCIAL ENTERPRISE LEADERSHIP AWARD**

### **Barbara Massey, Vice President, Bobby Dodd Institute**

Before the concept of social enterprise had a name and the popularity it enjoys today, Barbara Massey was pioneering its principles at Bobby Dodd Institute in Atlanta. Ms. Massey has been in charge of the start-up, growth, and sustainability of social enterprises that have improved the lives of thousands of BDI clients during her 25 years of service.

Barbara's leadership is most clearly demonstrated in her ability to identify, seize, and develop opportunities for businesses that create suitable employment opportunities for people with a variety of disabilities and to grow such businesses over time and with limited resources. The janitorial business Barbara started with a \$15,000 grant now generates almost \$700,000 in annual income and employs more than 40 people.

Genuine leadership stands the test of time, and many of the social enterprises started by Ms. Massey have been in operation for more than 20 years, contributing 65% of BDI's annual budget. Barbara's steady hand has made BDI a leader in the Atlanta community and a model for social enterprisers everywhere.

## **SOCIAL ENTERPRISE COMMUNITY VISIONARY AWARD**

### **Dr. Lula Ballton, CEO, West Angeles Community Development Corp.**

Dr. Ballton created the West Angeles CDC in 1994 in order to "increase social and economic justice, demonstrate compassion and alleviate poverty as tangible expressions of the kingdom of God through the vehicle of Community Development". Under her leadership, the WACDC is playing a pivotal role in the revitalization of south Los Angeles' diverse neighborhoods and helping thousands of families.

Fees-for-service provide 25% of the revenue required to fund WACDC's many programs, including emergency shelter, food and transportation, job referral and placement, mediation training, small business development, and homebuyer education programs. A resourceful visionary, Lula has given her organization a competitive edge by engaging such notables as Denzel Washington, Magic Johnson, Stevie Wonder and others to raise the visibility of the WACDC and promote its array of services.

Dr. Ballton's is a published author, including articles in the National Black Law Journal, and a lecturer in such programs as the Harvard University Summer Leadership Institute. A tireless visionary, she is active in the National Congress of Community Economic Developers, Christian Community Development Association and Habitat for Humanity.

## **SOCIAL ENTERPRISE INNOVATION AWARD**

### **Chandler Arnold, Executive Director, First Book Marketplace**

Led by Executive Director, Chandler Arnold, the First Book Marketplace is an online bookstore that offers high quality children's books to community tutoring, mentoring, and family literacy programs. By aggregating demand, the Marketplace negotiates bulk purchases that were previously impossible, lowering the purchase price 50-85% below retail prices. The Marketplace has revolutionized the way First Book advances its core mission of distributing books to children from low-income families while generating sustaining revenues.

During its pilot phase the Marketplace realized more than \$1 million in gross sales and placed well over half a million books into the hands of our country's hardest to reach children. This social enterprise currently serves programs in all fifty states and has been approached by partners in Canada, Mexico, and India to expand its model to these countries as well.

The Marketplace innovation is simple, yet delivers profound impact. Henry Ford understood that revolutionizing transportation meant making his product affordable to the masses. In the same way, the Marketplace offers small community programs across the U.S. cost effective access to new books for the first time ever.

## **2008**

*(Social Enterprise Innovation Award, Social Enterprise Leadership Award)*

## **SOCIAL ENTERPRISE INNOVATION AWARD**

### **Enrique Balaguer, RealBenefits**

Enrique Balaguer led the startup of RealBenefits in 2001 guided by a simple vision; namely, that innovative web-based technology put in the right hands could transform the way lower income families learn about and enroll in health and human service programs. Today 150 organizations in 3 states use RealBenefits. They include hospitals, community health centers, local government, and community organizations. Collectively they have helped connect 110,000 eligible low income households to more than \$400 million worth of food stamps, health care, energy assistance and other benefits. Under Enrique's leadership RealBenefits is undertaking a 16 state expansion following a social enterprise model that uses earned income from sales to large health care providers to build the business and subsidize the use of RealBenefits technology by community based organizations.

## **SOCIAL ENTERPRISE LEADERSHIP AWARD**

### **Allen R. Bromberger, Perlman & Perlman**

Allen R. Bromberger is a partner at the New York City law firm of Perlman & Perlman. Allen has more than 25 years of experience representing nonprofit organizations, charities, and private foundations in a wide variety of business matters and transactions. In addition to his work with traditional nonprofit and philanthropic entities, he specializes in representing for-profit and nonprofit social ventures, nonprofit /for-profit joint ventures, commercial co-ventures, and nonprofits engaged in substantial earned revenue activities. Allen has generously offered his expertise on the Social Enterprise Alliance listserv, where he frequently responds to questions about tax, governance and structural issues posted by social enterprise practitioners. He is the author of numerous articles on nonprofit legal matters and a frequent lecturer and speaker on nonprofit legal issues. He also participates on panels and discussions about the financing and structuring needs of social enterprise and is an advocate for changes in legal and tax policy related to social enterprise.

**2009**

*(SOCIAL ENTERPRISE INNOVATION AWARD, SOCIAL ENTERPRISE LEADERSHIP AWARD)*

**SOCIAL ENTERPRISE INNOVATION AWARD:**

**Kevin McDonald, Triangle Residential Options for Substance Abusers, (TROSA)**

Kevin McDonald is the President & CEO of Triangle Residential Options for Substance Abusers, (TROSA), a nationally recognized non-profit, two-year, residential recovery program located in Durham, NC. Kevin came to Durham in 1994 to establish TROSA and has shaped TROSA into a unique 501(c)(3) entrepreneurial organization dedicated to helping substance abusers change their lives.

Under Kevin's leadership, TROSA has become an outstanding example of social entrepreneurship. With the goal of becoming self-supporting, Kevin created a variety of business enterprises that serve a dual function of educational venues as well as revenue generators. The vocational training businesses include moving, lawn care, Christmas tree sales, used furniture store, picture framing, and catering.

Key elements of the program include vocational training, education, communication development and mentoring. In addition, TROSA's aftercare program offers low-cost housing, affordable transportation and ongoing support to graduates.

Kevin has received many awards for his efforts. In 2001 he was selected from a pool of over 3000 nominees for the Leadership of a Changing World Award. Kevin is also a past recipient of the Edna B. Spaulding Founder's Award. At the 5th Gathering of the Social Enterprise Alliance in San Francisco, TROSA received the first place founder's award in the mature enterprise category.

Kevin is married to Sue McDonald and has two sons, James and Joseph.

**SOCIAL ENTERPRISE LEADERSHIP AWARD:**

**David H. Carleton, Kitchens With Mission**

David H. Carleton is the Founder and Director of Kitchens With Mission, a nonprofit organization working to build and sustain communities that provide food-service based training and employment for individuals facing barriers to employment.

David works as a national catalyst for the replication, integration and growth of food-service based training and employment models rooted in social enterprise.

Prior to launching Kitchens With Mission, David directed FareStart's Communications, Community Relations and Business Development efforts. With the launch of Kitchens With Mission in 2006, David successfully achieved a top strategic priority of FareStart: to impact more lives by helping other organizations replicate the FareStart model.

David has applied over 14 years of broad management, business development and communications experience to the growth of FareStart, Kitchens With Mission and all KWM Partner Programs nationwide. His experience in publishing, media and Internet related fields has been well adapted to developing social enterprise and positive social outcomes for individuals facing barriers to employment.

Born in New York City, David has lived in the Seattle area since 1995. He has a BA from McGill University and a Masters in Communications from Northwestern University.