

**CHESTER COUNTY COMMUNITY FOUNDATION
GRANT PROPOSAL SUMMARY SHEET**

Date **03/06/2023**

Contact Information

Organization Name: **Social Enterprise Institute USA**
Address: **100 S. Queen Street, Lancaster PA 17603**
Phone: **717-422-2080**
Website: **www.socialenterpriseigroup.org**
Year Incorporated: **2011**
FEIN: **30-0604904**

ED/CEO Name: **James Reeb**
CEO E-mail: **reebj@socialenterpriseigroup.org**
Board Chair Name: **James Reeb**
Board Chair Approval (check here): **X**
Primary Contact Name: **Joaquin Villarreal**
Primary Contact Email: **villajp@gmail.com**

Organization Information:

Field/s of Interest:

Arts, Culture & Humanities Environment/Animal Welfare Education
 Health Human Services Religion

Mission: Social Enterprise Institute U.S.A. is a 501(c)3 charity with the mission to help organizations prepare, develop, and grow as social enterprises to maximize their mission impact and achieve financial sustainability. Good2Well is a program of S.E.I. run by two of our senior fellows.

Geographic Areas Served: All of P.A., including Chester County and Lancaster Country, where we are based.

Describe Population Served & Annual Number of People Served: Our Good2Well program is expected to support more than 10,000 within 3 years.

Annual Budget: \$650,000

<input type="checkbox"/> 75 % of budget for program expenses	<input type="checkbox"/> 4 # of Full-Time Equivalent Paid Staff
<input type="checkbox"/> 15 % of budget for administrative expenses	<input type="checkbox"/> 2 # of Board Volunteers
<input type="checkbox"/> 10 % of budget for fundraising expenses	<input type="checkbox"/> 0 # of Active Non-Board Volunteers
100 % total	<input type="checkbox"/> 0 # of Volunteer Hours

Top 3-5 funding sources: Advisory fees, grants, contributions

Is this grant proposal for: Capacity Building or General Operating - Supporting Good2Well Program

If Capacity Building Proposal, the focus is: Field of Interest

Mission, Vision & Strategy Governance & Leadership Partnerships & Collaborations
 Fundraising, Development & Marketing Technology Other: **Field of Interest**

Grant Amount Requested from the Community Foundation: \$50,000

Proposal Summary: Good2Well is a program that is a very unique mission-driven marketplace to help people create a supplemental or full-time income. It is designed to help nonprofits attract and acquire human talent. You can think of it as a talent marketplace for mission-driven people supporting the missions they are passionate about. As a tech-enabled marketplace community, nonprofits, foundations, charities, b-corporations, and other socially minded businesses (the 'mission-driven' industry) can more efficiently find and retain mission-driven people and organizations from around the world, offering their knowledge, skills, and more to support the sector and missions they are passionate about! The Good2Well platform is designed to create jobs and additional income opportunities to help people in need while addressing the mission-driven industry's current needs for services, talent, volunteers, and supporters. People can join and offer their knowledge and skills as freelancers, remote workers, volunteers, or full-time employees to support mission-driven organizations' needs while getting additional compensation through a unique token-based awards program.

CHESTER COUNTY COMMUNITY FOUNDATION: GRANT PROPOSAL NARRATIVE



Case for Support

Social Enterprise Institute U.S.A. is a 501(c)3 charity with the mission to help organizations prepare, develop, and grow as social enterprises to maximize their mission impact and achieve financial sustainability. Good2Well is a program of S.E.I. run by two of our senior fellows.

Good2Well, L.L.C. is a tech-enabled marketplace community where nonprofits, foundations, charities, b-corporations, and other socially minded businesses (the 'mission-driven' industry) can more efficiently find and retain mission-driven people and organizations from around the world offering their knowledge, skills, and more to support the sector and missions they are passionate about!

The Good2Well platform is designed to create jobs and additional income opportunities to support millions of people in need while addressing the mission-driven industry's current needs for services, talent, volunteers, and supporters.

Good2Well is where mission-driven people do good (socially) to do well (financially) and where the economic value of social impact is captured and distributed among the community.

Key Impact Attributes include:

- We are on a mission, using technology to help millions of people.
- We are launching in P.A. and the northeast as our first markets and plan to empower people in the community to create supplemental or full-time income in support of nonprofits.
- Staff for the program will be mainly in Lancaster and York counties.
- The technology for Good2Well is already built and ready to be launched in Q1 2023.
- Good2Well makes it easy for mission-driven organizations to find and hire (full-time, freelancers, remote workers) mission-driven people, and local or global services.
- We are filling the "gap" for nonprofits to find cost-effective talent to achieve their missions easily.
- We offer a unique reward system that helps both sides by rewarding people, providing their talents for social causes, or volunteering their time.
- We are addressing "future of work" trends toward outsourcing, freelance, remote work, and flexibility by bringing talented people and organizations together to support the mission-driven industry.
- Good2Well creates strong support/impact for many:
 - Mission-driven people who want to support nonprofit and charitable causes.
 - Individuals who are looking for additional income and more meaning in their work
 - Mothers or single parents who need work flexibility and to work from home.
 - Childcare and education costs are high and rising.
 - Disabled workers who are challenged to work in a traditional workplace.
 - Minority communities and people who face barriers to finding opportunities.
 - Veterans looking to offer their skills.
 - The promotion of Equity, Diversity & Inclusion by incentivizing millions of individuals from diverse backgrounds to participate in the mission-driven industry.
 - There tends to be a trade-off between nonprofit work and compensation, which excludes millions of individuals from the industry.

- For example, World Economic Forum predicts that 50% of the U.S. workforce will be freelancers by 2027. More than 54% of Google's workforce is already contractors today.
- There is no other commerce-driven marketplace explicitly designed to meet the needs of this global industry.
- We promote diversity and believe Good2Well creates opportunities for the small businesses and independent workers of the future.
- Good2Well breaks down geographic barriers to create hiring and income creation opportunities in the mission-driven space for people no matter where they live.
- The business model allows the operations to be self-sufficient within a short time and for the Company to contribute some of its earnings back to charitable organizations.

Talent is everywhere, but opportunity is not. Good2Well amplifies people's stories, breaks down barriers, and helps people and organizations create income streams as freelancers, remote workers, or full-time employees to support missions they believe in. Many people with the talent and skills to support nonprofits are currently not contributing to causes they support solely for financial reasons (e.g., the need for supplemental income).

The value of a marketplace in this industry

A marketplace is a community of like-minded people who work towards a common goal. The mission-driven industry supports the needs of people and the planet, and there is no better industry to create a marketplace designed as a community to support each other's needs in a new and unique way.

There are more than 10M nonprofits, foundations, and charitable organizations worldwide and more than 12.3M people in the industry. This is over five and a half times more workers than the nation's real estate industry, and if this were a country, it would represent the fifth largest economy in the world.

Freelancing, remote, and independent work, along with support for small businesses, is rising across the nation and in the Nonprofit sector. This is partially driven by the need for many people to have supplemental income, to work from home, and for employers to have flexibility in hiring. Yet, there is currently no industry-wide platform to address these needs.

Services

The marketplace platform has sellers who offer their services, knowledge, and skills and buyers who are nonprofits, foundations, charities, and socially conscious businesses (e.g., b-corporations). Sellers are people and organizations worldwide who join the community to create income, expand their business, and be part of a like-minded community. This includes people, students, small businesses, enterprises, and more. Some of the many services include:

- | | |
|-------------------------------|------------------------------------|
| ● Marketing Services | ● Accounting |
| ● Consulting | ● Auditing |
| ● I.T. Support | ● Fundraising |
| ● Website Development | ● Video Editing |
| ● Entity formations | ● Nonprofit Bookkeeping |
| ● Grant work | ● Payroll |
| ● Volunteers | ● Board Development Consultation |
| ● Website Content Development | ● Audit Preparation |
| ● Social Media Advertising | ● Fiscal Sponsorship |
| ● Legal | ● Develop an Organizational Budget |

People and organizations join the marketplace and create a "Showcase Page" (see exhibit 1) to show their skills, personality, work portfolio, and more using video, images, text, links to social media, and more. It's an interactive way to tell their story. They then can offer freelance services, get sales leads/opportunities, be available for full-time or remote work, and more.

Unlike typical freelance sites that take 20% or more of someone's income, the sellers pay a small monthly fee and get all the above services. This massive cost reduction is designed to help sellers achieve more and build a client base for long-term revenue.

Buyers can review a seller's showcase page and engage with them for part-time work, as a freelancer, full-time employment, and more. This is a massive global mission-driven talent pool. Buyers can also invite sellers to bid on projects, create their Showcase page, look for project volunteers, and receive donations from supporters.

Unique Reward Program

Good2Well incorporates a proprietary reward program technology designed to capture the otherwise lost economic value of social impact and feed it back into the mission-driven community and its members for financial well-being.

The Good2Well token is a matching program where individuals get a ~25% premium over their compensation for 'doing good' (e.g., completing a job or task for a nonprofit). This simple mechanism has a threefold effect: i. it rewards the individual providing their skills for a good cause (often below market rates), ii. it allows mission-driven organizations to access a broader and more diverse set of workers; iii. since the tokens can only be spent within the platform, it generates a multiplying economic effect by fueling more activity and 'business' transacted within the platform.

In effect, the G2W token will have captured social goodwill on each engagement in a tangible way and will utilize it to re-energize the mission-driven economy. The tokens represent 'discounts' for the holders and supplemental compensation for the receivers.

Some Examples

A person with marketing skills joins the platform and creates a showcase page to share their knowledge and experience. This interactive page is viewed by a nonprofit looking for assistance who can connect with the seller and hire them for services through the platform. The seller now has a new client, and the platform was only paid \$20 monthly for as many opportunities as they receive. Invoicing, payment processes, and more can be managed on the platform. There are hundreds of examples. Here are a few.

A foundation is looking to fill a senior position, and using A.I. and advanced search; they can research and find candidates showing that they are available for assignments. Searches can be local or global, based on keywords and many other criteria, and open doors to more diverse applicants.

A charity is looking for volunteers for a project in a different state. They can publish a request and get volunteers.

A nonprofit focused on veterans can find freelancers, remote workers, and more who may be veterans or have experience working with veterans.

A minority-owned small business specializing in fundraising can join the platform and show its skills. A buyer can engage with them for their services. Being in the marketplace gave the small business an opportunity, and the buyer could find and hire a talented company they would have never known about.

An academic journal is looking for reviewers for peer-reviewed scientific articles but can't find them because of the lack of compensation offered (a growing problem in the industry).

An underemployed professional who needs supplemental income to support their family but needs an efficient way to market their skills in their free time.

People with disabilities, lack of transportation, or areas without local job opportunities can showcase their talents and experience and be found by "buyers" who can offer them options they would never see. This can change lives.

The efficiency, scale, and curation of opportunities available on the platform will ensure that all of the above scenarios are addressed efficiently, creating income opportunities, solving operational concerns for organizations, and generating an economic multiplier effect through the G2W tokens that will be earned and spent on the platform.

Technology

The team has already developed the marketplace platform and technology with all the available features and services. After some additional marketing work, the services can go live. The infrastructure is on Amazon Webservices and has unlimited scalability.

Support

Good2Well is seeking philanthropic support at this critical time in its inaugural year. With your support, we can reach our goal of \$500,000 needed to achieve profitability; Good2Well will be able to launch the marketplace in the first half of 2023.

Sustainability and Giving

We intend to be profitable in less than 12 months with your assistance. We plan to begin giving back to mission-driven organizations immediately, donating a percentage of our profits or through programs and discounts on the platform to help many nonprofit organizations and individuals.

Use of Funds

Good2Well will use philanthropic investments to support our mission of creating an online community to cultivate financial and social impact in its members' lives and support the industry. Specifically, we will use these funds to attract sellers to the platform to join, find opportunities, and engage with nonprofits, foundations, and charities to join for free and utilize this unique community to help their operations while financially supporting participating individuals.

Impact

Good2Well intends to make a significant impact on people's lives. Creating income solves problems, empowering people to share their skills with others creates confidence, social interactions are a critical part of humanity, and when people succeed, they help others, and the cycle continues.

Struggling financially also leads to mental illness, alcohol and drug abuse, marital and family challenges, and even homelessness. By helping people financially, we believe we can help some people avoid these challenges.

This is a plan to help people create income and help those that want or need full-time income with the flexibility required to work from anywhere or find full-time employment in the industry they love.

In terms of measuring impact, the table below shows the result in years two and by year 5. This assumes that, on average, sellers in the community receive a value of approximately \$20,000. This can be for finding full-time employment, being hired as a freelancer or remote worker, or a small business receiving new revenue. We believe this could be conservative when considering the global market size.

By year five, there could be as high as a million people in the community whom you consider sellers, buyers, volunteers looking for ways to help, and even donors looking for places to provide financial support. Another factor that needs to be shown is students who will be available for internships.

Table 1.0

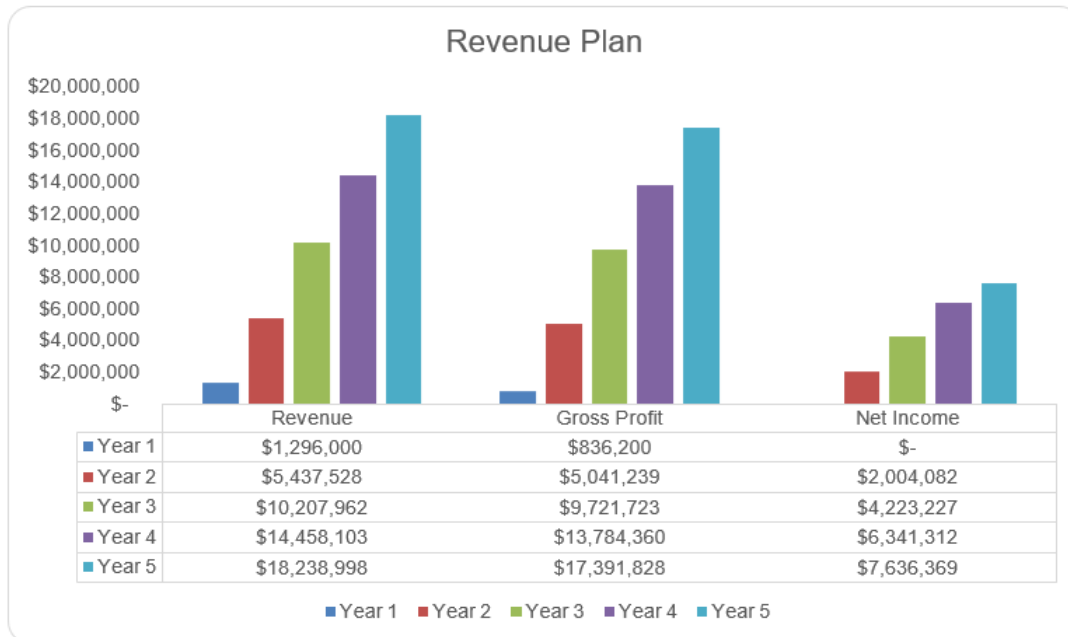
	Year 2	Year 5
Freelancers	5,000	25,000
Fulltime work (remote or on-site)	5,000	25,000
Annual impact per person	\$12,000	\$12,000
Annual total impact	\$120,000,000	\$600,000,000

Future/Next phase

Our next development phase will focus on using a percentage of the revenue generated by Good2Well to help the community by offering free training courses, paying membership fees for people in need, and much more.

Financials

Our financial model shows us generating cash flow very quickly as we help people to join Good2Well as sellers to offer services and buyers to support them. We anticipate a supportive community, and financially, we expect to be cash flow positive within 18 months.



The chart above shows our revenue projections over the next five years. During our first year, we need help from philanthropic support, but after the first year, we will be sustainable on our own but may continue to look for support on specific projects. The model is based on sellers paying a monthly fee of \$20 as individuals, \$10 as students, and \$30 for a business, with a percentage of people not paying based on financial needs. There are no other fees, and each person or organization can keep all opportunities to create income and build its customer base. A core goal is to help people generate income and retain as much as possible. Other platforms keep 20% or more of a member's income.

Leadership

Below is our current leadership team, which is expanding with more members and advisors. During the early stages of development, the senior team does not take any salary, and a group of people early in their careers will be utilized to keep costs down.

Joaquin Villarreal, MBA-CEO, is a Senior Fellow with the Social Enterprise Group. Joaquin serves as the inaugural Director of Entrepreneurship at Franklin & Marshall College. Before starting the Entrepreneurship Initiative at Franklin & Marshall, Joaquin founded and led the Entrepreneurship Initiative at the Tuck School of Business at Dartmouth, where he also served as Faculty Advisor. In addition, Joaquin has held positions in strategy consulting with L.E.K. Consulting and Accenture, where he led SAP software implementations for Fortune 500 companies. Joaquin has started and advised multiple entrepreneurial ventures in diverse entertainment, technology, and real estate industries. Joaquin holds a bachelor's degree in Industrial Engineering from Universidad Nacional de La Plata (Argentina) and a Master's in Business Administration from the Amos Tuck School of Business at Dartmouth.

Stephen Catanzano, C.T.O., is a Senior Fellow with the Social Enterprise Group. Stephen is also a Senior Technology Industry Analyst with Enterprise Strategy Group and has more than 25 years in leadership positions and with startup ventures, including the creation of a SaaS managed service company (Safecore), an equity crowdfunding platform designed to help entrepreneurs (Jumpstart Micro), enterprise software for email archiving (Fast Archiver), and the first broadband CLEC in M.A. (Digital Broadband Communications) which was designed to bring high-speed broadband to schools and homes. Stephen has a B.S. in Finance/Economics from Bentley University.

Jim Reeb, C.P.A., M.B.A., D.B.A., FRICS. Jim has more than 40 years of management experience. He is currently President and Chief Impact Officer for Social Enterprise Institute (S.E.I.), which is focused on addressing persistent social problems. The Social Enterprise Group is part of S.E.I. Jim served as the head of Cushman & Wakefield's Global Business Consulting Practice Group, a Partner of Deloitte & Touche's global consulting practice, a Development Partner at Liberty Property Trust, and a Tax Consultant with Pricewaterhouse Coopers. Jim plays a leadership role in supporting community development and the Innovation Transfer Network of the state of Pennsylvania, co-managing Principal of T.A.G. Impact Partners, and was the President of Institute Saint Onge, which focused on humanitarian supply chain development and financing.

Jim's education includes a dual bachelor's degree in Business Administration/Accounting and Civil/Industrial Engineering (with honors) and a Master's degree M.B.A. in Real Estate & Urban Land Studies (with honors) from Temple University. His post-graduate work focused on Cross-Cultural Management as part of his executive D.B.A. at Glasgow University, Scotland, and a post-graduate fellowship P.M.D. in Strategic and Organizational Leadership at Harvard University.

Vision

Our vision is to be an inclusive and diverse community that helps create income, increases education, trains people on skills, provides knowledge and answers to those in need, and truly helps people live better lives. More than anything, we envision Good2Well as an example of how positive social change and business can evolve hand-in-hand rather than at odds with each other.

In addition to income to help people solve their financial challenges, there are other key benefits:

- People can use their skills to support the missions of nonprofits they believe in for supplemental or total time income with rewards for their efforts, while nonprofits can broaden the talent pool through the Good2Well platform. They can find talent, volunteers, post projects and events, and more.
- Parents can work from home and reduce childcare costs.
- People can work from anywhere, live in more affordable locations, and help revitalize communities.
- Extra income to pay down student loan debt, save for a down payment on a home, take care of medical bills, save for the kid's college, and more.
- Retirees can create income by offering their skills without leaving home.
- People with disabilities can create income from home on Good2Well.
- Many urban areas lack work opportunities. On Good2Well, they can reach far outside their communities for opportunities.
- College students can do "virtual internships" for money and to build a work resume. It is estimated that many college students intend to be entrepreneurs, and Good2Well provides that pathway to financial independence.

We are confident that with your help, we can help nonprofits with their talent, volunteers, awareness, and global reach while supporting thousands of people who need income, especially during the current economic times. 2023 may significantly challenge people, and we hope to help.

We would like your support to help us meet our goals and greatly appreciate your consideration.

Sincerely,
Joaquin Villarreal, MBA
CEO, Good2Well, LLC

Exhibit 1. Sample Good2Well Showcase Pages

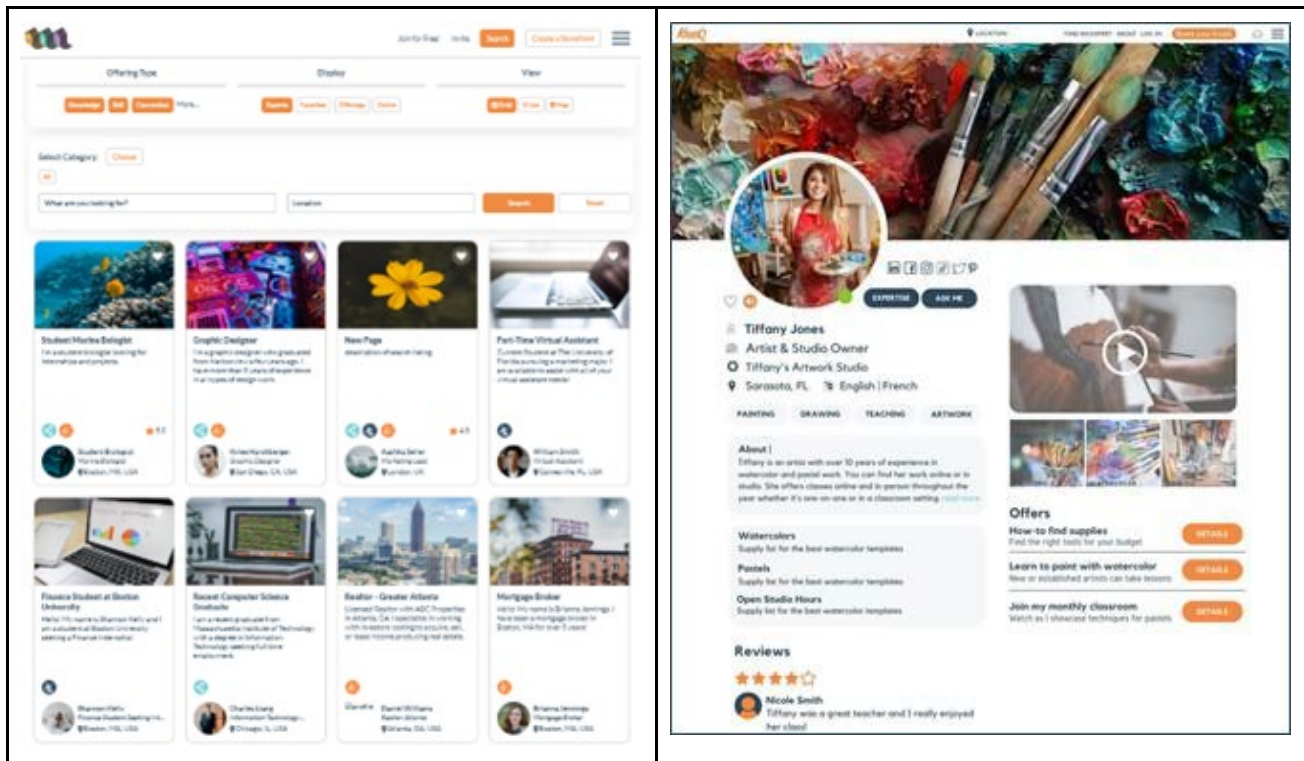


Exhibit B – Challenges faced by people where additional income will help.

Over the past 20 years, average household incomes have increased only 14.4%, while during the same time, we have seen housing and education costs increase 5X (times) this level. This has profoundly affected Americans, many racial groups, and our well-being.

Consider these statistics:

- 78% of workers live paycheck to paycheck (U.S. Bureau of Labor and Statistics).
- Only 37% of workers could come up with \$500 in an emergency (Forbes).
- Economic hardships are the leading cause of depression and family breakups and often lead to drug addiction and homelessness.
- Student loan debt has exceeded \$1.7 Trillion in the U.S. This is a 20-year+ burden for many.
- In a standard student loan repayment plan, a borrower pays 10% and 20% of their income.
- We have a massive population of "Underemployed" workers, and some statistics show it may be as high as 40%. These people work full-time but still don't make enough.
- An estimated 5.1% of U.S. households are "unbanked," meaning they don't make enough even to feel the need to have a bank account.
- There are many barriers to starting a new business. \$57B is spent on Google AdWords, and \$134B in SEO can be found on an internet search. Freelancers and small businesses are lost.



Description of Social Enterprise Institute U.S.A. Services

The Social Enterprise Group was founded to address some of the world's most pressing social issues by developing vibrant and sustainable social enterprises. We believe that social enterprise is the most efficient and effective means to address social problems. The Social Enterprise Group helps organizations start, scale, and sustain social enterprises. We achieve this by helping our clients develop their operational knowledge, revenue models, and asset base so they can maximize their social impact.

Founded in 2010, Social Enterprise Group is an integrated group of 501(c)(3) nonprofit public charities, including Social Enterprise Institute U.S.A., the board of Social Enterprise Foundation controls that. Our mission is to help organizations prepare, develop, and grow as social enterprises to maximize their mission impact and achieve financial sustainability.

Our History

The Social Enterprise Group had as its origin two nonprofit organizations and a community health development fund founded between 2010 and 2013 with a mission to help address some of the world's most pressing social issues through social enterprise development. During this time, the Group worked with the following:

2010 – 2015

- Industrial/Logistic Centers – 16 clients, including Prologis (P/k/A Liberty Property Trust)
- Manufacturing Facilities – 12 clients including P&G, Merck, Eli Lilly
- Healthcare and Social Services – 15 clients, including Jane Todd Crawford (K.Y.), Lancaster General (Penn Medicine), Susquehanna Health Systems (UPMC)

2015 – 2019

- The Social Enterprise Institute @ Elizabethtown College was established and operated as a program under the Office of Sponsored Research and Programs to:
 - Fulfill the requirements of several grants designed to provide seed capital for 15 new startup social enterprises.
 - Collaborate with faculty and students to provide the opportunity for applied research and real-world learning experiences by participating as resources on S.E.I. client projects.
 - Continue working with and through organizations by providing market feasibility, corporate social responsibility, enterprise development, and financial advisory services to the following:
 - Industrial/Logistic Centers – clients include Industrial Development Authorities and Community Development Organizations.
 - Manufacturing Organizations – clients include firms ranging in size from global to local (AMES, Stroopies).
 - Healthcare, Housing, and Social Services – clients include UPMC, Penn Medicine, ECHOS, Alliance Housing, and Healey International Relief Foundation.
 - Education – clients include K1-12 and Institutions of Higher Education.
 - Impact Investment Funds – clients include BB&T Community Impact Investment (Grant), Penn Ventures, IFC Farm Fund, and Ghana Impact Fund.
 - Social Enterprise Development Organizations – clients include Central Penn Food Bank, Champion for Kids, and Popped Culture.

2019 – Present

- The Social Enterprise Group was formed, integrating Social Enterprise Foundation, Social Enterprise Institute U.S.A., and Social Enterprise Properties. The Social Enterprise Group continues to expand on the work started in 2010-2019 and to scale by:

- Working with and through client organizations addressing the social determinants of health to maximize their social impact. Client examples include: Alkebulan (Ford Foundation Grant – advancement of the arts), Logos Academy (New Markets Tax Credits – a new high school), MISSIO-Polis Institute (Eli Lilly Foundation Grant – startup social enterprises), Riverside Discount Grocery Outlet (Robin Hood Foundation grant – food insecurity solution development), Treasures Markets (New Market Tax Credits, state and local grants – workforce development), Alliance Housing (low-income tax credits – affordable housing), and large-scale advanced manufacturing centers (state and local grants – employer expansion N.V. and N.C.).
- Affiliating with Social Enterprise Institute International based in Scotland as its U.S.A. value-added reseller of online educational programs focused on social enterprise entrepreneurship.
- Expanding S.E.G. resources to include over 10 Senior Fellow Project Directors and 20 Senior Fellow Subject Matter Experts.

I. ATTACHMENTS

1. Copy of 501 (c) (3) federal tax-exempt letter
 2. List of Board of Directors, with their affiliations
 3. Most recent annual report & financial statement, audited if available
 4. Itemized organizational operating budget with actual results for prior fiscal year & current fiscal year to date
 5. If capacity building initiative, itemized budget - NA
 6. Current strategic plan. If your nonprofit does not have a current strategic plan, explain why.
- Email proposals to grants@chescof.org