



Guiding the Journey to Responsible Living™

Strategic Business Plan

Presented to:

**The Zoeza Group, LLC
Board of Directors Meeting**

August, 2008

CONFIDENTIAL

The business plan for the Zoeza Institute will be presented in the following sections:

- **Zoeza Group Update**
- **Definitions**
- **Section 1: Problem Context**
- **Section 2: Strategic Overview**
- **Section 3: Operational Plan**
- **Action Items**

The Zoeza Group, parent company of the Zoeza Institute, is a full-service consulting firm specializing in organizational assessment, strategic planning, executive coaching, and instructional design. The firm specializes in creating solutions for clients in the social sector internationally. Recent projects include:

- **Facilitating the development of a formal partnership between the *National Educational Association (NEA)* and the *National Baptist Convention*. Leading the development of integrated training curricula design and national implementation programming.**
- **Assisting *Stanford University (California)* with the development of a structured partnership with *Teachscape, Inc.* to create, administer, and deliver distance learning solutions for teachers and administrators of *English Language Learners (ELL)*.**
- **Teaching rookies from the *National Football League (NFL)* principles of entrepreneurship and community reinvestment.**
- **Planning the development of a district-wide strategic planning process for *Chester Upland School District* (located outside of Philadelphia) to address, among other issues, the low proficiency rate of graduating students.**
- **Conducting annual research studies for *USA Football* identifying, by a coded methodological model, the best football state in America.**
- **Designing a research study, in collaboration with the *Wharton Sports Business Initiative*, to evaluate the best approaches to educating professional athletes across sports.**

Definitions

This business plan repeatedly makes reference to terms associated with, and relevant to, the development of troubled youth. For consistency of meaning, this document will refer to these terms as following:

Term	Definition
Adjudication	The act of a court in making an order, judgment, or decree. A judicial decision or sentence.
Apprenticeship	A person who works for, and is professionally mentored by, a skilled craftsman in order to learn a trade.
At-Risk	Youth placed outside the homes of biological family members.
Community Home	A type of group home usually arranged through a government or social-service agency that provides remuneration for expenses.
Comprehensive Transition Services	Services and resources provided for the purpose of helping troubled youth transition to independent living situations, including mentoring, supplemental education, training, and job placement and living assistance during and after the residential living/agency experience.
Dependency	Determined by a hearing whereby the question of juvenile care by a responsible adult is evaluated.
Juvenile Delinquency	Conduct by a juvenile characterized by anti-social behavior that is beyond parental control and therefore subject to legal action.
Development Resource Portal	Service offerings that include professional network, economic planning, counseling, and information services that will empower at-risk youth to independence.
Foster Care	The raising or supervision of foster children, as orphans or delinquents, in an institution, group home, or private home, usually arranged through a government or social-service agency that provides remuneration for expenses.
Gang	A group of individuals involved in a pattern of criminal acts.
Internship	An advanced student or graduate usually in a professional field (as medicine or teaching) gaining supervised practical experience (as in a hospital or classroom).
Mentoring	A structured and trusting relationship that brings young people together with caring individuals who offer guidance, support and encouragement aimed at developing competence and character (National Mentoring Partnership, 2005, p. 9).
Non- Traditional Family	Living with and being raised by individuals or organizations other than biological or extended family members.
Out-of-Home Care	Core support services provided by a group home or similar facility to at-risk youth.
Public Charity	A 501c(3) non-profit charity that receives the major part of its financial <u>support from the public</u> , rather than from an individual, single entity, or small group of supporters.
Private Foundation	A 501c(3) non-profit foundation that <u>does not receive major financial support from the public</u> , but, rather, from an individual, single entity, or small group of supporters.
Responsible Living	A lifestyle that is based on assuming responsibility for physical, psychological, moral, social, and environmental well being while achieving independence. Achieving a status of independence.
Successful Transition	Achieving responsible, independent living and thereby making positive contributions to society.
Traditional Family	Living with and being raised by biological or extended family members.
Treatment Team	A group of professionals (case worker, social worker, etc.) organized around the support of a client for the purpose of achieving a successful transition to responsible and independent living.

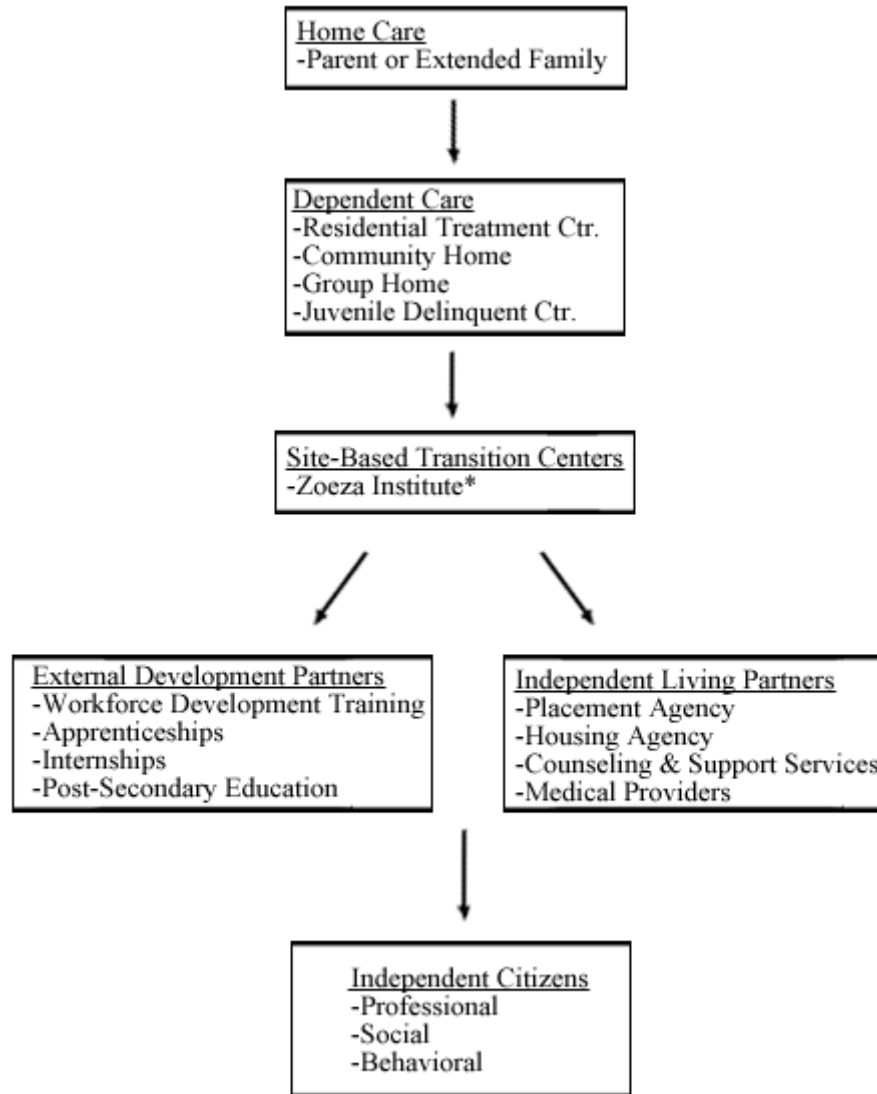
This section of the deck will focus on the problem facing troubled youth in dependent care settings and highlight the need for change.

SECTION 1:

- Development Continuum
- Transition Gap
- Transition Paths
- Transition Statistics
- Regional Center Services
- Intervention Need

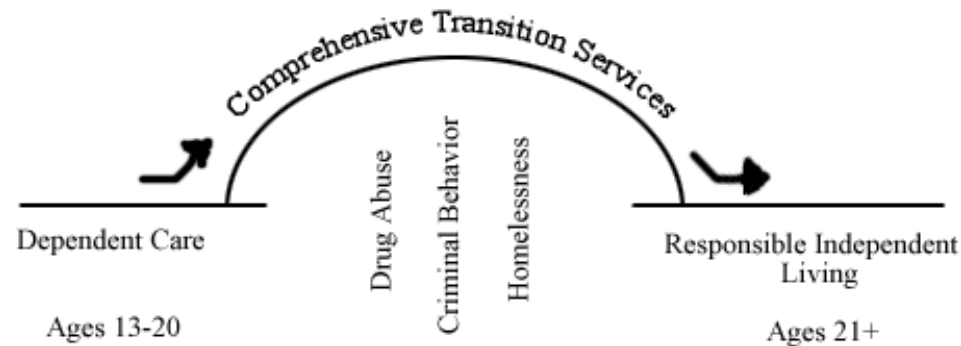
Development Continuum

The journey to responsible living follows a long continuum over many years from adolescence to adulthood.



Transition Gap

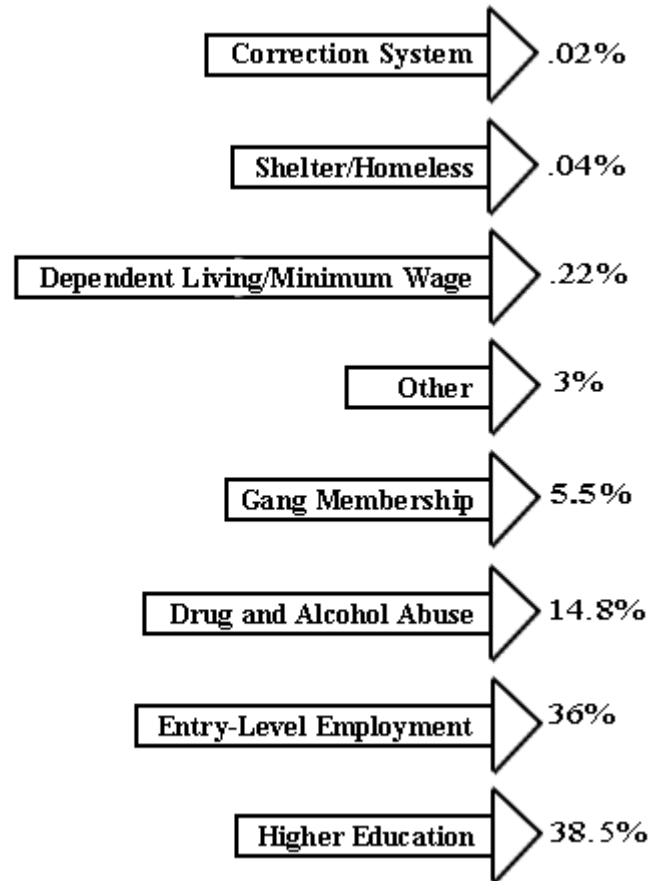
In the United States, there are increasing numbers of youth who are not being prepared for responsible, independent living by the traditional social-educational system. The gap between dependent care and responsible/independent living in non-traditional environments is in need of a bridge.



- ➡ In the absence of traditional parent structures, alternative agencies, organizations, and care facilities exist to attempt to meet this population's basic needs. Presently, these services fall short of the long term needs of these troubled youth's development continuum.
- ➡ In local regions and municipalities, troubled youth are referred to alternative schools and residence treatment programs based on a lack of other placement or support options. These organizations provide housing, education, specialist coordination and follow up field support but do not have bandwidth for transitional programming.
- ➡ Youth participants in these programs suffer because they are not able to realize their educational and vocational potential to become independent and productive citizens. In addition, society suffers by paying the price for this inefficiency in the form of continued tax burden for care, increased incidences of crime, and overall unproductive citizens.
- ➡ What is needed to eradicate this negative phenomenon is a dedicated development institute and resource portal focused on the educational/vocational development and effective transition of youth from residential care to independent living.
- ➡ Since changing the environment in which these youth live is a complex and difficult proposition, guiding and changing the behavior of these youth is an attractive approach.

Transition Paths

Troubled youth who successfully cross the transition bridge to responsible living statistically take one of the following paths:



There is a significant percentage of youth enrolled in various out-of-home care facilities relative to the number of youth in the U.S. at-large. Further, the percentages of these troubled youth who transition to responsible career or educational paths is alarmingly low. The percentages of youth from both traditional as well as non-traditional care environments is explored below and compared against rates associated with school drop-outs, the homeless, and the incarcerated.

Dependent Care Transition Comparison

Positive vs. Negative

Family Type	Negative Path*	Responsible Living Path**
Traditional Family	Lower %	Higher %
Non-Traditional Family	Higher %	Lower %

*Negative Path is defined as a transition from structured dependent care to a troubled situation including school drop out, homelessness, and incarceration.

**Responsible Living Path is defined as a transition a situation of gainful employment and independent status.

Source: Compilation of collective research data from multiple reports.

Negative Breakdown

Family Type	Drop-Out Rate	Homeless Rate	Incarceration Rate	Other
Traditional Family	58%	.04%	.02%	42%
Non-Traditional Family	40%	10%	15%	35%

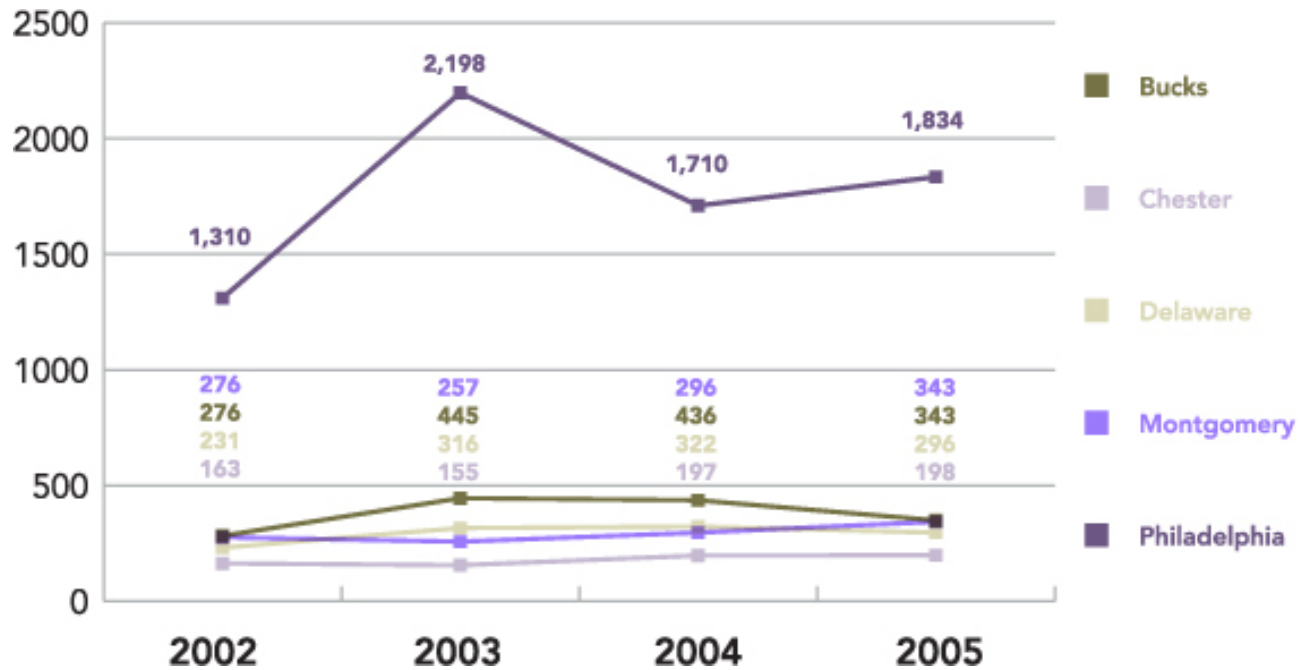
When troubled youth fail to transition from dependent care settings to responsible, independent living situations, society pays a price in various ways. The crisis level dropout rate and the economic costs associated with it in the U.S., particularly in Philadelphia is one prime example.

Drop-Out Statistics

National Drop-Outs	Philadelphia Drop-Outs
<ul style="list-style-type: none"> • Every nine seconds of every school day, on average, a student becomes a dropout. • There were 3.5 million dropouts ages 16 to 24 in 2005, accounting for about 9 percent of that age group. • Three-quarters of state prison inmates and 59 percent of federal inmates are high school dropouts. • Every 600,000 who drop out in any given year cost public health-insurance programs \$23 billion. • Crime-related costs would drop \$1.4 billion if 1 percent of male dropouts ages 20 to 60 finished high school. • Federal investment in second-chance education and training programs have fallen from \$15 billion in the late 1970s to \$3 billion today, adjusted for inflation. <p><i>Sources: Study data compiled by the American Youth Policy Forum; U.S. Department of Education; Peter Muennig, Mailman School of Public Health, Columbia University</i></p>	<ul style="list-style-type: none"> • 8,278 dropouts from 2003 to 2004 • An average of 46 students per day • Loss in region income: Over \$2 billion • Loss in tax revenue: Over \$500,000 • Loss in individual income for dropouts compared to graduates: \$260,000 • Loss in individual taxes: Over \$60,000 <p><i>Sources: 1) Ruth Curran Neild and Robert Balfanz, Unfulfilled Promise: The Dimensions and Characteristics of Philadelphia's Dropout Crisis, 2000-2005 cited in A Collective Effort to Understand and Resolve the Philadelphia Dropout Crisis, Project U-Turn, 2006; 2) Cecelia Rouse, National Study Princeton University (individual income & tax stats).</i></p>

Pennsylvania court ordered juvenile delinquency placements contribute to a significant number of non-traditional family situations. Some of these placements are a result of cases from previous years being brought in for review, so are not a result of charges brought against youth in the current year. Youth placements have gone up in all five Southeastern Pennsylvania counties since 2002.

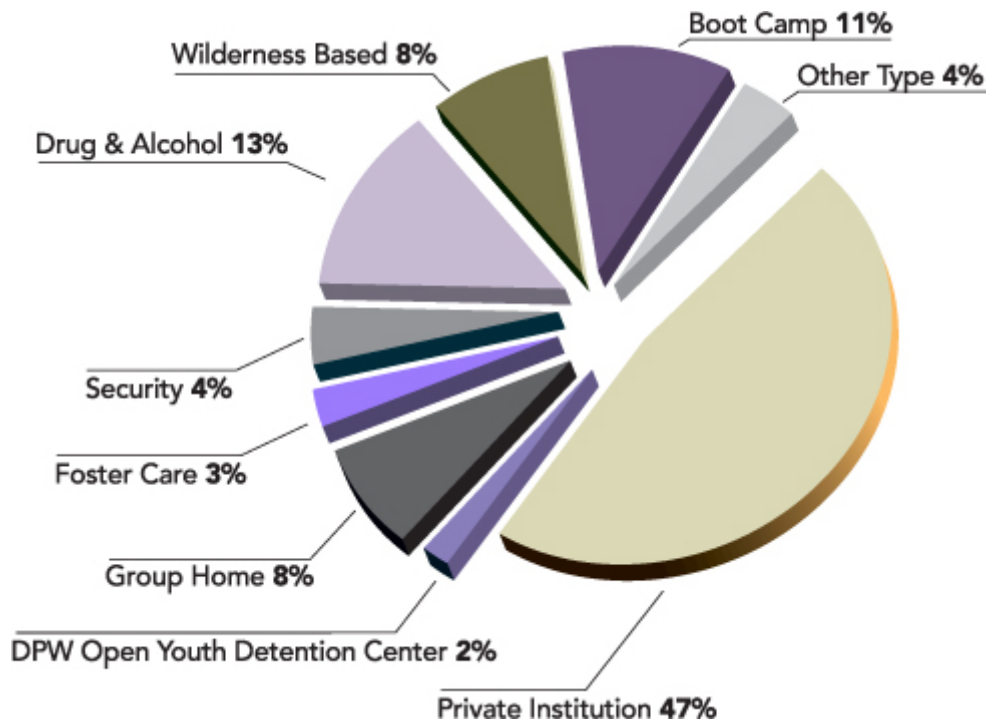
Youth Placement Trends



Source: Pennsylvania Juvenile Court Dispositions Report, 2002, 2003, 2004, and 2005. Juvenile Court Judges' Commission, Center for Juvenile Justice Training and Research, Shippensburg University. Chart from Public Citizens for Children and Youth, The Bottom Line Is...Children 2008, p.76.

The types of placement ordered in the five-county Southeastern Pennsylvania region is reflected below. Placement in private institutions is by far the leading type of non-traditional care option, accounting for 47 percent of all placements. The persistent question on the outcome of these placements is: Will youth be ready to transition to independent living?

Youth Placement Type



Source: Pennsylvania Juvenile Court Dispositions Report, 2005, Juvenile Court Judges' Commission, Center for Juvenile Justice Training and Research, Shippensburg University. Chart from Public Citizens for Children and Youth, *The Bottom Line Is...Children* 2008, p.77.

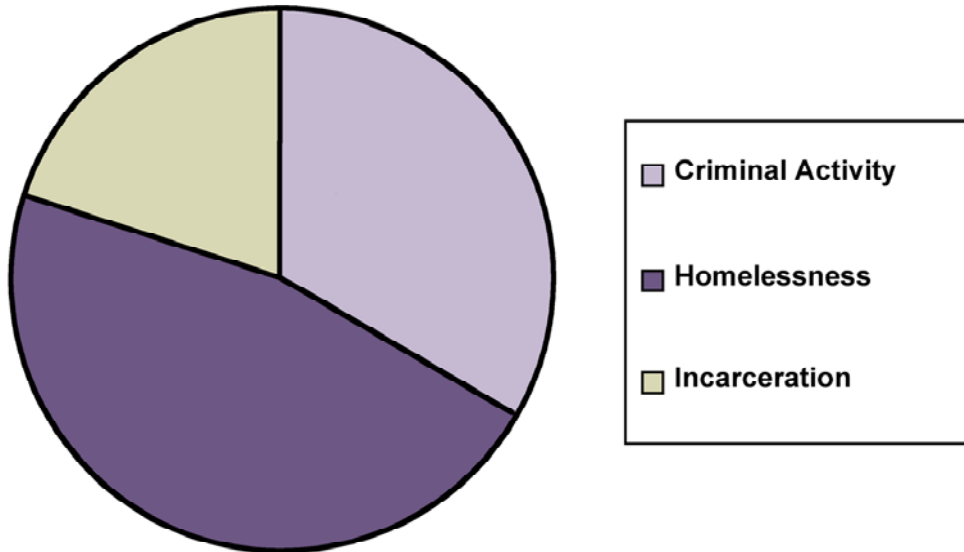
Research supports mentoring as one effective component of a comprehensive strategy to deter delinquency in at-risk youth. Mentoring that is sustainable, long term (3-5 years) and customized to meet individual needs increases the likelihood for success.

Mentoring Research

- ⇒ Research has demonstrated that adolescents with at least one high-quality **supportive relationship with an adult** are twice as likely as other youth to be economically self-sufficient, have healthy family and social relationships, and be productively involved in their communities (Gambone, Klem, & Connell, 2002).
- ⇒ Unfortunately, at-risk youth and youthful offenders often have limited contact with **positive adult role models** with whom they can form and sustain meaningful relationships (Jones-Brown & Henriques, 1997).
- ⇒ Studies show that mentoring helps keep **kids in school**. Students who meet regularly with a mentor are 52% less likely than peers to skip a day of school and 37% less likely to skip a class (*Public/Private Ventures Study of Big Brothers Big Sisters*).
- ⇒ Delinquent youth have **lower educational aspirations** and are more likely to drop out of school than their non-delinquent peers. Furthermore, once they enter the labor market, formerly delinquent youth tend to get **less prestigious jobs** and are more likely to be fired. Finally, if these youth get married, they are more likely to divorce. (Tanner, Davies, O'Grady, 1999).
- ⇒ Mentored youth, especially minority males, had improved **relationships with peers** (Grossman & Garry, 1997).

When troubled youth fail to transition from dependent care settings to responsible, independent living situations, society pays a price in various ways.

Economic Impact of Negative Transitions



Regional Centers

In the Greater Philadelphia region, there are several out-of-home care facilities that serve youth in the areas of basic care, education, service coordination, and mentoring. There are few organizations, however, that pledge long-term intervention commitments and focus specifically on ensuring the transition of the youth they serve into productive careers and independent living situations. The table below shows a representative sample of regional care facilities and highlights the need for focused, long-term transition services.

	Residential Based	Adjudicated Focus	Coed	School Services	Follow up Field Services	Mentoring	Field-Based/Immersion Component	Apprentice-ship Opportunities	Engagement Age range 12-18	Placement Assistance	Student Tracking Statistics	Comprehensive Transition Services*
Carson Valley School	•		•		•	•			•			
Baptist Children's Services	•	•	•	•		•	•		•	•	•	
Ferris School	•	•		•	•	•	•	•	•	•		
St. Francis /St. Joseph Catholic Social Services	•	•		•			•	•	•	•		
Northstar Youth Services	•	•	•			•	•	•	•	•	•	
House of Umoja	•	•				•	•	•	•	•	•	
Presbyterian Children's Village	•		•	•		•	•		•	•		
Juvenile Justice Center	•	•	•	•	•	•	•	•	•	•		
Youth Study Center	•	•		•					•	•		
Zoeza Institute	•	•	•	•	•	•	•	•	•	•	•	•

*Comprehensive Transition Services- A resource network for independent living, mentoring, supplemental education, training, and job placement services during and after the residential living/agency experience

Intervention Need

Given the clear need for transition development and the lack of bridge resources for troubled youth, a huge opportunity exists to close the gap and influence higher percentages of responsible living successes. The tables below display the three primary areas of need and the relative intervention characteristics for support.

High Incidence Rate	Lack of Formal Transition Services	Low Transition Rate
There are an alarming percentage of youth who are living in alternative homes and centers.	Youth treatment centers provide the following services: <ul style="list-style-type: none"> • Alternative Education • Basic Home Service (food, clothing, etc...) • Supervisory Oversight • Treatment Team Coordinating 	The percentage of youths that reside in alternative homes and centers that transition to responsible living situations is very low.



Needed Characteristics
To serve the high numbers of youth in non-traditional care settings and prepare them for successful transitions to independence, the following are needed: <ul style="list-style-type: none"> • Basic Education Skills • Hands-on Training • Cultural Intervention • High Touch Mentoring • Networking and Connections • Continuous/Ongoing Support and Counseling

This section of the deck represents an overview of the Zoeza Institute's organizational development and strategic framework. The strategic recommendation of developing a charitable trust is presented with projected scope and services. This overview reflects the long-range vision of possibilities for the Institute.

SECTION 2:

- Name Origination
- Organizational Options
- Mission & Vision
- Goals & Objectives
- Foundation Pillars
- Services
- SMART™ Mentoring Model
- Site Model
- Site Development
- Certification
- Organizational Structure
- Governance
- Inter-Org Benefits
- Success Measurement

Name Origination

Both the name “Zoeza” and the associated logo have roots in African traditions of learning and education. The respective meanings complement the working philosophy of the Institute.

- **Name Origin:**

The Zoeza Institute, and its parent organization, the Zoeza Group, derive their names from the Swahili word, *zoeza*, /zO-e-za/, a verb meaning to ‘accustom’ or ‘train by practice’ (Webster’s Online Dictionary). The Zoeza Institute believes the most effective learning is a result of active participation, deliberate practice, and meaningful experiences.

- **Logo Inspiration:**



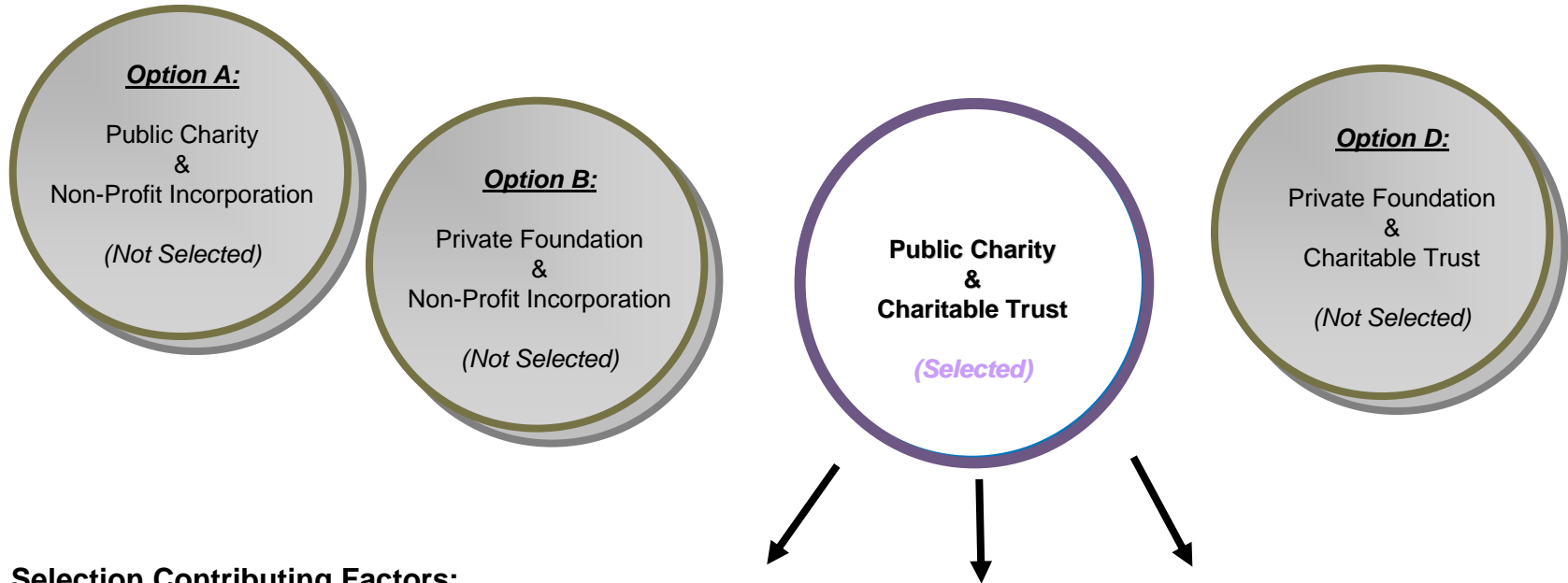
The Zoeza logo is inspired by the West African Adinkra symbol “Nyansapo”. Also referred to as the “Wisdom Knot”, this symbol represents wisdom, ingenuity, intelligence, and patience. An especially revered symbol of the Akan, it conveys the idea that “a wise person has the capacity to choose the best means to attain a goal. Being wise implies broad knowledge, learning and experience, and the ability to apply such faculties to practical ends.” For more information about the Wisdom Knot and its symbolism for knowledge and learning, see *The Adinkra Dictionary: A Visual Primer on the Language of Adinkra* by W. Bruce Willis.

- **Philosophical Connection:**

Drawing on its namesake meaning, the philosophy of the Zoeza Institute is to engage the target youth, develop deep, committed relationships, and maintain a long-term bond filled with learning experiences, enrichment activities, and apprentice opportunities. The Institute allows all stakeholders to learn valuable lessons by engaging in the doing of the aforementioned activities.

Organizational Options

During the organizing process, the board and staff of the Zoeza Institute were charged with identifying the best organizational form to carry out mission-specific objectives. Ultimately, a charitable trust/private foundation created by the Zoeza Group proved most appropriate.



Selection Contributing Factors:

Incorporation Recommendation	Fundraising Flexibility	Transparency of Purpose/Perception Test	Local, National, and Global Opportunities Through For-Profit
<ul style="list-style-type: none"> • Expert Legal & Accountant Recommendation • Maintain Conversion Opportunity • Back Excise Tax Penalty Only on Interest Revenue 	<ul style="list-style-type: none"> • Wider Pool of Qualified Funders • Hi-Touch/Long-Term Evaluation Metrics 	<ul style="list-style-type: none"> • Shared Objectives with Zoeza Group • Overlapping Services with Zoeza Group • Partner Channel Connections 	<ul style="list-style-type: none"> • Non-Profit to Non-Profit Partnerships • Qualified Donation Recipient & Grantee • Full Tax-Exempt Benefits

Mission & Vision

The Zoeza Institute is a development resource portal legally registered as a non-profit, 501(c)(3) organization. The Institute is classified as a tax-exempt entity and is based in Philadelphia, Pennsylvania.

- **Mission:**

To facilitate the successful transition of at-risk youth into productive careers and independent living situations by using a customized, research-based educational intervention model to 1) establish long-term, high-touch, sustainable mentor relationships; 2) incorporate “strength-based” supplemental instruction; 3) improve social acumen and confidence; 4) provide vocation-specific skills through training, development and apprenticeships; and 5) provide ongoing access to a comprehensive resource portal that offers professional network, economic planning, counseling, and information services.

- **Vision:**

To establish, refine, and replicate a preeminent, longitudinal, community-based development resource portal model that serves as the nation’s most successful effort focused on the productive educational, professional, and social transition of at risk youth.

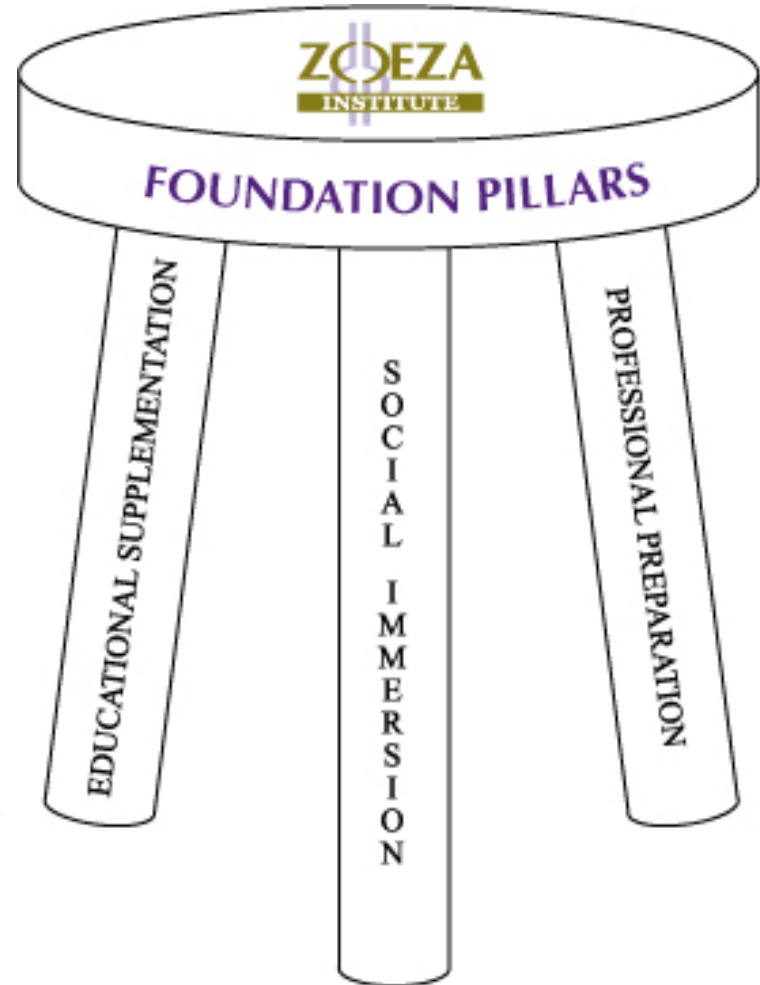
The objectives of the Zoeza Institute focus on helping troubled youth cross the bridge from structured dependency to responsible independent living.

Goals & Objectives

1. Extend the service offering for at-risk youth to prepare for and include post-secondary transitional support.
2. Provide a structured, organized, and resourceful environment conducive for achieving the Institute's three core development pillars:
 - Educational Supplementation
 - Social Immersion
 - Professional Preparation
3. Maintain long-term relationships and continuous student participation and engagement.
4. Increase academic achievement levels via relevant vocation mapping.
5. Increase participation in culturally broad extra-curricular and community-based activities.
6. Provide diverse and intensive experiences including extra-curricular, cultural immersion, educational supplements, and social modeling.
7. Satisfaction of personal accountability goals as identified in customized plans for both mentor and mentee.
8. Operate a comprehensive, training resource institute that provides broad skill building and networking services.

Foundation Pillars

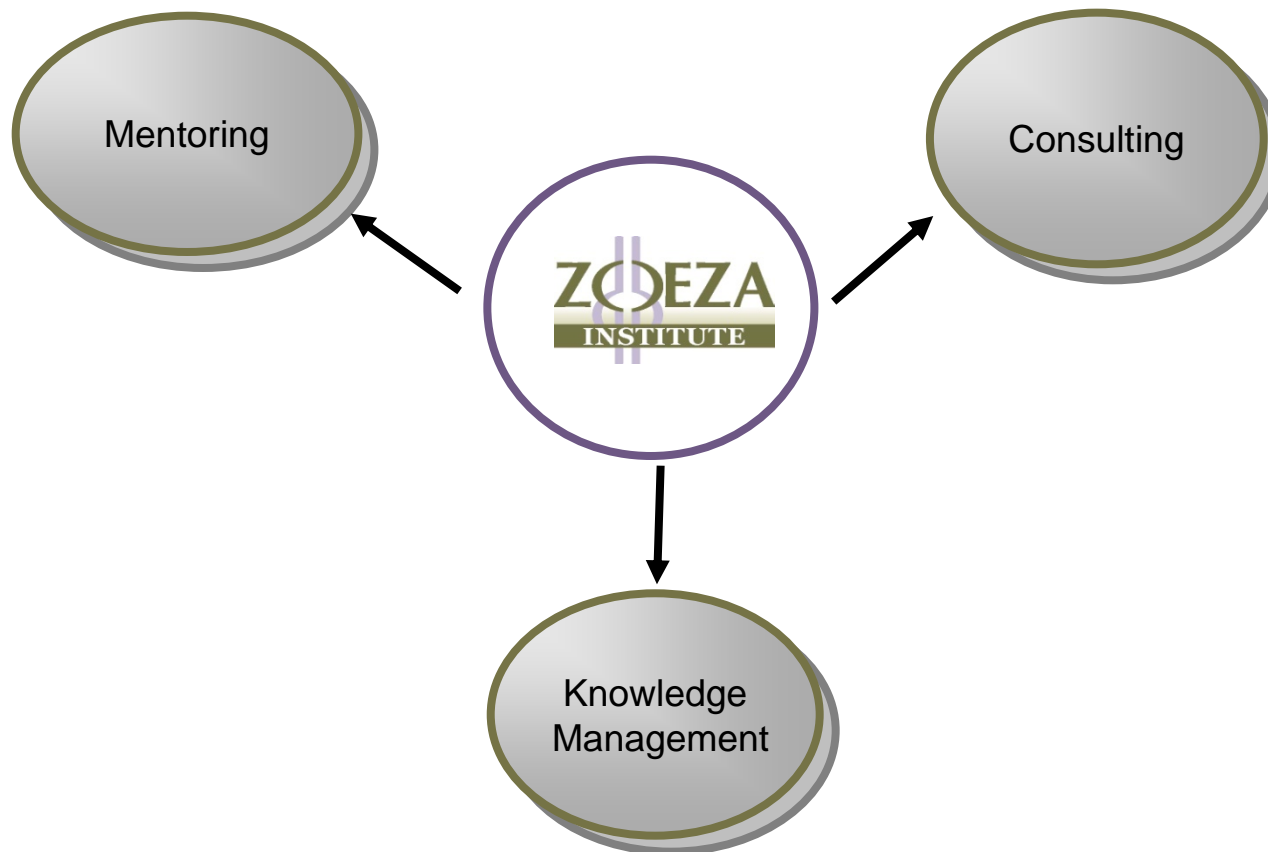
The function and services of the Zoeza Institute rest on the foundation of three core areas that highlight the necessary components of successful transition to responsible living.



- **Educational Supplementation**
 - Literacy-Based
 - Strength and Interest Anchored
 - Relevance Mapping
- **Social Immersion**
 - Cultural Experiences
 - Character & Behavior Modification
 - Respect, Rules, Responsibility, & Role
- **Professional Preparation**
 - Career Opportunity Mapping
 - Job-Readiness Apprenticeships
 - Network Development

Services

To implement the mission of the organization, the Zoeza Institute focuses on delivering services in three primary areas: Mentoring, Consulting, and Knowledge Management. The Mentoring program utilizes the Surrogate Mentoring and Responsible Transition (SMART)™ service model to prepare troubled youth for successful, independent lives. The Consulting department works exclusively with social sector clients to provide services such as strategic planning, implementation support, professional development, and applied research. And, the Knowledge Management department collects, maintains, and provides a comprehensive array of resources and materials that support the Institute's mission and are made available to students, parents, care providers, educators, and related community members.



The Zoeza Institute's three (3) primary service areas including the following elements:

Mentoring

Utilizing the innovative *Surrogate Mentoring and Responsible Transition (SMART)*™ service model, youth participate in a long-term, high-touch program that prepares troubled youth while they are young, facilitates their transition into adulthood, and supports their ongoing quest to live responsible, independent lives. The intensive, longitudinal program utilizes a carefully crafted flow of intervention activities (see SMART model next slide).

Consulting

- Strategic Services
 - Needs Assessment
 - Business Planning
 - Operational Planning
 - Solution Modeling
 - Coaching
 - Logistics Planning
 - Site Evaluation
 - Grant & Proposal Writing
- Implementation Support
- Professional Development
- Applied Research

Knowledge Management

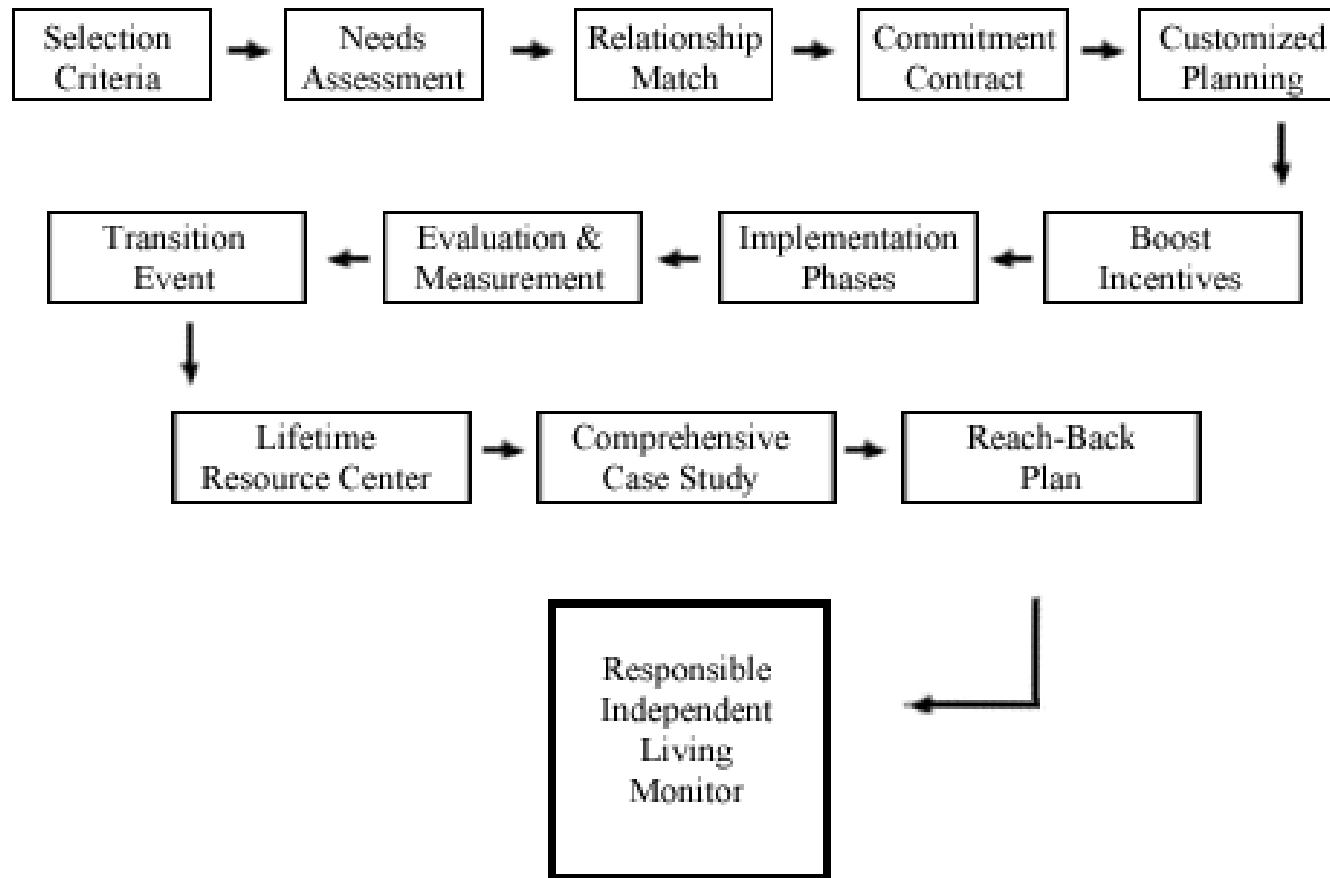
The Institute collects, develops, and maintains a variety of resource materials and serve as a portal for disseminating mission-specific information to targeted community members:

- Books & Manuals
- DVD's
- Network Database
- Certification Templates
- Relationship Tools
- Procedural Templates
- Customized Curricula
- Data Index

SMART™ Mentoring Model

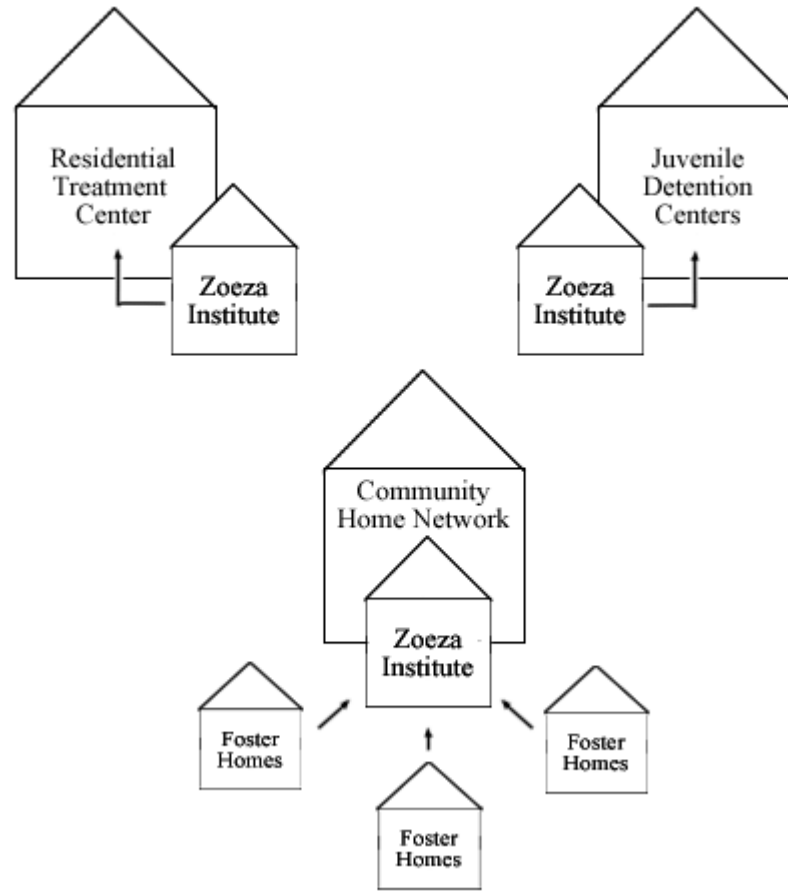
Utilizing the innovative Surrogate Mentoring and Responsible Transition (SMART)™ service model, youth will participate in and benefit from the following intervention activities:

SMART™ Model



Site Model

The Zoeza Institute operates in multiple locations within various out-of-home care centers. The diagram below provides an example of how each Institute can be situated at various sites. The scope of services offered at each Institute site will be customized based on population demographics and alignment with existing offerings. Each Institute will be housed at the partner agency location and managed by the Zoeza Institute.



The process of launching an Institute in a care facility follows several steps.



Organizational Structure

The following organizational structure of the Zoeza Institute highlights the formation details, funding sources, and relationship with its parent organization.

Status	<ul style="list-style-type: none">• 501c3 Charitable Trust• Established by Zoeza Group in 2008• Governing Board of Trustees• Operating Foundation (services in the community versus grants to other organizations)
Funding Sources	<ul style="list-style-type: none">• Operational:<ul style="list-style-type: none">• Zoeza Group contributions and resources• Site contracts• Contributions (Foundations, Corporations, Individuals, Government)• Programming:<ul style="list-style-type: none">• Strategic Partners (cash investment by project)
Parent Sponsorship	<ul style="list-style-type: none">• Zoeza Group<ul style="list-style-type: none">• Operational: Limited support for functions such as IT, HR, Accounting, Admin, Graphic Design, Office Space, etc.• Relationship Agreement: Term sheet highlights Institute's discounted/no-cost use of Group's resources.

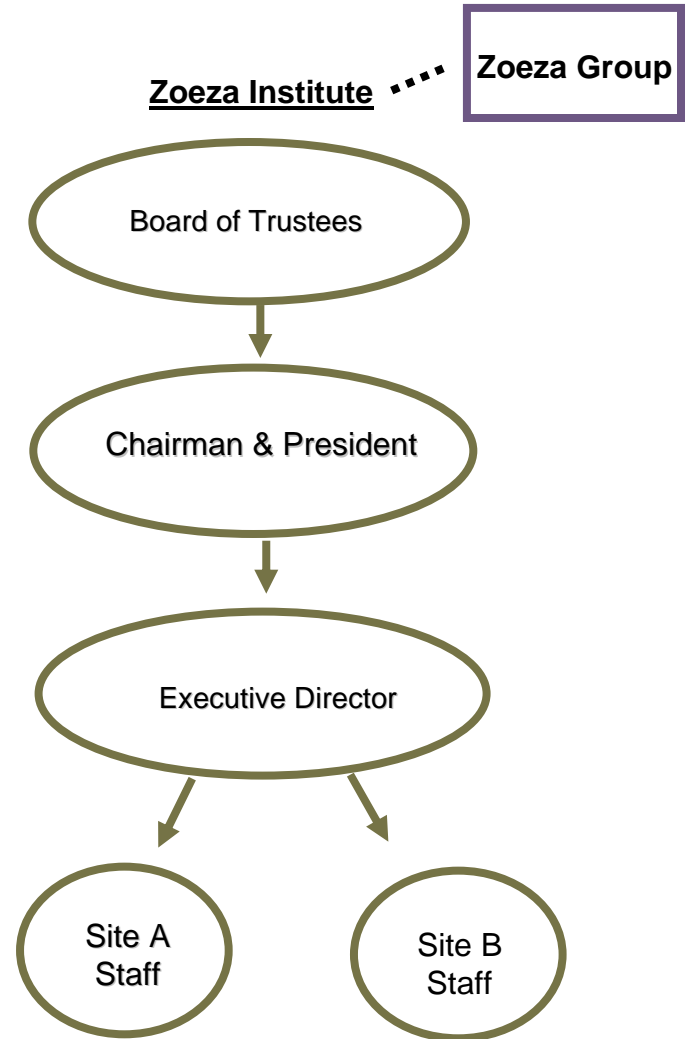
The Zoeza Institute will be governed by an elected board of trustees who have specific duties as leaders of the organization.

Composition

- Zoeza Institute will seat up to 12 trustees
- The trustees will have strategic oversight and fiscal responsibility for the Institute.
- Trustees will elect new members and execute all organizational policies
- Initially, executive staff of the Zoeza Institute will be employed by the Zoeza Group and “loaned” to the Institute for services (traditional corporate foundation model).
- Recruitment of new board members as needed

Board Roles

- Network referral for partnership development
- Thought leadership for programming/service solutions
- Organizational strategic consulting and policy advisement
- Media and promotion building
- Funding support for infrastructure & operations



The Zoeza Institute's governing board of trustees consists of nationally recognized leaders in fields closely related to the mission and objectives of the organization.

Board of Trustees

Trustee	Title/Organization
Elijah Anderson	Professor, Sociology, Yale University
Phillip Cuffey	Executive Director, Zoeza Institute; Principal, Zoeza Group
Carlton Payne, Ph.D.	Chief of Psychology, Philadelphia Prison System
Joseph Radelet, Ed.D.	Vice President of Mentoring, Big Brothers Big Sisters of America
Colleen Williams	Partner, McGladrey & Pullen, LLP
Jason Wingard, Ph.D.	President, Zoeza Institute; Managing Partner, Zoeza Group

Inter-Org Benefits

The Zoeza Group and Zoeza Institute will provide a variety of ongoing benefits to each other. Benefits include enhancements to marketing breadth, resource sharing, investment revenue, social perception, and knowledge sharing.

BENEFIT	DESCRIPTION
<i>Mission-Driven Legitimacy</i>	Business development and public relations “story” of the mission and works of a tightly connected organizations serving the social sector.
<i>Non-Profit Partnerships</i>	Structural ability to engage in formal relationships with organizations that are limited to contracting <u>only</u> with other non-profit organizations.
<i>Socially Responsible Investments</i>	Donors who are interested in investing in the Zoeza Group, but want to simultaneously support education and community development initiatives can do so by “flagging” their investment dollars to Zoeza Group to be routed to the Institute.
<i>Public Relations</i>	Expansion of positive brand placement, marketing, and advertising (in association with good works) through the utilization of the associated names and logos for: 1) community projects; 2) conference presentations; 3) research reports; 4) newspaper articles; and 5) partner outreach efforts.
<i>Bridge Support</i>	Initially, the Zoeza Group will fully finance and support the development and operations of the Zoeza Institute. Once fundraising efforts are planned and executed, the Institute will have the opportunity to seek independent funding.
<i>Research Analysis</i>	The Institute’s focused research agenda will provide keen insights and implications for some of the professional services needs in the social sector, as well as vendor requests and RFP’s issued by funding agencies.
<i>Tax Relief</i>	Contributions by the Zoeza Group to the Institute for operations and programming will be deducted at a rate of up to 10% of company’s AGI.

Given limited resources, growth, and transition issues, the Institute will focus specifically on key, targeted site projects for its inaugural year. This section of the deck represents the short-term plan and highlights the key projects and related resources associated with the upcoming school year 2008-9 (fiscal year 2009). In subsequent years, opportunities to implement the Institute's broader strategic and programming agendas will be explored.

PART 2:

- Project Opportunities
- Pilot Plan
- Budget (Infrastructure)
- Budget (Project Sample)
- Initial Financing
- Future Financing
- Fundraising Pipeline
- Public Relations Outlets
- Implementation Timeline

In the first year of operations, the Institute has the opportunity to focus on project site implementations. Featured below is one example (of hopefully two) of a project prospect that we might expect to launch this year.

2008-2009 School Year: Example Opportunities

	Site One: Mentoring/Achievement Org. (TBD)	Site Two: Residential Treatment Center (TBD)
Current Relationship Status	<ul style="list-style-type: none"> •Preliminary discussions to identify alignment & shared focus •Scheduled feasibility meetings 	<ul style="list-style-type: none"> •Identification, review, and assessment of suitable centers •Scheduled feasibility meetings
Number of Staff/Students	<ul style="list-style-type: none"> •Approximately 10 high school students •2-3 staff allocated from each organization 	<ul style="list-style-type: none"> •Selected sample of care population •Approximately 50 students; 2 ZI staff/5 host staff
Project Location	<ul style="list-style-type: none"> •Metro Philadelphia •Project partner offices/Respective school locations 	<ul style="list-style-type: none"> •Metro Philadelphia •Site-based office and intervention
Program Focus	<ul style="list-style-type: none"> •Non-traditional care, at-risk high school students •Various interventions to facilitate successful transitions 	<ul style="list-style-type: none"> •Non-traditional care, at-risk students •Various interventions to facilitate successful transitions
Project Partners	<ul style="list-style-type: none"> •Attendance high schools •Volunteer internship corporations 	<ul style="list-style-type: none"> •Attendance high schools •Volunteer internship corporations
Resource Needs	<ul style="list-style-type: none"> •Transportation or vouchers •Grant funds 	<ul style="list-style-type: none"> •Transportation or vouchers •Grant funds
Intervention Timetable	<ul style="list-style-type: none"> •Beginning School year 2008-2009 •Ongoing intervention for 5+ years 	<ul style="list-style-type: none"> •Beginning School year 2008-2009 •Ongoing intervention for 5+ years
Program Evaluation	<ul style="list-style-type: none"> •Quarterly reporting •Objective and subjective methodologies 	<ul style="list-style-type: none"> •Quarterly reporting •Objective and subjective methodologies
Budget	<ul style="list-style-type: none"> •Determined based on number of youth served •Ideal source funding: single individual/organizational donor 	<ul style="list-style-type: none"> •Determined based on number of youth served •Ideal source funding: single individual/organizational donor

In Phase 1 of the Zoeza Institute's development, focus was tied to incorporation and structural development. In the inaugural year (July 1, 2008 – June 30, 2009), the Zoeza Institute will focus on Phase 2—implementing both operational and programmatic deliverables. The execution of these deliverables is critical to the forming a sustainable business foundation as well as launching a successful community-based program intervention.

Administrative	Programmatic
<ul style="list-style-type: none"> • Trademark Registration of Branded Elements • Strategic Plan Development • Web Site Creation and Launch • Board of Trustees Recruitment & Engagement • Collateral Packet Development • Fund Development Plan • Seed Funding Security • Annual Fund Raising Event • Office Development • Staff Hiring 	<ul style="list-style-type: none"> • Curriculum Development Plan • Mentoring Program Templates • Consulting Model • Partner Site Agreement • Pilot Intervention with Targeted Students • Evaluation Metric Development & Year-1 Reporting • Curriculum Development Plan • Mentoring Program Templates • Consulting Model • Partner Site Agreement • Pilot Intervention with Targeted Students • Evaluation Metric Development & Year-1 Reporting

Budget (Infrastructure)

For fiscal year 2009, the Zoeza Institute will seek funding to cover operational and programming expenses. This planning year will allow the Institute to secure long-term funding that allows for the launch of a sustainable service model for regional/national replication.

- **Staff**
 - President ⇒ Strategic planning, business development, board relations, fundraising
 - Executive Director ⇒ Partner development & relations, project oversight, program implementation, staff management
 - Director of Operations ⇒ Logistical oversight, operational management, finance & accounting systems, protocol models
 - Zoeza Group Shared Resource ⇒ Budget modeling & oversight, legal coordination, I/T management
 - Benefits ⇒ Retirement Contributions & Medical Insurance
- **Outsourced Services**
 - Legal
 - Financial Audits
 - HR Management
 - Graphic Design
- **Travel**
 - Site Research
 - Conferences and Convenings
 - Partnership Building & Business Development
 - Board Member Visits/Meetings
- **Infrastructure and Administration**
 - Insurance
 - Telecommunications
 - Print Materials & Stationary
 - Supplies
 - Web Presence
 - Office
- **Program & Research Costs**
 - Coordination & Support
 - Materials, Books, & Supplies
 - Training, Customer and Tech Support
- **Budget**

Income		
Zoeza Group	25,000	25,000
Donor #1	175,000	175,000
Donor #2	125,000	125,000
Donor #3	125,000	125,000
Total Income	450,000	450,000
Expenses		
Staff & Benefits	300,000	300,000
Outsourced Services	40,000	40,000
Travel	22,500	22,500
Infrastructure & Administration	20,000	20,000
Program & Research	25,000	25,000
Overhead Contingency (10% of HQ Exp)	40,750	40,750
Total Operating Expenses	448,250	448,250

Budget

(Project Sample)

The Zoeza Institute's first project, and associated budget, will be developed in conjunction with an operational partner. It is assumed that both project partners have individual funding for their organizations' respective infrastructure operations. The project budget line items will correlate directly with the scope and terms of the specific project. Below is a project budget outline as well as respective resource commitments that should be viewed for example purposes only.

Project Budget ('08-'09)

Project Income:

• <i>Funding Source:</i>	\$200,000
Total:	\$200,000

Project Expenses:

• <i>Staffing:</i>	\$150,000
• <i>Office:</i>	\$15,000
• <i>Events:</i>	\$10,000
• <i>Supplies:</i>	\$10,000
• <i>Travel:</i>	\$10,000
Total:	\$200,000

Project Resources ('08-'09)

Zoeza Institute:

- *Mentoring Services*
 - *Program Development*
 - *Logistical Planning*
 - *Partner Coordination*
 - *Formative & Summative Research*
-

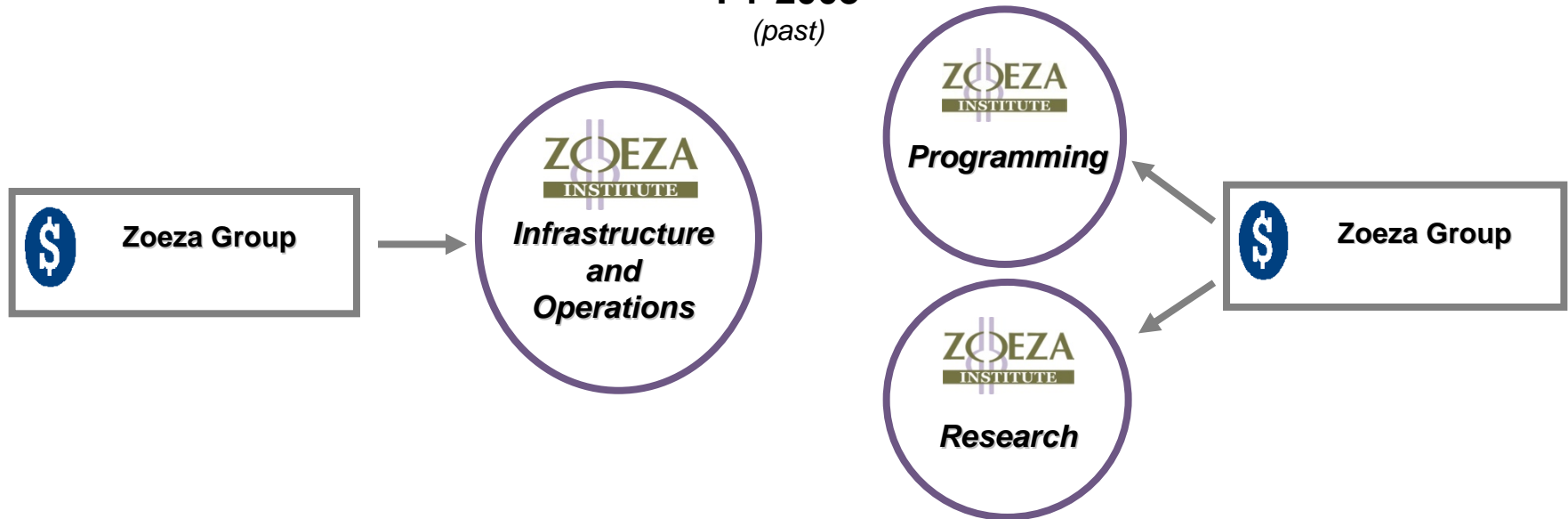
Project Partner:

- *Facilities*
- *Materials & Supplies*
- *Target Student Access*
- *Partner Coordination Support*

Initial Financing

In the first year, the Zoeza Institute's core infrastructure and operations budget will be supplied by support from the Zoeza Group. Programming and research activities will also initially be supported by the Zoeza Group as funding relationships with external donors and site partners is established.

FY 2008
(past)



Contribution Options

- Cash Donations and Personal/Corp Contributions
- Volunteer Services (Consulting, Marketing, Research, Pen Pals/Mentors)
- In-kind Contributions/Resources/Services
- Promotions/Grants/Awards
- Research Stipends

It is expected that the Zoeza Group will maintain minimal ongoing support from the Zoeza Group—primarily in the form of shared resources. The Zoeza Institute will receive primary funding from two sources: 1) external donors, including foundations, corporations, individuals, and government agencies; and 2) site partners, including any of the out-of-home centers where the Institute establishes services.

FY 2009+
(present)



Contribution Options

- Cash Donations and Personal/Corp Contributions
- Volunteer Services (Consulting, Marketing, Research)
- In-kind Contributions/Resources/Services
- Promotions/Grants/Awards
- Research Stipends

Fundraising Pipeline

Although a formal organizational structure has been in development, business development activities have been active and a host of partnership opportunities are in various stages of development. Fundraising activities to support both infrastructure as well as specific projects will begin in October, 2008.

Funder	Description	Support Opportunity	Status
Target Foundation A			
Target Foundation B			
Target Foundation C			
Target Individual A			
Target Individual B			
Target Individual C			
Target Corporation A			
Target Corporation B			
Target Corporation C			

TBD

The Zoeza Institute will ultimately measure success based on the metric of increasing the success rate of troubled youth transitioning to independent, responsible living. Other metric categories include increasing rates of student achievement, social behavior, and access to professional options.



It is critical to the mission of the Zoeza Institute that measurable results are achieved through all intervention activities.



Given limited funds, time, and personnel, a core focus area will be the maximization of said resources towards achieving targeted goals.



Impact data will be collected and reviewed on a quarterly basis and analyzed against an aggressive metric system based on:

- Participation Rates
- Assessment Reports
- Placement Statistics
- Feedback Surveys
- Subjective (Observations, Interviews, etc) Reviews

Public Relations Outlets

The Zoeza Institute will have access to, and use, several outlets to promote the brand and highlight the service work done for at-risk youth in out-of-home environments.



Local & National Press

- Newspaper Profiles
- TV Spots
- Trade Journals/Magazines
- Social Welfare Blogs
- Professional Communication Kit

Pubic Reports

- Peer-Reviewed Articles
- Participant Interviews
- Test Score Performance
- Quarterly Newsletter
- Project Case Studies

Partner Leverage

- Employee/Volunteer Network
- Co-Branding Opportunities
- Consumer Market Capitalization

Mass Audience Platforms

- Conferences
- Presentations/Speaking Circuit/Op Eds
- Web Portal/Resource Exchange

Events

- Grants & Giveaways
- Holiday/Special Promotions
- Project Fund Drives
- Seminars & Workshops

Community Citizenship

- Community Mobilization
- Student Achievement
- Field Advancement & Knowledge Sharing

Project Profiles

- Experience Testimonials
- Success Stories
- Partner Collaboration Showcase

Implementation Timeline

During 2008-2009, the Zoeza Institute will work diligently to execute a phased-approach to establishing the organization, developing partnerships, raising capital, implanting programs, and

	Phase 1 <i>April/May/June 2008</i>	Phase 2 <i>July/August/September 2008</i>	Phase 3 <i>October/November/December 2009</i>	Phase 4 <i>January/February/March 2009</i>
Strategy, Planning, and Administration	<p><u>Incorporation</u></p> <ul style="list-style-type: none"> •Organize Zoeza Institute •Apply for tax exemption •Complete IRS Application <p><u>Infrastructure Building</u></p> <ul style="list-style-type: none"> •Establish bank account •Develop graphic design portfolio •Design & build web site •Identify outsourced legal support •Identify outsourced accounting support <p><u>Financing</u></p> <ul style="list-style-type: none"> •Source funding from Zoeza Group <p><u>Administration</u></p> <ul style="list-style-type: none"> •Systems Development <p><u>Legal</u></p> <ul style="list-style-type: none"> •Trademark designs, taglines, and service models 	<p><u>Strategic Plan</u></p> <ul style="list-style-type: none"> •Revise for FY 09 •Develop fundraising plan •Expand marketing and public relations plans •Finalize programming model based on expected budget <p><u>Board Building</u></p> <ul style="list-style-type: none"> •Member recruiting •Governance by-laws and articles •Inaugural meeting •Committee development discussion <p><u>Budgeting</u></p> <ul style="list-style-type: none"> •Update w/financing actuals •Board-approved revision <p><u>Communications</u></p> <ul style="list-style-type: none"> •Update & revise website •Print “road show” packet of materials •Establish presence on primary distribution lists 	<p><u>Staffing</u></p> <ul style="list-style-type: none"> •Identify and confirm shared staffing resources •Recruit & hire (if necessary) program staff for partner projects <p><u>Research</u></p> <ul style="list-style-type: none"> •Establish governing research agenda <p><u>Fundraising</u></p> <ul style="list-style-type: none"> •Identify external investors to contribute to allowable 20% pool •Identify stock sale investor for FY 09 operational budget <p><u>Agreements</u></p> <ul style="list-style-type: none"> •Staff Employment •Share/Licensing (Zoeza Group) •Site Partnerships 	<p><u>Public Relations</u></p> <ul style="list-style-type: none"> •Launch PR campaign •Introduce pilot project •Participate in representative conferences/trade shows for preliminary visibility •Begin media recording/journaling of project progress <p><u>Metric Model</u></p> <ul style="list-style-type: none"> •Develop reach metric model for contracted projects •Explore revenue-sharing models for viral attractions
Program Development & Implementation	<p><u>Model Development</u></p> <ul style="list-style-type: none"> • Establish program frameworks and use models 	<p><u>Partner Outreach</u></p> <ul style="list-style-type: none"> •Pipeline cultivation •Corporate Foundation/Workforce Development outreach <p><u>Program Launch</u></p> <ul style="list-style-type: none"> •Confirm feasibility of school year 08-09 projects <p><u>Community Engagement</u></p> <ul style="list-style-type: none"> •Identify project site locations and prepare introductory meetings •Map field scope, infrastructure needs, and population demands <p><u>Contracting</u></p> <ul style="list-style-type: none"> •Execute agreements with regional site partners 	<p><u>Research Meeting</u></p> <ul style="list-style-type: none"> •Determine if dedicated Research Council is warranted •Develop deliverable plan based on site project agenda •Establish evaluation criteria rubric <p><u>Site Prep</u></p> <ul style="list-style-type: none"> •Coordinate action plans for site development and implementation •Initiate professional development for teachers and related participants •Initiate professional development for related partners <p><u>Partner Collaboration</u></p> <ul style="list-style-type: none"> •Execute partner work-flow model 	<p><u>Site Launch</u></p> <ul style="list-style-type: none"> •Secure project access permissions •Coordinate implementation models and timelines •Identify support needs by location <p><u>Research Agenda Launch</u></p> <ul style="list-style-type: none"> •Implement field study projects •Execute study subject agreements •Complete pre-study data collection and benchmarking

As the Zoeza Institute continues to refine the strategic plan and execute it's fundraising agenda, the following priorities will be monitored for consistent progress.

- Problem Research
- Model Development
- Organizational Planning
- Board of Trustees Recruitment and Development
- Planning Year Scope
- Infrastructure Development
- Funding Acquisition

