



The Giving Common

An Initiative of the Boston Foundation

www.thegivingcommon.org

Beverly Bootstraps



General Information

35 Park Street
Beverly, MA 01915
(978) 927-1561 118

Website

<http://www.beverlybootstraps.org>

Organization Contact

Heather Johnston hjohnston@beverlybootstraps.org

Year of Incorporation

1994

Statements & Search Criteria

Mission Statement

Beverly Bootstraps provides critical resources to families and individuals so they may achieve self-sufficiency. We offer emergency and long-term assistance including: access to food, housing stability, adult and youth education, counseling and advocacy. We are community funded and supported.

Background Statement

Beverly Bootstraps is a leading social service agency on the North Shore that started as a Food Pantry in a downtown Beverly church in 1992; incorporated as Beverly Bootstraps Food Pantry in 1994; and secured IRS 501 (c) (3) status in 1995. In 2008, the agency purchased a commercial building at 371 Cabot Street for its consolidated operations and hired its first non-founding Executive Director. In spring of 2016 we moved to our new home at 35 Park Street. In FY2016, we served 4,132 individuals and families, most from Beverly and neighboring Manchester.

During this time, 10% of the population of Beverly came through our doors for some form of assistance.

Impact Statement

Beverly Bootstraps continues to annually serve 10% of the Beverly population. Through our many programs, we help our clients reach stability and self-sustainability. In FY2016, our agency served 4,132 individuals, including 1,567 helped by our case managers and 2,522 who visited our food pantry.

The need in our community is ever present and increasing as evidenced by the 261 new clients that came to the Food Pantry this year. All told, we distributed over 344,474 pounds (over 170 tons) of food between our Food Pantry and Mobile Market program. We also provided over 8,450 pounds of food to local families with children through our Summer Food Program.

We provide adult education to increase our clients' skills and, therefore, their earning potential. In FY2016, we had 166 students enrolled in our ESOL (English for Speakers of Other Languages) class. We also had 20 students pass their HiSET exam, with another 92 still in the process of studying.

A strong education leads to successful adults and we encourage and help our children succeed through our Youth and Family programs. We have 22 elementary, and middle school age children enrolled in our Afterschool Homework Clubs where they get help with their homework, tutoring, and enrichment programs. We also distributed 644 backpacks filled with new school supplies so these children would be set up for success with the proper tools.

Our holiday programs support our clients through what could otherwise be a very stressful time of year. This year we gave out turkeys and fixin's to over 500 families so that they could enjoy a Thanksgiving dinner. We also provided 677 children with holiday gifts through our Adopt-a-Family program.

We are community funded and supported and depend on partnerships with the local community and businesses to be able to support those in need. Unlike many communities, residents of Beverly and Manchester-by-the-Sea know they have a place to turn to in emergency situations or when they can't quite make ends meet.

Needs Statement

1. Financial support of on-going programs: Food Assistance, Case Management, Adult Education and Youth and Family programs. We are community supported and funded and rely on the generosity of our community for general operating funds as well as specific projects.
2. In-kind donations of food (Please no glass containers or expired food), seasonal items, and items to be sold at the Thrift Shop.
3. Community members who are interested in volunteering in any of our programs or Board of Directors. Last year volunteers contributed over 15,000 hours.

CEO/Executive Director Statement

2017 marks a milestone for Beverly Bootstraps as we celebrate our 25th anniversary. We are proud to have served those in need in this community for 25 years and to have grown from a small space in the basement of the First Baptist Church to a 23,000+ square foot facility that houses our services, support functions, and our Thrift Shop. Unfortunately the need that emerged after the Great Recession still continues with rising housing costs and flat incomes squeezing more and more households. Fortunately, we are able to offer our help because of the support and funding from this community.

Last year was a time of change for Beverly Bootstraps. We moved into our new facility and adjusted our programs based on the needs of our clients and the opportunities of our new space. We started a new “choice” model in the food pantry, allowing clients the dignity of choosing the items that they want and will use instead of giving them a pre-filled bag of staples. The holiday programs flowed much more smoothly because we have space that accommodates multiple programs running at the same time. The Thanksgiving dinner program happened at the same time as regular Food Pantry distribution and both were seamless. Importantly, we no longer need to suspend our education programs in favor of completing the holiday gift giving program. All our vital programs can run at the same time.

Now that we are settled in, we can look to the future. This move into our new building was one of the last items in our strategic plan. We are concluding the last bits of the identified work and we are in the process of developing the next five-year strategic plan. We are continually accessing the needs of the community to determine how we can make a difference and we look forward to serving the community for many more years

Board Chair Statement

I am so proud to have been named the President of the Board of Directors this year. I started with Beverly Bootstraps several years ago as a volunteer in the Food Pantry and got to see first-hand the wonderful work the agency does. I was so moved by the people we helped and their bravery in the face of adversity that I joined the Board to help steer the agency to continued success.

I look forward to working closely with the staff to guide the agency through the next few years. Together, we will be working on the next phase of development to ensure we continue to meet the needs of the community. The new strategic plan will be developed with the goals of continued sustainability and responsible stewardship of funds.

Service Categories

Emergency Assistance (Food, Clothing, Cash)

Food Banks, Food Pantries

Youth Development Programs

Geographic Areas Served

Beverly and Manchester-by-the Sea, MA. Surrounding towns on a case-by-case basis and/or program-by-program basis.

Please review online profile for full list of selected areas served.

Programs

Food Assistance

Description

The Food Assistance programs at Beverly Bootstraps includes our Food Pantry, Mobile Market, and Summer Food Program.

Food Pantry - We provide over 1000 items of food daily to Beverly & Manchester residents once every 14 days. Food delivery service is available to home bound clients.

Summer Food Program - Families with children are able to visit the Food Pantry weekly in the summer months to provide additional food to children who otherwise might go without enough food when school is out.

Mobile Market - This free farmer's market provides eligible households with fresh fruit and vegetables.

Clients utilizing the food assistance programs are referred to our case management team, adult education classes and youth and family programs to assist them in overcoming the root causes and inter-connected issues of food insecurity, financial instability and shortfalls in education and job skills.

Budget

\$807,668.00

Category

Food, Agriculture & Nutrition, General/Other Food

Population Served

Poor, Economically Disadvantaged, Indigent, Unemployed, Underemployed, Dislocated, At-Risk Populations

Program Short Term Success

Program Long term Success

Program Success Monitored By

Examples of Program Success

Case Management

Description

Our Case Management team provides resources and referrals for individuals and families who are at risk of homelessness. The primary goal is to stabilize families by helping them maintain their current housing and to provide support and access to clothing and goods. Financial support is available on a case by case basis for rent, heat and utilities.

Additionally, case managers assist clients in signing up for SNAP benefits, DTA, Mass Health benefits and creating a personalized plan for each client to help them establish self-sufficiency.

Clients utilizing case management services are referred to our food pantry, adult education classes and youth and family programs to assist them in overcoming the root causes and inter-connected issues of food insecurity, financial instability and shortfalls in education and job skills.

During FY2016, our Case Management team worked with 1,567 individuals; 311 of them were new clients in need of help.

Budget

\$218,974.00

Category

Human Services, General/Other Case Management

Population Served

Poor, Economically Disadvantaged, Indigent, Unemployed, Underemployed, Dislocated, At-Risk Populations

Program Short Term Success

Program Long term Success

Program Success Monitored By

Examples of Program Success

Adult Education

Description

The adult education classes at Beverly Bootstraps assists unemployed, underemployed and those in need of furthering their education to obtain employment or increase wages.

The Career and College Readiness program provides clients with the tools necessary for employment. The program offers individualized tutoring and access to computers to help students enter the work force.

The HiSET test preparation, English language classes and literacy tutoring are often the first opportunity our clients have in obtaining the skills necessary to achieve self-sufficiency.

Clients utilizing adult education classes are referred to our food pantry, case management and youth and family programs to assist them in overcoming the root causes and inter-connected issues of food insecurity, financial instability and shortfalls in education and job skills.

Budget

\$149,952.00

Category

Human Services, General/Other

Population Served

Poor, Economically Disadvantaged, Indigent, Unemployed, Underemployed, Dislocated, At-Risk Populations

Program Short Term Success

Program Long term Success

Program Success Monitored By

Examples of Program Success

Youth & Family

Description	<p>The youth and family programs at Beverly Bootstraps provide important mentoring and support services to those needing academic support. The after-school programs allow kids to receive tutoring, enjoy a nutritious snack, and connect with one another in a safe and relaxed setting. We also offer an on-site library, school supplies to start of the academic year, opportunities for summer camp, and a holiday gift program for families.</p> <p>Clients utilizing youth and family programs are referred to our food pantry, case management and adult education classes to assist them in overcoming the root causes and inter-connected issues of food insecurity, financial instability and shortfalls in education and job skills.</p>
Budget	\$341,504.00
Category	Human Services, General/Other Children & Youth Services
Population Served	Poor, Economically Disadvantaged, Indigent, Unemployed, Underemployed, Dislocated, At-Risk Populations
Program Short Term Success	
Program Long term Success	
Program Success Monitored By	
Examples of Program Success	

Program Comments

CEO Comments

Beverly Bootstraps recognizes the critical importance of evaluating the impact and outcomes throughout all of our programs. Beverly Bootstraps has a successful track record and monitors key performance indicators including program service utilization and outcomes to continuously improve upon program success. An Outcomes Committee has been working to develop the methodology to measure more accurately specific outcomes of our programs on a long-term basis. In addition, we have now been working with Apricot Outcomes Achievement software for over a year. This database has greatly increased our data collection capabilities and ability to measure and communicate outcomes more efficiently.

Management

CEO/Executive Director

Executive Director

Mrs. Sue Gabriel

Term Start

July 2008

Email

sgabriel@beverlybootstraps.org

Experience

As Executive Director, Sue is committed to the vital role that Beverly Bootstraps serves within the community. She works closely with the Board and the staff to develop and implement strategic growth and maintain the fiscal health of the organization. Sue also takes the lead in advocating policy issues that relate to the mission of the organization.

Sue's path to the helm of Beverly Bootstraps includes over 20 years of experience, mostly in the non-profit sector. Since 2008, Sue has helped grow Beverly Bootstraps from a grass-roots organization to a mid-sized non-profit. Under her leadership, the organization has grown over 30% in clients served, revenue and number of staff and volunteers.

Sue's career experience includes much in the way of initiative and leadership. She has been the sole proprietor of Marketing Success, Director of Development for Beverly School for the Deaf and Director of Tourism for Thoroughbred Country in South Carolina. This varied experience prepared her for the complexity of leading a community organization.

Sue holds a B.A. in English/Communications with a Business Minor and frequently participates in business learning opportunities and training. Sue resides in Beverly, MA with her husband and three children. She is a member of the Beverly Rotary Club and St. Peter's Church and is involved in many aspects of the community through her work and family.

Former CEOs

Name

Term

Mr. Tom Giddford

Jan 1992 - July 2008

Senior Staff

Mrs. Heather Johnston

Title

Director of Donor Relations

Experience/Biography

As Director of Donor Relations, Heather oversees all fundraising efforts, marketing/communications and volunteer activities.

Over the last 18 years, Heather has held various leadership roles in Development/Donor Relations for Easter Seals NH, Wide Horizons for Children and Anna Jaques Hospital. In addition, Heather has been actively involved in a variety of leadership roles, including President of the New England Association of Healthcare Philanthropy and has been on the national board of the Association for Healthcare Philanthropy. Heather has also been actively involved as a board member for the Greater Beverly YMCA and currently volunteers at the North Beverly Elementary School.

Heather holds a B.S. in Business with an Economics/Finance Minor. Heather resides in Beverly, MA with her husband and two daughters.

Staff Information

Full Time Staff	17
Part Time Staff	19
Volunteers	251
Contractors	1
Retention Rate	93%

Staff Demographics - Ethnicity

African American/Black	0
Asian American/Pacific Islander	0
Caucasian	34
Hispanic/Latino	0
Native American/American Indian	0
Other	2 mixed race

Staff Demographics - Gender

Male	8
Female	28
Unspecified	0

Formal Evaluations

CEO Formal Evaluation	Yes
------------------------------	-----

CEO/Executive Formal Evaluation Frequency	Annually
Senior Management Formal Evaluation	Yes
Senior Management Formal Evaluation Frequency	Annually
NonManagement Formal Evaluation	Yes
Non Management Formal Evaluation Frequency	Annually

Plans & Policies

Organization has a Fundraising Plan?	Yes
Organization has a Strategic Plan?	Under Development
Years Strategic Plan Considers	5
Date Strategic Plan Adopted	Oct 2011
Does your organization have a Business Continuity of Operations Plan?	No
Management Succession Plan?	Yes
Organization Policy and Procedures	Yes
Nondiscrimination Policy	Yes
Whistleblower Policy	Yes
Document Destruction Policy	Yes
Directors and Officers Insurance Policy	Yes
Is your organization licensed by the Government?	No
Registration	Exempt
Permit?	Yes

Collaborations

The following represents a current list of partner agencies/groups.

Apple Village
Be Healthy Beverly

Beverly Hospital, a Member of Lahey Health
Beverly Housing Authority
Beverly Public Schools
Beverly Recreation Department
Beverly Resource Group
Cape Ann Resource Exchange (CARE) Network
Fort Beverly
North Shore Adult Education Partnership (NSAEP)
North Shore Hunger Network
North Shore Volunteer Resource Group
North Shore Community Action
Turtle Creek/Turtle Woods

Awards

Awards

<u>Award/Recognition</u>	<u>Organization</u>	<u>Year</u>
Senator Fredrick E. Berry Community Service Award	North Shore Community Action Program	2012
Non-Profit of the Year	Greater Beverly Chamber of Commerce	2013
Non-Profit of the Year	Essex County Community Foundation	2015
Top-rated Nonprofit	Great Nonprofits	2016

Comments

CEO Comments

D

Board & Governance

Board Chair

Board Chair	Mr. Mark A. Paluzzi
Company Affiliation	Citizens Financial Group, Inc.
Term	Jan 2017 to Jan 2019
Email	mark.paluzzi99@gmail.com

Board CoChair

Board CoChair	Mr. Mark Munoz
Company Affiliation	Jan Pro Cleaning Systems of MA
Term	Jan 2017 to Jan 2019
Email	mark.munoz@jan-pro.com

Board Members

Name	Affiliation	Status
Mr. Edward Cahill	Eagle Strategies, LLC	Voting
Mr. Laurence Chase	The Fitzie Foundation	Voting
Mr. Steven Cohen	Retired	Voting
Mr. Gary Cowles	Retired	Voting
Ms. Sarah Creighton	Manchester Master Planning Committee	Voting
Mr. Stephen Curran	Beverly National Bank	Voting
Mrs. Melissa Dane	Brookwood School Parent's Association	Voting
Ms. Joey Gustafson	JM Consulting, Inc.	Voting
Mr. Peter Johnson	Retired	Voting
Mr. Jeremy McElwain	Keller Williams Realty	Voting
Mrs. Mimi McFadden	SchoolWorks, LLC	Voting
Mr. Mark Munoz	Jan Pro Cleaning Systems of MA	Voting
Ms. Bernadette Orr	NeighborWorks America	Voting
Mr. Mark Paluzzi	Citizens Bank & Trust	Voting
Mrs. Lori Panicali	Forever 21	Voting
Mr. Jeffrey Roberts	Nutter, McClennen & Fish, LLP	Voting
Mr. James Tallo	Retired	Voting
Mr. Joseph Trainor	Boston Hill Advisors	Voting
Ms. Sarah Willwerth-Dyer	Anthony & Dodge, PC	Voting

Board Demographics - Ethnicity

African American/Black	0
Asian American/Pacific Islander	0

Caucasian	18
Hispanic/Latino	0
Native American/American Indian	0
Other	1 mixed race

Board Demographics - Gender

Male	12
Female	7
Unspecified	0

Board Information

Board Term Lengths	3
Board Term Limits	3
Number of Full Board Meetings Annually	7
Board Meeting Attendance %	75%
Written Board Selection Criteria?	Yes
Written Conflict of Interest Policy?	Yes
Percentage Making Monetary Contributions	94%
Percentage Making In-Kind Contributions	31%
Constituency Includes Client Representation	No

Standing Committees

- Board Governance
- Resource Development
- Finance
- Executive
- Personnel
- Program / Program Planning

Comments

CEO Comments

Beverly Bootstraps has undergone an impressive transformation from a grass-roots organization working out of the basement of a church to a lead social services agency within the community. In this time, the Board of Directors has transitioned from a hands-on, working Board to more oversight and strategy driven Board. This Board is committed to updating By-Laws, focusing on Board procedures and putting new governance structures in place to ensure the well-being of the organization. The commitment is so deliberate that it appears in the strategic plan.

Financials

Fiscal Year

Fiscal Year Start	July 01, 2016
Fiscal Year End	June 30, 2017
Projected Revenue	\$2,418,500.00
Projected Expenses	\$2,549,494.00
Endowment?	No
Spending Policy	N/A
Credit Line?	Yes
Reserve Fund?	Yes
Months Reserve Fund Covers	3

Detailed Financials

Revenue and Expenses

Fiscal Year	2016	2015	2014
Total Revenue	\$2,718,364	\$4,910,921	\$2,355,432
Total Expenses	\$2,857,045	\$2,516,545	\$2,219,282

Revenue Sources

Fiscal Year	2016	2015	2014
Foundation and Corporation Contributions	--	--	\$218,188
Government Contributions	\$10,495	\$8,000	\$9,300
Federal	--	--	--
State	--	--	--
Local	--	--	--
Unspecified	\$10,495	\$8,000	\$9,300
Individual Contributions	\$1,132,811	\$3,542,771	\$925,656
Indirect Public Support	--	--	--
Earned Revenue	\$672,651	\$773,730	\$639,200
Investment Income, Net of Losses	\$2,590	\$3,094	\$2,832
Membership Dues	--	--	--
Special Events	\$197,730	\$44,503	\$88,926
Revenue In-Kind	\$695,881	\$511,823	\$470,208
Other	\$6,206	\$27,000	\$1,122

Expense Allocation

Fiscal Year	2016	2015	2014
Program Expense	\$2,161,077	\$1,829,243	\$1,712,329
Administration Expense	\$118,322	\$155,741	\$67,871
Fundraising Expense	\$577,646	\$531,561	\$439,082
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	0.95	1.95	1.06
Program Expense/Total Expenses	76%	73%	77%
Fundraising Expense/Contributed Revenue	43%	15%	35%

Assets and Liabilities

Fiscal Year	2016	2015	2014
Total Assets	\$5,953,316	\$4,943,586	\$1,988,539
Current Assets	\$1,191,717	\$1,545,808	\$1,024,353
Long-Term Liabilities	\$2,177,210	\$643,104	\$284,582
Current Liabilities	\$126,187	\$511,882	\$309,733
Total Net Assets	\$3,649,919	\$3,788,600	\$1,394,224

Short Term Solvency

Fiscal Year	2016	2015	2014
Current Ratio: Current Assets/Current Liabilities	9.44	3.02	3.31

Long Term Solvency

Fiscal Year	2016	2015	2014
Long-Term Liabilities/Total Assets	37%	13%	14%

Top Funding Sources

Fiscal Year	2016	2015	2014
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

Capital Campaign

Currently in a Capital Campaign?	No
Capital Campaign Anticipated in Next 5 Years?	No

Comments

CEO Comments

FY16 was a year full of changes. Construction on the 198 Rantoul/35 Park Street building lasted longer and was more involved than anticipated which affected Thrift Shop sales. In addition, our annual campaign revenues were slightly lower than predicted. The organization has a line of credit that will cover the organization's cash flow and there is stability in the organization's balance sheet.

FY17 will be a tight year as the organization normalizes following a major capital project and move into its new building. While the operating budget follows GAAP accounting and must show a sizable deficit, \$72,000 will be used from the organization's capital account to cover the interest payments on the building loan, in addition to covering the principal payments, total monthly payment is currently \$10,500/month. Additionally, it can be noted that \$99,504 is depreciation expense (a non-cash item). The organization has a line of credit to support cash flow and there is stability in the organization's balance sheet.

Foundation Staff Comments

Financial summary data in the charts and graphs above is per the organization's audited financials. Contributions from foundations and corporations are listed under individuals when the breakout was not available.