



## Social New Venture Challenge Business Plan

May 9, 2014

Vanessa Douyon  
Swetha Krishnakumar  
Bhargavi Srivathsan

## Table of Contents

Table of Contents .....	2
Organization Overview .....	3
Market Opportunity .....	3
Our Program.....	4
Why? .....	4
Our Model.....	5
Key Activities .....	5
Our Value Proposition.....	6
Competitive Landscape.....	6
Social Value Proposition .....	8
Financial Sustainability.....	8
Progress to Date.....	9
Management Team.....	10
Measuring Our Impact .....	11
Growth Strategy.....	12
Funding .....	13
Appendices.....	14
Appendix A: The Gender Wage Gap and How Moxie Aims to Help Address It .....	14
Appendix B: Customer Profile .....	14
Appendix C: Stakeholders .....	14
Appendix D: EQ and Academic Achievement .....	15
Appendix E: Financial Statement Assumptions- Salaries .....	16
Appendix F: Financial Statement Assumptions- Programming.....	16
Appendix G: Financial Statement Assumptions- Marketing and Development .....	17
Appendix H: Financial Statement Assumptions- Headquarters.....	17
Appendix I: Financial Statement Assumptions- In Kind .....	17
Appendix J: Financial Statement Assumptions- Program Fees .....	17
Appendix K: Financial Statement Assumptions- Supported Salary Revenue.....	17
Appendix L: Girls-Only Rationale .....	18
Appendix M: Math and Science Rationale .....	18
Appendix N: Leadership Team Resumes.....	19

## Organization Overview

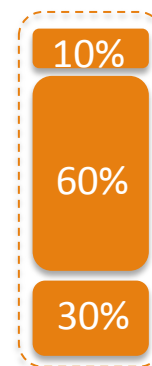
Summer marks a season with huge risks of regression for girls in low income communities. A lack of high quality, affordable programs leaves our girls academically months behind where they left us in June<sup>1</sup> and less likely to graduate college<sup>2</sup>. In fact,  $\frac{2}{3}$  of the achievement gap that costs our economy between \$3-500B annually can be attributed to this lack of opportunities<sup>3</sup> as parents consistently cite the summer as being a difficult time to find productive, affordable opportunities for their kids. While top students are afforded one-off opportunities at elite summer programs and the lowest performers attend mandated summer remediation, girls in the middle are left with few, high-quality options.

Moxie Leadership is a selective, summer and school year program for girls in low-income communities. Through an intensive four-year model, we expose girls to rigorous STEM content, hone their leadership skills and nurture their emotional intelligence. In the process, we will transform summer from a barrier to an opportunity to equip girls with the tools necessary for long-term success. We have run several successful mini-sessions, and are piloting full-scale with 50 girls this summer in partnership with 6 schools in New Orleans.

## Market Opportunity

As teachers, our founders noticed that summer was more of a barrier than a time of exploration for their students. Unfortunately, their kids were not unique in this regard. More than 3.4 million<sup>4</sup> girls in low-income communities are underserved in the summertime. While this is a national phenomenon, Moxie Leadership is initially focused on New Orleans where explosive student achievement trends promise a growing market<sup>5</sup> while high-crime and mental health issues demand stronger interventions. Moreover, our founders have deep educational ties to New Orleans- ties which have already yielded 6 school partnerships and use of a school's premises to pilot our program this summer. This pilot will enable us to begin providing opportunities for the nearly 5,000 girls in New Orleans alone.

Within the 3.4 million girl market, we specifically target the “60% of girls in between” who have the least access to summer programming. The top 10% of students have access to one-off prestigious opportunities. On the other hand, the bottom 30%, who fail state assessments, attend school-mandated remedial summer



<sup>1</sup> von Hippel et al. (2007)

<sup>2</sup> Alexander et al. (2007)

<sup>3</sup> National Summer Learning Association

<sup>4</sup> Using NAEP and NSLP as a proxy for determining the number of low-income girls scoring above proficient

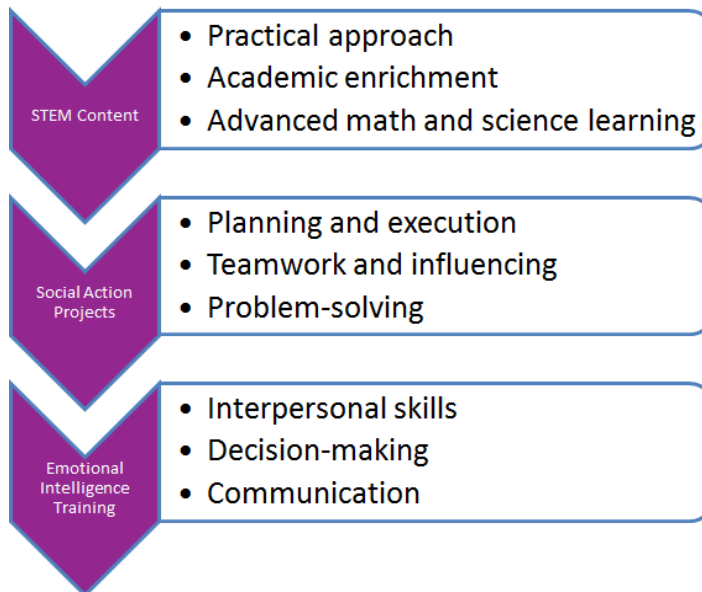
<sup>5</sup> 49% of 4th Graders passing in 2007 vs. 70% in 2011 (Cowen Institute)

programming. We target the 60% in between those groups with fewer available options.

## Our Program

Moxie Leadership operates an annual 6 week summer program and monthly Saturday sessions during the school year for 5th to 8th grade girls in low-income communities. The hallmarks of our program are repeated exposure and project-based learning, as successful emotional intelligence programming takes time<sup>6</sup> and promising students from low-income communities respond better to learning through real-world examples<sup>7</sup>.

Our content takes two forms: rigorous math and science (STEM) labs and social action projects. Together in teams, girls work on social action projects to spark a life-long interest in community work. We use those team experiences 1) to reinforce the team and leadership skills we teach through mastery experiences of being on a successful team and 2) to debrief the emotional intelligence progress of team interactions. Our curriculum is designed, in the short term, to ensure girls are more academically prepared for college and leave our program with strong communication, negotiation and leadership skills. Long-term, this means girls with increased earning potential who are invested in improving their communities. The map below shows the skills we build through our various program components:



## Why?

With the initial idea for a summer program, the Moxie Leadership team set out to **interview 40+ parents** and community members, conduct 2 focus groups of middle school girls and run a series of

<sup>6</sup> <http://www.edutopia.org/social-emotional-intelligence-learning-education>

<sup>7</sup> 49% of 4th Graders passing in 2007 vs. 70% in 2011 (Cowen Institute)

mini-sessions. Those conversations, perspectives and experiences yielded our current program model as we listened to themes of girl-specific programming, preparation for long-term success and year-round, intensive programming.

Our emphasis on emotional intelligence and developing social capital is rooted in research. According to the Carnegie Institute, 85% of your financial success comes from your ability to manage your emotions, communicate, negotiate and lead. These skills serve as the foundation for our emotional intelligence curriculum. At the same time, the social and human capital gleaned from a long-term, cohort-based approach will help position our girls for professional and social success.<sup>8</sup>

## Our Model

Moxie Leadership partners with elementary schools to launch a site and identify prospective girls. We then communicate with schools to identify interested and qualified rising 5th grade girls. For most girls, this is the first application they've ever completed, so we work with counselors, parents and girls to answer questions aimed at developing a full picture of each girl:

- Academic Achievement
- State Test Proficiency
- Leadership (Class, After-School, Community)
- Recommenders (Teacher, Mentor)
- Artistic Submission (Poem, Story, Drawing, etc.)

From there, we select a cohort of 25 girls to loop with us each summer until the 8th grade. A fully-grown program site serves one hundred 5th to 8th grade girls led by a Site Director (an experienced teacher seeking admin experience), 4 Teaching Fellows (college students with nonprofit/education leadership aspirations) and 2 High School Interns (Moxie Leadership alumni).

## Key Activities

Partner with Schools: We develop mutually beneficial relationships with schools whereby we provide their students with rigorous content during a potentially unproductive summer while also providing parents with a positive, ongoing, school-related experience. School in turn, assist us with marketing the program, recruiting girls and in some cases, sharing space.

Recruit Teachers and College Interns: To hire experienced teachers, we leverage partner schools, education networks and word-of-mouth to find teachers with at least 2 years of experience. At the

---

<sup>8</sup> Economic Mobility Project. See Appendix A.

intern level, we leverage college networks (student groups, professors, departments) to market our internship opportunities.

Train our Teachers and College Interns: In the months leading up to our program, teachers and interns participate in 30+ hours of virtual training and 20+ hours of session pre and post work.

Develop Curriculum: Experienced teachers and PhD students are currently working to develop our curriculum. In the long-term we have budgeted to hire a full-time curriculum expert to refine it.

Partner with Community Members: We recognize and value the role of mentors and community members who we invite to contribute to our program as guest speakers, real-world experts on our projects, fitness class leaders and recipients of awards at our annual community banquet.

In addition to these key activities, we rely on suppliers to execute other aspects of our program:

- Liberty's Kitchen (Lunch Service Provider)
- Hammond Transportation (Bus Service Provider)

## **Our Value Proposition**

The Moxie Leadership Academy differentiates itself in 4 major ways:

- Long-term engagement through 4 years of continuous programming
- Targeted focus on the 60% of girls "in between" with fewer opportunities
- Focus on developing emotional intelligence
- Sustainable financial model, decreasingly dependent on donations/grants

Our unique approach enables us to provide girls who otherwise would not have access with unparalleled exposure to well-developed social networks, emotional intelligence support, and academic enrichment.

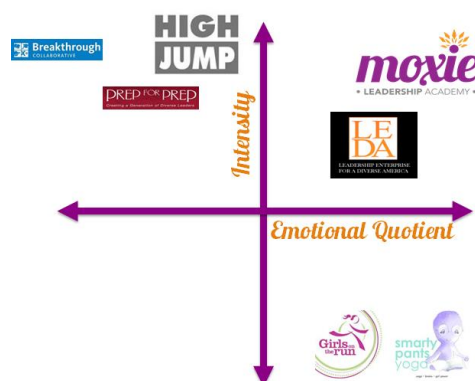
## **Competitive Landscape**

In New Orleans specifically, summer options for students in low-income communities have not caught up with our education reform movement. Currently, the only selective program for at-risk students is Breakthrough Collaborative. Nationally, while more options are available, these programs are not girl specific and do not by-and-large have aspirations to scale nationally (ex. High Jump, Prep for Prep). Our girl-centered approach allows us to create a safe environment for middle

school girls to challenge themselves<sup>9</sup>. In terms of the competitive landscape, our program fills a gap here:

Program Category	Cost	Topic	Curriculum	Target Market	Examples
<i>Summer School</i>	Free	Remedial academics	Varies	Underperforming students	Varies by district, charter school
<i>Selective: At-Risk Specific</i>	Free/Low	Academic	Strong curriculum	High achievers, not gender specific	High Jump, Breakthrough, Prep for Prep
<i>Selective: Not-At-Risk Specific</i>	High (scholarships)	Academic	Strong curriculum	High income, high achievers	MIT Summer Program
<i>Community Programs</i>	Low Cost or Free	Varies	Lacking a standardized curriculum	Low income families	Church Camp, Boys and Girls Club, Shorter one-week programs
<i>Traditional Camp</i>	High for our kids	Varies	Lacks curriculum	Middle income families	Sports Camp

The Moxie Leadership Academy fits into the “Selective, At-Risk” program category and differentiates itself with a targeted approach towards specifically enabling girls with not only academic enrichment as well as emotional intelligence development.

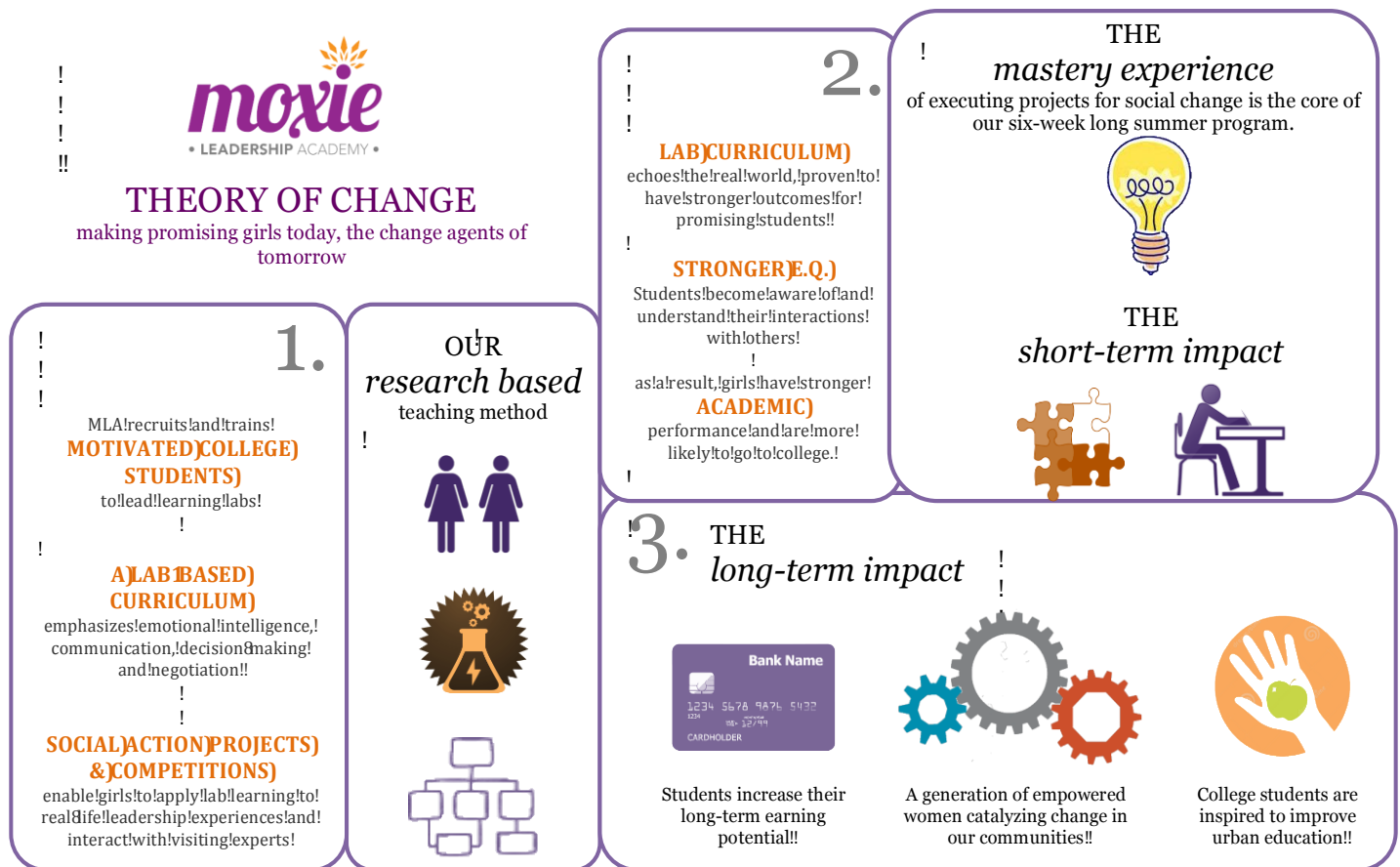


Lastly, research points to the importance of emotional intelligence for long-term success and the need for intensive, consistent programming for stronger impact [see appendix]. As shown at left, Moxie’s approach prioritizes emotional intelligence in our curriculum and has designed a four-year, summer and school year support system for a more effective intervention.

<sup>9</sup> See further rationale for our girl-specific approach in Appendix L.

## Social Value Proposition

Our social value proposition is three-fold: in the short-term, we will increase the immediate academic outcomes of disadvantaged girls and in the long-term, we will increase their earning potential and create a generation of women catalyzing change in their communities. By nurturing our girls' interest in service projects, we will cultivate a life-long passion for creating positive change in our communities. At the same time, the projects our girls execute will have their own set of beneficiaries. For example, our girls will refine their leadership skills by working in teams to build a community garden. At the same time as our program positively impacts our girls, the garden goes on to provide social value to the community. So our program won't just touch our participants- it will mobilize them to touch others.



## Financial Sustainability

Our financial model is more sustainable than those of other programs doing great work. Our financial strategy involves diversifying our participant mix with 10% students on full scholarships,



70% of students contributing just \$25 per week (\$125 total), and 20% of our students coming from higher income backgrounds who pay \$150 per week (\$900 total)<sup>10</sup>. As a result, we are able to use fees from higher income participants to subsidize those of our disadvantaged students, ultimately becoming less dependent on fundraising and grants with scale.

Year	2014	2015	2016	2017	2018	2024
<i>Number of Sites</i>	1	2	3	4	6	20
<i>Total Participants</i>	50	125	225	375	450	2000
<b>Revenue</b>						
<b>SFSP Grant (Lunch)</b>	4500	22500	40500	67500	81000	360000
<b>Program Fees</b>	0	38250	68850	114750	137700	612000
<b>Grants</b>	0	5000	20000	120000	100000	50000
<b>Individual Donors</b>	11690	5000	10000	70000	30000	35000
<b>Supported Salaries</b>	6500	3750	6750	11250	13500	60000
<b>In-Kind Donations</b>	8450	10550	15550	20550	30550	100550
<b>Total</b>	31140	85050	161650	404050	392750	1217550
<b>Expenses</b>						
<b>Salary</b>	8000	18500	30000	227026	242526	520096
<b>Programming</b>	14340	54560	81840	109120	72747	533350
<b>Marketing/Development</b>	350	700	1050	11400	12100	27000
<b>Headquarters</b>	0	0	31840	31840	31840	31840
<b>In-Kind Services</b>	8450	10550	15550	20550	30550	100550
<b>Total</b>	31140	84310	160280	399936	389763	1212836
<b>Surplus</b>	0	740	1370	4114	2987	4714
<b>% Revenue Coming from Donors/Grants</b>	38%	12%	19%	47%	33%	7%
<b>\$ Fundraised Per Girl</b>	\$234	\$80	\$133	\$507	\$289	\$43

Financial model assumptions listed in detail in the Appendix (F-K).

## Progress to Date

In terms of our progress-to-date, we have (1) tested and validated our market and (2) secured staffing and **50+ customers** for our full-scale pilot.

As previously mentioned, we engaged with a range of stakeholders to better understand the problem and the market needs **speaking to over 40 parents** of our target girls to understand their unmet needs. As we familiarized ourselves with the context, we then shifted into more targeted

<sup>10</sup> See Appendix J for comparable program prices.

market research efforts by conducting focus groups with small groups of our target girls. These discussions helped us refine our marketing efforts and program development.

With market confirmation, we began preparing for our upcoming full-scale pilot in June. We procured partnerships with 6 schools across 2 charter networks (Sylvanie Williams Elementary, Lawrence Crocker Elementary, Arthur Ashe Charter School, Dibert Community School, S.J. Green Charter School, and Langston Hughes Academy). All partner schools work to promote Moxie Leadership to students and parents (calling parents, including us in their newsletter, working with girls to complete applications). This strategy put us **116% to goal** for applications submitted- **forcing us to turn girls away** and yielding **50 program participants**.

This year, we will be hosted at Crocker Elementary School and have partnered with co-located summer programs to qualify for the **Summer Food Service Program grant** (providing free lunches for all of our participants). Even more exciting is that our lunches will be provided by Liberty's Kitchen- a healthy lunch program to ensure our girls develop great eating habits.

Following is a list of other milestones our team has achieved:

- \$26,469 Raised- founder's investment, crowdsourcing and in-kind donations
- 85% to goal for funding our pilot launch
- Teach For America Social Innovation Award Semi-Finalist
- Teacher, College Intern and High School Assistant hired
- Partnered with NYU Law for legal consulting
- Attended roundtable with Sheryl Sandberg to discuss "Ban Bossy" campaign
- Established Louisiana corporation, 501C3 application submitted

## Management Team

Our team represents a highly qualified, intentionally assembled group with diverse backgrounds and passion for high potential, at-risk girls.

**Vanessa Douyon, Founder and CEO:** The former TFA New Teacher Coach and Recruiter has the skillset to oversee our recruitment strategy and teacher development along with the relationships to build community partnerships.

**Christina Douyon, Co-Founder and Director of Curriculum:** As a former TFA and Breakthrough Teacher with a MA in Psychology from Columbia earning her PhD at Boston College, Christina has both the academic background and real-world context to write our curriculum.

**Bhargavi Srivathsan, Director of Development:** A former Program Manager at Intel Corporation and aspiring consultant, Bhargavi has fundraised > \$90K for other non-profit organizations and already has our pilot at 85% of its fundraising goal.

**Swetha Krishnakumar, Director of Data Management:** A former Market Analyst with experience in education startups in India and currently working for an investment management firm.

**Tanya Fraser, Director of Marketing:** A member of the Bill and Melinda Gates Foundation marketing team, previously of FIZZ Marketing, Tanya is responsible for our image and branding.

**Aria Woodley, Director of Finance:** This Bank of America-Merryl Lynch Financial Advisor has also won and serviced > 10 school contracts giving her both the skills and the context to run our financial projections.

Supported by this group of expert advisors:

**Dr. Venus Evans:** Author of “Teaching Black Girls”

**Dr. Stephanie Evans:** Author of several youth empowerment curricula

**Malajah Lopez:** 7th Grader and expert on what it is like to be a middle school girl

## Measuring Our Impact

In measuring social impact, we consider various aspects of both our short- and long-term impact. In the short-term, we want to know that girls are showing up, coming back and improving academically. At the same time, we want to see parents willing to pay and a constant demand for our limited number of slots. Below is an outline of what that outcome will look like in numbers.

Dimension	Questions Answered	Metrics
Program Quality	Are girls happy with the program and coming back?	<ul style="list-style-type: none"> <li>Retention</li> <li>Parent and Participant Surveys</li> </ul>
Program Composition	Does our program composition align with our long-term vision?	<ul style="list-style-type: none"> <li>Composition of payment levels</li> <li>% Students on free and reduced lunch</li> <li>% Students first in family to attend college</li> </ul>
Academic Growth	Are girls advancing academically as a result of our program?	<ul style="list-style-type: none"> <li>Pre, Mid and Post summer tests</li> <li>% Girls reporting feeling more ready heading into the next school year</li> </ul>
Social Emotional Growth	Are girls growing in terms of their ability to manage their emotions and work in groups?	<ul style="list-style-type: none"> <li>Pre, Mid and Post EQ questionnaires</li> <li>Growth in journal writing</li> <li>Observed improvement in social skills</li> </ul>

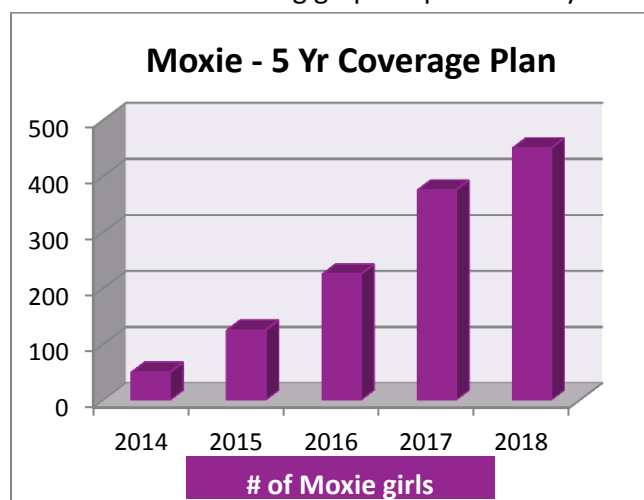
Community Engagement	Are girls passionate about social problems and invested in improving their communities?	<ul style="list-style-type: none"> <li>Impact of social action projects</li> <li>% Girls reporting increased interest in community issues</li> </ul>
----------------------	---	--

The high-touch nature of our program will set us up for long-term communication with MoxieGirl Alum, so we can effectively track our long-term impact.

Dimension	Questions Answered	Metrics
Academic Growth	Are girls graduating at higher rates than their peers?	<ul style="list-style-type: none"> <li>Strength of high school schedule</li> <li>High school graduation rates</li> <li>College graduation rates</li> </ul>
Social Emotional Growth	Are girls growing in terms of their ability to manage their emotions and work in groups?	<ul style="list-style-type: none"> <li>% Maintaining a consistent group of friends</li> <li>Leadership positions and internship participation</li> </ul>
Community Engagement	Are girls passionate about social problems and invested in improving their communities?	<ul style="list-style-type: none"> <li>% reporting volunteer and community engagement roles</li> </ul>
Long-term Financial Prospects	Are our girls on track to taking high-paying jobs?	<ul style="list-style-type: none"> <li>High school part-time jobs</li> <li>1<sup>st</sup> job salary as compared to graduating class</li> </ul>

## Growth Strategy

Moxie's focus is to serve girls in less saturated markets in second tier cities such as New Orleans, Nashville, Portland, San Antonio, etc. This provides us with the opportunity to take our program to girls who typically have less access to summer programming than major cities. After our initial pilot in New Orleans, our goal is to expand our offering in New Orleans, launching our second site in 2015 and a third site in 2016, thus providing sufficient coverage in the New Orleans area. As we continue to expand in the NOLA area, we also plan to launch pilots in other cities, starting with Nashville. The following graph depicts our 5-year coverage plan:



## **5 Year Growth Projection**

	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
Crocker (NOLA)	50 girls	75	100	100	100
KIPP (NOLA)	-	50	75	100	100
District (NOLA)	-	-	50	75	100
<i>Total Served in NOLA</i>	50	125	225	275	300
Nashville 1	-	-	-	50	75
Nashville 2	-	-	-	50	75
<i>Total Girls Served</i>	50	125	225	375	450

As Moxie continues to branch into new cities, our marketing team and curriculum designers will conduct detailed research and analysis to ensure that city-specific cost differences and customer preferences are taken into account while Moxie's core values and principles stay intact.

## **Funding**

Moxie Leadership seeks \$5,000 to execute our pilot in June and is calling all educators, all girl supporters and all advocates to rally with us.

## Appendices

### Appendix A: The Gender Wage Gap and How Moxie Aims to Help Address It

According to [whitehouse.gov](http://whitehouse.gov), women earn 77 cents to every dollar that men earn. In particular, based on research from the National Women's Law Center, African-American women make 64% of the pay of white, non-Hispanic men, and Hispanic women make 54% of the pay of white, non-Hispanic men.

There are a number of factors that can help women close this wage gap and increase their long-term earning potential to ensure opportunities for economic mobility. According to the Economic Mobility Project, a project of The Pew Charitable Trust, the three major indicator categories of economic mobility include: social capital, human capital, and financial capital. While many organizations and initiatives exist to develop the services available within these categories, the Moxie Leadership Academy aims to begin providing these services for girls at a younger age. We aim to promote a truly systematic, preventative change rather than a reactionary effort to alter women's outcomes when it might be too late.

### Appendix B: Customer Profile

Our target customer is an 11 year old girl, Mary, at Sylvanie Williams Elementary School. Having just finished the 4th grade, she has now graduated elementary school and is preparing for her first year of middle school. While Mary tries hard in school, her performance is average. Her "proficiency" on the state exam means she will not have to go to summer school, but it also means she likely will not be selected for any one-off, prestigious opportunities. She has not yet developed the moxie to navigate resources that could elevate her to the next level of academic performance. We develop girls like Mary to strengthen their emotional intelligence within the context of academic enrichment and community engagement. We believe our girls will defy expectations for long-term success. We view them as an engine for social change who, after years of cultivating their interest in reinvigorating our communities, serve as catalysts for positive change.

### Appendix C: Stakeholders

In addition, to better serve these girls, we also work to understand, educate, and work with our other stakeholders. These include teachers, parents and siblings, policymakers, and business leaders. In particular, in the lead up to each summer cohort, teachers and parents and siblings are particularly important stakeholders to ensure that we can better serve our Moxie girls. During the recruitment and application process, we work closely with our partner schools to reach out to their

teachers to have them (1) Build awareness for our program among their girls and (2) recommend girls for our program. As we accept girls into our program, we also begin cultivating close relationships with parents by congratulating parents on their daughters' acceptance by phone and answering questions and clarifying information regarding the program. This is essential to ensure program satisfaction and retention, particularly since our program requires 4 years of engagement with each girl.

## Appendix D: EQ and Academic Achievement



### EQ and Academic Achievement

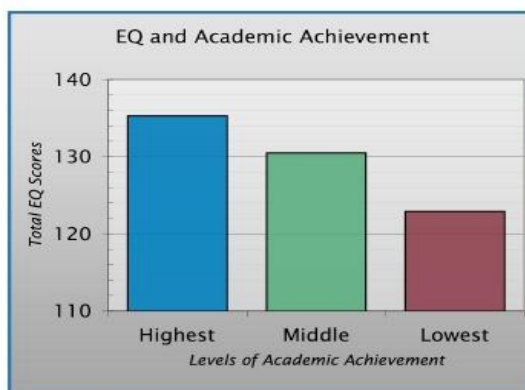
The introduction of emotional intelligence and social emotional learning curricula has sparked a new field of research examining the efficacy of EQ intervention programs. So far, the results indicate that emotional intelligence has extraordinary potential as a mediator of positive school outcomes.

For example, in a 2004 study of 667 high school students, James Parker and team gave students an emotional intelligence assessment and compared those scores to their year-end grades. As shown in the graph to the right, EQ and academic performance are strongly related.<sup>11</sup>

Participants in the study were asked to complete an EQ inventory between the first and second semesters of the academic year. At the end of the year, each EQ response was matched with the student's final grade point average. Students were then divided into three groups based on their grade point

"...Social and emotional learning students have significantly better attendance records; their classroom behavior is more constructive and less often disruptive; they like school more; and they have better grade point averages. They are also less likely to be suspended or otherwise disciplined."<sup>2</sup>

Timothy Shriver & Roger Weissberg, *The New York Times*



*Students with the highest grades also have the highest EQ – and likewise for the middle and lowest groups. In other words, this study shows a strong relationship between EQ and academic achievement.<sup>11</sup>*

## Appendix E: Financial Statement Assumptions- Salaries

FT Staff	Position	Salary w/ Benefits	Source
	<i>Executive Director*</i>	\$92,202	Salary.Com + Benefit Calc. Below
	<i>Development Officer *</i>	\$70,032	Salary.Com + Benefit Calc. Below
	<i>Curriculum and Program Specialist*</i>	\$70,032	Salary.Com + Benefit Calc. Below
	<i>Alumni Coordinator*</i>	\$50,032	Salary.Com + Benefit Calc. Below
	<i>Data Specialist*</i>	\$50,032	Salary.Com + Benefit Calc. Below
<b>Seasonal Staff</b>	<i>Site Director</i>	5,500	Teach For America Institute- COMP
	<i>College Intern</i>	\$1,500	Breakthrough- COMP

Year Round Staff Detailed Expenses	
Executive Director Base Salary	\$80,000
Social Security Tax (6.2% Salary)	\$4,960
Unemployment Insurance (.6% Salary for the first 7k)	\$42
Healthcare Insurance	\$7,200
<b>Total Executive Director Cost</b>	<b>\$92,202</b>
Development Officer	\$60,000
Social Security Tax (6.2% Salary)	\$2,790
Unemployment Insurance (.6% Salary for the first 7k)	\$42
Healthcare Insurance	\$7,200
<b>Total Development Officer Cost</b>	<b>\$70,032</b>
Alumni Coordinator/Data Specialist	
Development Officer	\$40,000
Social Security Tax (6.2% Salary)	\$2,790
Unemployment Insurance (.6% Salary for the first 7k)	\$42
Healthcare Insurance	\$7,200
<b>Total Coordinator or Specialist Cost</b>	<b>\$50,032</b>

## Appendix F: Financial Statement Assumptions- Programming

Subcategory	Total	Source
<i>Supplies</i>	\$1500 Per Site	Office Depot
<i>First aid, CPR, AED certification</i>	\$90 Per Site	Onlinecprcertification.net
<i>Transportation</i>	\$8,250 per site	Hammond Transporation (Current Provider)
<i>Background Checks</i>	\$31.88 per intern	IntelligentInvestigations.com
<i>Site Lunch Costs</i>	\$4500 per site	Liberty's Kitchen (Current Provider)
<i>Program Liability Coverage</i>	\$10,000 per site	Sadler Sports.Com



## Appendix G: Financial Statement Assumptions- Marketing and Development

Subcategory	Total	Source
<i>Printing and Copying</i>	\$200 Per Site	Kinkos (Flyers/Signs) and MOO (Business Cards)
<i>T-shirts</i>	\$150 Per Site	Froi's Custom Screen-printing
<i>Travel, New Site Development</i>	\$20,000 at scale	Southwest (\$300 Flight, \$200 Accommodations, 40 Trips)

## Appendix H: Financial Statement Assumptions- Headquarters

Subcategory	Total	Source
<i>Executive Team Cell Phones</i>	\$6,000	Verizon
<i>Rent (Incl. Internet, Utilities, Furniture)*</i>	\$28,840	St. Charles Avenue- COMP
<b>Other Assumptions</b>		
Avg. Sq. Ft. Per Employee	250	Loopnet.com
#Employees	5	
Total Square Feet Required	1250	
Rental Rate	\$1.38 /SF/Month	St. Charles Avenue- COMP
Total Square Feet Rented	1500 SQFT	

## Appendix I: Financial Statement Assumptions- In Kind

Subcategory	Total	Source
Building Website	400	Web Developer, Pierre-Guy Douyon
Annual Website Maintenance (Server, Domain)	550	Web Developer, Pierre-Guy Douyon
Program Location Space	5000	New Orleans College Prep- Crocker Elementary

## Appendix J: Financial Statement Assumptions- Program Fees

	Headcount	Wkly Rate	Source	Fee per Student	Total Fees
# w/FRL (70%)	1400	\$30.00	Boys and Girls Club	\$180.00	\$252,000.00
# w/o FRL (20%)	400	\$150.00	Academy of the Sacred Heart (\$200/ wk)	\$900.00	\$360,000.00
Scholarship (10%)	200	\$-		\$-	\$-
Total enrollment	2000				\$612,000.00

## Appendix K: Financial Statement Assumptions- Supported Salary Revenue

Subcategory	Total	Source
<i>College Intern Salary</i>	\$1500 per intern	Breakthrough Collaborative
<b>Other Assumptions</b>		
Universities provide stipends for students who work for non-profits	Varies	Tulane (stipend earned for our intern); University of Chicago (stipend earned for our director)
Nonprofits may rely on these stipends to pay interns	Varies	New Orleans College Prep (10 summer interns, 75% supported)

## Appendix L: Girls-Only Rationale

Part of our long-term vision is to increase the earning potential of our participants. When we consider what population is most vulnerable to the wage gap, it is clear that women of color should be our priority. As previously mentioned, women earn 77 cents to every dollar that men earn [whitehouse.gov]. In particular, based on research from the National Women’s Law Center, African-American women make 64% of the pay of white, non-Hispanic men, and Hispanic women make 54% of the pay of white, non-Hispanic men. But perhaps even more so, we believe that women are the engine to social stability. And as many women in low income communities double as mothers and heads of households, improving their quality of life is central to improving our communities.

The last piece of rationale for our girls-specific model is programmatic. Middle school is a unique time in a girl’s life. A girls-only environment allows us to create a safe space for her to experiment, ask questions and be vulnerable. Moreover, high quality gender specific programming is characterized not simply by the absence of boys, but rather by the presence of specific youth development strategies that are gender-sensitive (Mead & Boston Women’s Fund, 2000; Roychoudhury, Tippins, & Nichols, 1995). This suggests that girls-specific programs are not just effective because boys aren’t allowed, but because a girls-only environment is empowering.

## Appendix M: Math and Science Rationale

Recent reports suggest that women make up only 25 percent of the over 5 million scientists in the United States, and women of color make up just 2 percent of that group (Girls Coalition of Greater Boston, 2009). But in addition to a pressing need for more women of color in STEM, middle school is a crucial time to address this need as most girls lose interest in STEM subjects during middle school.

## Appendix N: Leadership Team Resumes

### VANESSA DOUYON

1130 South Michigan Avenue, Number 404 | Chicago, IL 60605  
(954) 257-6551 | vdouyon@ChicagoBooth.edu

#### EDUCATION

##### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

*Master of Business Administration: Entrepreneurship, Operations Management, and Strategic Leadership*

June 2015

- Awarded Wallman Merit Fellowship: Full-Tuition scholarship for academic achievement and leadership potential
- Nominated by peers for Leadership in Crisis (6% students); Selected to represent cohort in Captivate Booth speech showcase
- Selected for Board Fellows Program to serve as a board member with a local nonprofit and develop organization strategy
- Trek Coordinator for BoothEd and active member of Net Impact and the Entrepreneurship Venture Capital Group

##### THE UNIVERSITY OF FLORIDA

Gainesville, FL

*Bachelor of Arts in Sociology, Magna Cum Laude*

May 2009

- Hall of Fame Inductee for increasing Student Alumni Association memberships ten fold (largest in the nation at 10,000 members)
- Developed the "Distinguished Gator Series," a continuing program which connects prominent alumni to current students
- 2008 Homecoming Queen: top senior female leader as voted on by a panel of faculty and alumni
- Thesis: How Variation in Schooling Affects the Ethnic Socialization of Black Students: A Proposal for the Analysis of Students Who Attend Public, Private and Parochial Schools

#### EXPERIENCE

##### NEW ORLEANS COLLEGE PREPARATORY CHARTER MANAGEMENT ORGANIZATION

New Orleans, LA

*Recruitment Manager*

April 2013- August 2013

- Achieved 83% offer acceptance rate by implementing new recruitment strategies and activating non-recruitment team members
- Over 80 leadership and teaching roles hired ahead of target date by managing across groups of school leaders and managers
- Generated a 15% increase in staff diversity metrics and one year increase in teaching experience through targeted recruiting

##### TEACH FOR AMERICA

New Orleans, LA

*Recruitment Manager*

August 2012-April 2013

- Spearheaded recruitment efforts in Louisiana and Arkansas earning highest manager approval ratings in a region of 30 managers
- Procured partnership with previously unresponsive faculty members yielding a record number of minority applicants
- Awarded the TFA Innovation Grant to launch a leadership summit which led to a 100% increase in "application likelihood" rating
- Developed strategic marketing plan and exceeded goals by 150% for Hispanic/Latino candidates and by 113% for STEM candidates

##### *Corps Member Advisor*

May 2012- July 2012

- Mentored 12 first-year teachers at Houston Institute and built sixth through eight grade curriculum
- Optimized instructional time by creating a scope and sequence targeted at student growth areas based on diagnostic testing

##### *Teach For America Corps Member: New Orleans College Preparatory*

July 2010- July 2012

- Fast tracked to Math Curriculum Coordinator and Assistant Culture Manager; designated a "gap-closing teacher" in the state of Louisiana in Spring 2012
- 93% of reading students grew two years through use of data driven technique to drive classroom decision making
- Reduced student misconduct incidents as reported by the dean through the introduction of school-wide community meetings
- Launched "Exploratory Sessions" to alleviate half-day scheduling issues which led to a 100% decrease in classroom sendouts
- Stimulated a 30% increase in math department benchmark scores after formulating a response plan to off-target data

##### YOUNG ENTREPRENEURS FOR LEADERSHIP AND CHANGE SUMMER PROGRAM

Gainesville, FL

*Program Assistant*

September 2008-August 2009

- Coordinated programming for this 6-week summer leadership program; forged partnerships with local nonprofits to organize more than 2,400 hours of weekday community service along with 5 day-long service trips
- Organized and recruited Resident Assistants, Teachers Assistants and guest speakers for the program

#### ADDITIONAL

- Rotary International Ambassadorial Scholar (Senegal 2010); established École Notre Dame de Lourdes first library
- Avid Cook (and avid eater); winner of numerous unofficial battles for the world's best Macaroni and Cheese
- Guttied houses for victims of Hurricane Katrina and worked with orphans in Nicaragua to build beds and playgrounds
- Fluent in French

## CHRISTINA DOUYON

Whittier Hall 1230 Amsterdam Ave. Apt. 510 | NY, NY 10027  
(954) 559-6244 | cd2214@tc.columbia.edu

### EDUCATION

#### TEACHERS COLLEGE AT COLUMBIA UNIVERSITY

New York, NY

*Master of Arts in Clinical Psychology*

May 2014

- Elected President of the Black Student Network: chief spokesperson at official events and faculty/administration liaison
- Nominated Student Ambassador for the Sexuality, Women and Gender Project

#### THE UNIVERSITY OF FLORIDA

Gainesville, FL

*Bachelor of Arts in Psychology, Magna Cum Laude*

May 2010

- Breakthrough Collaborative Teacher: taught two English courses, guided group discussions for girls (on drugs, abuse, etc.)
- Vice President, Lambda Psi Chapter of Delta Sigma Theta Sorority, Inc.: oversaw programs, workshops and 5 committees
- Founder and President of Poets, Inc: hosted bi-weekly open-mic nights, raised allocated budget to 10K
- Career Events Assistant: planned 2 career showcases (400+ employers, 5000 participants), increased company sponsorships to \$12,000 and overall fair attendance by 20%

### EXPERIENCE

#### TEACHERS COLLEGE AT COLUMBIA UNIVERSITY

New York, NY

*Research Assistant at the New York Obesity Nutrition Research Center*

February 2013- Present

- Administer eligibility screeners, contact and schedule research participants, and build relationships with participants to promote retention throughout an 18-month research study
- Prepare and maintain subject folders as well as process blood for analysis of hormone levels
- Enter participant responses from questionnaires into SPSS and organize corresponding brain imaging data to assess changes over time

*Research Assistant in Dr. Lisa Miller's Research Lab*

February 2013- July 2013

- Reviewed and analyzed research articles to evaluate spirituality and resiliency in mothers and homeless persons
- Co-led childcare program designed to care for the children of the mothers during therapy sessions
- Entered participant data from various questionnaires to evaluate the effects of group therapy intervention

#### TEACH FOR AMERICA

New Orleans, LA

*KIPP Believe College Preparatory: 8<sup>th</sup> Grade Advisory Facilitator*

January 2012- July 2012

- Planned and implemented small group sessions with adolescent girls, ages 13-15, about topics pertaining to sex, drugs, identity, sexuality, difficult decisions and self-esteem
- Enforced safe-space rules to encourage comfort and disclosure of risk behaviors and/or clinical symptomatology
- Assessed students' mental health status and determined the need for follow-up interventions with guidance counselor or school psychiatrist

*KIPP Believe College Preparatory: 6<sup>th</sup> Grade Reading Teacher*

July 2010- July 2012

- Facilitated student learning through the Teachers College Reading and Writing Project method, resulting in 80% of students showing moderate to significant growth in their reading level
- Instructed students on test taking strategies resulting in 84% of students scoring Basic or Above on their Spring 2011 iLeap state standardized test in ELA (state average was 70%, district average was 53%)
- Planned and instructed small-group reading remediation classes and tracked student growth using the Fountas & Pinnell Benchmark Assessment System

#### ALACHUA COUNTY JUVENILE DETENTION CENTER

Gainesville, FL

*Group Facilitator*

August 2007-January 2008

- Designed and executed life-lesson classes for a group of 10-15 juvenile girls convicted of crimes such as grand theft, drug possession, and prostitution in order to improve decision making skills
- Created lesson plans to serve as interventions for issues and concerns presented during class such as those involving sex, drug use, and intimate partner disputes
- Led group sessions of healing activities to encourage appropriate means of expression in relation to extreme emotions such as anger and sadness

### ADDITIONAL

- Spoken word and poetry enthusiast
- Proficient in French and Haitian Creole



**SWETHA KRISHNAKUMAR**  
 233 E. Upper Wacker Drive, Unit #1709 | Chicago, IL 60601  
 (404) 630-6852 | swetha.krishnakumar@chicagobooth.edu

## EDUCATION

### **THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS**

Chicago, Illinois

*Master of Business Administration, Concentrations in Strategic Management and Econometrics*

Sep 2013 – Jun 2015

- Active member of Management Consulting Group, Emerging Markets Group, Net Impact Trek Co-Chair and Board Fellow
- Consulting member on five person team to Indian solar start-up and market researcher for new venture challenge team
- Impact investing competition member on seven person team working to source and recommend a health-related enterprise
- University of Chicago Careers in Business Mentor to undergraduate student who recently received a full-time job offer
- GMAT: 760 (99th percentile)

### **THE GEORGIA INSTITUTE OF TECHNOLOGY**

Atlanta, Georgia

*Bachelor of Science – Double Major: Industrial and Systems Engineering and International Affairs*

Aug 2007 – May 2011

- GPA: 3.66 (Highest Honors – top 1%)
- Honored by UNESCO Laura Bush Fellowship for proposal to provide alternative education for Indian child laborers
- Mentored international affairs student for ~2 years through alumni program to support career development and growth

## EXPERIENCE

### **GAS SOUTH, LLC**

Atlanta, Georgia

*Fastest-growing natural gas marketer in Georgia*

Oct 2012 – Aug 2013

#### Marketing Analyst

- Led market research of home warranty market entry strategy for senior leadership with potential for ~\$400,000 partnership
- Spearheaded customer surveys to drive improvement strategies with new satisfaction and loyalty targets of 92% and 90%
- Collaborated with operations team members to develop analysis to resolve \$50,000 issue in customer rebuttal program
- Recommended “sticky” customer acquisition strategy to potentially double conversion rates through regression analysis
- Implemented new marketing/sales model and training that led to average ~20% growth in third party partner performance
- Presented to executive team on long-term loyalty program recommendations after analyzing 2013 J.D. Power data
- Developed growth strategy with community leaders as representative on task force for credit-challenged customers

### **VILLGRO INNOVATIONS FOUNDATION**

Bangalore, India

*Ashoka Fellowship-award winning Indian social enterprise incubator*

Sep 2011 – Sep 2012

#### Villgro Innovations Foundation Social Enterprise Fellow (Fellow: '11-'12, Summer Intern: '10)

- Selected for competitive international fellowship (<5% acceptance rate) for Sustaintech which sells fuel-efficient stoves
- Created growth strategy to increase sales pipeline ~40% by forging four partnerships with leading financial institutions
- Managed 1.7 MM rupee (~\$35,000) marketing budget and developed new website leading up to Rio+20 conference session
- Collaborated with senior management to develop annual work plan forecasting ~3.5% revenue increase for 2013 fiscal year
- Established data management system to track 10 new sales and social impact metrics to promote data-driven sales strategy
- Supervised 10-person Villgro team as intern to assess market feasibility of a portfolio of 25 technology products

### **THE FOURTH R: HUMAN RIGHTS EDUCATION**

Atlanta, Georgia

*Atlanta-based program to educate 5<sup>th</sup> grade students on human rights, empathy, and service learning*

Jan 2008 – Aug 2013

#### Co-Founder and Program Coordinator

- Oversaw 10 volunteers per year to teach proprietary human rights program to 200+ urban fifth grade students
- Awarded \$44,000 from human rights fund to expand partnerships with Amnesty and Clinton Global Initiative University
- Served as human rights education workshop facilitator and 2008 Annual Atlanta Community Foundation Luncheon panelist

## ADDITIONAL

- Devoted podcast listener including shows such as *This American Life*, *Freakonomics Radio*, and *Frontline*
- Indian culture enthusiast having conceptualized first Georgia Tech Diwali event with school-sanctioned firecrackers
- Avid baker interested in vegan desserts including dishes like chocolate lava cake, oatmeal raisin cookies, and fruit cobblers

## TANYA FRASER

151 N. Michigan Ave., Unit #1816, Chicago, IL 60601 | (404) 512-8170 | tfraser@ChicagoBooth.edu

### EDUCATION

#### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

*Master of Business Administration; Concentrations in Marketing Management and Strategic Management*

*Sep 2013 – Jun 2015*

- Recipient of merit-based 1898 Scholarship
- Elected squad leader of 8-person group to increase participation and facilitate communication within larger cohort
- Member of the Marketing Group, Net Impact, Giving Something Back, African American MBA Association and Epicurean Club

#### GEORGIA STATE UNIVERSITY

Atlanta, GA

*Bachelor of Arts in Philosophy, Magna Cum Laude with Honors*

*Aug 2003 – May 2007*

- Cumulative GPA: 3.87/4.0, Dean's List
- Held position as Supplemental Instruction leader, supporting students with curriculum in high-risk courses; conducted review sessions, instructive presentations and interactive learning activities, integrating study strategies with course content

### EXPERIENCE

#### FIZZ | Word of Mouth Marketing Agency

Decatur, GA

*Director of Digital Media*

*Jan 2011 – Present*

- Managed digital marketing programs for numerous national brands, including AT&T, Widmer Brothers and the Atlanta Hawks
- Designed and implemented social media plan and policy for 36 Applebee's locations in Greater St. Louis area, resulting in 125% increase in user engagement; program increased likes, comments, shares, post reach and total fans across Facebook pages
- Directed digital marketing strategy of national campaign for BISSELL Homecare's heritage product, BISSELL sweepers; campaign resulted in 40% increase in sales year-over-year in two years and won a Gold WOMMY award in 2012
- Led agency's digital marketing initiatives; collaborated with cross-functional teams to create sales presentations, managed website overhaul and developed internal writing talent to increase company's industry thought-leadership

*Digital Marketing Manager*

*Mar 2010 – Jan 2011*

- Researched and standardized use of media listening tool, Radian6, to track trends and analyze data for determining consumer sentiments and KPIs and for informing marketing strategies; enabled team to better identify consumer needs
- Investigated potential key online communities for mobile payment system, Intuit GoPayment, and managed brand digital outreach efforts to its stakeholders and influencers; resulted in increased awareness and 10% rise in adoption in targeted community
- Oversaw design and development of commercial program collateral and communication tools, including videos and presentations
- Collaborated with internal creative team and clients to execute national and local team projects

*Marketing Coordinator*

*Aug 2009 – Mar 2010*

- Managed recruiting, hiring and training of digital and brand ambassadors for beverage giant, Monster Energy Corporation's Hansen's Natural and Blue Sky Soda brands, in turn fostering community building and consistent brand messaging
- Oversaw high-touch marketing efforts of two teams of brand field market representatives across five major US cities

#### LINCOLN FINANCIAL MEDIA, WSTR-FM

Atlanta, GA

*Promotions Assistant*

*Nov 2007 – Aug 2009*

- Operated contest administration, assisting promotions coordinator with all tasks related to contest development and execution
- Trained team in software used to identify and edit aired audio segments for clients, sales and programming staff

#### GANNETT | WB ATLANTA, WATL-TV

Atlanta, GA

*Field Promotions Lead and On Air Talent*

*Sep 2003 – Dec 2006*

- On-air talent and wrote and assisted in production of a 30-second daily televised promotional segment
- Acted as station representative and led company's consumer engagement efforts with teen demographic both in-field and online
- Organized experiential marketing promotions and community outreach at concerts and sales-driven remotes
- Coordinated and managed set-up and striking of promotional event spaces, including sound equipment and décor
- Managed guerrilla field marketing team, touring the Metro Atlanta area executing weekly pop-up promotional events

### ADDITIONAL INFORMATION

- Earned Community Management Specialist certification awarded by the Word of Mouth Marketing Association
- Served as a board member and fundraising chair for First Book Metro Atlanta, a nonprofit improving literacy in the Atlanta area
- Pursued a career as a professional actor; performed in Atlanta's longest running stage production, *Peachtree Battle*

**BHARGAVI SRIVATHSAN**  
233 E. Upper Wacker Drive, Unit #1709 | Chicago, IL 60601  
(425) 753-7620 | bsrivath@chicagobooth.edu

## **EDUCATION**

### **THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS**

Chicago, Illinois

*Master of Business Administration: Finance, Operations and International Business*

*Sep 2013 – Jun 2015*

- Developing marketing strategy for an investment research web startup as part of the Business Solutions Group
- Fundraising coordinator for five person team developing young girls leadership program for social new venture challenge
- Active member of Management Consulting Group, Chicago Women in Business, Booth Tech, and Risk and Gaming Club
- GMAT: 750 (98th percentile)

### **TEXAS A&M UNIVERSITY**

College Station, TX

*Master of Computer Science*

*Sep 2003 – Aug 2005*

- GPA 3.8/4.0; developed artificial intelligence tools for training Department of Defense personnel

### **NATIONAL INSTITUTE OF TECHNOLOGY**

Trichy, India

*Bachelor of Engineering: Computer Science*

*Sep 1999 – May 2003*

- Dean's List (GPA: 8.9/10; top 5% of class); captain of college women's volleyball team

## **EXPERIENCE**

### **INTEL CORPORATION**

Hillsboro, OR

*Senior Program Manager*

*Jan 2013 – Jul 2013*

- Partnered with marketing and public relations teams across Intel and Dell to lead Ultrabook press-kit release, generating significant pre-release momentum for 2013 worldwide launch
- Devised and implemented Intel's social media strategy for the global cloud computing conference Forecast 2013, driving engagement with 300+ companies

*Program Manager (Project Management Professional)*

*Jul 2011 – Dec 2012*

- Led cross-functional team of 15 employees to drive Intel Ultrabook's security and privacy compliance program across 10 divisions comprising 2,400 employees; improved compliance from 78% to 95%
- Pioneered division-wide security analyses by securing buy-in from General Managers, resulting in initial savings of ~\$1M through 7% drop in critical issues
- Chosen to spearhead marketing efforts through rotational program to drive brand messaging around new Windows 8 support on Intel hardware; resulted in potential sales volume increase of 450K units

*Technical Lead*

*May 2008 – Jun 2011*

- Managed team of 12 engineers testing multiple hardware and software products; team won the best project award at Intel's software professionals conference for developing new power measurement techniques to improve battery life
- Designed and executed validation strategies for product portfolio worth \$12 million, resulting in on-time releases with zero critical bugs and savings of ~\$750K over three years

### **ASSOCIATION FOR INDIA'S DEVELOPMENT (AID)**

Oakland, OR

*Volunteer and Project Coordinator for the Oakland Chapter*

*Jun 2011 – Jun 2013*

- Executed high-end donor dinners, cultural events, tournaments and musical events raising more than \$15,000 through each event and \$70,000 cumulatively
- Coordinated development projects in the areas of rural health, women's empowerment & pollution control in India impacting 5 million people across 9 states

### **GREATER PORTLAND TAMIL MANDRAM (GPTM)**

Portland, OR

*Vice President*

*Jun 2011 – Jun 2013*

- Raised more than \$20,000 in revenue through cultural events in the Greater Portland area
- Conceptualized, marketed, and organized a new event "Super Singer" customized to GPTM's 400+ members; Initiated and led transition of publicity to social media and web channels, leading to 30% net-new members

## **ADDITIONAL**

- Indian classical dancer and Carnatic music vocalist (received state level award for stage performances)
- Poker enthusiast; coached 20+ players for cash games and tournaments



# ARIA RUTH WOODLEY

1410 Chicago Avenue, Unit 306, Evanston, Illinois 60201  
(845) 853-4504 | awoodley2014@kellogg.northwestern.edu

## EDUCATION

2012-present	<b>KELLOGG SCHOOL OF MANAGEMENT NORTHWESTERN UNIVERSITY</b> Candidate for Master of Business Administration degree, June 2014 <ul style="list-style-type: none"> <li>Intended majors in Management &amp; Organizations, Management &amp; Strategy, Finance</li> <li>Social and Cultural Committee, Kellogg Student Association, Day At Kellogg Section Leader</li> <li>Member, Consulting Club, Black Management Association, Women's Business Association</li> <li>GIM Mozambique Global Health Initiative and AB INBEV Customer Insights competition participant</li> <li>Robert W. Baird &amp; Co. Scholarship recipient</li> </ul>	Evanston, IL
2004-2008	<b>THE UNIVERSITY OF FLORIDA BACHELOR OF SCIENCE BUSINESS ADMINISTRATION, AUGUST 2008</b> <ul style="list-style-type: none"> <li>Major in Finance</li> <li>Outstanding Female Leadership Award for Graduating Seniors, Cycle of Success Scholarship Award Recipient (full-tuition scholarship), National Achievement Scholar, Student Honors Organization</li> <li>Elected to Board of College Councils Administrative Vice President, selected Homecoming Director, SAACURH Finance Chair, Gatorship Assistant Director</li> </ul>	Gainesville, FL

## EXPERIENCE

Summer 2013	<b>BANK OF AMERICA</b> <i>Product Consultant</i> <ul style="list-style-type: none"> <li>Worked within the Employee Banking and Investments group (EB&amp;I; annual revenue: \$2.4B) to engage employees as customers by collaborating with product, channel, segment, and support partners to develop strategies to increase employee customer product sales</li> <li>Assessed and documented gaps in operational and technological processes across banking products in order to prevent discrepancies with on-boarding and off-boarding of employee accounts</li> <li>Developed a comprehensive guide for Bank at Work and Bank on Campus groups to utilize in order to effectively update Flagscape website through utilization of SharePoint, Discovery, PRO, and Solutions Center; currently used as training and reference tool</li> <li>Formulated strategic marketing concept, including script and storyboard, for Narrated Town Hall presentation with intended audience of all 300M Bank of America employees and \$25M budget; launching Fall 2013</li> <li>Created new hire e-mail strategy, including content and sequencing of e-mails to increase number of new hire product sales by analyzing past sales data and integrating stakeholder input; launching Fall 2013</li> </ul>	Charlotte, NC
2009-2012	<b>BANK OF AMERICA-MERRILL LYNCH</b> <i>Financial Advisor</i> <ul style="list-style-type: none"> <li>Analyzed investment portfolios to provide solutions to help clients meet their financial goals; generated on average \$22M in transactional revenue and \$350M in new money monthly</li> <li>Conducted on average 5 portfolio reviews a day, creating portfolio models and investment proposals to present clients with investment solutions</li> <li>Ranked in the top 15% of Premier Advisors: promoted twice within 10 months</li> <li>Selected to be on a 10-person team of advisors that served as a liaison between senior managers and 150 advisors to discuss and solve issues regarding operations and policies at the advisory center; helped implement change in compensation attrition metric improving advisor morale</li> <li>Received Merrill Lynch Bull Award for soliciting in excess of \$5MM within 10 months</li> </ul>	Jacksonville, FL
2008-2009	<b>LPL FINANCIAL</b> <i>Financial Advisor</i> <ul style="list-style-type: none"> <li>Developed and implemented a business plan to market advisory services to teachers; gained access to Tampa Bay area schools, acquiring more than 10 individual clients and gathered assets in excess of \$1MM over the course of 6 months, soliciting more than any other junior advisor in the firm</li> </ul>	Tampa, FL

## ADDITIONAL DATA

- 2013 Management Leadership for Tomorrow MBA Prep Fellow
- NASD Series 7 and Series 66 licenses, Florida Life, Health, and Variable Annuity License
- Traveled in Caribbean (St. Kitts, Anguilla), Asia (Japan, South Korea), Central America (Panama), Europe (Croatia, Germany), and Africa (Mozambique, South Africa, Morocco)
- Other interests: playing and listening to music, playing and watching sports, and traveling