



REAL PROSPERITY STARTS *HERE*

2015 BALLE IMPACT REPORT



OUR VISION

To connect deeply within, deeply with one another, in reverence for the larger natural world, and to meet suffering with compassion: these are local behaviors.

This is real prosperity – not a distant act, but local by its very nature.

BALLE creates real prosperity by **connecting leaders, spreading solutions, and attracting investment** toward local economies.

Our vision is to create within a generation a global network of interconnected local economies that work in harmony with nature to support a healthy, prosperous, and joyful life for all people.

2015 BOARD OF DIRECTORS



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Leslie Christian Financial

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Workers Lab

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BALLE Co-Founder



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Susan Witt
Schumacher Center
for New Economics





“It’s one thing to agree that today’s economy is only working for a sliver of households at the top; it is quite another to have a vision and a plan for changing that and creating true shared prosperity.

I’m proud to be part of BALLE, which is supporting leaders across the nation working in communities every day fostering equity and prosperity for all.”

*Devita Davison
FoodLab Detroit*



2015 a year of **Convergence. Illumination. Impact.**

The challenges we face are so big, so complex, and so pervasive that there is no top-down path forward. Experts agree that once corrupted, a complex system has an almost impossible time fixing itself. The only real path to wholesale transformation is to find or create safe spaces outside the dominant system where something wholly new can emerge from the ground up.

At BALLE, we see those safe spaces in the form of **local networks** of innovative, place-based businesses and organizations that are working together to create **equitable, regenerative local economies**.

Social scientists have also shown us that when a movement for change is emerging, it is possible to **accelerate its emergence**. BALLE is doing just that – cultivating the emergence of a new economy by hosting communities of practices that name, connect, nourish, and illuminate the local economy leaders who are inventing alternatives to our broken economic system.

Finally, we know that the path forward requires tapping into a deeper place in our **shared humanity**, shifting to an understanding that real security comes from community and collaboration. That’s why transformational development is an essential ingredient of our programmatic efforts here at BALLE: this learning allows our leaders to transform the networks and communities they support and **create the conditions for the emergence of a new economy that works for all**.



CONNECTING LEADERS



MEET the BALLE Fellows

“As a Fellow I began to recognize the value my organization provides for systems change. This confidence helped me raise more money, launch new programs, and build new partnerships.”

*Erin Kilmer-Neel
Sustainable Business Alliance*



CULTIVATING A NETWORK

In 2016, we'll launch our fourth cohort of Local Economy Fellows. These 36 leaders will represent at least eight new states and provinces and will increase the depth of our network, especially in Appalachia and the northeast. The cohort will be focused on the intersection of locally rooted economic development, organizing for equitable change, and the movement toward well-being in cities.

42 Local Economy Fellows 

CONNECT

35k

Businesses & One Million People

In 2015 they report:

\$1.8M

IN NEW FUNDING
Attributed to their Fellowship Experience 

(Since 2011 THIS TOTALS \$6M)

BALLE LOCAL ECONOMY FELLOWSHIP

Ours is the nation's only fellowship focused on the development of a new economy that is healthy, equitable, and democratic. Each Local Economy Fellow is selected based on their vision, their leadership, and their role as strategic connectors of hundreds or even thousands of community entrepreneurs. Whether leading local social enterprise incubators, community business networks, or regional food labs, they are all pioneering champions for a new economic vision. Half of current fellows identify as people of color and most serve under-resourced communities.

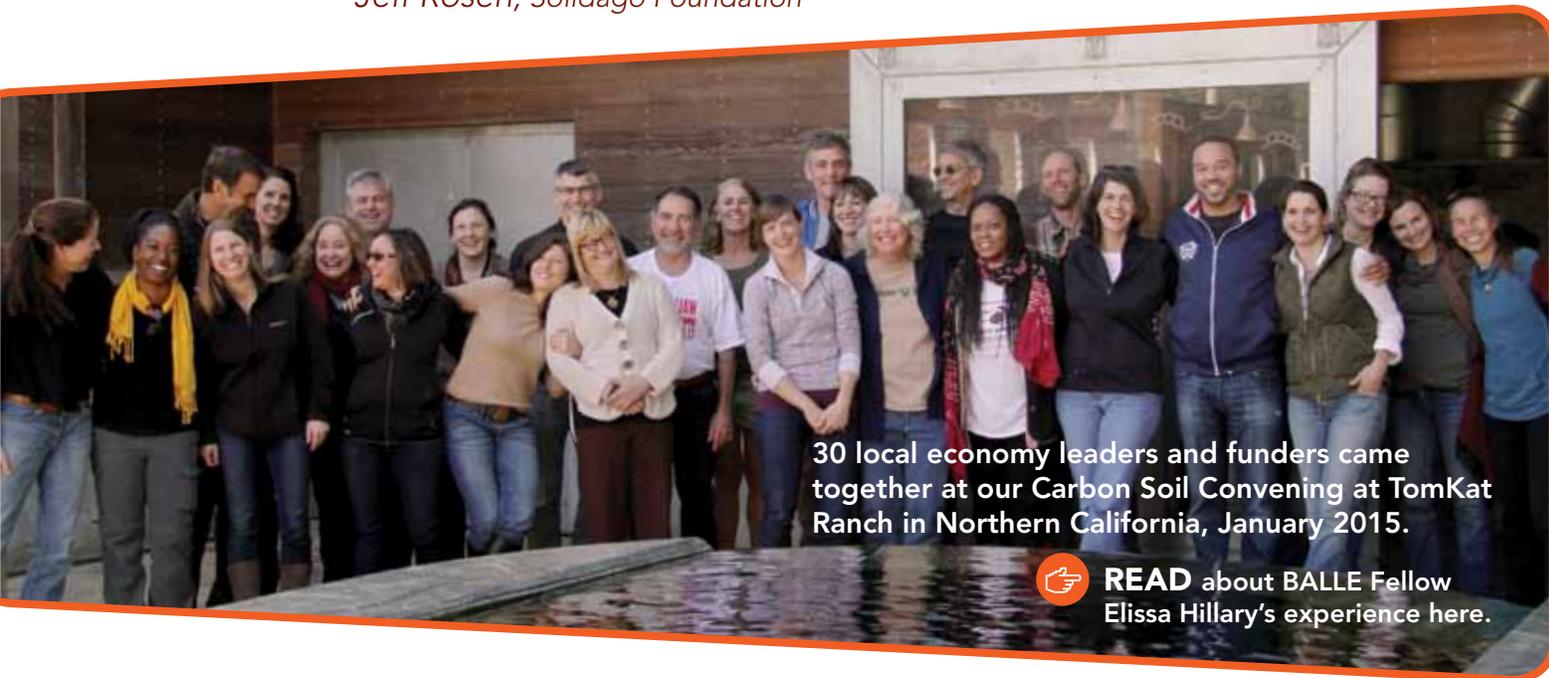
The immersive program equips Localist Leaders with cutting-edge leadership and capacity-building skills that will advance their work, connect them with their peers across North America, and provide a national platform to share their models so that other regions can learn from them.

↑ 124
instances of **INNOVATIVE COLLABORATION**

83% 
work with **UNDERRESOURCED COMMUNITIES**

“People talk about building the movement for transition – BALLE is one place where it’s actually happening.”

Jeff Rosen, Solidago Foundation



30 local economy leaders and funders came together at our Carbon Soil Convening at TomKat Ranch in Northern California, January 2015.



READ about BALLE Fellow Elissa Hillary's experience here.

CONVENING AS A CATALYST

An awakening to our interdependence is being called forth in our economy, and across the world we see leaders and social justice platforms reflecting this in increased numbers. To meet this moment, we are creating more opportunities than ever before for communities, leaders, and movement builders to come together, join in shared values and strategies, and accelerate change.

In 2015, in addition to our 13th annual conference, we produced three unique new convenings to bring thought leaders, practitioners, and funders together from across fields. Through these cross-sector conversations, we believe we can better foster the convergence of movements and strategies in our collective work toward a new economy.

In 2015
we convened & curated
THE RIGHT

PEOPLE &
CONVERSATIONS
at 4 events:

**2015 BALLE
Conference**

**Place-Based
Impact Investing
Summit**

**Carbon Soil
Convening**

**Well-Being in
Business Lab**

WELL-BEING IN BUSINESS

Awakening the Heart of the Entrepreneur

This year, in partnership with the Greater Good Science Center, MIT's Presencing Institute, Ignite, Impact Hub Oakland, Service Space, SBA, Etsy.org, Armonia, and others, we supported business owners in Oakland and Brooklyn in piloting the **Well-Being in Business Lab**.

Looking ahead, we invite all business leaders to join us in a shared intention: that we may cultivate our own capacities for well-being, innovate from this place in our businesses, and together align our economy in service of who we really are and who we want to be as a society.



LEARN MORE about the science of well-being.



SPREADING SOLUTIONS



"BALLE is leading the way toward the new economy and modeling the new behaviors we will require every step of the way."

*Stephanie Jackman
2015 Conference Attendee*

ILLUMINATING WHAT WORKS

This year...

23 New toolkits
webinars &
case studies
DOWNLOADED & ACCESSED
by **7,000**
web users

SOCIAL MEDIA
platforms reached
130k
people every month

BALLE
Local Economy Leaders were
IN THE NEWS

300 times 

97%
of conference
attendees say

"I WILL TAKE ACTION"
using learnings & connections
made at BALLE 2015

After 14 years leading and supporting this movement, we've accumulated a rich body of understanding about what works to build equitable, regenerative local economies. We've developed a platform of eight strategies that we see paving the way forward: **Local First, Shared Ownership, Community Capital, Opportunity for All, Localist Policy, Collaboration for Good, Soil & Nature, and Magic & Soul.**

This year we shared stories and innovations within each of these strategies through new webinars, case studies, toolkits, and our annual conference, held in partnership with Local First Arizona. We also saw this work manifesting among our communities and influencing the broader field:

Policy: In partnership with the Institute for Local Self-Reliance, BALLE leaders crafted a Localist policy platform, which is scheduled for release later this year. Two BALLE Fellows were elected to public office in 2015.

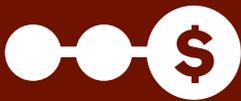
Mainstream Forums: BALLE leaders were featured in Forbes, Fast Company, Popular Mechanics, and Yahoo! Finance and represented Localism at Davos, SOCAP, World Economic Forum, and more.

Measuring Impact: We advanced work on the Quick Impact Assessment tool with B Lab to identify common metrics for businesses that are positively impacting local economies.

Partnership: We partnered with Kaiser Permanente to create a field guide for anchor health institutions connecting the eight What Works strategies to the social determinants of health.



LEARN MORE about *What Works Locally*



ATTRACTING INVESTMENT



“A deep level of expertise and this support network of peers has made place-based impact investing seem much more doable.”

*Jessica David
Rhode Island Foundation*

SHAPING THE FIELD

At BALLE’s **Place-Based Impact Investing Summit** held in Asheville, NC, in April, members of our three leadership groups and invited guests connected for the first time to generate collective solutions, create an ecosystem map identifying opportunities and gaps, and develop a model for connecting place-based philanthropy, investment, and capacity-builders to support healthy, equitable local economies.



INVESTING WITH IMPACT

BALLE convenes two groups of local economy funding innovators: Local Economy Investors Circle members are committed to building inclusive, regenerative, relationship-based economies; the Community Foundation Circle, held in partnership with RSF Social Finance, is a peer learning group for community foundations doing place-based impact investing. Members report increased:

Innovation: The Investors Circle created an online platform for due diligence and opportunity sharing, which members are using to accelerate investment in local economies.

Activation: Members of the CFC report that by connecting with peers, they feel encouraged and inspired to influence all 800 community foundations in the field to shift their investments.

Influence: BALLE created a Place-Based Impact Investment Summit, and advised local economy tracks at SOCAP, Confluence Philanthropy, the New Economy Funders Group, and more.



SHIFTING THE NARRATIVE

Impact Investing Goes Mainstream

Investor Circle members Joel Solomon, Bonny Meyer, and Sonja Swift were each featured in Forbes this year. Others presented on place-based impact investing at events across the country.

BALLE & RSF
convene

31

**LOCAL ECONOMY
FUNDERS**

Representing

\$5B

INVESTMENT ASSETS



READ about Bonny in Forbes Magazine

“BALLE has a vision that pushes back on the pressures of a globalized economy. We support their work because it celebrates and builds upon what is good and possible at the local level.”

Diane Ives, Kendeda Fund

JOIN THE MOVEMENT



Invest in our work by making a recurring or one-time gift. Every dollar fuels the Localist Movement.



Follow us on social media for the latest on what's happening in the movement.



THANK YOU 2015 FUNDERS

Creating the conditions for an equitable economy to emerge takes incredible commitment and vision. Thank you to our donors for their critical partnership in this work.

\$500k

NoVo Foundation
Anonymous

\$100k - \$500k

Kendeda Fund
Surdna Foundation
Christiano Family Fund

\$10k - \$100k

Swift Family Foundation
One 4 All, a donor-advised fund of Proteus Fund
Kalliopeia
Flora Family Foundation
Anonymous
Sandy River Charitable Foundation
Armonia
Solidago Foundation
RSF Social Finance
Mamma Chia
Lydia B. Stokes Foundation
Workers Lab
Eileen Fisher Community Foundation
TomKat Trust
PikFly
\$5k - \$10k
Kaiser Permanente
Organic Valley
Local Initiatives Support Corporation
Infusionsoft
Appalachian Regional Commission
Arizona Community Foundation
Community Foundation for Southern Arizona

\$5k - \$10k (cont'd)

Main Street Resources
Blue Cross Blue Shield of AZ
Cohen Milstein Sellers & Toll

\$1k - \$5k

Local First Arizona
Scott's Marketplace
EZBZ
Chelsea Green Publishing
Ideas Collide
Sprouts
PHX Sky Harbor
International Airport
Luhrs City Center
IMP Photography
WebPT
Docuprint Solutions
Pinchot University
Etsy
Veris Wealth
Kelly Ryan
Nia Community Foundation
Gateway Bank
Lawrence Lunt
Alfa Demmellash
Jerry Gorde
Katherine Collins

\$250 - \$1k

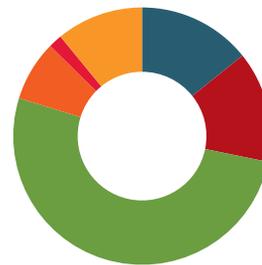
Leslie Christian
Michelle Long
David Korten
Judy Wicks
Jeff Marcous
Goodworks Ventures
Sandy Wiggins

< \$250

Roger Pritchard
Cynthia Power
Ellen Shepard
Marcus Sheffer
Jason Berry
Margie Miller
Tyler Norris
Gar Alperovitz
Amy Divine
Suzy Ageton
Kimber Lanning
Eric Strickland
Anthony Flaccavento
Patricia Goelz
Nancy Deren
Marilyn Winter-Tamkin
William Braine
Tolulope Ilesanmi
Aleyne Larner
Jen Risley
Thomas Streiffert
Judith Winfrey
Art Menius
Amy Quarry
Jonnie Sharp
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Sue Beckwith
Jennifer Jubin
Michael Sullivan
Lamar Grube
Ray Battistelli
Jordan Luftig
Rajneesh Aggarwal
Chandra Morice
Jan Rhodes Norman
Alissa Barron-Menza
Amy Cortese

PROJECTED 2015 FINANCIALS

INCOME:
\$2,121,541



- Annual Conference: \$302,238
- Operating Support Grants: \$296,375
- Fellowship Grants: \$1,093,632
- Community Engagement Grants: \$161,125
- Memberships/Donations: \$36,421
- Local Economy Funders: \$231,750



EXPENSES:
\$1,930,304

- Programs: \$1,504,932
- Development: \$210,372
- Administration: \$215,000



NET ASSETS:*
\$1,301,611

- Board Reserve Fund: \$498,106
- Fellowship Horizon Fund: \$523,505
- Temporarily Restricted: \$150,000
- Other Assets: \$130,000

* Held at Beneficial State Bank, these funds are used to make values-aligned loans.