



**MARION INSTITUTE**

**ANNUAL REPORT  
2015-2016**



# GLOBAL SUSTAINABILITY. COMMUNITY STRENGTH. INDIVIDUAL POTENTIAL.

## **BOARD OF DIRECTORS**

Michael Baldwin, *(Co-founder), President*  
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## **MARION INSTITUTE TEAM**

Janet Milkman, *Executive Director*  
Robyn Branco  
Adam Davenport  
Jane Dolan  
Zöe Hansen-DiBello  
Milagros Sanchez  
Angela Silva  
Abigail Haines Smith

*\* In Memoriam*

**DEAR FRIENDS,**

*As with people, organizations must continually adapt to a changing environment. Thanks to stable and flexible Board leadership and dedicated staff, the Marion Institute has been fortunate to be able grow and thrive through such changes.*

As the previous year was one of transition, this year has been one of transformation: evolving the annual Connecting for Change conference into the year-round Connector Series; renewing our Biological Medicine Network focus by working to develop the first Biomed clinic on the East Coast; evolving our Serendipity Projects into robust, expanded Greenhouse Initiatives; intentionally strengthening our role in New Bedford through our flourishing GROW Education program and newly-adopted SouthCoast Energy Challenge; and expanding our ability to share ideas and energize changemakers with a redesigned website.

Throughout this transformation, the Marion Institute has remained true to its mission as an incubator of innovative models for positive social change.

- *We focus on defining and addressing core problems in the fields of healthcare, the environment, and sustainability.*
- *Through our core programs, we strive to enhance the quality of life for our neighbors on the South Coast of Massachusetts, particularly in the historic industrial port city of New Bedford.*
- *Through our Greenhouse Initiatives, we support others in turning creative ideas into effective action.*
- *We believe in nurturing cutting-edge thinking, connecting people of diverse backgrounds, and communicating what we are learning, confident that caring, informed people can work together to create a better world.*

Our new website is meant to engage you, dear friend, and to convey the passion and energy that drives our collective work and shared mission. Come visit us often: [marioninstitute.org](http://marioninstitute.org)

With gratitude and love,  
Michael Baldwin and Janet Milkman

STUDENTS AT THE CHAURIKHARKA SCHOOL WELCOME VISITORS  
FROM THE HIMALAYAN PROJECT AND MARION INSTITUTE  
PHOTO: JANET MILKMAN





# IMPACTING LIVES AROUND **The World**



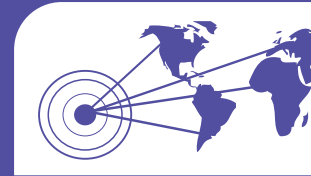
**20+yrs**

Strengthening communities  
globally and locally



**44+**

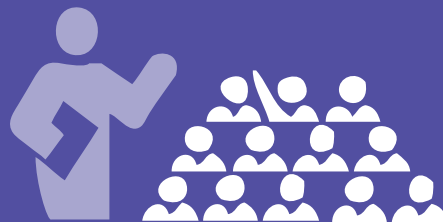
Innovative charities  
nurtured through  
passionate  
administrative support



**400+**



Schools directly  
impacted in Africa,  
Asia, North America  
and South America



**25,000+**

Inspired audience members  
at wide-ranging lectures  
and workshops

**500,000+**

Enlightened and engaged  
via Facebook, Twitter & YouTube





# GROW EDUCATION MEETS A COMMUNITY NEED

**GROW Education is an innovative community gardening initiative that works as a hub for community action.**

Based at local schools in urban neighborhoods, the GROW Education gardens create strong points of connection between teachers, students, families, and community leaders. Sharing responsibilities and ideas, the program has been a highly effective tool for engaging immigrant families – from children to grandparents – in nurturing healthy gardens, strong families, and thriving neighborhoods.

The city of New Bedford's low-income, immigrant and refugee population is in dire need of increased access to healthy food. The U.S. Census Bureau reported that 23.5% of the city's residents, and 34% of children under 18 years of age were living below the poverty line in 2013. In 2014, the entire school district of New Bedford qualified for universal free lunch, and the population suffers disproportionately from obesity, asthma and heart disease, all of which can be helped through better nutrition.

STUDENTS FROM HANNIGAN SCHOOL IN NEW BEDFORD AT  
THE VICTORY PARK GARDEN WITH GROW EDUCATION.  
PHOTO: KEVIN KERTSCHER

**3yrs** of community gardens in  
New Bedford Public Schools



**12** 

School garden sites

**114**

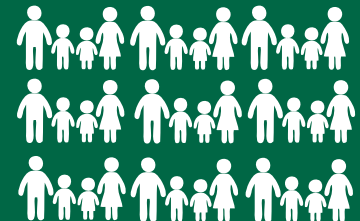
Raised beds planted



**50** Community  
partner  
organizations

**7,000**

Underserved families  
connected with healthy food





# CONNECTING FOR CHANGE BECOMES THE CONNECTOR SERIES

Eleven years ago, the Marion Institute's Connecting for Change conference began as a satellite of the renowned, California-based Bioneers conference ([www.bioneers.org](http://www.bioneers.org)). We never dreamed that spark would grow into a bonfire of ideas and energy that would ripple out in so many positive ways, for so many years. We used the high point of our wonderful 2015 Connecting for Change conference to launch our new Connector Series.

The Connector Series started with a November day-long workshop featuring Mark Booth, Gary Lachman and Ptolemy Tompkins. In April, Greg Watson shared the floor with Zoe Hansen-DiBello and Adam Davenport in a conversation about farming and community in Cuba and New Bedford. A climate

change panel featuring leading atmospheric scientist Jennifer Francis and policy pro Chad Maguire brought over 100 local Marion folks together around town planning issues. The coming fall promises more excitement with autism expert Temple Grandin.



BER 23 & 2



Nobel Laureate

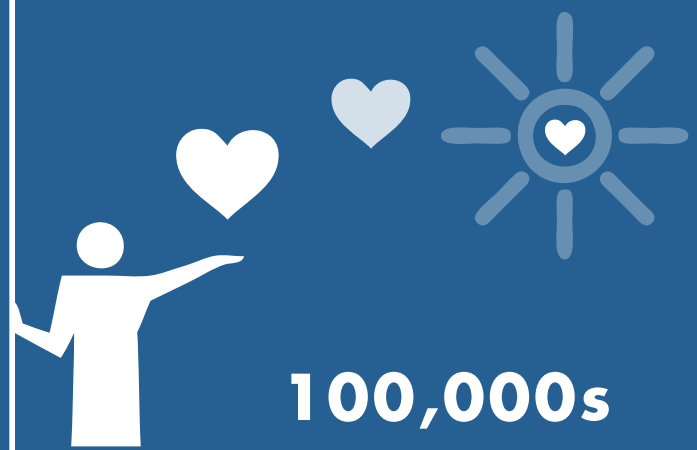


**100s**  
of visionary thought leaders

**1,000s** of engaged students



**10,000s**  
of passionate change makers




**100,000s**  
of lives changed for the better



ENERGY  
CHALLENGE

# SOUTHCOAST ENERGY CHALLENGE





WORKING WITH THE SOLSTICE INITIATIVE, THE MARION INSTITUTE HELPED CONNECT HOUSEHOLDS TO THE FAIRHAVEN COMMUNITY SOLAR GARDEN MANAGED BY BLUEWAVE  
PHOTO: BLUEWAVE

In 2016, the Marion Institute was asked to take on the South Coast Energy Challenge from its founding parent, the Southeastern Environmental Education Alliance. Educating and empowering residents on the SouthCoast around energy conservation and renewables remains a critical need. Despite its leadership on policy and programs at both state and local levels, Massachusetts is behind in meeting its goals to reduce greenhouse gases. Energy conservation and renewable energy are an increasingly important part of the power mix and the SouthCoast has a critical role to play in making key decisions about replacing Brayton Point as a resource, developing off-shore wind, and extending natural gas pipelines. SouthCoast residents can and should contribute to decision-making and implementation on these issues.

In addition, low- and moderate-income residents of New Bedford need to know how they can save on their utility bills. Local leaders in the field, including the City of New Bedford, Eversource and their vendors, all agree that low and moderate income home owners and renters have been the hardest audience to reach with conservation information and services. While they pay the conservation fee on their utility bills, they are rarely informed about the services that should be provided to them through that fee, such as Home Energy Assessments. In addition to being the least served, this group stands to benefit most from savings on their utility bills and the ultimate improvements to their environment.

**The SouthCoast Energy Challenge will provide a vehicle for education and implementation in two ways:**

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**1) BY EDUCATING LOW AND MODERATE INCOME RESIDENTS IN NEW BEDFORD ABOUT ENERGY CONSERVATION AND SOLAR ENERGY OPPORTUNITIES, AND CONNECTING THEM WITH PROVIDERS.**

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**2) BY SERVING AS A HUB FOR ENERGY POLICY CONVERSATION, LEARNING AND ACTION ON THE SOUTHCOAST.**




# BIOLOGICAL MEDICINE NETWORK

*"The personal attention is key and in such contrast to allopathic medicine. The emphasis on supporting health rather than treating disease supports my own ability to heal."*

**- BIOLOGICAL MEDICINE PATIENT**

*"The treatments are tailored to my needs – the doctors listen! They care and dedicate time and attention to patients."*

**- BIOLOGICAL MEDICINE PATIENT**

A close-up photograph of a wicker basket filled with bright yellow dandelion flowers. The basket is placed on a light-colored wooden surface, and the shadows of the basket and flowers are cast onto the wood. The text is overlaid on the top left of the image.

DANDELIONS ARE AMONG THE MANY  
PLANTS USED FOR NATURAL HEALING  
IN BIOLOGICAL MEDICINE.

PHOTO: ASHLEY NUNEZ

Biological medicine offers a common sense understanding of the principles of disease prevention and health – why we get sick and how we can support our body's innate ability to become well. The Marion Institute's BioMed Network is dedicated to the advancement of, and accessibility to, biological medicine in North America.

This year, the BioMed Network continued our work supporting and connecting BioMed practitioners and patients through our relationships with the Paracelsus Klinik in Switzerland, the American Center for Biological Medicine in Arizona, and many others. We took the initial steps in developing the first BioMed clinic on the East Coast in Providence, RI, to provide wider access to diagnostics and therapies so successfully used in biological medicine.

**We also worked closely with UMass Dartmouth to conduct a study of patient satisfaction with Biological Medicine care, and the findings were very encouraging:**

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- At least 40% of Americans use some form of Complementary and Alternative Medicine.
- Only 9% of surveyed patients sought biological medicine care at the end-stage, while 91% of choose treatment for wellness and prevention.
- 85% of patients surveyed were very satisfied with the medical care they received from biological medicine clinics.
- 73% of patients surveyed reported that their quality of life was excellent after receiving biological medicine care.
- 93% of patients surveyed would recommend biological medicine to friends and relatives.



**GREENHOUSE  
INITIATIVES**

# AROUND THE WORLD: GREENHOUSE INITIATIVES



1: TAKSTE: GANGTOK, SIKKIM, INDIA

2: MASTATE CHARITABLE FOUNDATION : MASTATAL, COSTA RICA

3: THE HIMALAYAN PROJECT: CHAURIKHARKA, NEPAL

4: S.A.F.E.: NAIROBI, KENYA

5: ORGANIZATION UNBOUND: CAPE TOWN, SOUTH AFRICA

6: MASS IN MOTION: NEW BEDFORD, MA;

7: LAWRENCE ARTS: LAWRENCE MA

8: SPIRITUAL WARRIOR: TORONTO, CANADA

9: INSTITUTE FOR HUMAN AND PLANETARY FLOURISHING: MARBLEHEAD, MA

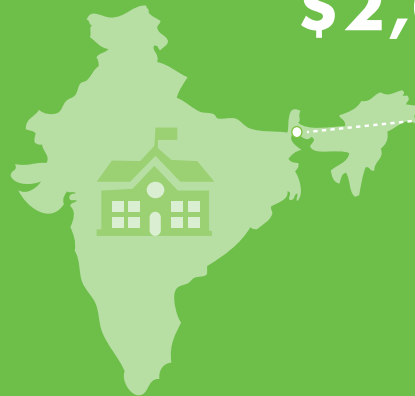
\$11,000,000

Raised through fiscal  
sponsorship projects



\$2,000,000

Raised by the Taktse International School in India



547,000

Acres designated  
for transfer to  
indigenous  
communities  
in the Peruvian Amazon



11



Countries  
served



9 Initiatives currently sparking change



4 New Greenhouse Initiatives



## MASTATE CHARITABLE FOUNDATION

The Mastate Charitable Foundation (MCF) remains active and successful with its empowering and groundbreaking work on the edge of the Costa Rican rainforest. Through their new Central American Scholarship Fund this year, MCF provided funding to six regional leaders from four different countries to enable them to participate in workshops in three critical areas related to sustainability and health: permaculture design, food production in the tropics, and rural medicine. MCF also continued to support local health, recreational, conservation and educational efforts in Mastatal, Costa Rica, through a variety of programs that provide access to medicines and health care for low-income individuals areas, finance the

maintenance and improvement of the community's soccer field, capitalize environmental protection programs in conjunction with the Ministry of Environment, and contribute critical monies to help sustain the operation of the local library that MCF built in the community of Mastatal 5 years ago. The program continues to improve how they leverage limited resources in ways that provide long-term, sustained and positive change in their local communities.



## THE HIMALAYAN PROJECT

Sally Hunsdorfer has worked with the village of Chaurikharka and other villages in the Khumbu region of Nepal for nearly two decades, initially providing fleece jackets for the residents and more recently supporting the building of a school, community center and monastery. This past year and a half, the project raised funds to rebuild all of the Chaurikharka buildings that had been damaged in the two earthquakes in the spring of 2015.

In the words of Nepali liaison Karsang Sherpa: "2015 was very unfortunate for all the people in Chaurikharka. When the massive earthquakes shook our village, we were left with only rubble from our damaged homes. We were shocked.

*We were terrified. Today, when you go around this village, you will witness hard work, you will experience the rebirth of hope, you will also taste the perseverance of all the people here in Chaurikharka. Through The Himalayan Project's dedication and energy in raising the necessary funding to rebuild, it has shown as a beacon of light and inspiration for all of us."*

Now that rebuilding is complete, the focus is to rebuild and expand the Chaurikharka School. Since the school in Chaurikharka is the ONLY school in the Mt Everest region to provide a full education through Grade 12, this is a critical project to embark on.





### SAFE KENYA

SAFE Kenya uses street theater, film and community programs to educate, inspire and deliver social change across Kenya with a focus on HIV/AIDS prevention, ending the practice of female genital cutting, increasing access to clean drinking water, environmental sustainability and preventing violence against women. The performances provide people with the information, skills and attitudes that enable them to take the first steps to changing their own lives for the better. This approach allows for sensitivity in engaging with people on otherwise culturally taboo subjects.



### TAKSTE INTERNATIONAL SCHOOL

Taktse International School (Taktse) is a not-for-profit coeducational school with residential and day boarding facilities located in the foothills of the Indian Himalayas, near Gangtok, Sikkim. It was founded to combine the best aspects of American education with Sikkimese tradition and culture. At Taktse, students learn how to be creative and how to balance an increasingly complex outer world with a rich inner life. The mission of Taktse is to develop a diverse community of self-motivated students and teachers who have a passion for excellence, inquiry and lifelong learning. The curriculum prepares students for the challenges of a competitive global economy while the school culture nurtures self-confidence, social

responsibility, and environmental awareness. Students have the opportunity to become independent and innovative thinkers, confident, articulate communicators and, above all, they will be compassionate and ethical leaders.



### SPIRITUAL WARRIOR SOCIETY

Led by Khepe-Ra Maat-Het-Heru, the Spiritual Warrior Society teaches intergenerational leadership. Working with Ysaye Barnwell from Sweet Honey in the Rock, Khepe-Ra gathered an African based intergenerational, cross cultural, LGBTQIA inclusive community of activists from all over the continent, including Colorado, California, Canada, New Orleans, New York City, Massachusetts, and Washington DC to conduct the first ever Spiritual Warrior Song Leader Mission in August at Lake Toxaway, North Carolina. The Song Leader Mission will train activists in song leading and writing so that whenever and wherever protesters rise up, choirs of four to six song leaders will be ready to go and teach the songs they can use.



### **INSTITUTE FOR HUMAN AND PLANETARY FLOURISHING**

The Institute for Human and Planetary Flourishing was founded by Johanna Keefe and Gena Mavuli. Their mission is to hold a space for expansion of knowledge and exploration of ideas that complement the academic and intellectual pursuits of our community. With an emphasis on diet and real food, they focus on ways to nourish through simple, healthy eating. They look back to ancestral communities to see how they thrived, and how we can learn from dietary mistakes from the past. Their holistic philosophy is based on the research of Dr. Weston A. Price.



### **LAWRENCE ARTS HOUSE**

The Lawrence Arts House (LA House) is an expressive arts studio in Lawrence, MA, providing a space to create, learn, grow, & enact change through the arts. It serves as a home for authentic expression and creative change. Fostering community connections, LA House seeks to empower individuals as active agents for change, ultimately supporting the larger growth and development of individuals, families and their communities. LA House is open to the community at no charge, promoting an accessible space for all ages to innovate, awaken curiosity, and cultivate creative engagement with the larger community.



### **MASS IN MOTION NEW BEDFORD**

Founded in 2009, Mass in Motion has been working to implement policy and systems change that promote active living and healthy eating. Their current initiatives include increased opportunities for physical activity through policy, environment and system changes to make it easier to live a healthier lifestyle. As managers of the New Bedford Farmer's Markets and the Food Security Network, Mass in Motion focuses on access to nutritious foods. Mass in Motion has also implemented two Walking Schools Buses as part of Safe Routes to School efforts. Notably, New Bedford is one of 53 communities to earn 5 Gold Medals for Michelle Obama's Let's Move Program.



### **ORGANIZATION UNBOUND**

Organization Unbound is an international community of inquiry that explores ways that social purpose organizations and movements can live out, in their daily practices, the changes that they are trying to create in the world and by doing so, seed deeper patterns of institutional transformation. Organization Unbound is an attempt to re-imagine the way we think about and engage in social change, as to close the gap that often exists between the overarching visions of organizations and their internal cultures and practices. Their goal is to more closely align internal practices and cultures with external social change goals. Organization Unbound has created hands on materials in the form of a short film and series of self-guided sessions to help apply the concept of expressive change.



## WHAT KIND OF ORGANIZATION WILL BENEFIT FROM PARTNERING AS A GREENHOUSE INITIATIVE?

- Organizations aligned with the Marion Institute's mission of positive social change.
- Leader-driven projects with an existing funding base, particularly overseas groups that need a US charity for donation and tax purposes.
- Organizations that are too small to support 501(c)(3) status.
- Organizations that are larger but don't want to have 501(c)(3) status.
- Organizations needing an interim home in transition to 501(c)(3) status.
- Short-term projects that only need 501(c)(3) status for a limited time and will complete their work with that timeframe.
- Groups forming new nonprofits, coalitions and networks.
- Established nonprofits seeking back office support services to reduce administrative costs and overhead.

### Support Services Offered by the Marion Institute

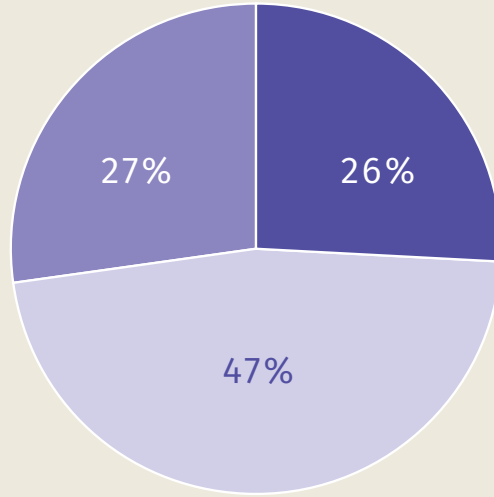
501(c)(3) Fiscal Sponsorship  
Donation Processing  
Annual Auditing  
Accounting Services  
Donor Reporting  
Online Marketing  
Grant Writing & Reporting  
Events  
Organizational Management  
Donor Cultivation Trips  
Human Resources Services

Payroll Administration  
Pension Administration  
Office Space  
Health Insurance Administration  
Liability Insurance Administration  
Organizational Analysis/Assessment  
Communications  
IT Support\*  
Legal Services\*  
*\*may be outsourced*

# FINANCIALS

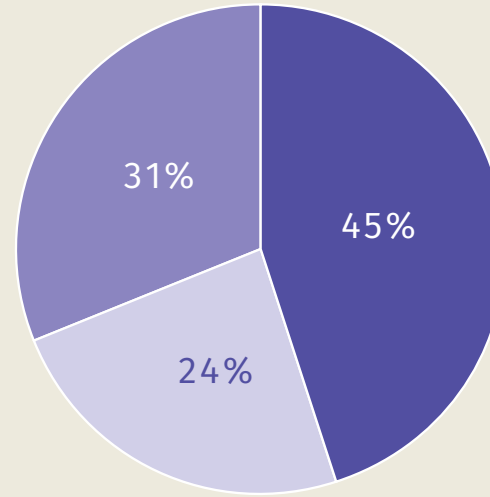
FISCAL YEAR 2015 (OCTOBER 1, 2014 - SEPTEMBER 30, 2015)

## REVENUES



- MI Unrestricted
- Programs
- Greenhouse Initiatives

## EXPENDITURES



- Programs
- Admin/Fundraising/Program Support
- Greenhouse Initiatives

### REVENUES:

MI Unrestricted	\$461,140
Programs	\$856,767
Greenhouse Initiatives	\$486,345
<b>TOTAL</b>	<b>\$1,804,252</b>

### EXPENDITURES:

Programs	\$872,208
Admin/Fundraising/Program Support	\$453,435
Greenhouse Initiatives	\$597,966
<b>TOTAL</b>	<b>\$1,927,343</b>
<b>NET</b>	<b>-\$123,091</b>

# OUR SUPPORTERS

The following donors have given \$500+ to these programs:

## BIOLOGICAL MEDICINE NETWORK

Michael and Margie Baldwin  
David and Laurie Barrett  
Joan and James Brady  
Steven Carini, DDS  
Catherine Carlson  
Ed Goodman  
Adelaide Park Gomer  
William Kistler  
Carlene Larsson  
Whitney and Phillip Long  
Alexander and Sally Lynch  
Michael D. Margolis, DDS  
Duncan and Ellen McFarland  
George McCown  
Jeffrey Morrison, MD  
Joseph Portmann  
John and Bonnie Rupprecht  
Patricia Schoppe  
Steve Wiggins  
Advanced Naturopathic Medical Centre  
Breast Care Naturally Foundation  
BioTech Energy Patch  
The Bromley Charitable Trust  
Electromagnetic Health.org  
Groton Wellness and Dental  
Hansa Center for Optimum Health  
High Tech Health International, Inc  
Marie G. Dennett Foundation, Inc.  
The Morrison Center  
The Paracelsus Clinic  
Radical Remedies  
Renaissance Charitable Foundation  
Seekonk Family Chiropractic  
Terra Medica  
True Wellness of PA, Inc

## CONNECTING FOR CHANGE & CONNECTOR SERIES

Baldwin Brothers, Inc.  
Michael and Margie Baldwin  
Matthew and Margaret Balitsaris  
Nonie Brady and Wil Merck  
Cabot Creamery  
Cape Cod 5  
Johnnie Chace  
Chelsea Green Publishing  
Community Foundation of SE Mass  
Fresh Sound Foundation  
The Grace Jones Richardson Trust  
Honeybee Capital  
John and Katie Mannix  
Margot Stone  
Massachusetts Cultural Council  
Harold Talbott  
Grant Winthrop

## GROW EDUCATION

Arcadia Charitable Trust  
Michael and Margie Baldwin  
Baycoast Bank  
Mr. Mac Bell  
Boutique Fitness  
John and Nancy Braitmayer  
Bristol County Savings Bank  
Carney Family Charitable Foundation  
Clif Bar Family Foundation  
Community Foundation of SE Mass  
- Sustainable Southcoast/11th Hour Fund  
Community Foundation of SE Mass  
- Henry H. Crapo Foundation Fund  
Christina and Charles Bascom  
First Citizens Federal Credit Union  
Hawthorn Medical Associates  
Island Foundation  
Kohl's Department Stores

Nancy and Edward Kurtz  
Jack and Doris Ludes  
Duncan and Ellen McFarland  
New Bedford Wellness Initiative  
Not Your Average Joe's, Inc  
Organic Gem  
Sandria and Charlie Parsons  
Planetary Metamorphosis Foundation  
Pro Contracting Group  
Elaine Seiler  
Jamey Shachoy and Laura Ryan  
Sid Wainer & Son  
Southcoast Health  
Edwin and Joan Tiffany  
Weatherlow Foundation  
Whole Kids Foundation

## HIMALAYAN PROJECT

Porter Anderson  
Chris and Patricia Arnold  
Susan Babcock  
Michael and Margie Baldwin  
Matthew and Margaret Balitsaris  
Chrissie and Charles Bascom  
James and Lisa Bedell  
The Boston Foundation  
Odessa and William Bourne  
Peter and Nancy Bousum  
Susan Brengle  
The Bromley Charitable Trust  
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Coins for Change  
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Adam Danforth  
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Planetary Metamorphosis Foundation  
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Louise Swartz  
Linda Tyrer  
Dickon Verey  
Cristina Vitiello  
Ryan Wagner  
Russell and Megan Wiese

#### **LAS GAVIOTAS**

Ben Muirhead

#### **MASS IN MOTION**

Harvard Pilgrim HealthCare Foundation  
Island Foundation  
Southcoast Health

#### **MASTATE CHARITABLE FOUNDATION**

Richard Andrus and Jane Stuart-Andrus  
Christina and Charles Bascom  
Rachel Jackson

#### **SPIRITUAL WARRIOR SOCIETY**

Mary Ann Rob  
Mark Robinson

#### **TAKTSKE INTERNATIONAL SCHOOL**

Kathrynn Adams  
Thomas and Marion Adams  
Daniel Amory  
Susan Babcock  
Michael and Margie Baldwin  
Chrissie and Charles Bascom

Kim Brengle  
The Bromley Charitable Trust  
The Buddhayana Foundation  
Johnnie Chace  
Catherine Cuthell  
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Chewang Denjongpa  
Mr. David Dvore  
Gloria Eng  
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Fish Family Foundation  
Lonnie Friedman and Paul Lauenstein  
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Jewish Foundation of Greensboro  
Andrea and Daniel Lasman  
John and Catherine Lastavica  
Helen and Milton Lauenstein  
Bokara Legendre  
Richard Lerner  
Lerner Family Foundation  
Whitney and Philip Long  
Celene and Geof Lyon  
Maine Community Foundation  
Ms. Caroline Maness  
Dr. Gregory Marvelas  
Sheila McBroom  
E. Robert and Angenette Meaney  
Duncan and Ellen McFarland  
Deborah Munger-Jaehning  
Etsuko Okada  
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Quan Yin Foundation Trust  
RSF Social Finance Anjel Advised Fund  
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Ann and Mike Strem  
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Dickon Verey

John Vine  
Paula and Anthony Viscogliosi  
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Priscilla Woods

#### **MARION INSTITUTE**

\$50-\$499

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Anne Baldwin  
Ms. Sybil Baldwin  
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Susanna Colloredo-Mansfeld  
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Anne Converse  
Linda Cornell  
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Pamela Epple  
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Kate and David Fentress  
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Albert Francke  
Connie and Michael Fulenwider  
Laurel Furumoto  
Nathaniel Gardiner and Nancy Bader Gardiner  
Ben Goldberg  
Sam and Gerry Gray  
Marjorie Greville  
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