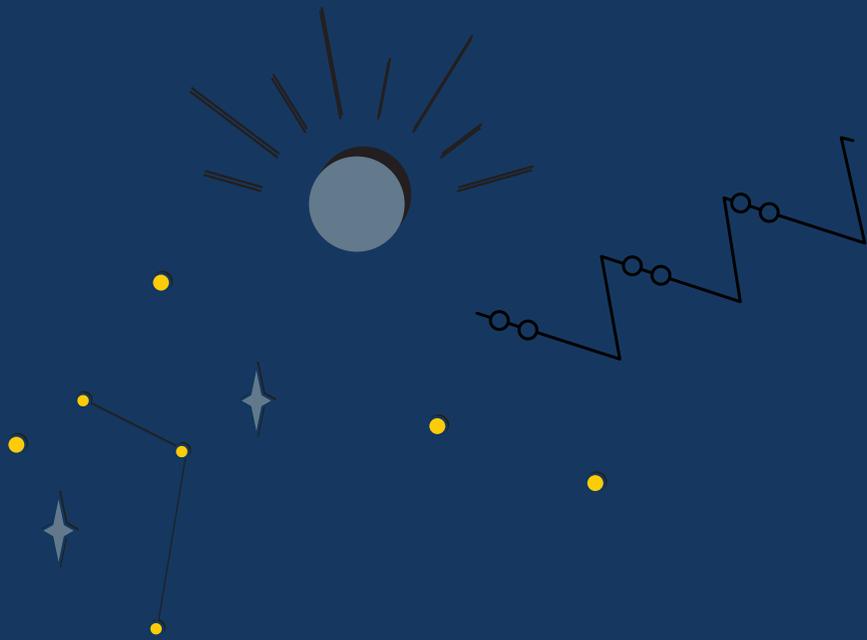




CONSTELLATION FUND



5th Edition

STRENGTH IN SUPPORT

Ann Henderson
CEO, Mental Health Resources



As the leader of a nonprofit supported by the Constellation Fund, I can say firsthand that working with Constellation is radically different from working with most other philanthropic foundations. To understand why, one must first understand the work of the organization I lead, Mental Health Resources (MHR).

The mission of MHR is to foster hope, health and recovery for people affected by mental illness and substance use disorders. I am passionate about this work and find that being surrounded by others who experience the same fulfillment has been one of my greatest joys. Watching MHR staff helping people overcome barriers and improve their lives drives me to instill greater creativity and collaboration within our organization.

Continuing to provide essential services through a pandemic, civil unrest and uprising, and a crushing workforce shortage has been the most difficult challenge of my



career. MHR has never been more needed than it is today. And thanks in part to the support provided over the last four years from the Constellation Fund's financial giving and Beyond Dollars capacity-building program, we've also never been stronger.

The 25-year disparity in life expectancy between a person who lives with a serious and persistent mental illness and the rest of the population is unconscionable. In any other area of health care, the public would be livid. We would have campaigns, champions, and research galore. Seeing none of this, it became clear that MHR would have to begin acting on its own rather than wait any longer. We know that correcting these disparities is not an insurmountable issue. But given that the mental health industry does not often support innovative approaches, philanthropic dollars help make it possible to do this work.

With financial support from the Constellation Fund, we have been able to sustain our dedicated Health and Wellness team to identify targets, design interventions, train case management staff, and measure the impact of our work. By using high level interventions that can be spread across numerous types of services, and ultimately touch thousands of individuals, we have been able to exponentially increase the reach of dollars given.



**“Working with
Constellation is
radically different
from working
with most other
philanthropic
foundations.”**



The work we are doing is innovative, smart, and supported by data. Connecting someone to smoking cessation treatment, dental care, asthma management helps them to take more active control of their medical health. People who do better physically often have better mental health, and those who are mentally and physically healthy typically have more productive and satisfying lives.

Without the Constellation Fund's support, MHR would not be in the position it is today. The staff at Constellation see us as the experts in our field. They actively work to make it easier to access grant funds. They understand what it means to be partners and have deep listening skills that translate into incorporating feedback and connecting us to additional resources. We are given full control over the benefit cost report created with our data and the expertise of the Constellation Fund's economists as additional leverage in conversations with our payers, regulators and other potential funders. The Beyond Dollars program has provided MHR staff with access to expert branding and marketing support, executive coaching, data analysis and intervention design.

Data driven interventions and the support to analyze that data should be a driving philosophy for any organization wanting to be a part of transformative work. Given the rising need, lack of public dollars, and inequities in our community, there is a desperate need for more philanthropic organizations to follow the path of the Constellation Fund. Accessing funds to support the fight against poverty shouldn't be more difficult than doing the actual work.

PLANNING FOR CHANGE

Mental Health Resources
By Cinnamon Janzer

Prior to 2018, Mary Redd was in and out of sometimes three-month stints at the hospital. She felt like she didn't need her bipolar medication and had a social worker who was helpful but overworked and unreliable. Redd would call when she needed help but wouldn't hear back for days. It was then that she was referred to Mental Health Resources, MHR for short — a non-profit organization offering community-based mental health and substance use disorder services to adults recovering from serious mental illnesses. MHR is a grantee partner of the Constellation Fund.

When Mary started working with MHR's Assertive Community Treatment (ACT) team in 2019 she was civilly committed and receiving Electroconvulsive Therapy. MHR's ACT team provides comprehensive, in-context, integrated care to those struggling with serious and persistent mental illnesses. The ACT team began seeing Mary three times a week to assist her with reaching goals. After a while she began to develop a trusting relationship with the team and started to actively participate in her recovery. Over time and with support from her ACT team Mary has quit smoking tobacco, visited annually with her primary care physician for preventative care and completed multiple dental appointments.

Now an MHR caseworker visits Redd once a week. They gave Redd a pill box to help her stay on track with taking her medication each morning and night, as well as a pager she can use to get immediate help any time she needs it.

Today, thanks to MHR, Redd doesn't experience bipolar symptoms and has been out of the hospital for the last five years. "They care about you. They really support



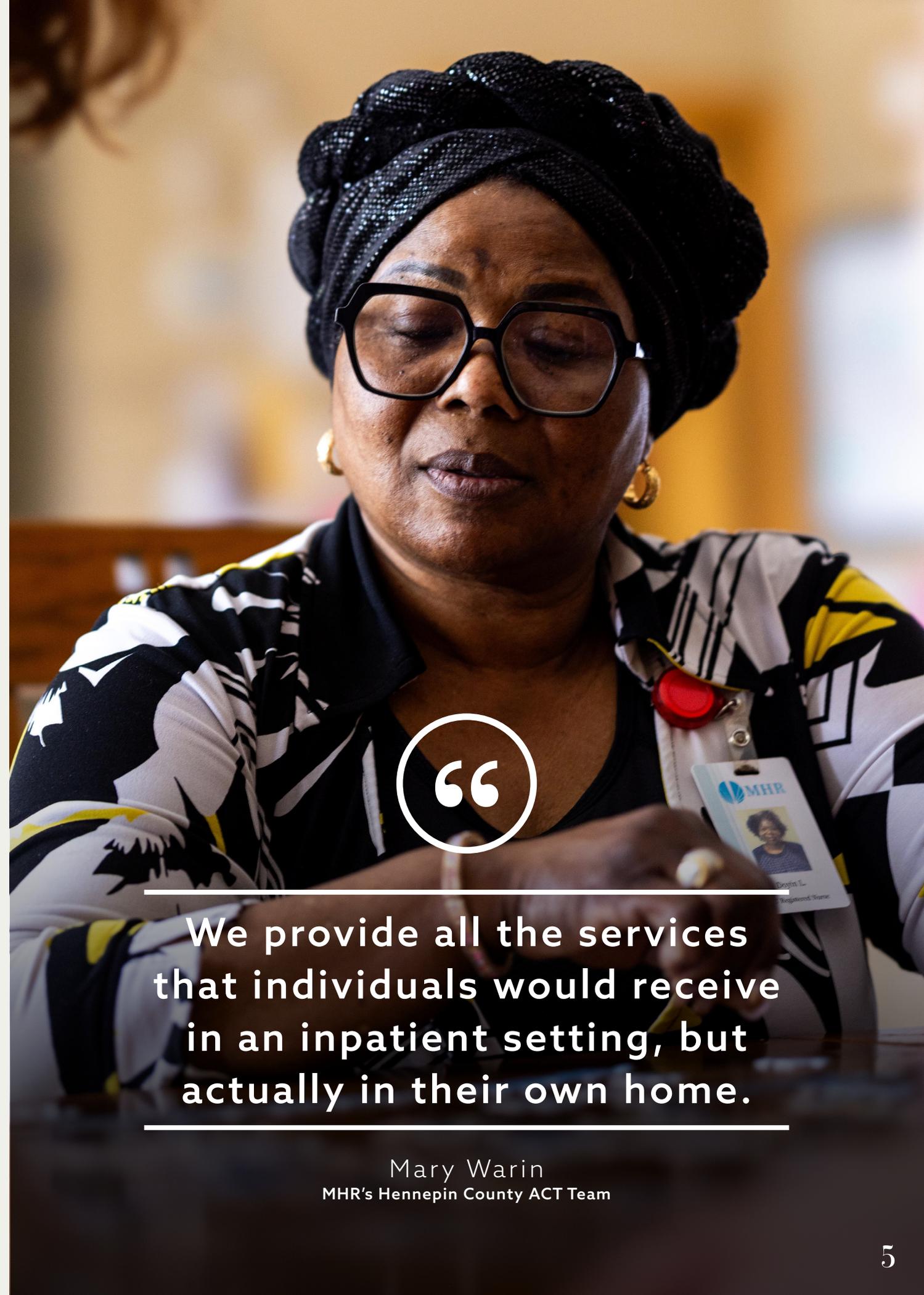
you and try to help you do whatever goal you have," Redd says.

Mental Health Resources was incorporated in 1976 with a mission of having both short-term and long-term community impact. In addition to meeting immediate needs with the consistent, on-the-ground services they offer clients like Redd, MHR also works to alleviate systemic issues in health care, and break down persistent myths about people with mental illnesses or substance use disorders.

"The goal is to become a hospital without walls. We provide all the services that individuals would receive in an inpatient setting, but actually in their own home," explains Mary Warin, team lead on MHR's Hennepin County ACT team. "We serve 75 individuals in Hennepin County and develop treatment plans for each one of them to help them accomplish their goals."

MHR's Health and Wellness team helps clients achieve goals that go beyond their mental health by developing, improving, and measuring initiatives targeting dental health, commercial tobacco treatment, respiratory health, and other gaps in care faced by the people they serve. They also provide health-related training to MHR case workers so they can work with mental health clients to also improve their physical health.

MHR's person-centered focus is vital for the community it serves and treats clients as the



We provide all the services that individuals would receive in an inpatient setting, but actually in their own home.

Mary Warin
MHR's Hennepin County ACT Team

decision makers in their healthcare journey – something that does not always happen for people living with a serious mental illness. Hennick recalls one client telling her about a time she asked her doctor about quitting smoking. The doctor discouraged it, saying that quitting would be too stressful. “That’s just poor care.” Hennick says. “It’s discrimination against people with mental illness because of a belief that people with mental illnesses don’t care about their health.”

“Tobacco companies have long targeted people who live with substance use disorders, with mental illnesses, and BIPOC people, LGBTQ communities, and folks with lower incomes,” says Jourdan Hennick, MHR’s Health and Wellness Coordinator. The numbers tell a difficult story: People living with serious mental illness die, on average, 10 to 25 years sooner than the general population, so the impact can be immense.

Less than 14% of Minnesota adults smoke, but that figure rises to 55% among MHR’s client population. In 2022, among MHR clients who received nicotine replacement therapies through the Health and Wellness program, 51% have cut down on tobacco use and 13% have quit altogether.

MHR’s approach is to embed health and well-being directly into the services they provide so that all the people they serve have opportunities to address their individual needs and goals. This work is not reimbursable by insurance plans and requires flexibility and creativity. The unrestricted grant funds from Constellation allow MHR opportunities to try these new approaches, sustain effective initiatives, and support

the process of using data to improve and advance their efforts.

Low Medicaid reimbursement rates or lack of insurance coverage for dental care pose other major challenges for MHR participants. Dental care providers often say that the cost of providing treatment to Medicaid patients exceeds the funds they receive through the reimbursement-based program. As a result, just 27.5% of Minnesota adults enrolled in Medicaid have had dental appointments in the last year. Using grant funds, MHR has established a mechanism to cover the cost of some vital basic dental care that may otherwise go unmet. Constellation supports the Health and Wellness team to provide targeted support and care coordination for individuals with dental care needs they cannot afford. All three of MHR’s county ACT teams exceed the statewide metric. “Our team has prioritized dental appointments more than ever, now that we have the ability to pay for some of the cost,” says Warin.

Hennick will often accompany clients into the exam room to help calm their nerves about a commonly stress-inducing experience. Going to appointments like these in-person is about providing more than just logistical support. It’s also about personal support. She helps them advocate for themselves in healthcare settings by supporting them to ask questions when they have them or flagging that the client needs a break when she notices stress bubbling up.

These results are possible because of MHR’s intentional approach to integrating a person’s physical health goals with their mental health care. “For years it was thought that mental health should address needs from the neck up and primary care doctors would do everything else,” says Hennick. “But we have to work together across professions.”

This comprehensive approach helps MHR prevent premature loss of life and cut down on the years of suffering that can stem from chronic health conditions in addition to mental illness and addiction. “Our staff are experts in talking with folks about motivation to change, and connecting people to the resources needed to make that change,” says Hennick. “That keeps me going.”



GROWING CONFIDENCE

Way to Grow
By Lauren Cutshal

After 2020's disruptions in education, Maya and Maki — second grade students and twins — were each struggling to read and comprehend material for their grade level. That changed when the family made a meaningful connection with someone who would become a key part of their support system: their Family Educator Amanda. As Amanda spent time with Maya and Maki, she noticed both the differences in the twins' learning styles and interests as well as their strengths when collaborating together. Both Maya and Maki loved games and competition but Maya loved learning through art and play while Maki learned best through hands-on real life application and worked really hard outside of home visits to keep learning concepts. Amanda helped them through individualized literacy games, creative projects, and reading practice. By the end of their third grade year, both Maya and Maki were reading at grade level.

The catalyst for the twins' new confidence in learning is the Twin Cities based organization, Way to Grow, where Amanda is a Family Educator. As it strives to eliminate barriers to early education, Way to Grow offers connections, programming, and resources to families in need.

Despite its strong education system, Minnesota has the third largest opportunity gap in educational attainment between white students and students of color in the country. Through one-on-one family educators and meaningful creative connection with parents, Way to Grow works hard to close that opportunity gap and set children up for success. In 2022, 98% Way to Grow's pre-k learners entered kindergarten on track!

Over the short term, Way to Grow works to offer parents more tools to impact their children's education — and this goal feeds



right into the program's long term vision. Way to Grow uses a holistic approach to change the trajectory of parent's lives — which in turn benefits children, families, and communities. "We see our parents go back to school, get their education and increase their earning potential," says CEO Carolyn Smallwood. "In turn, their children graduate from high school, go on to college or technical school, and are able to give back."

"Parents really are their child's first teacher," says Patricia Hayes, Program Manager for Way to Grow. "We build parents up and help them know that they have a voice, that they can be the advocate for their child's education."

While Way to Grow's Great by Eight program is at the heart of its mission to prepare children for their education, the organization also supports families by connecting them to resources in the areas of housing, employment, and health services.

"Anyone can go into someone's home and show up with a book. But it also has to be heartfelt. We accept families where they're at; we ask how we can help," Patricia says. Before families can focus on education, they may need support in meeting other needs, like finding stable housing or employment. The organization helped make over 1,300 resource referrals and served 1,850 people in their network in 2022.



Way to Grow focuses on the importance of the pivotal early years for children and their education by offering support in both early education and elementary school. And in 2022, 81 percent of students in Way to Grow's kindergarten through third grade programs demonstrated growth in reading level assessments.

By focusing on a language-to-language approach, Way to Grow works to build trust between parents and Family Educators. For example, Spanish speaking families are given the opportunity to pair with a Spanish speaking Family Educator. Way to Grow makes a point to offer culture-to-culture connections too, connecting families to staff and well as books, and materials that all relate to that family's culture.

"Parents really are their child's first teacher."

"It's very intimate to have someone come into your personal space and share your life with them," says Melissa Meyer, Director of Development. "But because we're making that language-to-language or culture-to-culture connection, deep trust is built."

A large part of this sense of trust comes from Way to Grow's ability to follow their programming over time and see its short- and long-term impacts. Through the Constellation Fund's initiatives, such as Beyond Dollars and the Impact Report, Way to Grow is able to gain insight into the progress and success of their programs.

For example, in 2022, 98 percent of children scheduled to enter kindergarten tested

kindergarten-ready — a metric that Way to Grow can use in sharing their story with potential families, and also with prospective investors.

"Having these types of metrics helps communicate our programming impact," says Melissa.

Not only are these metrics important from an analytic and programming standpoint, but it's meaningful to the Family Educators and staff who are involved in the hands-on work as well.

"We take this data, along with parent feedback, and we adjust accordingly," says Carolyn. "We are an ever-learning organization, and we use this information to make our organization better."

"Our staff do this work day in and day out, and I am not sure they all realized, collectively, what their individual impact was doing for the community," says Melissa. The Impact Report from Constellation helped staff see the bigger picture impact of their work and how it improves communities.

"Now we can say, this is the work that you're doing, and this is the long term economic impact," Melissa says. "In that moment, we see a lightbulb go off and they stand up a little straighter; they feel so proud of their work. This type of information really helps validate our work in a new way."

With assistance from Constellation, Way to Grow learned that for every dollar invested in their organization, over \$9.27 of impact is generated in the community toward reducing poverty.

"We are working with families that will contribute and support the communities in which they live," says Carolyn. "Making homes into stable, learning environments impacts not only the entire family, but also changes communities and school systems."



Through Way to Grow's programs, families are more easily able to navigate systems and advocate for their children's education. By helping families build a network of support for their children, and in turn, find long term stability, communities are strengthened.

"We're giving them hope, and giving them confidence and resources," Carolyn says. "Family by family, we are changing communities as we go along."

READY FOR TAKEOFF: INTRODUCING CONSTELLATION LAB

Matt Morton
Executive Director of CoLab



In the Constellation Fund's efforts to build the kind of rocket ship that can reach for the stars of poverty impact, this past year, it added a critical component - the Constellation Lab, or "CoLab." A partnership with the Foundation for Educational Research and Development (FERD), CoLab aims to reduce poverty by producing actionable data through funding and supporting high-quality, long-term research on programs, practices, and their effects.

The underlying rationale for CoLab is simple: we can't fight poverty in the dark. We can't rely on good intentions, trends, or positive anecdotes to guide necessary investments to drive down poverty. As community organizations and public agencies work to improve programs and practices in the field, philanthropy can help improve outcomes by investing in reliable evidence: what's working, who is and isn't benefiting, and whether and how short-term results disrupt intergenerational cycles of poverty.

Constellation's uniquely sophisticated model uses the best available evidence to identify and fund some of the most effective programs in the Twin Cities. Yet, limiting our work to the best available current evidence from prior research would mean limiting the bounds of our potential for long-term poverty impact.

Imagine how the world might be different if the software industry took the best available technology of the 1980s and never advanced beyond the once dominant Microsoft Disk Operating System (MS-DOS). If companies like Apple and Microsoft had never invested in the science to continuously update and iterate on that technology, we'd never have seen the rise of game-changers like Windows or Mac OS, and the better results they delivered for global consumers.

When it comes to fighting poverty and disparities, the stakes are even higher. Building and using continuously better evidence to inform poverty-fighting investments and practices brings us closer to enabling all young people to imagine a similar future, fostering thriving communities, and preventing avoidable early deaths and disease connected to known health consequences of poverty.

We started CoLab by listening. In my first few months on the job as CoLab's inaugural Executive Director, I engaged in listening conversations with over 100 people representing government, nonprofit and community leadership, the private sector, philanthropy, and research. In the months ahead, we will launch our early projects through collaborative processes, including engaging with community and learning from people with lived expertise.

We're in the final countdown now, and can't wait to get this rocket ship in the air. I hope you'll join us on this journey - to explore the spaces where CoLab-funded research and evaluation can best help fight poverty in Minnesota, and ensure all Minnesotans have equal opportunities to thrive. I am so excited about the unique contribution that we can make together.

“
We can't rely on good intentions, trends, or positive anecdotes to guide necessary investments to drive down poverty.”

Matt Morton
Executive Director of the Constellation Lab

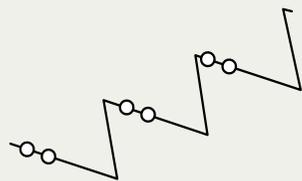
INVESTING IN EQUITY

Dianna and Joel Grebenick

While neither of us were born in Minnesota, this state is our home. With careers in the financial services sector, we both moved here over a decade ago to work in a community with a robust economy and a high quality of life. While we have found that and more in the Twin Cities, we are keenly aware that many of our fellow residents have not shared in that same good fortune.

As people who care about improving our community, we have donated to charity since arriving in the Twin Cities. Yet our approach to giving looked much different than our approaches to our jobs in finance, which involve the use of rigorous and objective diligence as a means to achieving returns on invested capital. When it comes to philanthropy, though, we are by no means equipped to evaluate and identify the nonprofits that are poised to create the biggest impacts with our donations.

Fortunately for us – and for our community – we don't have to be experts in philanthropic measurement in order to have a measurable impact. Through the Constellation Fund, we have found a vehicle to channel our donations toward nonprofits shown by evidence to be moving the needle in the fight against poverty.



Constellation's approach provides us the opportunity to give with confidence, knowing that every dollar is being carefully and impactfully invested across our community. And it has also provided us with the opportunity to go deeper ... or, in Constellation's parlance, to go beyond dollars! Through his work at the investment firm Northern Lakes Capital, Joel has participated in the Beyond Dollars program, which connects Constellation's impactful grantees with skills-based capacity-building support from local professionals. Joel was so inspired by his experience working alongside one of those nonprofits that he has since joined its board of directors.

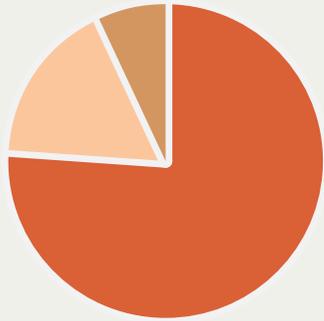
We love the Twin Cities and plan to be here for the long haul, but it must become a more equitable place for everyone who calls it home. It is a responsibility that is shared by each of us, but it is also hard to know how to help and where to start. Like a growing number of our peers, we have found in the Constellation Fund a modern toolkit for using our dollars and talents to effectively invest into our community.

“Through the Constellation Fund, we have found a vehicle to channel our donations toward nonprofits shown by evidence to be moving the needle in the fight against poverty.”



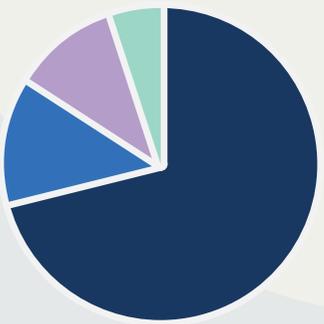
Dianna and Joel Grebenick
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HEALTH IMPACTS



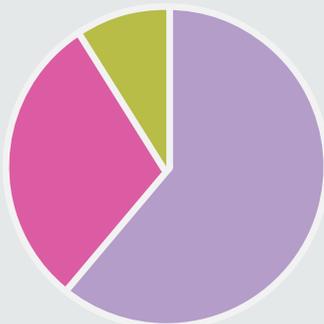
- 76%** Improvements to general physical and mental health
- 7%** Reductions to chronic diseases and deaths
- 17%** Increased access to sexual health care and knowledge

HOUSING IMPACTS



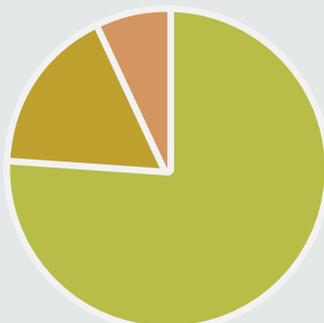
- 5%** Increased cash assistance
- 11%** Prevented evictions
- 13%** Reduced out-of-home placement
- 71%** Reduced homelessness

EDUCATION IMPACTS



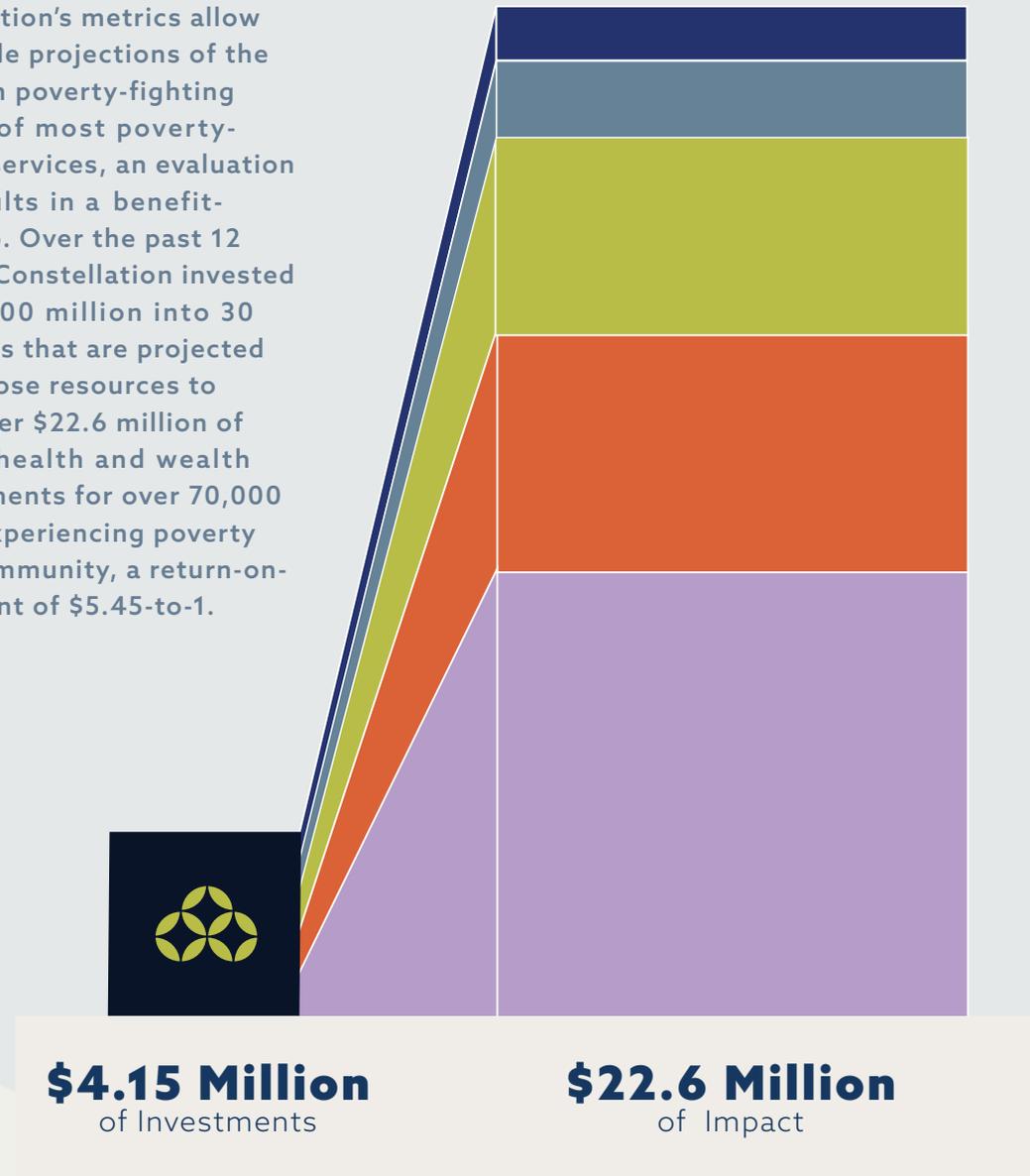
- 9%** Improved early childhood education
- 30%** Increased high school achievement
- 61%** Increased bachelor's and associate degree achievement

EMPLOYMENT IMPACTS



- 80%** Increased employment
- 13%** Increased financial benefits
- 7%** Avoided loss of earnings

Constellation's metrics allow for reliable projections of the long-term poverty-fighting impacts of most poverty-fighting services, an evaluation that results in a benefit-cost ratio. Over the past 12 months, Constellation invested \$4,145,000 million into 30 nonprofits that are projected to use those resources to create over \$22.6 million of lifetime health and wealth improvements for over 70,000 people experiencing poverty in our community, a return-on-investment of \$5.45-to-1.



Housing

Reduced homelessness
Less out-of-home placement
And more...

Multi-Service

A combination of benefits from inter-sectional programs

Employment

Increased employment
Improved technical skills
Increased financial benefits
And more...

Health

Increased health insurance
Reduced chronic illness
Improved mental health
And more...

Education

Increased academic achievement
Increased Kindergarten readiness
Reduced disruptive behavior
And more...

A NOTE FROM OUR CEO

Andrew Dayton
Founder and CEO of the Constellation Fund



In the year ahead, the Constellation Fund will celebrate its fifth anniversary. While our organization is laser-focused on long-term impact, this short-term milestone offers the opportunity to reflect on what has been learned.

Learning has been the operative word in these first years. Early on, I received advice from leaders at the Robin Hood Foundation – our sister organization in New York City that has implemented a similar philanthropic model for 35 years – for Constellation to build its own evidence base before drawing its own conclusions. We have taken that wisdom to heart, having now built over 230 customized metrics and conducted well over 100 rigorous evaluations of nonprofits across the Minneapolis-St. Paul metropolitan area. Here are a few things that I have learned from that work.

First, the nonprofit sector deserves our trust and admiration. The evidence indicates that a majority of poverty-fighting organizations in our community are creating meaningful, measurable impact by addressing challenges, removing barriers, and unlocking potential.



Second, while most nonprofits are doing good, some are doing great. Just take a look at the top and bottom quartiles of Constellation's evaluations to date.

On average, the bottom quarter of these evaluated nonprofits are projected to turn every donated dollar into \$1.3 of health and income improvements for those living in poverty, whereas the top 25 percent of those organizations are projected to turn that same dollar into \$7.5 worth of long-term impact, a nearly six-fold difference. I'll bet you can guess where Constellation has focused its investments.

Third, even with an ever-growing body of evidence at our fingertips, there is always more that we wish we knew about what is truly working best in the fight against poverty. This realization has led to the launch of CoLab, a groundbreaking new research partnership that will improve and disseminate research evidence that can support action to reduce poverty.

Lastly, we must do more. In the for-profit world, businesses offering a sky-high return-on-investment would have a long line of investors eager to help bring their work to its full potential, yet too many of Constellation's high-performing grantees remain under-resourced. With a mounting evidence base, powerful new tools like CoLab, and a rapidly-growing group of generous donors, Constellation is now in a unique position to help bring some of our community's most impactful poverty-fighting solutions to scale. This will be the work of Constellation's next five years and beyond – and I invite you to join us!



Constellation is now in a unique position to help bring some of our community's most impactful poverty-fighting solutions to scale.

Andrew Dayton
Founder and CEO of the Constellation Fund

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\$1,000,000+

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\$500,000 - \$999,999

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Constellation is proud to partner with a growing group of generous donors. Our board of directors funds 100% of the operating expenses so that 100% of the funds from the community are invested in what evidence says are the most impactful poverty-fighting organizations in the Twin Cities. Below are the generous supporters who made gifts between July 1, 2022 and June 30, 2023. Find information about becoming a donor to the Constellation Fund online or by contacting the team at give@constellationfund.org.

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Robert Beach
Shannon Evenstad
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