Investing in Social Entrepreneurs to Bring Economic and Health Equity to Our Communities

American Heart Association Bernard J. Tyson Impact Fund

Bernard J. Tyson Impact Fund Portfolio

Bernard Tyson's legacy of improving health equity and breaking down economic and social barriers lives on through the Impact Fund.

The Fund has provided more than $13M in funding to 50 community-based enterprises addressing the social determinants of health in San Francisco/Oakland, Atlanta, Chicago, Michigan, New York City, Philadelphia, Seattle and Washington D.C.

- **94% of our enterprises are led by Black, Indigenous and People of Color (BIPOC) or women.**

Every grant or loan made by the Impact Fund is performance-based and includes an outcome evaluation based on mutually agreed upon KPIs.

- **98% of our organizations are meeting or exceeding performance metrics.**
- **For 75% of our investees, our funding is the first or largest**

Impact Focus Areas

Focused on the Three Social Determinants of Health (SDOH) Pillars:

Access to Health & Healthcare : Access to affordable, accessible, culturally appropriate quality healthcare is a fundamental value. In most cases, factors outside the traditional healthcare system (transportation, technology, tech services) can support health and the opportunity to live a long healthy life.

Food Security: Food security encompasses the full food ecosystem from dirt (agriculture/ farming) to dirt (food waste management. Social Enterprises that contribute to the agribusiness vertical/ value chain can lead to better access to affordable healthy and environmentally sustainable foods.

Economic Resilience/ Poverty Reduction: Promoting economic stability through expanded educational opportunities, employment programs, vocational training, banking practices, affordable housing is critical to achieving positive health outcomes.

Operational Strategy

The AHA Social Impact Funds, of which the BJT Fund is one, focus on strategies ***to drive equitable health and well-being for all***, specifically through the lens of adverse social determinants of health and related structural inequity. Investments through these funds are designed to **address the needs of communities from within the communities themselves**. Specifically, the Funds are focused on:

Providing Access to Capital for Small and Medium-Sized Enterprises (SMEs) that address adverse Social Determinants of Health (SDOH) with the goal of generating long-term positive health outcomes. This strategic approach is designed to achieve two objectives—capital access for those who have little or no other opportunities for funding and positive health impact by addressing structural barriers to create opportunities for being healthy.

Combating Structural Inequities through an inclusive and innovative approach to **investing in social entrepreneurs and organizations that are reflective of their communities** and have a vested interest in solving the challenges there. This often includes investing in diverse SMEs that have been systematically bypassed by venture capital.

Accelerating innovation, scale, and the sharing of best practices for the portfolio of SMEs. This includes continually **seeking synergies between investees and their communities**, knowledge transfer across communities, and replication of effective interventions. *Think about what Greg & Bechara shared in terms of KP getting COVID shots into arms.*

Dynamically studying and addressing SIF existing and target markets to ensure we are working on the most pressing challenges. This is also inclusive of continually **engaging with the larger investor network to ensure continuity of funding opportunities** as investees mature.

Catalyzing Investment: Paths for Graduating Investees

"We don't fund Patches. We Fund Pathways to Impact, Innovation and Scale."

Path 3: Grantee or Investee is either self-funded and/or growing equity organically with no need for follow-on funding.

Path 1: Grantee hits impact milestones and receives follow- on grant(s) for expansion and/or technical assistance (TA).

Initial investment

Path 2: Grantee graduates to an Investee and access products that will help catalyze healthy external investment. Investments can be stand-alone or accompanied by a 2nd TA grant.

(e.g., Convertible Note as a catalyst to an Equity Round)

Clymb

4PFOODS

Impact in Our Communities To-Date

Our investments have improved the quality of life for **more than 1.5 million individuals** across the nation, across our social determinant of health areas.

Health and Healthcare

HEALTHCARE SERVICES

10,523
people have access to healthcare services

MENTAL HEALTH

13,077
people have access to mental health services

HEALTH TECH/INNOVATIVE SOLUTIONS

312,417
people have access to healthcare services through innovative approaches to healthcare

Food Security

HEALTHY FOOD ACCESS

82%
Individuals within food insecure communities reporting increased access to healthy and affordable food

HEALTHY FOOD AVAIALABILTY

1,479,218
pounds of fresh produce was grown for areas with limited access to affordable and nutritious food

SALE OF FRESH HEALTHY FOOD

$4,244,991
worth of fresh produce and healthy meals were purchased with in food insecure communities

Economic Resiliency and Poverty Reduction

HOUSING

1,625
individuals are now living in stable housing

RECIDIVISM

7%
recidivism rate achieved across portfolio programs

(Compared to the national rate of 45%)

EDUCATION

2,694
students have improved access to education

Environmental Health

The Environment affects the sustainability of our 3 social determinants of health pillars.

Examples of social enterprises with a strong environmental health lens are those focused on the following:

- **Food Security**
- (*Sustainable Farming, Soil Quality Preservation, Water Quality Solutions, Innovation in Food Waste Management)*

- **Economic Resiliency & Poverty Reduction**
- *(Affordable Energy, Innovative Energy Solutions for under-resourced communities, Green Industries/ Products providing new Employment, Air Quality Improvements related to labor conditions)*

- **Access to Healthcare**
- *(SMEs producing or scaling green, less toxic products, affordable energy, and other innovation for hospitals and clinics.)*

Food Security Origination

Executing across the Full Food Security Value Chain, the Social Impact Funds Originated $3.02mm in the fiscal year.

INPUT/SUPPLY

$ 980,000

FOOD HUB/ AGGREGATORS

$ 1,000,000

RETAIL

$ 1,040,000

Economic Resilience

In the fiscal year, the IIG Executed $2.63 mm in enterprises focused promoting economic resilience.

HOUSING

$ 570,000

HousingLink

HOUSING CONNECTOR

WELD

SOCIAL COHESION

$ 740,000

THEPRICEDYNAMIC
Transforming Single Parents Into Co-Parenting Families

Youth Alive!

POWER OF TWO

SMART FROM THE START

EDUCATION

$ 340,000

Cognitive ToyBox

ECONOMIC EMPOWERMENT / RECIDIVISM

$ 975,000

THE KNOWLEDGE HOUSE

JOURN/>

URBANED
Creating Hope & Opportunity Through IT

Stepful

Uptrust

Health and Health Access

In the fiscal year, the IIG Executed $800k in enterprises focused on promoting access to healthcare.

Health Technology

$ 400,000

Mental Health/ Behavioral HealthTech

$ 400,000

BMBFA BLACK MOTHERS' BREASTFEEDING ASSOCIATION

STRONG CHILDREN WELLNESS

Clymb

butterfly HEALTH

INFINITE FOCUS SCHOOLS

Conclusions

- **I believe that the AHA BJT Impact Fund model represents a replicable Path to Sustainable Growth.**

- **I believe it represents a true partnership opportunity to fight the Social Determinants of Health to improve the health of the people in the communities you serve.**

- **I believe it offers, through the social entrepreneurs we support, new approaches to old problems to find new, innovative, accessible solutions.**

- **I believe that during these challenging times, we have to put our funding and our trust in partners who can meet those challenges and I think that the AHA Bernard J. Tyson Fund represents one of those partners.**

If you wish to donate directly to the Fund in Bernard's name, please go to https://www.heart.org/en/bernard-j-tyson-fund

Also, for those who want a copy of the latest AHA Bernard J. Tyson Annual Report, please ask the IFHP team, with whom I've shared a copy.

Finally, If you want to learn more about how your organization can partner with the AHA Bernard J. Tyson Fund, I can be reached at vdenisebradley@gmail.com; +1.415.307.8044