

DEAR SIFE JUDGES:

The UMass Dartmouth SIFE (UMassD-SIFE) team is committed to the promotion of the principles of free enterprise within the University and its surrounding communities. The cities of New Bedford and Fall River are historically characterized by low levels of educational attainment and entrepreneurial activities and high levels of unemployment, thus revealing a need to improve the community through educational services. In its third year, the UMass Dartmouth SIFE team has made substantial contributions in helping the disadvantaged populations of this region by guiding them, just like a lighthouse guides sailors at night, through the process of obtaining necessary skills to achieve community and personal success. The group aims to expand both its local and global outreach in the future as it continues to develop into a cohesive team of motivated students making a difference in the world. We certify this report.

Sincerely,

Adam Fleckles, President
UMass Dartmouth SIFE

Dr. Godwin Ariguzo, Lecturer
Sam Walton Fellow

Dr. Eileen Peacock, Dean
Charlton College of Business

PROGRAM
SUSTAINABILITY

In an effort to ensure succession, UMassD-SIFE members put in a concerted effort this year to increase membership, and were successful in recruiting several new students yielding a total of 32 members (20 over last year—a growth of 146 percent). This year's group has the most number of freshman class—6 members who all have been active the entire year. Many members have already expressed an interest in becoming officers next year. The Business Advisory Board (BAB) has been increased by 100 percent from 9 members last year to 18 this year. The number of projects completed by the UMD SIFE team has also grown from 8 to 15, an 88 percent increase with many scheduled for continuation. Administrative support from the University has expanded. Dean Dr. Eileen Peacock, and two UMass Dartmouth faculty members have joined our BAB—providing program sustainability. In addition, the UMass Dartmouth Student Senate increased its financial allocation to the UMassD-SIFE from \$200 last year to \$2,000 this year and the Chancellor awarded \$3,000 to us as a way of supporting our work. One of the new faculty BAB member donated \$200 to us to support our Katrina project. A local bank donated \$500 and one of our alumni members purchased 50 t-shirts for the organization—a \$260 donation. UMassD-SIFE also maintains a bi-weekly column in The Weekly Compass giving it a platform to continue its educational efforts. We clearly have a strong system established for SIFE to thrive on the University of Massachusetts Dartmouth campus in future years.

UMASS DARTMOUTH SIFE 2005-2006 PROJECTS

1. ETHICS

BOOKS FOR KATRINA

CRITERIA: 1,5
RESULTS: 1,200 books collected, 3500 impacted



On Monday, August 29, 2005, level-five Hurricane Katrina set 80% of New Orleans underwater, killing 1,325 people and causing nearly \$200-\$300 billion worth of devastation. With millions homeless and displaced, UMassD-SIFE members were compelled to help the youth who had been affected by this storm with a strategy to involve the college and local community in making a positive difference by collecting books and games for the children. The hope was that books would inspire the affected children to begin the process of healing by providing them an outlet to escape the tragic events they had recently experienced.

From September to November of 2005, SIFE members were able to promote the book/game drive via the UMass Dartmouth website, three local newspapers (The New Bedford Standard Times, the New Bedford Weekly Compass and the student newspaper The Torch) as well as through the distribution of fliers and the use of word-of-mouth promotion. Not only did UMassD-SIFE collect 1,200 books, toys, games and playing cards, it also worked with the Southwestern University SIFE team in Georgetown, Texas to coordinate the logistics of shipping and distributing the items to those who needed them in the region.

Christmas in the Village

CRITERIA: 1,2
RESULTS: 500 impacted

The Christmas in the Village organization (an ecumenical group) provides a family-oriented holiday experience for the community. To help develop a promotional strategy for this event, Saint Bernard's Parish, the United Church of Assonet and the Freetown Histori-

cal Society, co-sponsors of the event, asked the UMassD-SIFE members to help it promote this free and unique holiday experience for the underprivileged children and families in the area. SIFE members developed a new marketing strategy to promote the events and activities, and were able to create a memorable holiday experience for all of the participants.

A solid foundation was laid and we have started planning for the 2006 holiday season early. This project allowed us to advance in two ways: a freshman learned leadership skills as it was her first time leading an assignment of this magnitude, and the whole group benefited from establishing a new relationship.

United Fronts Home
Christmas Toy Drive

Criteria: 1,5
Results: 142 people impacted

Last December 2005, Mr. Jim Butler, CEO/Publisher of the Weekly Compass, a member of the UMass-D-SIFE Business Advisory Board, and the Property Manager of the United Front Homes in New Bedford (a housing project), approached UMassD-SIFE and asked us to find a way to provide holiday presents for the disadvantaged children living in the United Fronts Home because many of them had no holiday presents coming to them that holiday season. With only a two-week window and final exams in the horizon, UMassD-SIFE members distributed pledge cards to the members of the college community and through personal selling the team educated over 50 members of the community about the problem. Within a week over \$450 was raised to purchase books and toys for the 46 disadvantaged children living in the United Front Homes and a relationship was established for future projects. This December we plan to repeat the project and will try to solidify our relationship with the children with a goal of developing a tutoring/mentoring program for them in the areas of math, reading and writing skills. A grant application will also be developed and implemented. We have a long term view of the project and do not want to rush the trust-building process.

Solar Decathlon

CRITERIA:1,5
RESULTS: Energy Efficient home built,
100,000 people impacted

Working alongside Habitat for Humanity, four UMassD-SIFE members helped build a home in the Solar Decathlon competition bringing together architecture, design and technology to produce a home that uses energy more efficiently. The completed home was transported to the Washington D.C. area where a national Solar Decathlon competition was held and after the competition the home was donated by Habitat for Humanity to a

victim of Hurricane Katrina.

2. MARKET

ECONOMICS

The Weekly Compass Column

CRITERIA: 2,3
RESULTS: 5,000 people impacted

UMassD-SIFE was invited by one of the advisory board members, Mr. Jim Butler, CEO/Publisher of the Weekly Compass, to help his bi-weekly newspaper develop its business plan (he had never had one) and to help the paper increase its advertising revenue. The newspaper has a circulation of over 25,000 readers—covering the city of New Bedford and the surrounding communities of Dartmouth, Westport and Fairhaven, and the paper is required reading in the New Bedford High School system. In return for this service, UMassD-SIFE was given a column in the newspaper to write about its activities. Various members of UMassD-SIFE wrote bi-weekly columns in the newspaper covering topics such as financial management, business ethics, and the benefits of the free enterprise system.

3. FINANCIAL LITERACY

SMART Money Management

CRITERIA: 2,4
RESULTS: 12 students impacted

UMassD-SIFE teamed up with Vice President Andrew Guilbeault from Bank Five in Fall River to educate UMass Dartmouth students about credit card risks and how to manage their payments to avoid bad debt, as well as the importance of saving money and establishing financial independence and borrowing basics. Three workshops were conducted during the course of the year. Pre-post tests were given to the participants.

4. ENTREPRENEURSHIP

The Weekly Compass
Business Consulting

CRITERIA: 2,4
RESULTS: 17 people impacted

UMassD-SIFE was invited by one of the advisory board members, Mr. Jim Butler, CEO/Publisher of the Weekly Compass, to help his bi-weekly newspaper develop its business plan. Working in conjunction with Mr. Butler, SIFE members developed a business plan including the creation of informational packages that were sent to local businesses. When Mr. Butler approached UMassD-SIFE in November 2006, he had expressed a concern that the paper "may not be able to meet its financial obligations that month and that it was on the verge of closing its doors." Through UMassD-SIFE consulting work the

paper format was completely revamped and its revenues have risen. This project will be continued next year with a more aggressive marketing strategy and the business plan will be revisited as well.

The Entrepreneurship Education
Outreach (EEO) Projects

CRITERIA: 1,2,3,4,5
RESULTS: 39 people impacted

At both the New Bedford and Durfee High Schools, the UMassD-SIFE members conducted workshops over an eight-week period to teach high school students about entrepreneurship and business plan development. The workshops included product/service concepts, marketing, management, financial plans, business ethics, and successful operation of a business. The students will be presenting their plans on April 30 to a panel of judges and the winning plans will each receive prize money; two \$200 awards at Durfee High and one \$200 award at New Bedford High.

SAY-YES to Entrepreneurship

Criteria: 1,2,3,4,5
Results: 10 students and their parents impacted



In summer 2005 an entrepreneurship program for ten 14 and 15 year old students at the New Bedford Global Charter School was implemented as a five-week summer job program to teach the students how to write a business plan. Various small business leaders from the community where recruited to teach them the skills they needed. Equipped with knowledge of how to develop professional business plans, the students engaged in the process of creating their own plans and presented them to the faculty and staff of the College of Business who selected the top three winners. Each winner was awarded \$800 seed money to start their business. Over the course of the year, SIFE students and the Sam Walton Fellow worked with the students to mentor and assist the winners. As of this report, one of the winners, the owner of a landscaping business (Mendes Landscaping) is successfully operating his business with seven (7) customers. The other two, owners of a dog grooming business and a t-shirt business, are still in the process

of establishing their businesses.

Peace through Commerce (PTC)

UMassD-SIFE/International
Business Association (IBA)

Joint project

CRITERIA: 1,2,3,4,5
RESULTS: Over 700 people directly impacted

Fairloom, founded by 24-year old Annie Doran in 2002, works with the community of Terra Prometida in Fortaleza, Brazil. Fairloom sells their artisans' products in the United States and returns the proceeds to the community for sustainable economic development. UMassD-SIFE, in collaboration with the International Business Association (IBA), traveled to Brazil this March as an alternative spring break experience to help this Brazilian community. A total of 31 students, two professors, and Ms. Doran went on the trip. The projects included developing a financial plan, budget, and production schedules, implementation of total quality management strategies, literacy education for the children, remodeling of the production studio, and development of new product designs for the American market. SIFE along with IBA worked two months prior to the trip to map out an action plan on how to help the community.

In addition, SIFE members also traveled to Peru with the IBA team to provide business consulting services to Centro Ann Sullivan del Peru (**CASP**), a non-profit school for disabled children (or as they like to call them "people with different abilities") specializing in autism. Six groups worked on six different projects including how to Franchise the CASP humanistic model, marketing and brochure development, fund-raising, project development for the families, and development of a marketing plan to sell their training videos. Furthermore, a connection between Fairloom and CASP was established.

UMassD-SIFE members on the PTC program evaluated five business plans developed by mothers of the CASP children many of whom come from rural villages and possess very limited education. Most cannot afford their children's medications. The business plans they developed included a small Peruvian fish and lime soup restaurant, a small pastry shop, a jewelry stand, a Peruvian juice and soda fountain. Each micro business needs a small startup capital of between \$1,300 and \$1,900. As a follow-up to the visit, SIFE students are planning to raise enough capital to provide interest-free loans for one or two of the businesses. The payments from the borrowers would be used to fund future programs in Peru.

DBS Commercial Creation

CRITERIA:1,2,3
RESULTS: 30 students impacted

The UMass Dartmouth Charlton College of Business (CCB) and SIFE members worked

with seven-time Emmy Award winning television producer, John Methia, the executive producer and owner of a local production company called clicknet.tv, and Mr. Ron Fortier, Marketing Manager at Dartmouth Building Supply. UMassD-SIFE worked with these two Business Advisory Board members to promote and conduct a casting call on campus and are working together to produce a fifteen-minute TV commercial. The various aspects of this commercial as well as promoting it in the community helped educate the participants about how commercials are really made.

5. PERSONAL SUCCESS
SKILLS

Community Education
Outreach (CEO)

CRITERIA: 1,2,3,4,5
RESULTS: 26 people impacted

For the third year in a row, UMassD-SIFE members devoted their time and expertise during a five week program to teach inmates of the Bristol County House of Corrections basic computer and business skills through the use of Microsoft Office, including Word, Excel and Power Point. Inmates who are chosen for this project are those within six months of release time and had been convicted of non-violent crimes. The program was expanded to two classes per week this year so that the number of inmates in the training would be increased to twenty from six the previous years. Moreover, this year's classes had a GED entrance requirement, making the learning experience more intensive and rigorous for the inmates, preparing them for the skills necessary upon their release.

CREATE

CRITERIA: 1,2,5
RESULTS: 65 people impacted

The Creative Roster of Executives and Artists Teaching Entrepreneurship (CREATE) program was initiated by the UMass Dartmouth marketing/BIS Department in collaboration with the UMassD-SIFE members facilitating its success. The purpose of this program is to invite successful entrepreneurs and artists to discuss how to tap into creative energies for business innovations, entrepreneurship and management. Guest speakers included Annie Doran, Founder and Director of Fairloom, John Methia, Executive Producer of Clicknet.tv and Creative Services Director of WLNE TV, and Dr. Yolanda Liliana Mayo, Founder and General Director of Centro Ann Sullivan del Peru (CASP). UMass Dartmouth students and community members have benefited greatly from the insight provided by these brilliant entrepreneurs guest speakers.

2005-2006
BUSINESS
ADVISORY
BOARD

- Mr. Stephen Almeida

President
Almeida & Associates
- Dr. Godwin Ariguzo

Lecturer/Sam Walton Fellow
UMass Dartmouth
- Ms. Donna Branco

Director of Education
Bristol County Sheriff's Office
- Mr. Jim Butler

Publisher/Managing Editor
The Weekly Compass
- Dr. John A. Chopoorian

Chancellor Professor of Marketing
UMass Dartmouth
- Ms. Carolyn Conroy

Financial Advisor
Waddell & Reed
- Mr. Ron Fortier

Marketing Director
Dartmouth Building Supply
- Ms. June D. Goguen

Vice President, Commercial Lending
Eastern Bank
- Mr. Andrew Guilbeault

Assistant VP Marketing and Bus. Dev.
Bank Five
- Mr. Joseph Jandrow

Store Manger
Wal-Mart
- Mr. Cecil Lopes

President
New Bedford Floor Covering Sales Inc.
- Mr. John Methia

Executive Producer
Clicknet.tv
- Mr. Shawn Mills

President/Owner
New England Video Productions
- Dr. Eileen Peacock, Dean

Charlton College of Business
UMass Dartmouth
- Mr. Manny Pinarreta

Distributor Manager, New England Zone
Heineken USA
- Mr. Cesar A Rodas Jr.

Sales Representative
The Conway Group
- Mr. Trey Whalley, CFA

Senior Financial Planner
MetLife Resources
- Dr. Steven White

Professor of Marketing
UMass Dartmouth

IMPACT FROM
SIFE PROJECTS

Projects	Members involved	Criteria Met	Number impacted	News Coverage	Hours	New/ Continued	BAB
The Weekly Compass Column	2	2,3	5,000	YES	15	NEW	2
The Weekly Compass Business Consulting	5	2,4	17	YES	110	NEW	2
EEO Fall River	3	1, 2, 3, 4, 5	13	NO	77	CONTINUED	2
EEO New Bedford	4	1, 2, 3, 4, 5	26	NO	45	NEW	1
Books for Katrina	8	1, 5	3,500	YES	155	NEW	2
Christmas in the Village	2	1,2	500	YES	40	NEW	1
Solar Decathlon	5	1, 5	100,000	YES	130	NEW	1
United Fronts Home Christmas	4	1, 5	142	YES	32	NEW	2
CEO	4	1, 2, 3, 4,5	26	YES	97	CONTINUED	2
Smart Money Management	6	2,4	12	YES	60	CONTINUED	1
SAY-YES to Entrepreneurship	6	1, 2, 3, 4, 5	10	YES	160	CONTINUED	3
CREATE	4	1, 2,4, 5	65	YES	65	NEW	3
Fairloom	5	1, 2, 3, 4, 5	200	YES	200	NEW	2
DBS Commercial	8	1,2,3	30	YES	37	NEW	2
CASP	5	1, 2, 3, 4, 5	500	YES	200	NEW	2
Total			110,041		1,423		

2005-2006
UMASS
DARTMOUTH

SIFE
ANNUAL
REPORT



“Education
Meets Reality”



UMASS DARTMOUTH
SIFE HISTORY

In November 2003, UMassD-SIFE was founded under the guidance of Dr. Godwin Ariguzo (Sam Walton Fellow) and six (6) students who were eager to utilize their business skills and fundamental knowledge of free market economics to provide disadvantaged members of the surrounding community tools of self empowerment. Now, with thirty-two (32) enthusiastic members, UMassD-SIFE membership has grown by over 400 percent from its founding days, the team has successfully implemented 15 projects this year (88 percent over last year) and has raised over \$6,000 this year (100 percent increase over last year) to implement its projects. The team has been a beacon of light for various members of the community and as a team we have been forever changed by the experience and enormous responsibilities.

OUR MISSION

The UMassD-SIFE team mission is embedded in its vision of connecting education with the real world by promoting steadfast commitment:

- To reinforce entrepreneurial ideologies and endeavors on the campus and in the surrounding communities;
- To foster leadership, business skills and lasting relationships among its members;
- To enhance networking and learning opportunities through interactions with its advisory board members;
- To serve as a bridge between the University and the Southcoast region;
- To continue to increase its membership from diverse backgrounds in order to amplify its educational impact.

OUR LOCATION

Established in 1664, the town of Dartmouth is located 60 miles south of Boston and 30 miles east of Providence. Lying midway between Fall River and New Bedford, Dartmouth is intertwined within a region once known for its strong textile and apparel manufacturing jobs, held primarily by the Portuguese and Hispanic immigrant populations. UMass Dartmouth became one of five campuses in the University of Massachusetts system in 1991, and is strategically located to serve the Southcoast region and its more than 500,000 residents.