

# Lifting Our Communities UpTogether

KATHRYN YORK (PRODUCER): Welcome to the Big and Little Podcast from Boston Children's Museum.

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KATHRYN (PRODUCER): My name is Kathryn York, and I'm the Museum's Digital Content Manager and Podcast Producer. Today on the show, our President and CEO Carole Charnow talks with Jesús Gerena, the CEO of UpTogether. Jesús, a native of Puerto Rico, moved with his mother and siblings to Amherst, Massachusetts, at the age of nine. After graduating college, he spent almost 10 years in the Boston area working on projects that focused on community organizing and social impact.

Now, he leads UpTogether, a national organization on a mission to change policies, systems, and underlying beliefs so that all people in the United States are seen and supported. In today's podcast, we discuss what happens when we empower and put trust in the people we serve. UpTogether invests in people from historically undervalued communities and amplifies their true lived experiences.

What happens when we don't always have to stress about paying rent, buying groceries, or making ends meet? What happens when we have the freedom to choose where our money goes? Let's find out.

CAROLE CHARNOW: Hello, Jesús. How are you?

JESÚS GERENA: I'm doing very well. A little cold here in Oakland, which is not typical for this time of year, it feels like. But hanging in there.

CAROLE: Well, it's a little warm in Boston, which is certainly not typical for this time of year, either. I wonder if you could just start telling our listeners a little bit about yourself, your career, and how you became the leader of UpTogether.

JESÚS: Sure, yeah. So I've been with this organization UpTogether now for going on 13 years. It was a by chance situation. I'll come back to that in a second and just share I was born and raised in Puerto Rico until about the age of 10 before my family moved to Western Massachusetts, to Amherst, Massachusetts. Not an easy transition. Although at first, you celebrate the cold and then you realize that it doesn't go away.

For my family specifically, we had been in a position of poverty in Puerto Rico and lacked many opportunities and places to be able to thrive, for the most part. And my mom was a single mom at the time and struggled in trying to make ends meet. And her sister had moved to Western Massachusetts and sort of gave her an inspiration of what could be possible.

And so my mom picked up and went and brought us there. So we went from a place of great need and little opportunity to great opportunity and very little need. And that really set us on a course to be able to succeed. By the time I had to find a career, one of the things that really has stayed with me was the inequities that I understood through a number of volunteer opportunities in Holyoke, Massachusetts, where there was a large Puerto Rican community, that my circumstances were based on a zip code. That if I were to landed in a place like Boston at the time or Holyoke, I would have possibly faced a very different fate.

And so I wanted to do something about that. Started doing some community organizing in Boston and ended up at an organization called the Hyde Square Task Force in Jamaica Plain that allowed me to

really understand and learn more about critical components of community and how to be active, how to support young people and really be a voice for change. And simultaneously, I got engulfed in this, a great immigrant community that lived both within its identity inside of this country.

That's the backstory that then led me to an opportunity where I met our founder Mauricio Lim Miller as he was looking to grow his organization that was formed here in Oakland, California. And his whole purpose was, yeah, there should be an ability for people to thrive. Why aren't we creating that opportunity for all? Why aren't we investing in people and their abilities? And it starts with them. It's putting them at the center.

And all of that experience all of a sudden clicked for me.

CAROLE: Wow. That story really illustrates how this particular organization so suits your own personal experience. So in reading about UpTogether and then reviewing your work and being familiar with it over some years, it strikes me that the way that you approach your mission is very, very unique. Particularly because it empowers and puts trust in the people that you're serving, which is a very different way of looking at philanthropy.

I wonder if you could tell us about your approach, about your mission, and let us know more about UpTogether.

JESÚS: Sure, yeah. So again, we have this very audacious, bold mission to changing policies and systems. As well as the underlying beliefs so that all people in the US are seen and invested for their strengths and are able to build power, reinforce their autonomy, and drive their own economic and social mobility.

Going back to my own story. Right, this is exactly-- that was the change, right? But it meant that we had to physically move to be able to be put in that position. Our approach, our strength based approach, is centered around recognizing the value of community on social networks, of relationships, the way that they are able to guide us and support us as we're facing opportunities and challenges in our lives.

Second is that for folks who are facing financial hardship, money is a powerful agent that people who are struggling below the poverty line are continuously trying to get above it. And actually oftentimes succeeding. Unfortunately they can't sustain it, because there's no investment. So whenever the next crisis or emergency hit, they fall back. So for us, the way to change that is to model what policy should look like, which is that direct investment in people. And by that, I mean just unrestricted cash investment.

And then the last piece is choice. I may have guesses, as did maybe Carole, how you could succeed in life and vice versa. But the truth is that I am the expert in my own household. And that I should be able to choose, what are the goals I want for myself and for my family, as well as how to be able to pursue them.

CAROLE: So this strengths based approach is you're really identifying the strengths of the individual and their dreams and their vision for their life and then investing in them so they can make their own choices. Which is very, very different than the way we address poverty now, isn't that right?

JESÚS: That's exactly right. So the other side of this, right, is what we identify as a deficit based system, which is predominant in health and human services. And, you know, it started well intended. I think it was in '68 when President Johnson had this war on poverty, right? And being able to address the inequalities that existed between the rich and the poor.

But it always felt like, oh, well, they're helpless. We need to do something for them. And that good intention over the decades has only continued to put the resources away from people directly and more

into a belief that they can be trusted. That they're a victim of their own circumstance that somehow is their own fault for being and facing economic hardship.

When the truth is that between those negative stereotypes as well as system failures, some based on racism, we're continuously depriving an ability to recognize the ability of these communities and these folks. And so as a result of that, there's a disinvestment that happens. And top down approaches that create programs and services, that create hurdles, that replace personal relationships with professional relationships. And all of those pieces just, again, well-intended, but take away resources and also rob us of the ability to recognize the initiative, that hard work that those who are facing that hardship are demonstrating on a day-to-day basis.

CAROLE: It just makes so much sense. It's just impossible to imagine how we got here. But we'll talk more about that in a minute. On your website, you have this amazing sentence that I want to read, because it really struck me, and it sort of elaborates on what you've just been saying. That society has underestimated the potential and resourcefulness of people with limited income to improve their own financial and general well-being.

So can you talk more specifically about what you actually do to improve these individuals' financial position?

JESÚS: We demonstrate just by one census data point that shows of the 38 million people at or below poverty, within a four year period of time, 75% of them will move above poverty.

CAROLE: Wow.

JESÚS: Within five years, 50% will fall back in.

CAROLE: Oh my goodness.

JESÚS: It's so hard to grasp because the narrative is so ingrained about how helpless these individuals are, how stuck they are, how much they need help. And it really changes the position back in really putting and understanding that, actually no, there's huge capabilities. And so we partner directly with these communities. Historically, we've asked an individual who was interested in working with us to just help us learn who that community is.

And then forming a small groups of 5 to 8 individuals. We would then ask them to meet monthly with no agenda, just so that we could learn from them what was happening. And this is then partnered with our community platform, the UpTogether community, where they could then sign in, create a simple profile, invite the other members to participate. And then as a result of that, we get a good sense of what these folks are doing.

They get the benefit of being able to coordinate meetings, share goals with one another, as well as the dollars become available, we can then directly invest in them through that platform. Right now, we're doing about \$500 a month for 18 months to many of the families that work with us. And this is-- it's not income. It's total direct unrestricted grants to them.

And what that allows us to do is to, again, model what we believe policies and systems should be doing, which is to say, hey, you're able. You have great initiative. You have a rich community. Show us those things. And as you are pursuing success in your life and your household, give us that information back so that we can show others as well. So that demonstration work is really important to us, because A, it provides an ability for those who are facing a financial hardship to get some immediate relief.

But then what it also allows them is the breathing room to start going after those bigger goals that they have for themselves.

CAROLE: That's fantastic. Being a Children's Museum, we're really deeply interested in this, because of course, poverty really impacts the child's life. This UpTogether community platform that you're talking about, where these small groups of individuals from an identified community come together, they connect, they support each other. Can you talk about how that really benefits families to have that camaraderie of one another?

JESÚS: So a number of different ways. I think first is there's always some healthy peer pressure that people get to build off of. A, having that community of folks around you to be able to crowdsource solutions for you. So you're meeting those challenges. It's important.

But then B, if you and I were in a group, and Carole, you start going after maybe some higher education, maybe buying a house, I'm going to be motivated to be able to do the same. Right, and I may also lean on you to say, I never thought you were able to do that. Show me how you did it, because I know now that I can't do-- you're giving me that example.

I can share one example in Boston. Two women who were looking for improving their kids' educational reading levels. And, you know, one of them found a after school program that showed the other woman how to be able to potentially pursue that for her family, right? And I have hundreds of those examples of just people doing some sort of activity that then moves the other person to want to be able to do so. And that's happening in our lives at all time. It just, it helps us to be able to capture it.

CAROLE: It's so interesting, because we often think of peer pressure as a negative. But you're illustrating what an incredibly positive effect it can have on your aspirations, to see someone like you who achieves something. And you think, well, they can, I can.

JESÚS: Yeah, no, that's exactly right. And each of these communities to-- one of the things that we continuously see because we are targeting working with families, with dependents, is that the children are always one of the major focuses. And being able to surround them with positive activities that reinforce their identity, their cultural background, whatever it may be, it just becomes really center. And so they are looking for those additive opportunities. And so these groups then create that opportunity for people to be able to have as a result.

CAROLE: So earlier, Jesús, you mentioned racism. There is another interesting statement on your website. There are systemic barriers, some created by racist policies and practices that challenge families' ability to leverage their assets, strengths, and capacities. I have a feeling you have a lot of thinking about this. So can you tell us where that statement came from?

JESÚS: It goes back to how we think why we have to model, right, this direct investment, this recognition of people's abilities. One of the things we've been able to do over the years is lift the scientific evidence, right? And we've done our randomized controlled trials as well as our working with academic institutions to be able to lift the value of this work. Which, it's really critical and important because we want this broader adoption to it.

I will also add, oftentimes we are proving that people are worth being invested in.

CAROLE: Yeah.

JESÚS: The reason for that is-- there's a number of examples I can show. But the best one is in the '80s, we developed a welfare queen, this moniker characterization of this woman who was just having kids to be able to have extra income in her home and was just really happy. It was a total false, but also specifically centered around stereotyping Black women in this country.

And it was meant to continuously be able to deprive and recognize the opposite that was happening. Right, that these people were actually really taking all sorts of efforts to be able to do better for themselves. As a result of that in the '90s, there was all this welfare reform that occurred, right? That was based on these racist--

CAROLE: Stereotypes, yeah.

JESÚS: --stereotypes about, who were the welfare recipients? Even though if somebody is receiving handoff dollars, which is the modern term for food stamps, you can't hold more than \$2,500 worth of assets in your house.

CAROLE: Wow.

JESÚS: That includes a vehicle. Right, that's an impossible situation to overcome. And the gap to leap from that to sustainability on your own, if you are in a position where you need that sort of help, it's great. And so all of a sudden, they're-- and people are pretty familiar with cliff effects that occur for you to be able to make that leap forward. And you oftentimes are hiding your assets. You're oftentimes hiding the resources that you have around you because you are punished and as a result of it.

One of the many ways that we have built and again ingrained this narrative about-- it then translates, right, to all people who are experiencing financial hardship who are below the poverty line. But it just continues to create this inability for people to say, how do we walk away from that?

CAROLE: Right.

JESÚS: How do we stop that? And so I think it's really important for us to recognize a lot of the reasoning behind the way we act to be able to support these communities so that we can start afresh, right? So that we can start with putting people back at the center. And then it goes from there, from the reality of what is really happening.

CAROLE: From some of the narratives and the great stories on website, I think also these resources that you provide, aside from just the unrestricted cash, are also what really helps people to be able to learn how to think about their financial situations. Think about their living situation. So can you just say a few words about what other supports you provide?

JESÚS: We're sort of famous for saying we're not an intervention, right? We're creating this environment. But it's actually the people that are providing resources for themselves. So the commitment really is getting this cash and having them in return show us who their community are and the impact of that work. There's ways that people are connecting and sharing those resources, but that's pretty much the limit of what we do.

CAROLE: You're the connector, essentially. Yeah, yeah.

JESÚS: We used to be described as a rich uncle or aunt who was willing to be able to see your abilities and give you the space to be able to do well while providing you with that little extra cash that you need to be able to do so.

CAROLE: Yeah. That's just remarkable. So you do a lot of work in communities. And you, in your career, we're talking about all the community work you've done up to this point, what would you say are some of the key factors that really make a community cohesive and strong and thriving?

JESÚS: Yeah, I think one of the things that we've learned over and over again, and it builds a little bit on what I showed before of this ability for people to be able to celebrate, to enjoy friendships, their networks, right, their community. Once they have that extra space, yeah, there's this personal pursuit to do better.

But in community, oftentimes is that they're pursuing ways to be able to, again, celebrate their culture. Bring that identity and understanding to their children, both together around the arts.

And the way that you get to enjoy the fruits of your labor, right, of how to be able to get to this place where it doesn't always have to be about trying to make ends meet. So what happens when you have that space? Whether it's playing, whether it's the arts. I oftentimes use the example of-- I work in New Orleans, as a way to demonstrate that, where, yeah, there were some financial gains through our investment.

But the thing that they were really passionate and caring about was preserving their culture and their arts inside of their community. Because it was the one thing that was theirs, right? It's the one thing that over the centuries, they've been able to keep as well as share and pass down to other generations as a result. It's really hard, I think, for people to understand the value of having the space to be able to enjoy those commons, right?

And ability to celebrate, whether it's through music, through dance, through museums. I mean, I think that, for us, I'm thinking about our Children's Museum, is that those are the cornerstones, those are the institutions that allow us to be able to not only learn and recognize the value of our communities, our cities, and its history. But it also gives us a way to be able to engage our children in that so that they get to model and hold on to that culture as they grow and then pass it on to their children. Right, these are the things that we want for ourselves.

CAROLE: Yeah. How do you think parents and caregivers and educators can actually work towards creating this supportive culture in their communities, as you talk about? What should they actually be doing to further this?

JESÚS: Well, I always say, it's like, you don't have to look for the answers. You have the answers in front of you. You have in the communities that you work with. I think positioning your work around those communities, and I'm sure you can share your own examples of how that has been invaluable and the history of the museum, that component of it, it just changes the dynamic.

And it also eases the burden of having to guess at what can work.

CAROLE: Right.

JESÚS: Because they'll give you the answer of what really is working. And that, to me, has been my biggest "aha" in my career and doing-- seeking this-- addressing the inequities of our country is, I don't have to find that answer. People can find that answer for themselves. Let's put them in a position to be able to do so.

CAROLE: Yeah, I was just thinking about how all these various groups have come together on Facebook and in other ways, where communities are really helping each other. And you're UpTogether community online must be one of those places where people are saying, hey, I need a loan for my car or I need something fixed, and they're sharing their ideas and thoughts and talking about events or a sports game or something.

So you're providing this format where people can come together and help each other without everyone else telling them what they need to do to solve their problems.

JESÚS: My favorite story in the pandemic. So we were able to do pretty large cash assistance during that time. And using our technology, we could get into anywhere in the country to do so. And we were doing a fund in Texas, thousands of people came to it. Because they needed it. One time, \$500 or \$1,000. And all

of a sudden we saw a huge group of people from Houston trying to get the dollars that were designated for Boston.

And we caught it. Right, it was more out of, is there a way for us to be able to also benefit. But those dollars were not intended for them. And then we learned that there was a Facebook group that was created that said, if you didn't get any UpTogether dollars. Our first instinct was like, oh my god, they must be complaining about us, right? We need to find out.

And so we entered the group to learn a little bit of what was being said. And we figured out that it was they had self-organized to find new resources if they weren't able to get the UpTogether.

CAROLE: Oh, wow. Wow.

JESÚS: So right? And I should--

CAROLE: Proof of concept, really.

JESÚS: Exactly right. So they were just resourcing a new avenue to be able to possibly get some sort of relief. And I shouldn't have been surprised by that. But it was a nice little moment of being like, that's right. This is what people do.

CAROLE: Right. So that brings me to this thought in my mind. You must have so many success stories. You want to tell us a few of your favorites?

JESÚS: Sure. As I mentioned, I started in Boston. But this was in 2010. I met a small group of women in East Boston, mostly from Colombia and Peru. And, yeah, they were actually really cautious of working with us. Because at the time, we didn't have a recognition in the city. And they were like, this sounds like a scam, right? I give you personal information, you give me money.

[LAUGHS]

This sounds like a pyramid scam. So they were really cautious about it. But we were able to build a relationship and build trust. They were seven women that eventually led to hundreds of families in East Boston that they would bring in as they were sharing with us about what they were doing. They had 30 families that they were sharing resources and were do a savings, a susu. Or basically a savings group that they would pull their cash together and then get the benefit of it at the end of the year.

And over the next three years, we learned a lot when we invested in them. A year ago, I got a text message from WhatsApp from one of them, and they were like-- they sent me a picture of these seven women, and they were like, we're still meeting.

CAROLE: Wow.

JESÚS: So this is 13 years later. They're still meeting, they're still sharing resources. And so we just said, what's going on? What are you guys up to now? And they were like, well, yeah. For this one individual, her goal was to get her kid into college. She now has two kids in college and has been able to support them as well as other people in her family through that process. And then others have bought homes, run businesses, bought cars. You name it, it's happened, right?

And we've been able to even listen and hear a little bit from their children who are now young adults. Who would have thought, right? And she says this. Her name is Bethany. So she's like, I would have never known that this is a trajectory that we would take. But as a proof, right, that actually, the relationships is what's lasting here. That even though our investment was just for those first three years, they've been able to sustain it for a decade afterwards because they saw the value in being able to share and support one another through whatever life brought to them.

And that's really everything here. We're not going to solve this issue of poverty through philanthropy. This is a policy choice. And we need government to act differently. So our hope here is, yes, we make these commitments for about two years to these households with the aspiration that we'll get to change systems to act the same.

CAROLE: Yeah. I can see you testifying down in Washington with the successes you've had. I thought our listeners might be interested that in 2020, the Schwab Foundation named you the Social Innovator of the Year for leading the work at UpTogether, and specifically for your work during the COVID pandemic. So how did the pandemic impact your work? You talked a little bit about how it gave you-- increased resources, how it allowed you to reach more families.

JESÚS: We were positioning ourselves at the time to be able to strengthen our technology and continue to scale with the systems change aspirations. And the pandemic hit, and we wanted to help people immediately, right, and support people immediately. And we started getting calls from our partners being like, hey, could you do one-time direct cash transfers?

And we agreed. And then another phone call, and another phone call. And I guess the easiest way to say this is that we distributed \$130 million.

CAROLE: Oh, wow.

JESÚS: In 2020 alone. Yeah. And over the last three years, we've done almost \$200 million. And you've known me for a bit, Carole. Right, if you were to ask me this five years ago, I would have been like, I wish we could get to that sort of scale.

CAROLE: That is a huge amount.

JESÚS: Yeah.

CAROLE: That's a lot of families.

JESÚS: It was. It was over 200,000 households in every corner of the country we've been able to--

CAROLE: That's extraordinary. So when you were a child, obviously this yearning to help others was part of who you are. And you told us your story of coming to Massachusetts and how that really put you on your path. But what about other kids that would be interested? And so many children want to make life better. You see them do their campaigns and collecting funds for climate change or animal welfare, et cetera.

What would be your advice to kids to who are interested in making social change not only in their own community, but in the world?

JESÚS: Yeah. I would say first just figure out where you feel like you can make a difference, and go at it. And it doesn't have to be in a huge way. Just whatever that first step is that will-- satisfy that calling and that urge I think is really important. And I can think of a couple of instances that I'm sure these individuals were just making just small steps, right, for themselves to be able to act.

And you just never know. At a minimum, it's going to have an impact on somebody, right? And that should be enough. In California, there was this whole movement around getting rid of straws. And it was just a kid who was just like, why do we have so many straws? That's harming kids, right? And it just put it up somewhere, it rolled from to a pretty statewide movement. And I think it has a really meaningful impact in that way.

And it's just that action, right? You just have to move. And I think that that's everything.



CAROLE: Take action. Yeah, it'll be interesting to see your three kids and what they end up doing with their lives with a father like you. We discovered that you actually have your own podcast at UpTogether. And I was just curious, what inspired you to begin that, and how's it going?

JESÚS: It's been going great. It's called Moving Up Together. And essentially what we've wanted to do, we're really into this trying to help elevate the voices of the families that we work with. And because again, it's their stories that will shift hearts and minds in this country, right? For us to have a different understanding of individuals who are facing economic hardship. And so we just wanted to test and dip our toe into the podcast space, because we recognize that as a powerful medium to be able to share those stories.

And so far, it's been great. If you haven't had a chance to listen to it, I really encourage you to. We recently had in one of the episodes at the City-Councilor-at-Large Julia Mejia, who was an UpTogether member at one point.

CAROLE: Oh, she was? I didn't know that.

JESÚS: Yes. And prior to her political career. One of the things I love about the way that she speaks on the podcast is that, what can we do? What can we do to change a piece that obviously she's been embodying for quite some time now in the city? But I think it's a powerful reminder. And maybe going back to your last question, too, that I feel more hopeful today, right, than I did yesterday about what's possible.

And those stories, that ability for people to share what they're doing every day is-- it's the motivation.

CAROLE: Yes. What is your future vision? Is your vision to reach more families, to be able to distribute more resources? Or really are you aspiring to really change policy and make more people understand the success of what you're doing?

JESÚS: I think as an organization, we want to go out of business.

CAROLE: OK, yeah.

JESÚS: And I say that because, again, what we're doing is-- and to your point before, we're just the connectors. We're just enabling people to be able to act differently in that way. And my hope is that we don't have to do that, because people will act on their own. I see a powerful role that we can help in supporting philanthropy to be able to do so.

But going back to what our hope is over the next 20 years is that we get government to really shift in the way that they see and recognize and invest in people. To be able to do that, we really have embraced being a systems change organization. To do that, we want to really build a true narrative of these communities through narrative change. And so that's what we're working actively on is not necessarily to grow for the sake of growth, but to really find ways to, yes, create immediate relief to these communities for the purposes of finding any and all mediums that can help lift their stories, their value, with the hope that policies and practice will then follow.

CAROLE: Yes. Well I just really hope that that vision grows and grows, and more and more people see the value in what you're doing. I wanted to personally thank you, Jesús. You talked about philanthropy and about creating culture and places where people can gather. And you were a contributor to our new You, Me, We exhibition. And this is a place where children can come together and celebrate their own identities, their own cultures, and learn about others and take action, too, in their communities.

So I can't wait to show it to you the next time you're over on the East Coast. And I want to thank you on behalf of all of us at the Children's Museum for your support.

JESÚS: Absolutely. I will say as we talked about this. Right, this is exactly why we need these spaces and we need these exhibitions, I think, to be able to put a mirror back in our communities and celebrate them.

CAROLE: Before we go, why don't you tell our listeners where they can reach out to you, where they can make a donation to UpTogether, or where they can really find resources perhaps in their own community?

JESÚS: Sure. Yeah, so [uptogether.org](http://uptogether.org) is the place, our landing page where both if you want to learn how to sign up and create a profile in our UpTogether community. You can do so from there. As well as you'll be able to learn all about our organization. If you wanted to make a donation, you can do so there as well. So the first thing that you'll also get is how to be able to find our Moving Up Together podcast as well. So it's a one stop shop.

CAROLE: Wonderful, wonderful. Well, we will be publicizing our podcast to link to yours so that more and more people can hear the amazing work that you are doing with you and your colleagues in Oakland and all across the country. We're so honored to speak with you today, Jesús. Thank you so much for being with us.

JESÚS: Thank you. It's been a pleasure. I really appreciated the invitation.

[MUSIC PLAYING]

KATHRYN (PRODUCER): Thanks for listening to today's episode, and to PNC Bank for sponsoring this podcast. Stay tuned for more. And take a moment to subscribe wherever you get your podcasts.