

SPRING 2022

Center for Community Investment

The first five years



“At its core, systems change is a human enterprise, requiring people to come together and develop new relationships that foster new ways of working together.”

Debbie Greiff



Dear Friends,

Five years ago, when Marian Urquilla and I founded the Center for Community Investment at the Lincoln Institute of Land Policy (CCI), we knew a few things:

1. People across the country with powerful visions for their communities were struggling to get the funds they needed because centuries of structural racism have shaped our financial systems and markets to channel resources to communities that already have them and further disinvest communities that don't.
2. We had an approach people could use to build stronger, more equitable community investment systems to turn their visions into reality: our [capital absorption framework](#), which helps community leaders and residents define local [priorities](#), develop and execute [pipelines](#) of investable deals to achieve those priorities, and create supportive [enabling environments](#) of policies and practices to accomplish those deals more efficiently and effectively.
3. Successfully implementing the capital absorption framework would require strong, skilled leaders and well-functioning, multi-sector collaborative teams, so that's where we focused CCI's efforts.

Over the next five years, CCI grew from two staff members to 15. We built two **leadership development programs**, the [Fulcrum Fellowship](#) and [Field Catalyst](#); supported three **multi-year, multi-sector cohorts**, [Connect Capital](#), [Accelerating Investments for Healthy Communities \(AIHC\)](#), and [Connecting Capital and Community \(3C\)](#); and created the short-term team learning opportunities we call [Sprints](#).

Hundreds of people from dozens of communities participated in these programs, where they developed skills, built relationships, strengthened their local investment systems, and increased investment in their communities. **Thousands more** learned about our work at **conferences**, in **workshops**, and **through the publications, videos, and other materials we produced**.

Five years later, we know a lot more about **how community leaders can use the capital absorption framework** to empower residents and local organizations, engage anchor institutions, scale up development to the level their communities need, access new funding sources, and secure the resources (from land and money to skills and relationships) they need.

In the pages that follow, we introduce you to some of the core principles of our approach along with the people we've worked with, the ways they've changed how they do things, and what they've accomplished over the last five years. None of this would have been possible without the CCI team, so we're also introducing you to them and their accomplishments.

As we look toward CCI's next five years, we are grateful to everyone who has joined us on our journey so far, in particular The Kresge Foundation, The Robert Wood Johnson Foundation, the JPMorgan Chase Foundation, The MacArthur Foundation, and The California Endowment. We look forward to continuing to work together over the next five years to expand our reach, build our network, and equip a critical mass of people with the knowledge, skills, and support they need to do the collective work of moving our communities toward racial equity and community health.

Robin Hacke, Co-founder and Executive Director



Giving People Permission to Think Differently Frees Them to Act Differently

“If you do what you’ve always done, you’ll get what you’ve always gotten.”

This familiar saying has been attributed to Albert Einstein, Moms Mabley, and Tony Robbins, presumably because it resonates so strongly. But over the last five years, CCI has seen that in order to change what we **do**, we need first to change how we **think**.

When we think differently about ourselves, we can approach challenges as curious learners seeking new, more equitable solutions rather than as experts determined to apply our proven solutions, even when they don’t fit.

When we think differently about our work, we can shift our focus from making individual community investment deals to transforming community investment systems.

When we think differently about the world, we can shift our focus from problems to possibilities.



Fulcrum Fellow Monica Mitchell



Fulcrum Fellow Damon Burns



Staff at the Coalition for Nonprofit Housing and Economic Development, participants in Connecting Capital and Community

CCI creates opportunities for people to think *differently*. In our leadership development and cohort programs, leaders:



Step away from their day-to-day work, which gives them the opportunity to reflect and rethink



“Go to the balcony” to shift perspective, which helps them think about systems and system change



Work with people from different fields, places, and backgrounds, which enables them to collaborate, learn from each other, and expand their thinking



Receive support targeted to their own context, which lets them go deep and strategic as they develop their approaches

Thinking Differently: Bright Spots and Resources

Our *Toward a Just Recovery Sprints* helped participants **dramatically expand their sense of the possible**. A team of community leaders from Richmond, California, who wanted to fund four specific projects, developed a new vision for Richmond’s community investment system. Government and philanthropic leaders from Lafayette, Louisiana, who hoped to bring a grocery store to their city, left their Sprint with a **nuanced strategy to address the community’s healthy food shortage**.



Joining forces with Neighborhood Allies (an umbrella organization of community groups), Bridgeway (a regional CDFI), and ACTION-Housing (a large nonprofit developer), helped AIHC participant UPMC Health Plan **transform their approach to supporting affordable housing** in Pittsburgh, where they are headquartered. Their new partners helped them recognize that investing in affordable housing preservation is critical to maintaining communities, so UPMC Health Plan helped create a local Preservation Working Group and Affordable Housing Loan Program and began **assembling and investing in a pipeline** of preservation deals, along with their other projects focused on homelessness, housing insecurity, and wealth-building.

Deals as System Events

Reviewing an individual deal (looking at what was hard and easy, what worked and didn’t) can provide a window into an entire community investment system.

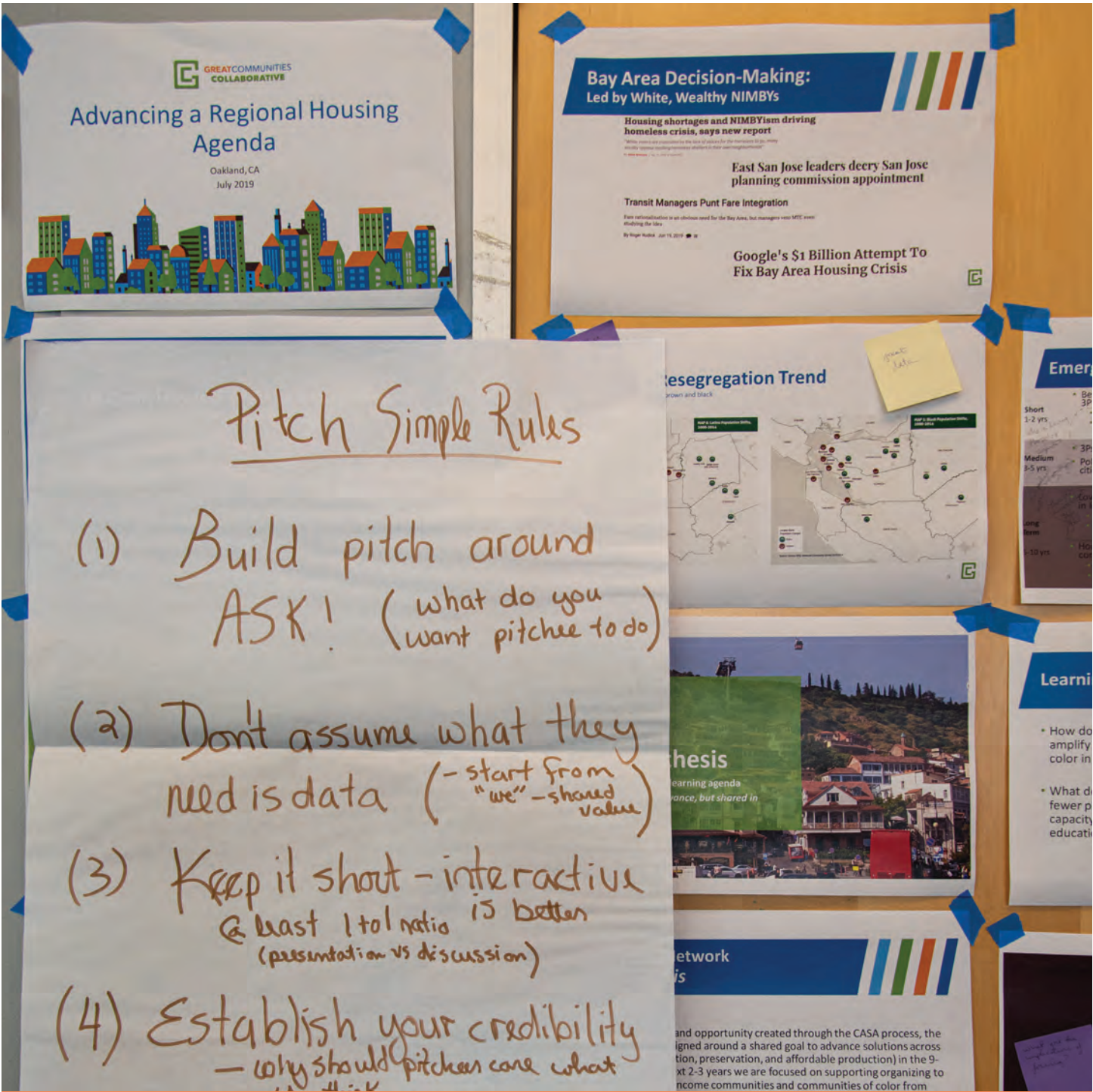
<https://bit.ly/DealsAsSystemEvents>



Seeding Climate Resilience Through Equitable Investment

CCI Field Catalyst Saneta deVuomo-powell explores how approaches to climate resilience grounded in racial justice and creative financing solutions have produced new possibilities for communities across the country.

<https://bit.ly/SeedingClimateResilience>



“I got a crash course in the mechanics of deals and how deals move systems. My peers showed me ways of leading with a strong racial justice lens.”

Aysha Pamukcu, Fulcrum Fellow alumna and Policy Fund Initiative Officer, San Francisco Foundation



Results at Scale Are About Approach, Not Replication

Communities are like fingerprints and snowflakes: no two are alike. That’s one reason cookie-cutter, one-size-fits-all community development approaches can end up hurting communities as much as helping them.

It’s also one big reason we’ve seen the capital absorption framework grab people’s attention, take hold, and generate results across the country: it’s an **approach** leaders can use to activate the visions and navigate the challenges of their **specific places**—not a model they are expected to replicate regardless of where they are.

We created the capital absorption framework because structural racism and the financial systems

in which it is embedded in have thwarted too many communities from realizing their visions. We built it on the principle that large-scale redress for centuries of purposeful neglect will require dramatic changes in where money goes, how it gets there, and the policies, regulations, and institutional practices that shape its use and distribution. We measure its success not just in numbers of deals, but in how those deals advance racial equity by moving community visions forward and creating effective local community investment systems that respond to the aspirations and realities of their residents.



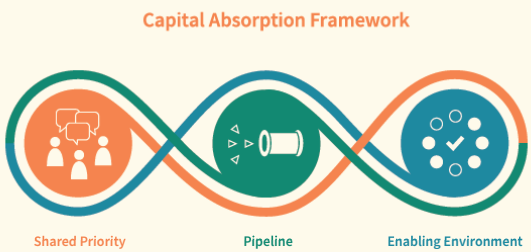
Courtesy of the Foundation for Appalachian Kentucky



Site visit with Seattle Public Utilities, a participant in Connect Capital

This is a different way of doing community investment, which calls for different skills and attitudes. In our programs and materials, we invite community leaders to:

- Envision their dreams and what it would take to accomplish them
- Look at every step of their work through a racial equity lens and act accordingly
- Think in terms of pipelines of deals that can make big changes for communities and their community investment systems
- Understand that this work is as much about leadership and relationships as it is about assets and financing



When people use the capital absorption framework to change how they do community investment, they can imagine the future of their place—which is their own future.

Approach, Not Replication: Bright Spots and Resources

Central Appalachia is a region at once unique to this country and diverse in itself, with a wide range of communities, people, and cultural and economic assets. Central Appalachia also faces deep structural barriers to inclusive economic opportunity, including persistent poverty and limited access to capital. For over two decades, local and regional nonprofits, philanthropies, businesses, and state and local governments have been collaborating on



Appalachia's Bright Future conference, courtesy of Kentuckians for the Commonwealth

targeted strategies for community and economic growth based on clean energy, agriculture, food systems, downtown revitalization, community health, culture, natural resources, and tourism. CCI's Appalachia Connect Capital team built on these efforts by leading the collaborative design and creation of Invest

Appalachia, a regional social investment fund whose partnership-based approach will provide **transformative capital to help take these visions and strategies to scale**. Training local leaders on the capital absorption framework will help ensure this money gets where it needs to go, supporting community priorities and further strengthening the regional community investment system.

When Nationwide Children's Hospital wanted to expand the geographic focus of its community development arm, Healthy Homes, from the South Side of Columbus, where it had worked for years, to the Linden area, **they dug deep to engage with local residents**. Along with using the recently completed One Linden Plan to inform their planning, they hired a local resident to help build relationships, became a regular presence at community meetings, participated in open houses and hosted community hours at a local social service agency, and established a Neighborhood Advisory Committee. Linden's residents wanted high-quality, affordable housing, so Nationwide completed 37 home repairs in 2021 and is building 50 new construction rental properties and 22 homeownership projects in 2022.

Triage Tool

CCI co-founder Marian Urquilla's triage tool, created in the first days after COVID-19 shut down the country, remains an invaluable (and popular) way to help individuals and organizations focus their work to make the most impact.

<https://bit.ly/TriageTool>

Strategy Triage Tool Assessment Template	
Guiding Question: What will it take to...?	
The guiding question defines the line of sight—Where are you heading? What are you trying to achieve? The question should be open-ended and future-focused. It should not make assumptions about who is responsible or what the solution is.	
Current Priority—Still Relevant—Continuous Forward (with modified approach)	Pause & Reassess when crisis "looms" (assuming a 6-12 month delay—high uncertainty)
These are items that are relevant and possible and will go forward, though perhaps not as planned. Make a short-term, daily reevaluation.	These items will be paused. They are either not feasible now or they need to be paused to make space for emergent priorities. You don't need a crisis for this. Set a time to reassess in a few weeks or months.
Emerging Priority or Existing but Newly Prioritized (in case of current conditions)	Unknown Status/Approach (need more data, too much to plan to know)
These items are new or newly prioritized items that are on the table for short-term forward of current conditions. You are being asked to do them or you realize they are necessary and/or urgent.	These are items that are either unclear or too much to plan to do now. You need to have more data, talk to others, or let the dust settle a little before deciding.
Never and Let Go (not going to happen)	
Conditions make these items impossible.	

Investing Upstream for Community Health Equity: Getting Started

When hospitals partner with communities to invest in housing, jobs, education, food security, and health care, the outcome is healthier communities.

<https://bit.ly/InvestingUpstream>



Maggie Walker Community Land Trust's first property in Church Hill, in Richmond Virginia, built in partnership with Bon Secours Mercy Health

“Whenever I hear or think about deals, they don’t oftentimes benefit the people in the neighborhoods in which I work. The Center’s framework helps me rethink this whole idea about what a deal could be. It’s powerful and can be catalytic.”

Albert Walker, Fulcrum Fellow alumnus and Director of Health Equity and Community Building, Richmond Memorial Health Foundation



Collaboration Is the Strategy; Communities Transformed, by Their People, for Their People, Is the Outcome

While collaboration has been central to CCI’s vision from the start, our program participants have taught us a lot about the who, what, and why of collaborations that transform community investment systems and help achieve community visions—and the best ways we can help facilitate them.

➤ **The things communities want**—quality housing, good jobs, convenient transportation, accessible green spaces—can only be accomplished through cross-sector collaboration. Where structural racism and the conventional finance system have long prevented communities from getting the resources they need, that collaboration is even more important—and may require creative action to engage new partners, from local anchor institutions and philanthropy to health systems and CDFIs.



Fulcrum Fellow Ain Bailey



Site visit with Duwamish River Cleanup Coalition, a participant in Connect Capital

➤ **Local government officials and agencies**, who make laws and regulations, create policies and procedures, and have access to public funding sources at all levels, can be critical partners for strengthening community investment systems—especially when they are willing to share the work, consider new ways of doing things, and collaborate with each other as well as local partners.

➤ **Collaborations across organizations and sectors** work best when they aim to achieve a clear and ambitious purpose. Otherwise, they are likely to get stuck in the details of process or in smaller projects and transactions that won’t add up to their vision.

➤ **We need to practice the skills and habits that make collaborations effective**, from systems thinking and adaptive leadership to learning orientation, tolerance for failure, and confidence. Too little attention to process can also become an impediment to progress.



Fulcrum Fellow Carmen Llanes Pulido

➤ **Collaborations flourish when they build from strengths**—the skills and experience of the people doing the work and the assets of the place itself. The work of building racial equity, including healing trauma, must be grounded in strength.

Collaboration: Bright Spots and Resources

In California’s Coachella Valley, CCI’s Connect Capital team built a strong community investment system and strategy by **organizing community organizations, developers, city and county agencies, and local businesses around a crystal-clear shared priority**: reducing rent-burdened households by 30% over ten years by building 10,000 affordable housing units. The team developed a regional pipeline of community-identified projects, launched a \$100 million Housing Catalyst Fund, and has already put 1,800 units into development. **The relationships they built enabled them to collaborate in aggregating and distributing \$135 million of housing assistance** during the COVID-19 pandemic, helping more than 17,000 households and 68,000 people with low incomes keep up with rent and utility bills.



The Seattle Connect Capital team focused on the Duwamish Valley neighborhoods of South Park and Georgetown, two riverfront neighborhoods that are significantly more diverse and have a significantly lower average income than the city as a whole. Led by Seattle Public Utilities, the team brought together neighborhood residents, city agencies, and local philanthropy to create the **Duwamish Valley Resilience District, a new mechanism for pursuing a climate change adaptation approach to neighborhood development that empowers local residents and prevents displacement**. The team has secured grant funding, helped persuade the city to acquire land for approximately 100 units of affordable housing and other community-supportive services (nonprofit space, childcare, etc.), advanced plans for a local park expansion and redesign, and fostered community decision-making in local development efforts.

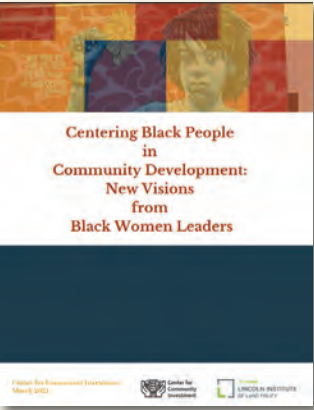
“It’s been incredibly useful to learn techniques on how to foster mutually beneficial relationships, understand the perspectives others hold, model reliability, take small steps, and accumulate a track record of success.”

Alberto J. Rodriguez, Fulcrum Fellow alumnus and Strategic Advisor, Seattle Office of Sustainability and Environment

Centering Black People in Community Development: New Visions from Black Women Leaders

We can help community development and investment better support Black communities in making change—and when we make Black lives better, we make all lives better.

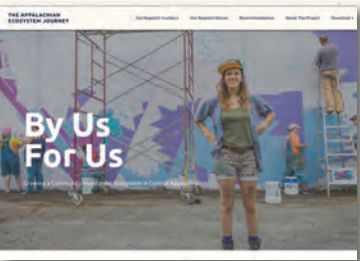
<https://bit.ly/NewVisionsCCI>



By Us, For Us: Growing a Community Investment Ecosystem in Appalachia

For over 20 years, Appalachian leaders have collaborated across states, sectors, and silos to create a sustainable, equitable economy based on the region’s many assets.

appalachianinvestmentecosystem.squarespace.com/



Magnolia Screen Printing, a Black-owned small business on the South Side
Photo Credit: Teresa Crawford, courtesy of Chicago’s Community Trust

“This is not the time to hypothesize; this is the time to listen for the solutions that come forward from the community. To do this, we need to go where Black people want to be heard and figure out how to build trust in order to move their priorities and interests.”

Romi Hall, Fulcrum Fellow alumna and Director, Healthy Homes and Communities, NeighborWorks America, “Advancing The Social Determinants Of Health As The Pathway To Recovery For Black People,” *Centering Black People in Community Development*

CCI by the Numbers

101⁺

PRESENTATIONS
GIVEN

22

RESOURCES
CREATED



The six health systems who participated in AIHC deployed nearly **\$20 million** of their resources to make loans and grants for affordable housing and:

- Secured **\$20 million** in government funding with more on the way.
- Directly supported development or preservation of **1000+ affordable homes** representing over **\$330 million** in total development costs.
- Triggered **\$10 million in loans and grants** by national foundations

- One site negotiated a **long-term land lease valued at \$2 million**
- Two sites obtained **\$2 million** from other financial institutions.
- Four sites received **\$15.1 million** in grants from JPMorgan Chase & Co.



52

Leadership
Development
Participants

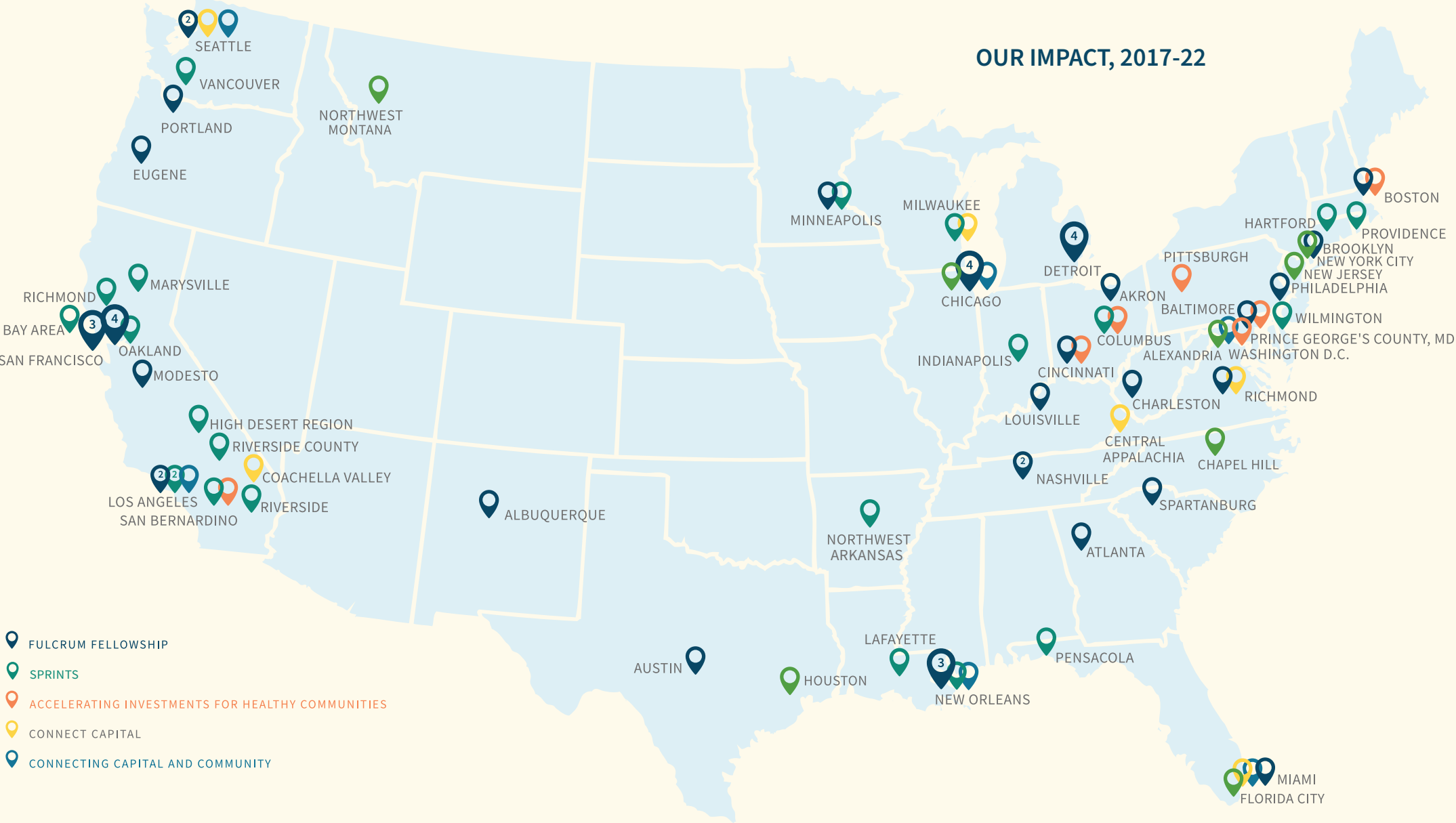
244

Multisector Cohort &
Sprint Participants

47

Multisector Teams

OUR IMPACT, 2017-22



CCI Programs



LEADERSHIP DEVELOPMENT

- The **Fulcrum Fellowship** is a 15-month, intensive, hands-on program that brings together experienced executives to address significant strategic challenges facing their organizations or communities. Through an action-learning framework, Fellows build skills in adaptive leadership and collaboration, strengthen their networks, and sharpen their ability to use capital investment to advance community priorities.
- The **Field Catalyst** program aims to develop leaders' capacity to facilitate effective community investment collaborations. It brings together established practitioners for a year of cross-fertilizing their experiences and expertise, strengthening their coaching and technical skills, and deepening their understanding of community investment, racial justice, and adaptive leadership.

MULTI-YEAR COHORT INITIATIVES

Current

➤ **Connecting Capital and Community** (2021-24) is taking aim at the racial inequities at the core of the housing ecosystem. Teams of community leaders in Chicago, Los Angeles, Miami, New Orleans, Seattle, and Washington, DC, are developing and implementing equitable strategies for investing in affordable housing, seeking not just to create more units, but also to change the structure of opportunity in their communities.

Completed

➤ **Accelerating Investments for Healthy Communities** (2018-21) helped participating hospitals and health systems deepen their investment in affordable housing and advance policies and practices that foster equitable



housing solutions. Over the course of three years, AIHC helped Bon Secours Mercy Health System (Baltimore, MD, and Cincinnati, OH), Boston Medical Center (Boston, MA), CommonSpirit/ Dignity Health (San Bernardino, CA), Kaiser Permanente (Prince George's and Montgomery

counties, MD), Nationwide Children's Hospital (Columbus, OH), and UPMC Health Plan (Pittsburgh, PA) and their community partners develop and execute pipelines of affordable housing projects and advance long-term community investment in affordable housing.

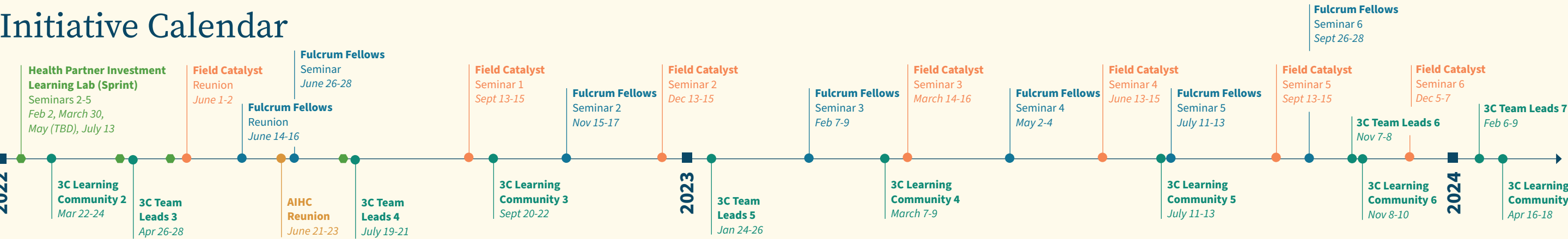
- **Connect Capital** (2018-2020) assisted six regions and communities in attracting and deploying capital at scale to improve the lives of their residents and increase access to opportunity. Multi-sector teams from Central Appalachia, California's Coachella Valley, Miami, Milwaukee, Richmond (VA), and Seattle used the capital absorption framework to execute projects and expand and advance their local community investment systems. Teams strengthened collaborative networks, helped increase the supply of community investment and other financial resources in their communities, initiated housing and climate-resilient investments, contributed to potentially transformative changes in policy and practice, and demonstrated the powerful role utilities can play in catalyzing equitable, climate-resilient investments.



SPRINTS

- In 2021, building on the experience of our multi-year cohort programs, CCI began offering **Sprints**, shorter courses that provide an opportunity for community-based teams to learn about community investment, adaptive leadership, and racial equity and access one-on-one coaching, peer learning, and new ways to think about their practice. Sprints focus on specific topics, audiences and/or geographies, including, in their first year, Just Recovery, affordable housing developers, and California.

Initiative Calendar



CCI Staff Highlights



Robin Hacke, *Co-founder and Executive Director*
Seeing our Fulcrum Fellows advance their work, gain recognition in the field, and **realize their potential** as transformational leaders



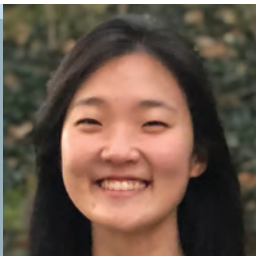
Alex Castilla, *Program Manager, Leadership Development*
Continuing to **expand our incredible network of leadership development alumni** and facilitating experiences for them to collaborate and learn together



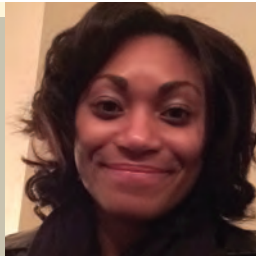
Marian Urquilla, *Co-founder and Lead Faculty, Leadership Development*
Launching Field Catalyst, an advanced leadership program focused on facilitating effective community investment collaborations—and **gaining thirteen new colleagues for capital absorption work** when the first cohort completed the program!



Adriane Bond Harris, *Director of Connecting Capital and Community*
Securing the funding for the 3C initiative through our partnership with JPMorgan Chase to **produce equitable housing solutions by centering racial equity and intentional investment**



Yerin Cho, *Program Assistant, Connecting Capital and Community*
Creating adaptive work plans, executing the **virtual launch of the 3C initiative** across six cities, and seeing the excitement and engagement of our participants and partner



Janelle Julien, *Assistant Director of Communications*
Re-envisioning **CCI's brand** for the next five years



Omar Carrillo Tinajero, *Director of Innovation and Learning*
Planning and executing Sprints courses to demonstrate new approaches to support sites across the country with **an equity and justice frame**



Stephanie Walker, *Program Assistant, Sprints*
Working with a dynamic group of people who are fiercely doing the work to **make change in an inequitable world**



Zev Alexander, *Communications Assistant*
Creating publications like *Centering Black People in Community Development: New Visions from Black Women Leaders*, *Seeding Climate Resilience Through Equitable Investment*, and *By Us for Us: Growing a Community Investment Ecosystem in Central Appalachia* that **highlight the work and thinking of our program participants**



Meyana Watley, *Operations Manager*
Successfully pivoting our organization and processes to **meet the challenges created by a global pandemic**, growing from a team of two to a team of 15, and virtually onboarding seven new staff members



Thomas Yee, *Advisor, Community Investment*
Supporting collaborations between health institutions and community partners that are **expanding our vision of what's possible for upstream investments in housing**



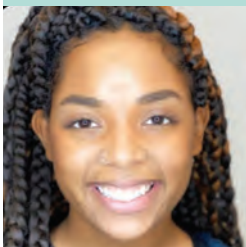
Jacques Page, *Director of Finance and Operations*
Getting to work with a team of **dedicated individuals who are committed to improving the lives of others**



Ashlee Cunningham, *Assistant Director of Programs*
Working on the first learning community for 3C and having the opportunity **to fully realize what is possible within the community investment space** if the desired outcome is targeted toward people and not deals



Nora Bloch, *Senior Advisor, Community Investment*
Successfully completing the Accelerating Investments for Healthy Communities initiative with **many site-specific successes, despite the varied COVID challenges**, especially for hospitals



Makayla Lorick, *Program Assistant, Leadership Development*
Finishing each virtual cohort, hearing the feedback from each group of individuals in the last seminars, and feeling that the work we do at CCI is like **planting seeds and trusting that the environment will push each alumnus to grow**

Acknowledgements

The last five years of our work would not have been possible without the organizations and people below, to whom we are deeply grateful:

- Our funders and friends at The Kresge Foundation, The Robert Wood Johnson Foundation, the JPMorgan Chase Foundation, The MacArthur Foundation, and The California Endowment
- Our colleagues at the Lincoln Institute of Land Policy, especially Katie Lincoln, Mac McCarthy, Armando Carbonell, Maureen Clarke, Amy Cotter, Katie Grace Deane, Jessie Grogan, Will Jason, Scott McDaniel, Vinod Parmeshwar, and everyone in the Finance, HR, and IT departments
- Our program participants
- Our consultants (especially the faculty and coaches who have helped deliver programs that both support and challenge the participants) and vendors

We especially thank the people who live in the communities where CCI and our program participants have been honored to work over the last five years. Their visions drive us.



The Center for Community Investment at the Lincoln Institute of Land Policy works to ensure that all communities, especially those that have suffered from structural racism and policies that have left them economically and socially isolated, can unlock the capital they need to thrive.

Visit us at centerforcommunityinvestment.org or follow us [@C4CInvest](https://twitter.com/C4CInvest)



The Lincoln Institute of Land Policy seeks to improve quality of life through the effective use, taxation, and stewardship of land. A nonprofit private operating foundation, the Lincoln Institute researches and recommends creative approaches to land as a solution to economic, social and environmental challenges.

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