

Local Impact Investing Accelerator

A partnership with the Indiana Philanthropy Alliance

Welcome Indiana Community Foundations to Cohort 2

Thank you for your interest in the Local Impact Investor Accelerator for Indiana community foundations. We have provided initial information below to help with your planning and decision making. The Accelerator is made possible through a partnership of LOCUS Impact Investing (LOCUS) and the Indiana Philanthropy Alliance (IPA). This program builds upon IPA's commitment to strengthen and grow Indiana philanthropy and LOCUS' mission to help foundations explore the tool of local impact investing in support of more prosperous and equitable communities.

Contracting

The LOCUS Local Impact Investing Accelerator strategy is an investment in the foundation – and your community – that requires financial resources, time, and commitment on the part of foundation staff and board members. Our work together will set a new strategic direction for the foundation and provide the structure and tools to successfully act on that strategy. The cost for this engagement is \$26,500 per foundation and will be confirmed through a contract between LOCUS Impact Investing and you. You may provide payment to LOCUS in a method and timeline that works best for you. Some foundations have covered the cost by using grant funds to support their own organizational development and expanded community leadership. As a nonprofit, LOCUS is familiar with grant and reporting requirements.

Calendar

The LOCUS coaches will set agendas, analyze and prepare materials, and provide thoughtful guidance and coaching throughout the engagement. All sessions will be conducted virtually.

Description	Participants	Date	Timing
Virtual Site Visit	Your Foundation Working Group, LOCUS, members of IPA	Pending selection	3.5 hours January 2022
Workshop I	All the Accelerator participants (Foundation Working Groups), LOCUS, IPA	February 22 February 23	1pm-5pm 8:30am-12:30pm
Workshop II	All the Accelerator participants (Foundation Working Groups), LOCUS, IPA	April 19	9am to 5pm
Workshop III	All the Accelerator participants (Foundation Working Groups), LOCUS, IPA	August 16 August 17	1pm-5pm 8:30am-12:30pm
Customized Coaching Calls Six 90-minute coaching calls scheduled 4-6 weeks apart	Your Foundation Working Group and your LOCUS Coach	March – August	Pending selection



Building your Working Group

The crux of Accelerator experience is your foundation team. Each team should include participants who are critical – as decisionmakers, influencers and/or implementers – to strengthening your foundation's community leadership using the tool of local investing. We recommend a Working Group of no fewer than 3 and no more than 7 members. Your team should include key foundation staff (e.g., CEO, CFO, Program Officer), board members (e.g., Board Chair, members of investment committee) and/or engaged community partners (e.g. community members of your investment or grants committee). As you finalize your Working Group, consider whether each team member – and the team as a whole – meet these criteria:

- Has the capacity, by position or personal characteristics, to influence your community foundation's understanding, vision, action, and practices now and in the foreseeable future.
- Brings key decision-making, implementation and/or advocacy skills to your work during the Accelerator, and as you carry the work on in the future.
- Represents a key component of the diversity in your community.
- Agrees to attend all Accelerator workshops and meetings (Accelerator will require approximately 45-55 volunteer hours for your Working Group members)

Next Steps

Our first activity together is the Virtual Site visit, the objective of which is to ensure that the LOCUS team gains a good understanding of your unique starting point. This is also an opportunity for the members of your Working Group to get to know LOCUS and how we will work together. Upon execution of the contract, LOCUS will provide a site visit overview and work with you to identify a date.

Again, on behalf of LOCUS and our partners at Indiana Philanthropy Alliance, thank you for all you do for your Indiana communities. We are excited to begin this journey with you. You may contact Lisa O'Mara at LOCUS Impact Investing (lisa@locusimpactinvesting.org) with questions about the program or your specific situation.

Meet the Team



Deb Markley, deb@locusimpactinvesting.org

Deb has over 35 years of experience working in community economic development and community philanthropy as a faculty member and practitioner. As Senior Vice President of LOCUS Impact Investing, she manages LOCUS' consulting services for place-focused philanthropic institutions. Together with the Aspen Institute Community Strategies Group, she is working to advance the practice of economic development philanthropy and has developed a national model for foundation peer learning that helps philanthropic leaders explore, unlock, and deploy local impact investments. She was lead author on "A New Domain for Place-Rooted Foundations: Economic Development Philanthropy" published by *The Foundation Review* in 2016. Deb has BS and MS degrees from Cornell University and a PhD from Virginia Tech.



Sydney England, sydney@locusimpactinvesting.org

Sydney joined the LOCUS team in 2017 after working for several years at a \$300 million private foundation in Florida. While at the foundation, Sydney oversaw a \$5.5 million place-based PRI portfolio, a \$300,000 small grants program, and New Markets Tax Credit relationships with 4 CDE lenders. Previously, Sydney worked in communities across Arkansas and Virginia to mobilize grassroots coalitions aimed at civic participation. Sydney's migration from coalitions to philanthropy to place-based capital systems reflects her evolving appreciation of what it takes to advance a more equitable, just society. At LOCUS, Sydney works to match interested philanthropic parties with the right place-based impact investing solutions and on-ramps. Sydney graduated summa cum laude with a BA from a small liberal arts college in southwest Virginia.



Travis Green, travis@locusimpactinvesting.org

Travis assists place-rooted foundations and organizations in implementing regional community economic development strategies to help people and places prosper. He authored a series of practitioner guides on value chain economic development focused on wealth building for low-income households. He also coordinated Rooting Opportunity, a national conference on emerging economic development practice. Previously, Travis served as program manager at the Aspen Institute in Washington, DC focusing regional community economic development and community development philanthropy. He was part of the team that organized and facilitated the Rural Economic Development Philanthropy Innovators Network. Travis also served as a research assistant for Building Integrated Communities, an effort by leaders in Durham, North Carolina to make their community more welcoming to foreign-born residents. Travis is a graduate of Haverford College and has a Masters in City and Regional Planning from University of North Carolina—Chapel Hill.



Lisa O'Mara, lisa@locusimpactinvesting.org

Lisa has over 20 years of experience in the philanthropic sector and believes that place-focused philanthropic organizations are critical to our communities being more prosperous and equitable places for all, and that local investing is a tool to achieve this goal. She assists place-based foundations and organizations on their journey to explore, unlock, and deploy local impact investments. Previously, Lisa served as a philanthropic advisor to generous individuals and multi-generational families at the Community Foundation for a greater Richmond. She also directed the Foundations' collaborative giving programs. Through her long-time Board service on the Advancement Network, she provided thought-leadership and support to community foundation colleagues nationally. Lisa is a graduate of Rochester Institute of Technology (RIT) and the Bryce Harlow Institute of Government Affairs at Georgetown University.



Dana Williams, dana@locusimpactinvesting.org

Dana has worked with community analytics for over eight years first with the Center for Rural Entrepreneurship, and then with LOCUS Impact Investing. She leads research, content development, and logistics for Transfer of Wealth™ analysis, a decision-making tool for place-focused philanthropic organizations seeking to understand the wealth-transfer opportunities in their communities. This work requires Dana to provide extensive research and analysis of geographies across the United States. Working in the Lincoln, Nebraska office, Dana also provides research and data visualization support to LOCUS analytic and consulting projects, and grant management and project Salesforce tracking support to the broader LOCUS team. Dana received her BA in English from the University of Nebraska – Lincoln.



Amy Haacker, ahaacker@inphilanthropy.org
**Vice President of Community Foundation Programs, Indiana Philanthropy Alliance
(Director of the GIFT Program)**

Amy joined IPA in July 2020, as VP of Community Foundation Programs. The GIFT Team provides training and technical assistance to Indiana community foundations, connecting them with resources and expertise to lead in their communities. Prior to joining IPA, Amy was the Executive Director at the Blue River Community Foundation in Shelby County, Indiana, 30 miles southeast of Indianapolis, from 2012-2020. She served as the City of Shelbyville Redevelopment Director prior to her position with the community foundation, which provided the insight and experience on effective ways to work collaboratively across sectors for common goals. Amy is a graduate of Purdue University (B.S. in Agriculture) and Duke University (Master's in Environmental Management), and the Indiana University Lilly School of Philanthropy (CFRM).



Sarah Aguirre Origer, soriger@inphilanthropy.org
GIFT Program Manager, Indiana Philanthropy Alliance

Sarah serves as a “navigator” for the Indiana Philanthropy Alliance’s GIFT VII community leadership work funded by Lilly Endowment Inc. Before that, Sarah was the director of development for Starke County, part of the Northern Indiana Community Foundation (NICF). In that role, Sarah has worked with a number of coalitions and partnerships, including ones focusing on community health and early childhood education. Prior to her work with NICF, Sarah held positions at The Heritage Foundation and the Colorado State House of Representatives. Sarah graduated from the University of Northern Colorado with a degree in Political Science and is a graduate student at the Lilly Family School of Philanthropy at Indiana University Purdue University Indianapolis.