Plenary 3 – Overview

Moderator: Christopher Gergen, CEO, Forward Cities

Capitalization: Impact Investing, Strategic Grantmaking
Teri Lovelace, President, Locus Impact Investing

Community Leadership: Convening Power and Voice
Mary Thomas, COO, The Spartanburg County Foundation

Resource Alignment: Seeding and Leading Intentional Connections and Collaborations
Bernie Mazyck, President and CEO, South Carolina Association for Community and Economic Development

Competitive Talent Development: Investing in Youth (Emerging) Workforce, Adult Learning, and Retraining
Cedric Brown, Chief of Community Engagement, Kapor Center for Social Impact
Plenary 3 – How Regional Success Happens
Room: Colosseum
11:15-12:15 P.M.
ENABLE

ADVOCATE

SHARE

EQUITY?

BUILD

MEASURE

DEVELOP

RETAIN

RECRUIT
Disconnected & Disengaged

- Cross-sector leadership
- National learning network
- Benchmarked data

Connected & Coordinated

- Target outcomes
- Aligned strategies
- Public/Private investment

Aligned & Acting

- Measurable progress
- Sustained economic return
- Scalable initiatives
- National contribution

Realizing Results

The Developmental Path
Plenary 3 –
How Regional Success Happens

11:15-12:15pm

Capitalization: Impact Investing, Strategic Grantmaking
Teri Lovelace, President, Locus Impact Investing
Empowering place-focused foundations to invest their capital locally to build, prosperous, VIBRANT communities
Local Impact Strategy Solutions

Local Investment Advisory Services

Empowering Data
The Need

Small Business Development

Home Stabilization & Revitalization
The Goals, Partners & Investment

- Small Business Development
- Home Stabilization & Revitalization
- project: HOMES
- LISC
- CITY OF RICHMOND
- Altria
- Virginia Community Capital (VCC)
- SOUTHSIDE COMMUNITY DEVELOPMENT & HOUSING CORPORATION
- THE COMMUNITY FOUNDATION
The Structure

- $2M Small Bus. Loan Capital
- $100k Technical Assistance
- Interest Rate Buy-Down: $70k
- 10% Credit Enhancement: $200k
The Results

REVITALIZING JEFF DAVIS CORRIDOR
Partnering with Altria, over three years we worked with small businesses in the economically and socially disadvantaged corridor in South Richmond.

$2 MILLION Deployed
11 Businesses
18 Jobs created
900+ HOURS Technical assistance

Virginia Community Capital
The Learnings

- Recruiting small business to the corridor
- 2-yr loan deployment timeline was aggressive
- Small businesses have a high need of TA
- Partners were critical
- Need for cultural inclusion
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Community Leadership: Convening Power and Voice
Mary Thomas, COO, The Spartanburg County Foundation
Five Forms of Philanthropic Capital

- **Social**: Utilizes networks and relationships to foster change

- **Moral**: Takes courageous, sometimes counter-cultural positions on important issues

- **Intellectual**: Disseminates data and meaningful information to community partners and grantees

- **Reputational**: Changes the civic conversation about the future direction of the community

- **Financial**: Makes grants and program/mission related investments

Credit: Ambassador James Joseph
<table>
<thead>
<tr>
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<th>Tradition</th>
<th>Impulse</th>
<th>Philosophy</th>
<th>Limits</th>
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</thead>
<tbody>
<tr>
<td><strong>Philanthropy as RELIEF</strong></td>
<td></td>
<td><strong>Address immediate need</strong></td>
<td>“Love thy neighbor”</td>
<td>Need is limitless.</td>
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<tr>
<td><strong>Philanthropy as IMPROVE</strong></td>
<td></td>
<td><strong>Maximize human potential</strong></td>
<td>“Teach a man to fish”</td>
<td>What if the pond is empty and the rod is broken?</td>
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<td><strong>Philanthropy as ADVOCATE</strong></td>
<td></td>
<td><strong>Dismantle structures that perpetuate problems</strong></td>
<td>“Change not charity”</td>
<td>Who decides what must be reformed?</td>
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<td><strong>Philanthropy as ENGAGE</strong></td>
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<td><strong>Build a community</strong></td>
<td>“Only connect”</td>
<td>Relationships may not lead to action.</td>
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*Credit: Elizabeth Lynn and Susan Wisely*
THE SPARTANBURG COUNTY FOUNDATION THEORY OF CHANGE

Collect Data

Evaluate Impact

Develop Innovative Solutions

Analyze and Learn

Build Awareness / Engage Community
GRASSROOTS LEADERSHIP DEVELOPMENT INSTITUTE

Target Population

• Grassroots individuals
• Nonprofit staff/volunteers
• Neighborhood leaders

Activities

• 7-month Institute
• Grassroots Leadership Alumni Association

Short Term Goals

• Train/equip leaders
• Place on nonprofit boards
• Encourage civic engagement

Long Term Impact

Community voices at local, state, and national levels
Ecosystem factors

➢ Leaders act to close the gap between current reality and the desired future.

➢ Community habits, attitudes, and values influence the appetite for change and shape individual and system behavior.

➢ Every system is perfectly designed to get the results it produces.
THE SPARTANBURG COUNTY FOUNDATION PARTNERS

Spartanburg County Nonprofits

Behavioral Health Initiative
Plenary 3 – 
How Regional Success Happens

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Resource Alignment: Seeding and Leading Intentional Connections and Collaborations

Bernie Mazyck, President and CEO, South Carolina Association for Community and Economic Development
Resource Alignment: Intentional Connections and Collaborations

“Stakeholder Engagement Approach”

Presented by

Bernie Mazyck, President & CEO

South Carolina Association for Community Economic Development
To ensure the most challenging issues are addressed, resources must be aligned appropriately for the target audience. More often than not, this requires changes to systems and institutional policies. The right collaboration is often needed to bring about systemic changes, but their composition must be intentional and with proper preparation.
Intentional Connections and Collaborations

Rural Resource Coalition SC
Growing economies through stronger communities
Rural Resource Coalition

Sector Partners

Affordable Housing
Agriculture
Community Development
Conservation
Forestry
Tourism
Rural Resource Coalition SC
Growing economies through stronger communities

• Signs of Progress
  • Public Policy Wins:
    • **Reauthorization of the Conservation Bank Act** which improves the quality of life in South Carolina through the conservation of significant natural resource lands, wetlands, historical properties, archeological sites, and urban parks. **Over 200,000 acres of land protected in SC.**
    • **Expansion of the Community Development Tax Credit** (pending) which incentivizes private capital investments into certified CDCs and CDFIs working in low-wealth urban and rural communities. **The impact has been over 926 jobs created, 76 businesses, 650 affordable units of housing and over $12 million in community lending.**
  • Program Development
    • Sustainable Forestry Program of the Center for Heirs Property Preservation enables under-resourced landowners to access federal programs in order for them to convert their land into an economic engine for their family and community by accessing the **$21 Billion timber industry.**
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