



**center for
community
investment**



**LINCOLN INSTITUTE
OF LAND POLICY**

FULCRUM FELLOWSHIP 2017 – 2018 Program Announcement

Introduction

The Center for Community Investment at the Lincoln Institute of Land Policy is pleased to announce the opening of applications for its first Fulcrum Fellowship class. The Fulcrum Fellowship, a 15-month program for rising executives in the fields of population health, climate resilience, community development, urban planning and community investment, is designed to position fellows to help disinvested communities achieve their environmental, social and economic priorities.

The environments in which people live, learn, work and play powerfully shape the availability of choices and opportunities. In disadvantaged communities, structural racism and conventional market activity have helped create zones of disinvestment that exacerbate income inequality and health disparities, increase the risk of disruption from climate impacts and prevent communities and residents from reaching their full potential. Communities need a new approach to mobilize capital and change systems to achieve their goals and address their most pressing needs.

The inaugural class of Fulcrum Fellows will include up to a dozen diverse leaders from across the country who will participate in five quarterly in-person, multi-day seminars designed to help them address a significant strategic challenge facing their organization or community. Through this program, fellows will build skills in areas such as adaptive leadership and collaboration, broaden their vision, strengthen their networks, and sharpen their ability to advance strategies that overcome barriers to investment, making communities healthier and more sustainable.

The Center for Community Investment

The Center for Community Investment (www.centerforcommunityinvestment.org), launched in early 2017, helps disadvantaged communities harness investment and use land to achieve their economic, social and environmental priorities. Through a combination of technical assistance, leadership development, dissemination of research, and lessons learned and the creation of a robust peer network, the Center builds the capacity of local partnerships and institutions to define priorities and guide capital and other resources toward those priorities.

The Center, with support from the Robert Wood Johnson Foundation, the Kresge Foundation, and the John D. and Catherine T. MacArthur Foundation, encourages innovation and shared learning among a broad set of stakeholders, from mission-driven investors, banks and intermediaries to community leaders, policy-makers, local officials, anchor institutions and others with an interest in achieving better outcomes for low-income and disadvantaged communities and people of color. The Center is based at the Lincoln Institute of Land Policy.

By recognizing the centrality of capital in transforming communities and focusing on systems rather than individual transactions, the Center helps communities harness and align public, private, and philanthropic investment to achieve impact at greater scale and with greater efficiency.

The Program

The Fulcrum Fellowship recognizes that the environments in which people live, work and play powerfully shape the availability of choices and opportunities. In disadvantaged communities, the legacy of discrimination and disinvestment combine with perceived risk to impede the flow of capital that could finance transformation and broaden opportunity. We aspire to support leaders as they work to transform communities so that all people can realize their potential and lead healthy and fulfilling lives.

We believe that to accomplish this shift, leaders need to collaborate across silos and sectors to change how community investment is organized and deployed. They need support to move away from “business as usual” thinking and practices, develop new solutions, and apply ideas, tools, and strategies from other communities and disciplines.

The Fulcrum Fellowship is grounded in an action learning framework. It aims to help participants apply new insights and competencies to advance their current work in real time. Participants will come to the program having identified a significant challenge that is of strategic and systemic importance to their organization and community. The challenge must be credible and ripe (i.e. it makes sense to address it now). It should be neither too broad (“world peace”) nor too narrow (reorganizing a department), and it must require collaboration, risk-taking and changed behavior on the part of multiple stakeholders. Success will mean the attainment of specified outcomes that matter rather than merely the performance of certain activities.

By the end of the Fellowship experience, it our hope that Fellows will:

- have made material progress on their challenge;
- have deepened their understanding of and commitment to transforming community investment systems;
- be better prepared to effectively lead complex, multi-stakeholder projects; and
- have a base of peer and mentor support from which to amplify their influence and impact.

Our Approach

Participants: The program will bring together a diverse cohort of up to 12 rising leaders drawn from the public, nonprofit, philanthropic and private sectors in the fields of health, climate, urban planning and community investment. Each participant will commit to addressing a challenge of critical importance to their organization and community.

How We Will Work Together: Participants will come together in person quarterly over a 15-month period to broaden their vision, build skills in areas such as adaptive leadership and collaboration and results-based accountability, and strengthen their networks and knowledge base in community investment and strategies to address social determinants of health and climate resilience. The fellowship will cover the cost of Fellows’ attendance (including travel, lodging and meals) at one three-day and four two-day sessions.

Fellows will also be supported in addressing their identified challenge through monthly individual coaching and technical assistance, group calls, and supervised practice opportunities. Upon conclusion of the initial Fellowship term, Fellows will be welcomed into a practitioner network designed to strengthen the strategic orientation and reinforce the peer relationships that contribute to achieving systems change.

Participation in the Fellowship program will require a consistent commitment of time as well as agreement from the Fellow’s employer (direct supervisor and CEO). In addition to preparing for and attending all five in-person seminars, Fellows will commit to applying what they are learning and practicing their new skills so they can make substantial progress on their challenge between seminars.

Program Content: The Fellowship program is designed to help participants build the competencies and skills they need to solve the challenge they have identified. Fellows will come to the program with different areas of strength and expertise; sharing skills and perspectives will enrich the cohort experience. Core content areas will include social purpose finance, equity analysis and strategy development, and systems analysis and change. Participants will also deepen their understanding of the social

determinants of health and the ingredients that help communities build resilience in the face of climate change.

The program will include:

Session 1	October 2017	<i>Launching Together: Key Frameworks and Results</i>
Session 2	December 2017	<i>Strengthening Action: Emergent Strategy Development and Implementation in the Context of Race and Equity</i>
Session 3	March 2018	<i>Making Scale Happen: Time Scales and System Change</i>
Session 4	June 2018	<i>Holding Accountability for Impact: Collaborative Leadership and Data Frameworks</i>
Session 5	September 2018	<i>Taking Stock and Sustaining: Working with Large Scale Networks</i>

Fellowship Faculty

The Fulcrum Fellowship program will be designed and led by Marian Urquilla, who will also coach participants and facilitate cohort convenings. Marian serves on the faculty of the Annie E. Casey Foundation's Results-Based Leadership Program. She consults on strategy, collective impact and coaching in the social sector, and has worked with the capital absorption team since its inception.

From 2008 to 2012, Marian served as Director of Program Strategies at Living Cities, where she managed the Integration Initiative. She cofounded the Columbia Heights/Shaw Collaborative in Washington, DC and served as a senior consulting advisor in Mayor Anthony Williams' administration and as a senior consultant for human capital in Mayor Adrian Fenty's administration. Recognized by the Rockefeller Foundation as a Next Generation Leader, Ms. Urquilla has been a Mellon Fellow and an Annie E. Casey Foundation Fellow.

The program also will draw on the expertise of Center staff and affiliated consultants.

Who Should Apply

We welcome applications from individuals who meet all of the following criteria:

- ***You have been charged with leading an organizational or cross-organizational effort that is of prime importance to your community and you are open to rethinking and reframing this effort (i.e. you have identified a suitable challenge);***
- Your current work will allow you to apply what you are learning in the fellowship immediately;
- You have been working in one of our focus fields—community health, climate, urban planning, community organizing, and community development or investment—for at least 10 to 15 years and have a track record of success. You are eager to have a bigger, material impact on social and economic inequality;
- You have demonstrated expertise and experience in your field and want to deepen your capacity and develop yourself as a leader;
- You are ready to dig into the realms of system and personal change;
- You are open to learning, giving and receiving coaching, and eager to build a network of diverse, committed peers focused on transformational impact;
- You can commit to completing the 15-month program and your organization is willing to endorse your participation.

Process and Schedule

Applications for the program are due July 31. Selections will be based on the written application as well as two rounds of phone interviews, which will take place in late August and the week of September 11th. We are committed to selecting a diverse cohort of individuals addressing challenges that matter for their organizations and communities.

Successful applicants will be notified by September 19th and will have until September 29th to confirm participation in the program.

The first in-person session will take place on the West Coast during the week of October 16th. The second session will take place from December 11-13 on the East Coast. 2018 dates will be available before final applications are due; only applicants who can participate in all in-person sessions should apply.

Application

Applications should be submitted to agaskins@centerforcommunityinvestment.org no later than July 31, 2017. Only complete applications will be considered.

Part I: Applicant Information

Name

Organization and Role

Address

Telephone

Email

Please attach a current CV

Part II: Short Answer Questions

A. Strategy Challenge (no more than 1000 words)

Please describe the challenge you will focus on during the fellowship program. Make sure to include:

- What result are you striving for, and what will success look like?
- What will it take to achieve the result you are aiming for? (Who has to do what?)
- How's it going—where are you making progress and where are you stuck?
- How are you addressing issues of racial and economic inequality?
- How does your job/authority relate to the nature of the challenge?

B. Approach

We would like to understand how you approach your work. Tell us four quick stories (150-250 words per story) about your efforts to advance social and economic opportunity.

1. Tell us a story about failure. What happened? How did you contribute to the failure?
2. Tell us a story about a time when you engaged an unlikely ally and aligned their work with your efforts.
3. Tell us a story about a time when you had to make a significant mid-course correction in the implementation of strategy. What happened? What was gained and lost as a result?
4. Tell us a story about a time when you took a significant personal and professional risk in the service of your results. What did you risk, what led you to take the risk, and what were the consequences?

Part III: Readiness to Participate

- Letter of support from direct supervisor
- Assurance of challenge as organizational priority (letter of CEO support)
- Signed personal commitment to participate fully in all aspects of the program

Part IV: References

Please provide the name, title, email and telephone number for two references who know you and your work well.