Anchor Institutions Task Force

2018 Annual Conference

November 15-16, 2018



Welcome

Ira Harkavy

Director, Netter Center for Community Partnerships University of Pennsylvania Chair, AITF



Director's Report

David Maurrasse

President, Marga Incorporated Director, AITF



Education



Executive Director Double Discovery Center, Columbia University



Michelle McDonald

Chief Officer for Academic Programming, Atlantic City Associate Vice President for Academic Affairs Stockton University



STOCKTON: MAKING A DIFFERENCE

Dr. Harvey Kesselman, President Dr. Michelle McDonald, Assoc. VP for Academic Affairs



stockton.edu

NEW YORK

Ramapo College

Kean University

William Paterson University Montclair State University

Rutgers, The State University of New Jersey

New Jersey Institute of Technology New Jersey City University

Rutgers-Newark

CONNECTICUT

New Jersey's Public Colleges & Universities



Off-Site Locations

- 1 Stockton University Atlantic City
- 2 Carnegie Center Atlantic City
- 3 Dante Hall Theatre Atlantic City
- 4 Stockton Noyes Arts Garage Atlantic City
- 5 Kramer Hall Hammonton
- 6 Manahawkin Center
- 7 Marine Science Field Station
- 8 Sam Azeez Museum of Woodbine Heritage

About Stockton

9,621 full- and part-time undergraduate and graduate students **(3,300 residential)**

94% attend full-time

1,585 first-time freshmen

Freshmen retention rate: 85-87%

Graduation rates: 58 % 4-year and 74% 6 year





stockton.edu

CULTURE CLASSES

STOCKTON UNIVERSITY ATLANTIC CITY

Anchor Institution

Important Presence in the City and Community

Economic Impact

Ability to Attract Businesses and Skilled Individuals

 Center of Culture, Learning, and Innovation

SRI&ETTC STOCKTON UNIVERSITY

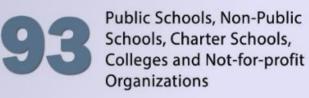
Annual Report Summary 2017-2018

8631

5816

2815

CONSORTIUM MEMBERSHIP



94,000+ PreK-12 Students 24,000+ Educators

PROGRAM TOTALS REGISTRATIONS

501 Total Workshops
352 Custom Workshops
149 Public Workshops



Counties participated in SRI&ETTC programs in 2017 - 2018

Counties

TRAINING **TODAY'S TEACHERS** SRI&ETTC 20+ years of Professional **Development** Training

stockton.edu

TRAINING TOMORROW'S TEACHERS

150 Student Teachers

150 student teachers placed in Atlantic City and County Schools a year, for fifteen hours a week.

Homework Completion Programs 300 students and 168 volunteers in three programs in partnership with

the Atlantic City Police Department (ACPD), and Atlantic City Housing Authority.

COMMUNITY SERVICE

Stockton manages Atlantic City's Campus Kitchen, a partnership with the AC Public High School.

- Addresses food security among low-income residents.
- Serves more than 200 each year.
- Draws over 300 volunteers









A Degree in your Community

In 2018, Stockton launched a degree in Community Leadership and Civic Engagement. Based at the Atlantic City campus, studying, engaging, and contributing can be your major.

Educational Opportunity Fund-AC

Significant financial support for 50 local students committed to pursuing a degree with a community-centered focus.







Worklorce Development

Over \$1.5 million in grant funding to provide training and job placement assistance for more than 700 under-employed or unemployed workers a mually.

TOP HONORS



2016 - 2018 HEED Award Insight into Diversity



2016 Sustainability

2017 Civic Learning & Engagement







stockton.edu



President

Tuskegee University



Forging New Community-University Partnerships Lily D. MeNair, PhD

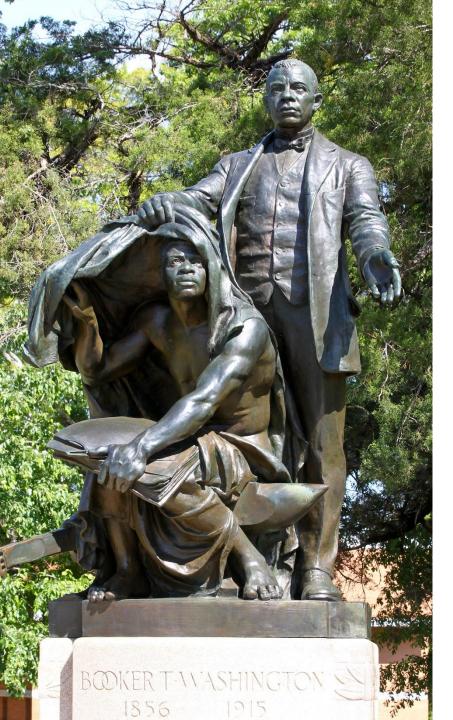
Anchor Institutions Task Force November 15, 2018





Tuskegee, Alabama

- County seat of Macon County
- 2010 population: 9,865 (▼16.7% vs. 2000)
- Tuskegee University is the city's #1 employer; county's #2 employer
- Strong tourism appeal:
 - 15-state U.S. Civil Rights Trail
 - Alabama Civil Rights Museum Trail
 - Tuskegee Institute National Historic Site



Cradle of Civil Rights

- City founded (1833)
- Tuskegee University founded (1881)
- Rosenwald Schools established (1913)
- Tuskegee VA Medical Center opened (1923)
- U.S. Public Health Syphilis Study (1932-72)
- Tuskegee Airmen (1940-48)
- Gomillion vs. Lightfoot (1960)



T-100 Collaboration

- Competitive USAF bid unifying private, community, chamber of commerce and university partners with the potential for:
 - 750 direct high-wage, full-time jobs
 - up to 4,000 indirect, supplier jobs
 - economic boost of \$200M-\$250M
- Contract awarded to Boeing in October 2018
- Has led to repairing and better-coordinated town-and-gown relationship



Forging New Partnerships

- Located on the I-85 corridor spanning from Montgomery to Atlanta
 - home to leaders in automotive, aviation, education, manufacturing, agriculture, forestry and military sectors
 - situated on the CSX Main Line Rail
 - provides 5,000-foot corporate runway & full-time fixed-base operator at Moton Field



Forging New Partnerships

- Current city and university collaborations include
 - redeveloping gateway interstate exchange and corridor
 - developing and implement workforce and economic development strategies
 - strengthening community-wide infrastructure
 - enhancing city-wide aesthetics



Tuskegee University

- Enrollment: 3035 (undergraduate and graduate)
- Top 5 academic majors
 - Veterinary Medicine
 - Mechanical engineering
 - Biology
 - Animal and Veterinary Sciences
 - Nursing



Tuskegee University

Graduate Programs: 5 PhD programs; 16 master's programs

Academic Accreditations

- College of Agriculture, Environment and Nutrition Science
- Robert R. Taylor School of Architecture & Construction Science
- Andrew F. Brimmer College of Business & Information Science
- College of Veterinary Medicine
- College of Engineering
- School of Nursing & Allied Health; School of Education, College of Arts & Sciences



New Leadership in City and University

- Mayor Lawrence Haygood and TU President: have signed 3 MOUs in August 2018
- Developing positive "town-gown" experiences
- Civic engagement already underway: Architecture School
- Next steps: collaborating with community to identify needs
- Positive response to "Communiversity"

Félix Matos Rodriguez

President

Queens College of the City University of New York



Teri Thompson



Vice President of Strategic Initiatives

Executive Director

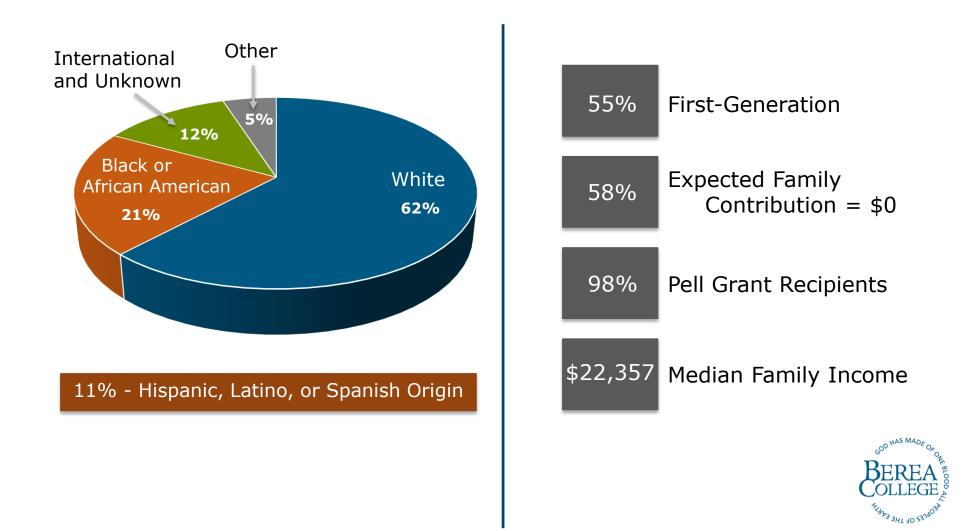
Berea College Partners for Education at Berea College





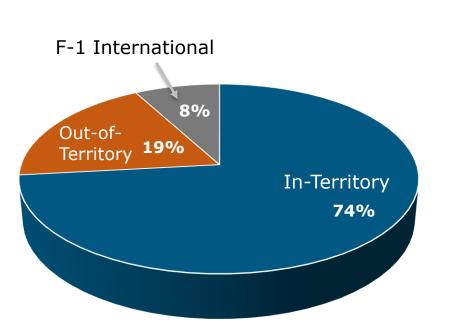
Berea College Student Body Highlights

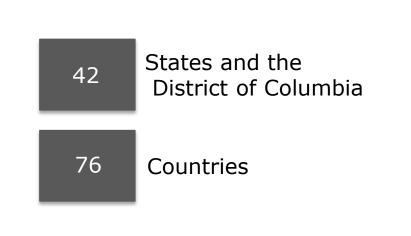
1,610 Degree-Seeking Students



Berea College Student Body Highlights

Admissions Territory

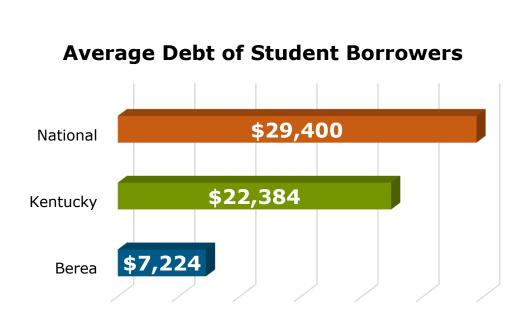




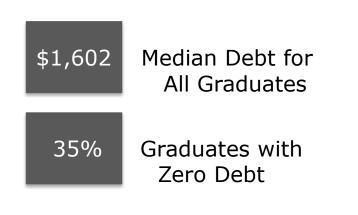


Berea College Student Body Highlights

Tuition Promise Scholarship



(According to Project on Student Debt [2012 Graduates])





Berea College's Eight Great Commitments



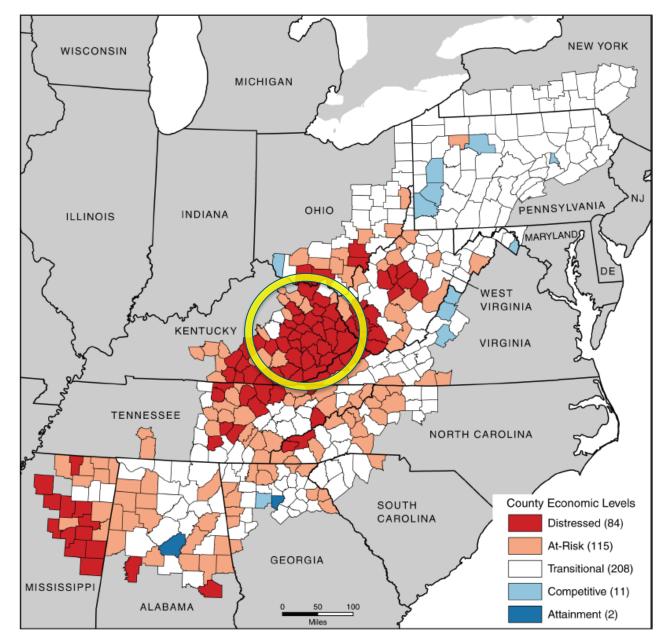


Berea College commits itself: To engage Appalachian communities, families, and students in partnership for mutual learning, growth, and service.



Our Population: Appalachia

The distressed core of Appalachia is rural Appalachia. By creating success in rural, central Appalachia, we will shift the outcomes for Appalachia as a whole.







Delivering Books 1917

First Lady Eleanor Frost 1914



Rural School Improvement Project and Extension Library





STRATEGIC INITIATIVES

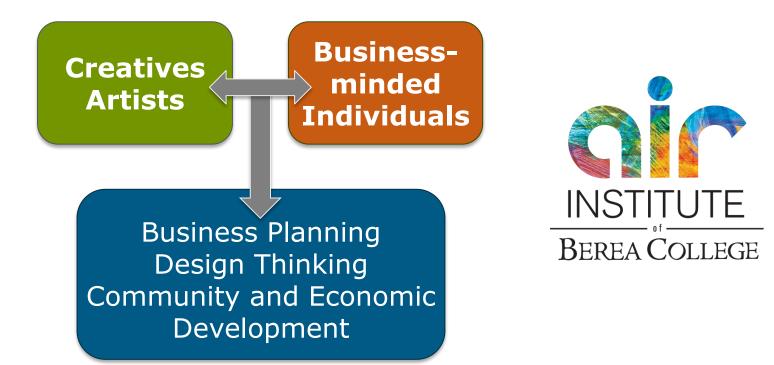






Partners for Education BEREA COLLEGE

STRATEGIC INITIATIVES



STRATEGIC INITIATIVES

Empowering Appalachian leaders in rural communities

Annual Institute

Sub-grant Program

Leadership Curriculum

Learning Workshops

Custom-designed Services



STRATEGIC INITIATIVES





FOOD INSECURITY

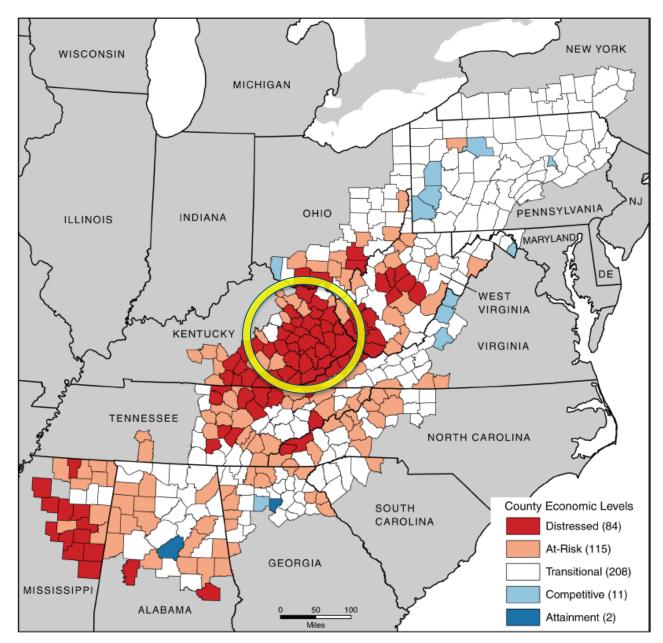
Garden Grants Berea Kids Eat Technical Assistance

Social Enterprise Commercial Kitchens



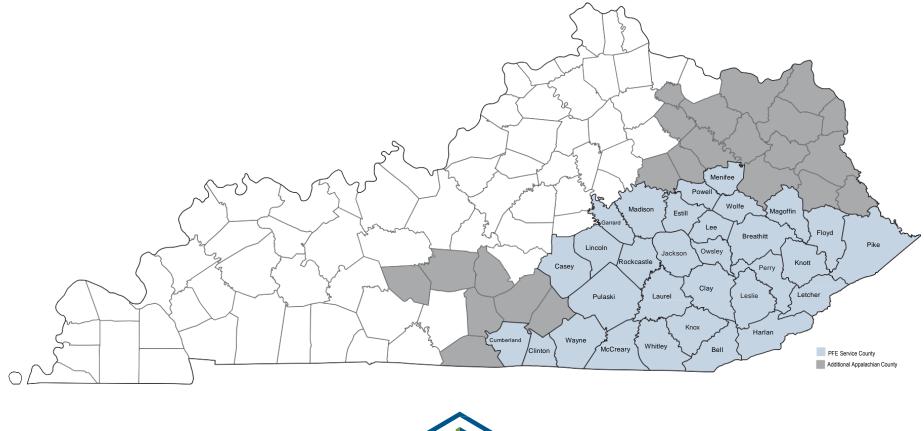
Our Population: Appalachia

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Partners for Education at Berea College Direct Services Region





All Appalachian Students Succeed

51,000 STUDENTS

AND FAMILIES served

by Berea College's Partners for Education **8 OFFICES** within the **Appalachian Region** +Berea

\$56 MILLION in **annual** private and federal investment



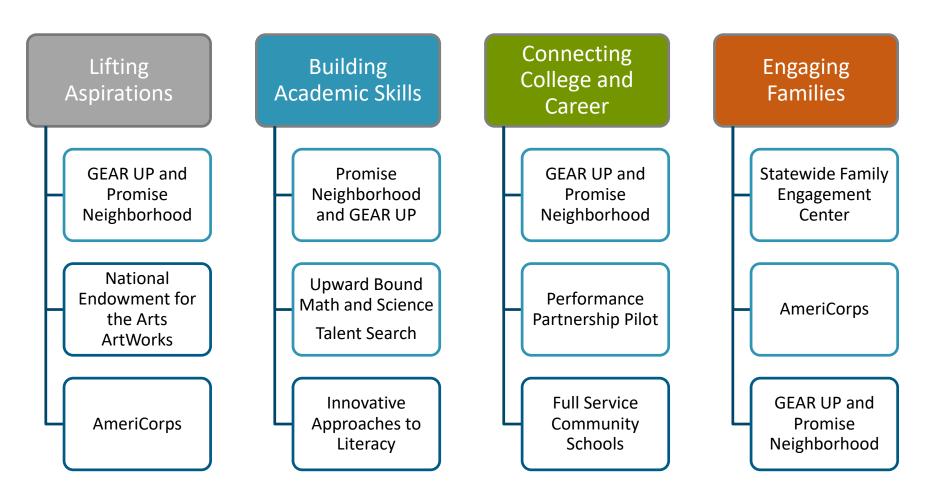


All Appalachian Students Succeed Our Five Indicators of Success

- **1** All children enter kindergarten ready to learn.
- **2** All students are academically proficient.
- **3** All students are safe, healthy and supported.
- 4 All young people graduate from high school college ready.
- 5 All young people receive a degree beyond high school.



Programs Supporting Direct Service Strategies





PFE programs have achieved promising results to date for students from kindergarten through college

| Kindergarten Readiness | K-12 Academic Achievement | High School Graduation | Postsecondary |
|--|--|---|--|
| In the Berea Promise Neighborhood the % of kindergarteners ready to learn increased from 16.3% in 2012- 13 to 35.5% in the 2016-17 school year | In the Berea Promise Neighborhood from 2012 to 2015-16, the % of students at or above proficient increased from 37.1% to 49.5% in English Language Arts and 27.1% to 39.5% in Math | Between 2013 and 2016, the total percent of high school graduates in Promise Zone counties that are college and/or career ready increased from 49.4 percent to 70.6 percent Leslie County High School's graduation | • Seventy-three- percent of the 2012 Upward Bound Math & Science high school graduates enrolled in postsecondary institutions, vs. 62.5% of all Kentucky students |
| | PartnerCorps STEM program participants increased student achievement on standardized tests by 36% (target was 25%) | rate increased from 66.5% in 2012 to 98.3% in 2014 after participating in the GEAR UP and PartnerCorps School Turnaround programs | • Eighty-percent of these Upward Bound students continued in their second term at a postsecondary institution |

Our Lessons Learned

- Long-term commitment is essential
- Critical to invest in organizational infrastructure
- Work must be community focused with community outcomes as the priority
- Remain nimble with ability to respond quickly to community needs



All Appalachian Students Succeed

Dreama Gentry

Executive Director Partners for Education Dreama_Gentry@Berea.edu

Teri Thompson

Vice President Strategic Initiatives Teri_Thompson@Berea.edu



Economic Development

Melvin Colon

Executive Director

Southside Institutions Neighborhood Alliance



Jamie Bennett

Executive Director

ArtPlace America



Cultural Institutions & Economic Development

Marga, Inc.'s Anchor Institution Task Force New York, NY

November 15, 2018

ARTPLACE ARTPLACE ARTPLACE ARTPLACE

Anchor institutions

- 1. Hiring
- 2. Procurement
- 3. Real Estate Development



Anchor institutions

- 1. Hiring
- 2. Procurement
- 3. Real Estate Development
- 4. Gathering





Jackson Medical Mall Foundation (Jackson, MS)



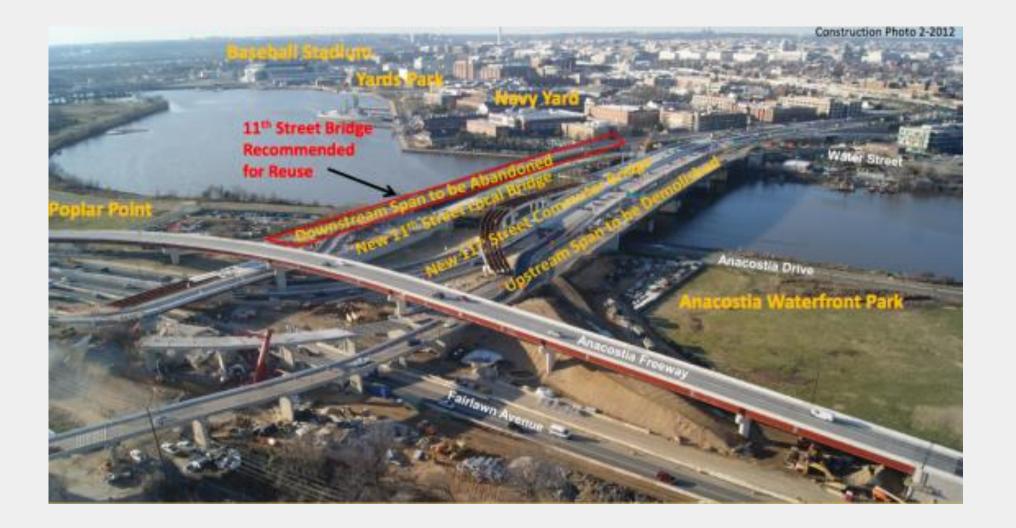






Jackson Medical Mall Foundation (Jackson, MS)





11th Street Bridge Park (Washington, DC)



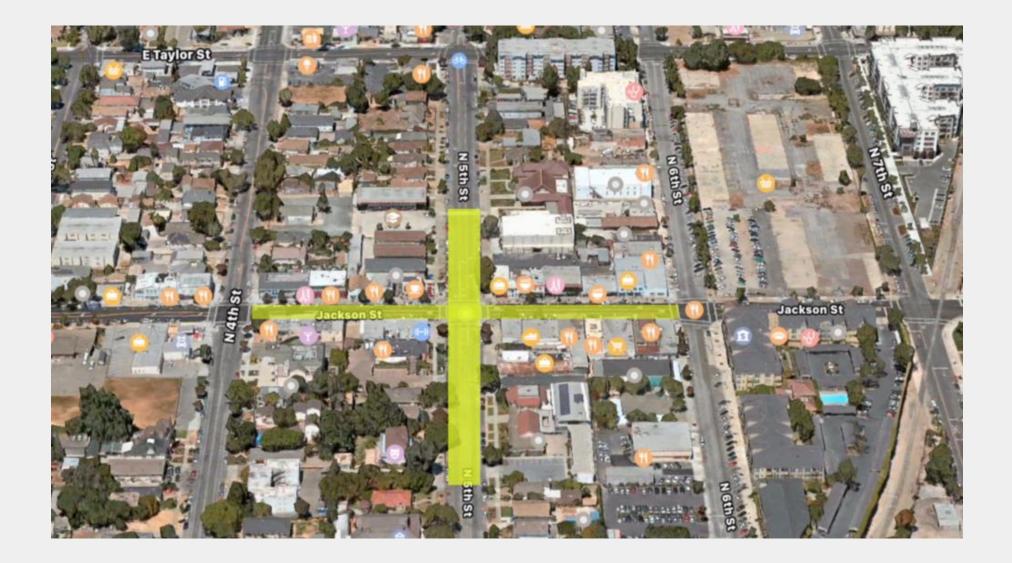






11th Street Bridge Park (Washington, DC)





San Jose Taiko (San Jose, CA)









San Jose Taiko (San Jose, CA)



RTPLACE ARTPLACE ARTPLAC

Jamie Bennett

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Vincent J. Tufo

Pamela A. Koprowski

CEO, Charter Oak Communities

Executive Director, Dovetail SIP, Inc.

Principal, Cardinale Associates

Public Affairs Consultant, Stamford Hospital



Anchor Opportunity Network A Regional Collaboration: NY-NJ-CT

Vincent Tufo Executive Director, Dovetail CEO, Charter Oak Communities

Pam Koprowski Principal, Cardinale Associates Public Affairs Counsel, Stamford Hospital

November 15, 2018



RPA's Fourth Regional Plan

Equity Health Prosperity Sustainability

RPA Regional Plan Association

Leveraging Anchor Institutions to Foster Healthy Communities in the Region



A Report of The Fourth Regional Plan December 2017



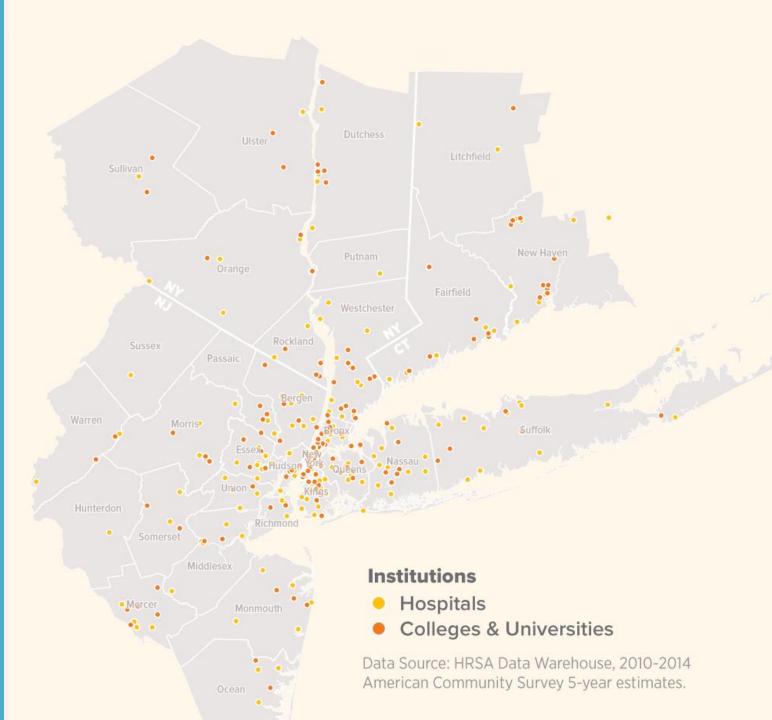
A generation from now, the New York-New Jerreys-Consocietor marroyables meas could be a pice what tilli its promise of opportunity and acquility for all races, schnicktic incourse, ages and abilities, a count legion that shows the vest of the work1 how to adapt and prosper in an age of riting east and transportunes; and a global hob the harnerses its immems resources and innovative takent to make the fast paced, coparise methropolis an aster, healther and more affordable place to live and work.

But unkers thing: changs, a child born in 2017 horses for different futures. One in free childrow and ligrevue poper on most will mever make it to the middle class. These children, the majority of them back, Hitpanice or Attan, will be far more likely to a stand fulling relocids, under form obesity and athma, it will unusin a high/bofnedis, and experience homalessness. If current transfer continue, the average family agametation tension will arm his stand speed more on homing and transportation. Many reach and trans will and medical care will like longer and the homest transferil 2060 more than two million near stand founding and the more million more alderly relations: will live in hoster, more congented and more policited tens.

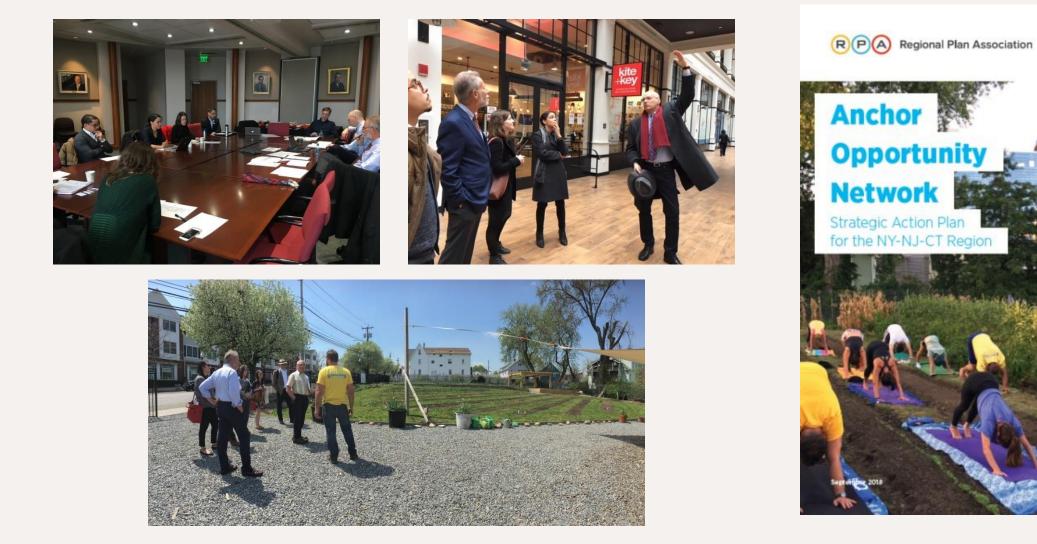
The Fourth Regional Plan offers a vision and strategies for achieving a more propergroup, equilable and resilient future. The Plan is intended to generate dialogue, encourage collaboration and promote action to make this vision a reality.

Image. Camble Associat

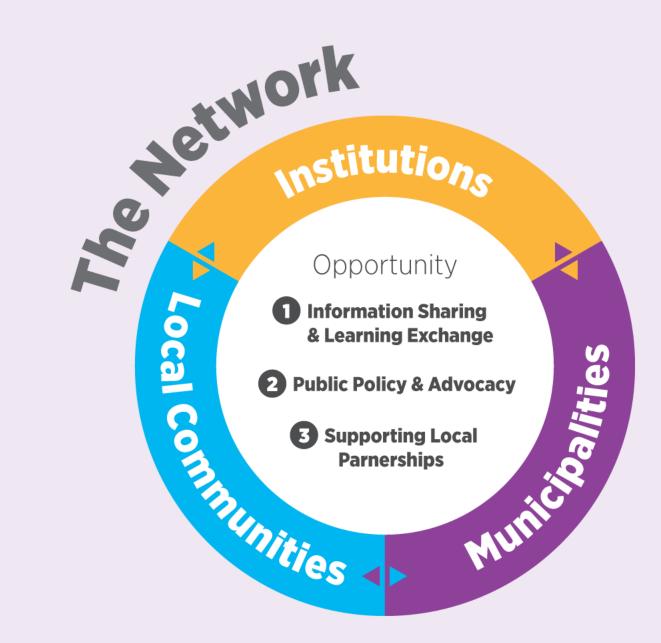
More than 340 health care & higher education institutions in our region



From Plan to Action



dovetail



The Anchor Opportunity Network will engage with anchor institutions, municipal leaders and local communities to create meaningful and sustainable partnerships that leverage diverse capital and human resources to drive community well-being and equitable economic growth.

Benefits



Investment in Quality Housing

Quality, mixed income housing stock is the building block for healthy and equitable neighborhoods.



Coordinated Capital Investments

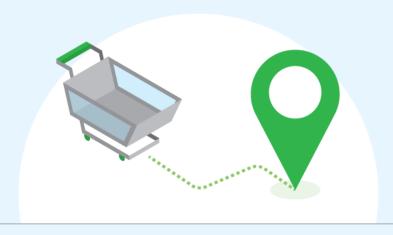
Coordination allows anchors and municipalities to multiply the impact of their planned investments in infrastructure such as streetscape and public space improvements.

Benefits



Local Hiring & Workforce Development

Training and hiring local and diverse residents creates a strong local workforce for anchor institutions.



Inclusive, Local Purchasing

Keeping money spent by institutions within local neighborhoods strengthens and grows local businesses, creating sustainable local economies.

Information Sharing & Learning Exchange

Build relationships and a shared vision across partners to *move the needle* in overcoming complex challenges facing urban areas.

- Sharing *case studies* of impactful projects & replicable models
- Sharing proven methods and tools for unlocking cross-sector opportunities
- Informing members through quarterly roundtable meetings, webinars, site visits and peer-to-peer exchanges
- Proactively identifying opportunities for local partnerships

Public Policy & Advocacy

Advocate for public policies that support effective anchor strategies to enhance equity and build community health and wealth.

- Crafting and advocating for policies at the state, county and local levels that advance anchor strategies
- Promoting policies that align anchor objectives with those of surrounding communities

Support Local Partnerships

Unlock human and financial resources within and across partners to power investment in local communities.

- Providing technical assistance to help members implement & grow anchor collaboratives
- Proactively engaging members in anchor, municipal & neighborhood planning efforts
- Helping align anchors with local efforts to support equity in education, public health & economic development

What does a successful anchor partnership look like in our region?



Alignment for Partnership

Stamford Hospital

- Evaluated its 50-year facilities and service outlook
- Identified need for facility replacement and campus modernization

Charter Oak Communities

- Evaluated the long range outlook and viability of conventional public housing
- Determined to replace dense, aging public housing 'projects' with attractive mixed income communities

Neighborhood in Transition



Vidal Court public housing built in 1955, demolished 2013



Fairgate HOPE VI mixed- income community, built 2010

Hospital Expansion Plan





WHR ARCHITECTS

Outcomes: Improved Livability & New Hospital Facility

- Quality of Life: Public-private investment in walk-able neighborhood, aligned with improvement in parks and public facilities; reductions in crime and nuisance conditions
- Hospital Replacement: New \$500M state of the art hospital with improved physical connections to the community



New Housing & Economic Development

- Housing: Created 550 units of attractive, mixed-income, healthy housing with on-site support services
- Business Development: Attracted new businesses and activated WSNRZ Merchants Association





Healthy Nutrition & Community Building

- Access to Healthy Food: Established Fairgate Farm community garden and nutrition education center supported by programs, volunteerism, farmers market and cooking classes
- Obesity Prevention: Kids' Fitness & Nutrition Services (KidsFANS), a community-wide taskforce for the prevention of childhood obesity has served thousands of children



Amir Kirkwood

First Vice President, Commercial Banking

Amalgamated Bank



AMALGAMATED BANK AMERICAS SOCIALLY RESPONSIBLE BANK

Anchor Institutions Task Force (AITF) Amalgamated Bank

November 15, 2018



amalgamatedbank.com Member FDIC

A History of Responsible Banking

1923 – 2013 Bank of the Labor Movement

- Organized Labor
- Union Members

2014 - 2017

Progressive Community



- Organized Labor
- Affordable Housing
- Middle Market C&I
- Political Customers
- Nonprofits

2018 - Beyond

America's Socially Responsible Bank



- Organized Labor
- Nonprofits
- Sustainability
- Political Banking
- Foundations



Missioned Aligned Customer Strategy

We are organized to provide relationship banking model relying on industry expertise



- 1. Regional sales structure with impact focus areas
- 2. Diversified banker team with extensive industry knowledge
- 3. Relationships built on Trusted Brand
- 4. Cross-product sales strategy to deepen client relationships
- 5. High-touch service model



Our customers

We bank impact based organizations, institutions and social enterprises



Banking Your Values

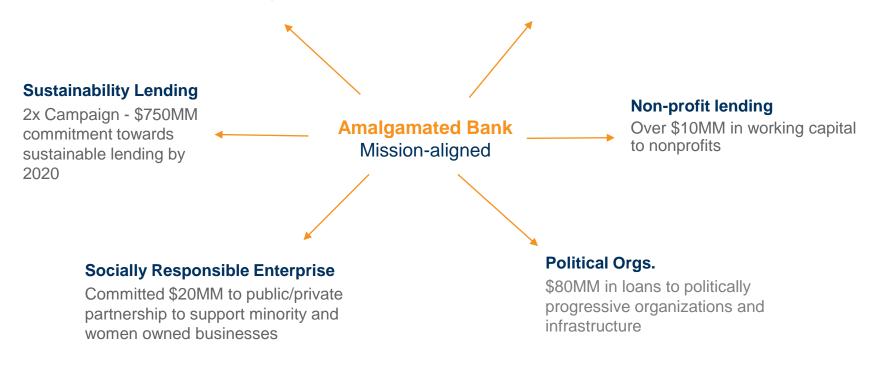
Our focus allows us to be the financial ally of the socially responsible movement

Community Development

- \$375MM in community development loans
- 74% of community development loans support affordable housing
- 6500 affordable housing units funded

Supporting CDFIs

\$53MM in loans to CDFIs to support community focused projects





Socially Responsible Banking with Anchors

We employ public private partnerships to execute local strategies

Borrower: New York City Acquisition Fund, LLC

Purpose: Acquisition/rehab of affordable and supportive housing in NYC.

Amalgamated Loan Amount

\$10MM senior unsecured for 5yrs @ 3% fixed (2 year draw period and 3 year amortization)

Amalgamated Services

- Treasury Management Operating Accounts
- Liquidity Management Short Term Investments

Aligned Values with Anchors



bridge loans for affordable housing

- **Critical Funding Partners –** subordinated financing from City of New York, Robin Hood Foundation, Rockefeller Foundation, Starr Foundation
- Community Development Lending Borrowers are Community Development Financial Institutions (LISC, Enterprise, Corporation for Supportive Housing, Low Income Investment Fund)
- Local Impact The NYCAF has invested \$415MM in New York City's communities and created or preserved over 12,000 units of housing.



Socially Responsible Investment with Anchors

Anchors can utilize ESG Core Bond investments



Impact

Deliver core fixed income financial returns with a strategy that rewards higher ESG performing issuers and penalizes laggards ultimately through costs of capital.

Investment Objective

Invest in a portfolio of investment grade fixed income securities that meet conservative fundamental underwriting standards and excel in environmental, social and governance standards relative to industry peers.

Strategy

- Conduct fundamental credit underwriting of investment grade securities
- Screen-out ESG laggards, via MSCI ratings service
- Construct a solid "all-weather" portfolio designed to protect capital while generating income
- Custom separate accounts available



Thank You





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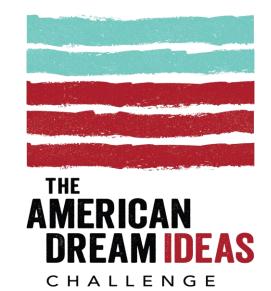
Courtney McBeth

Sarah Munro

Special Assistant to the President for Higher Education Innovation Project Director, American Dream Ideas Challenge Special Assistant to the President for Campus-Community Partnerships

Director, University Neighborhood Partners, University of Utah









Courtney Hills McBeth, EdD

Special Assistant to the President for Higher Education Innovation

Director, American Dream Ideas Challenge

Sarah Munro, PhD

Special Assistant to the President for Campus-Community Partnerships Director, University Neighborhood Partners

Anchor Institution Conference - November 2018



The American Dream Ideas Challenge aims to find, fund, and develop policy and technology innovations to support and strengthen Utah's middle class.

Specific Goal: to increase net income by 10 percent for 10,000 Utah households by 2020.

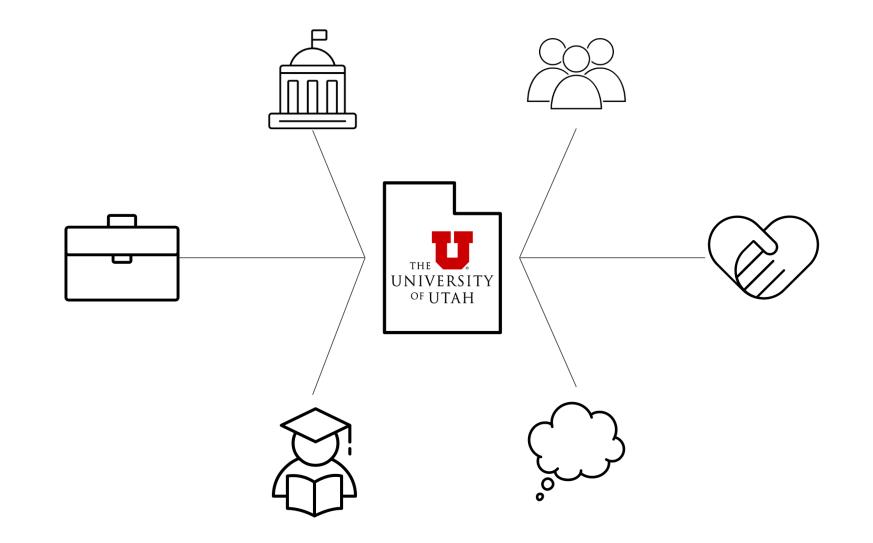
americandream.utah.edu

Alliance for the American Dream



SCHMIDT FUTURES

Statewide Grand Challenge & Cross-Sector Collaboration

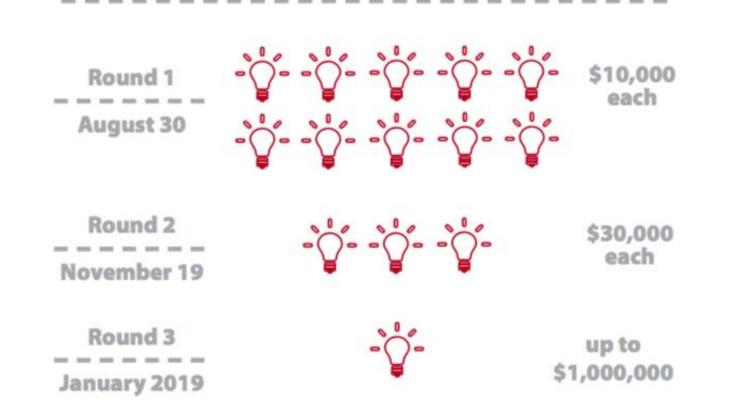


Proposals

We welcome creative proposals that focus on **sustainable** ways to expand **access to** and **increase stability** of the middle-class in Utah – whether through policy ideas or investible concepts for public benefit.



Challenge Process



Final 3 ideas will be forwarded on to compete nationally to receive up to **\$1 million** from Schmidt Futures.

Proposals

We are particularly interested in **innovative** and **interdisciplinary** solutions in the areas of health care, workforce development, education, transportation, housing, and supports for families.





Autism Futures

Expand employment and services for adults on the autism spectrum through a platform that connects them with employers, focuses on raising the income of these newly hired employees and supports families in transitioning youth with autism to the workforce.



Coal Country Strike Team

Create a "strike team" to work with community leaders to pursue a five-pronged policy platform in Utah's rural coal country, focusing on Emery and Carbon counties, to address problems (such as the opioid crisis) and promote opportunities in health care, tourism, employment and economic development training, technology and housing.



Community Design Innovation Hub

Design and implement a community hub in one of Salt Lake City's westside communities as part of a public-private housing development to connect residents to innovative educational and career pathways.



DASH Digital Pathways

Develop in-demand digital skills for educators, entrepreneurs and early career professionals. DASH, which stands for Design, Arts, Social Sciences and Humanities, aims to help participants build skills and earn verified credentials that support relevant, sustainable careers in Utah's classrooms and high-tech economy.



Debt Free Middle Class

Develop an app that creates a new culture of saving money by helping individuals and families restructure payments to get out of debt faster and make smarter financial decisions.



Developing Skills and Rural Businesses in the Gig Economy

Increase gig-economy employment in rural Utah through education and outreach to enhance freelance worker success and expand freelance opportunity throughout rural southern Utah.



Leveraging Value to Convert Healthcare Premiums to Income

Through a partnership with regional health plans, implement medication value assessment, value-based insurance design and outcomes-based contracting to decrease health care premium costs.



Тор

Ideas

Mobility as a Service

Save middle-class citizens significant transportation-related expenses through a new mobility-as-a-service pilot that encourages use of and integrates public transportation options—transit, ride hailing, bike sharing, etc.—and reduces automobile ownership and use.



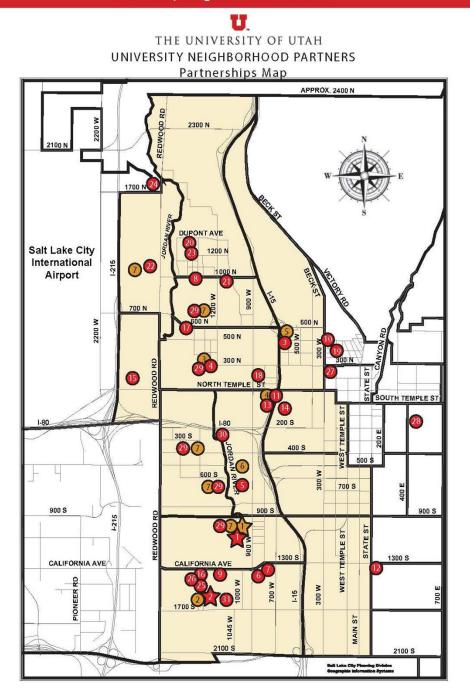
Neighbor

Allow Utahns with unused space in their homes or apartments to rent their RV pads, basements, sheds, closets, attics, etc. to other Utahns in need of self-storage, both reducing costs and providing income.



Single Parent Shared Living

Encourage shared living arrangements among single-parent families through the development of an app that matches interested parties, reducing living costs and, potentially, child care costs.



University Neighborhood Partners

"Bringing University and west side resources together for reciprocal learning, action, and benefit. . .a community coming together."

PARTNERS

Place-based

Long-term partnerships

HOO

NIVERS

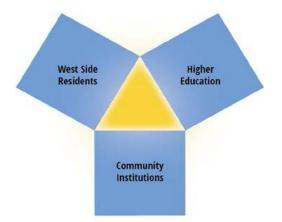
Anchor Role:

Engagement around shared goals Long-term commitment (2001—present)

| Community priorities | University priorities | |
|--|--|---|
| Reduce systemic barriers to education & opportunity | Reduce systemic barriers to higher education | |
| Strengthen neighborhoods; address historical inequities | Strategic goal: engage community to enhance health & quality of life | 70+ partnerships; 33 sites |
| | | U of U Departments: 44 |
| Build pathways to higher education | Increase diversity of students & staff | U of U Students: 102 |
| Support community leadership | Enrich teaching & research with skills to engage effectively with complex issues in multicultural society | Organizational Partners: 63 |
| | | Residents Directly Involved: |
| Build community capacity & wellbeing (health, housing, employment, org. development) | | 4056 |

University Neighborhood Partners

THEORY OF CHANGE



UNP acts as a convener, bringing together higher education institutions, community institutions, and Salt Lake west side residents in reciprocal partnerships aimed at shared goals.



Partnerships are based on a set of principles that ensure successful, sustainable, mutually- beneficial collaboration.



Partnerships target university and community outcomes, all feeding into the long-term goal of decreasing barriers to higher education.

University Neighborhood Partners

6 AREAS OF IMPACT



University of Utah's Engagement on Salt Lake City's Westside since 2001

Westside Web and Community Innovation Hub

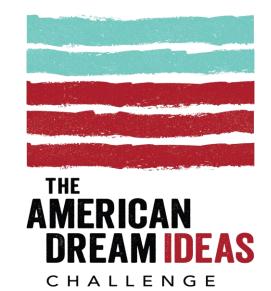
Aligning neighborhood resources to create effective pathways to education and workforce training



- Westside Web: connects 10 existing neighborhood resource centers
- Innovation Hub:
 - Coordinates Westside Web through collaborative research and data sharing
 - Combines affordable housing, education, entrepreneurship and workforce training spaces.



Lessons Learned







Courtney Hills McBeth, EdD

Special Assistant to the President for Higher Education Innovation

Director, American Dream Ideas Challenge

Sarah Munro, PhD

Special Assistant to the President for Campus-Community Partnerships Director, University Neighborhood Partners

Anchor Institution Conference - November 2018

Special Briefings

Health Professionals Subgroup

Angela Mingo Community Relations Director Nationwide Children's

Economic Development Subgroup

Anthony Sorrentino Assistant Vice President, Office of the Executive Vice President University of Pennsylvania



Opening Reception

Empire Complex, 7th floor

