

Community Investment: Focusing on the System

Worksheets

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Exemplary Deal Worksheet

Name of deal:

\$ amount:

What did/will the deal finance?

Who participated?

User(s) of capital:

Intermediary(ies):

Sources of capital: *(including grants/subsidies)*

Authorizers:

(whose approval was required for the deal to proceed)

What were the key milestones in the deal's history and when did they occur?

Milestone:

Date:

Milestone:

Date:

Milestone:

Date:

Milestone:

Date:

Milestone:

Date:

Exemplary Deal Worksheet (continued)

What was tough/what were the challenges?

(e.g. needed to overcome x policy barrier, couldn't find sources of capital willing to accept loan to value ratio over 80%)

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What worked well?

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-
-
-

Any innovations?

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-

What is exemplary about the deal?

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Exemplary Deal Worksheet (continued)

What can you learn from the deal about the system?

Examples:

Size of projects constrained by capacity of small local developers

Pipeline slowed by need to assemble six subsidy sources for each deal

No projects currently contemplated in xx target area

Many projects wait more than 6 months for yy approvals

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What action(s) (that are within the realm of possibility) would have made the deal easier/less heroic?

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Strategic Priorities Worksheet

DEFINITION:

Ensure that investment priorities will yield important benefits to low income people and are aligned with recognized community needs.

Key questions to consider:

If a Martian came to our region and spent some time observing and understanding our work, how would the Martian describe our organizing vision and priorities?

What are the shared priorities we think should guide investment in our community?

Assessment:

On a scale of 1-10, with 1 being low and 10 being high, to what extent do we have a widely shared vision that guides investment in our community?

What would it take to raise the score by 1 point? 3 points?

Pipeline Worksheet

DEFINITION:

Deals and projects that are contemplated or in progress that generate financial and social return.

Guiding prompts:

List some past or current deals that embody the priorities you identified.

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Assess any significant differences in the strength of the pipeline by type of investment, i.e. housing, community facilities, commercial real estate, small business development, human services and plot out the different sector-specific pipelines from weakest to strongest:



Select one of the pipelines and use the chart (on reverse) to complete an initial pipeline analysis.

Pipeline Worksheet (continued)

City: Name of pipeline:

	Sufficiency	Efficiency	Impact
Assessment of Current Status <i>Circle One</i>	Red Yellow Green	Red Yellow Green	Red Yellow Green
What Gets in the Way	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • •
Non-Utopian Strategic Targets	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • •
Near-Term Actions to Strengthen	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • •

Enabling Environment

DEFINITION:

The policies, processes, resource flows, relationships and capacities that facilitate or inhibit community investment.

Guiding prompts:

What are we already doing to foster the success of equitable community investment?

Using the following table, list the bright spots and gaps:

<i>Bright Spots</i>	<i>Gaps</i>
<ul style="list-style-type: none">•••••••	<ul style="list-style-type: none">•••••••

Enabling Environment (continued)

If you had a magic wand and could introduce 3 new catalytic elements (policies, incentives, practices, tools, data, norms and behaviors, platforms, etc.) that would dramatically accelerate your capacity to drive equitable results, what would they be and how would you know they are making a difference?

Report back with a chart that has the following table:

<i>Catalytic element</i>	<i>Difference to be made</i>	<i>Current assets to build on to deliver this catalytic element</i>
•	•	•
•	•	•
•	•	•
•	•	•
•	•	•

Assessment:

On a scale of 1-10 with 1 being low and 10 being high, to what extent do we have the policies, practices, resources, incentives, and actors that we need to translate our priorities into investments that achieve them?

What would it take to raise the score by 1 point? 3 points?

Next Steps Worksheet

Interventions to strengthen the community system:

1. Form a multi-sector team
2. Integrate new stakeholders
3. Secure new resources
4. Align resources and attention
5. Provide data
6. Create feedback loops
7. Advocate for supportive policies

Key questions to consider:

How can we foster a systematic approach to developing and implementing our shared priorities?

Of the items we discussed today, what are the top 5 things we could do over the next 6-12 months that would have the most powerful effect on improving capital absorption?

- 1.
- 2.
- 3.
- 4.
- 5.

Of the items we discussed today, what should be the group's immediate next steps over the next 90 days?

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