

## Social Impact: Senior Vice President | Vice President | Director

Racial Equity | Community Health | Economic Mobility | Community Development | Multi-Sector Initiatives | Investments

**Dynamic social impact leader** expert in leading innovative, multi-sector national initiatives to address racial equity, health, and economic mobility issues to transform vulnerable communities. Extensive leadership raising and investing social impact capital in affordable housing, small business, health, and transportation to advance social justice efforts. Economic mobility work highlighted in *New York Times* and *Wall Street Journal*.

### Career Highlights

- **Led innovative \$200M national community development initiatives funded by top US foundations** to advance economic mobility and racial equity through multi-sector partnerships and new investment models.
- Early **pioneer in aligning health and community development sectors** in collaborations designed to **address social and economic factors affecting community health** in low-income communities.
- **Established first-ever racial equity framework for 2 federal government-related agencies** to create an institutional strategy for financial sector to address structural racism in housing, financial services, and small business.
- Appointed to Advisory Committee of **Health Initiative Foundation**.

### Areas of Expertise

Strategy and Vision | Social Impact Initiatives | Racial Equity | Economic Mobility | Affordable Housing | Community Health | Metrics/Evaluation | Team Management | Thought Leadership | External Ambassador | Partnerships -- Community Organizers, Education and Nonprofit Leaders, Government Officials | Grantmaking Strategy | Project and Program Leadership | Social Impact Investments

## Professional Experience

FEDERAL INSURANCE CORPORATION | Medford, OR | 2020–present

**Regional Manager, Community Affairs** | Led insurance corporation to systematically institute a racial equity lens to guide strategies and policies related to the Community Reinvestment Act (CRA) and move the Corporation toward a more intentional social impact focus. Lead the community affairs team to support innovative CRA investments that support low- and moderate-income communities in the western portion of the country from Utah west-ward. Key contributions:

- Within first five months, developed and implemented the FIC's racial equity strategy to reduce racial wealth gap.
- Established "results-based" community development framework to enhance response to community challenges.

NATIONAL RESERVE BANK | Medford, OR | 2012–2019

**Vice President and Community Affairs Officer** | Created and implemented community development strategy to advance major social impact issues. Gained executive leadership buy-in to publicly advance efforts to advance health, climate change, and racial equity to improve marginalized communities. Led 12-member team, served on executive public affairs leadership team to guide broader external engagement and oversaw the Community Advisory Council to advise bank president. Key contributions:

- **Racial Equity-Economic Disparity** | Instituted racial equity framework that defined objectives and provided structure to advance economic disparity research and programs, including monetary policy.
- **Economic Mobility** | Spearheaded \$90M Strong Communities Challenge (SCC), a ground-breaking national six-site, multi-sector initiative. Advanced economic mobility with racial equity focus through collaborative housing, health, and transportation community efforts.
  - Secured funding from unique consortium made up of four foundations.
  - Defined partner roles, executive leadership structure, metrics/evaluation, sites, and overall initiative goals.

### RESERVE BANK, continued

- Managed health sector site relationships.
- Representative accomplishments included: Creation of a new community-led fund to purchase affordable rental property to reduce effects of gentrification and new private investments to support re-development of a historically black community.
- **Community Health** | Initiated and guided pioneering integrated community development and health sector initiative to develop collaborative models across western region to improve health in low-income communities.
  - Led team to secure partnerships with western region health sector entities to participate in integrated community efforts.
  - Helped sites secure funding. Advised and worked with regional leaders to implement program regionally.
  - Led to new health sector funding source and advocacy for community development efforts. Health sector benefited from long-term public health improvements for vulnerable communities.
  - Models have been replicated across country. Examples: major health insurance investing in affordable housing for LatinX community and conversion of public spaces into vibrant community space.

### CITY COLLABORATIVE | Alexandria, VA | 2011–2012

**Assistant Director of Capital Formation** | Hired for investment acumen to align grant-making and investing strategies for leading US philanthropic and bank investor consortium. Originated "program-related investments" (PRI) for \$38M Program Investment Funds, designed to meet financial and social impact objectives in such areas as asset building, green economy, education, and transit-oriented development. Key contributions:

- Identified and granted \$20M for The Integration Initiative (TII), a public/private/community collaboration in six US cities to address affordable housing and economic development in low-income communities.
  - Developed investment vehicles for each site, including opportunities to invest in City "re-densification" strategy; growth of small businesses in City; and an affordable housing structured fund to combat displacement and gentrification strategies in City.
- Led the research that laid the foundation for key model of public/private investing, using structured funds to acquire property quickly to support affordable housing efforts.

### FED BOARD | Alexandria, VA | 2006–2011

**Community Affairs Team Leader** | Led the community affairs team and spearheaded community development finance initiatives. Created model to coordinate community development efforts across Fed still in use today. Assessed new liquidity solutions for low-income communities; conducted research and analysis cited by the Fed Chairman and included in congressional testimony to help small businesses during financial crisis

## Early Community Finance and Affordable Housing Career

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Held positions as Financial and Program Analyst for **US Fund**; Special Assistant to **Deputy Mayor**; **Public Interest Investment Banker and Community Development Finance Specialist** for City; and Commercial Lending Officer for Bank. Highlights:

- **As Special Assistant to the Deputy Mayor** • Led two large-scale real-estate development projects to revitalize Southeast City **affordable housing** and **economic development**.
- **As Public Interest Investment Banker** • Federal Home Loan Bank of City: Led the launch of \$200M HUD Title VI loan purchase program to create a secondary market for **Native American affordable housing loans**.
- **As Community Development Finance Specialist** • City : Managed the City's \$50M public finance development programs. Conducted financial analysis/ underwriting of community housing development projects.
- **As Commercial Lending Officer** • Bank : **Originated and underwrote community development loans** and created a subordinated debt product for bank-owned community development corporation.

## Social Impact-Community Health Industry Leadership

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### FOUNDATION | National Advisory Committee Member of the Invest Health Initiative

Appointed by Foundation to provide strategic guidance for new cross-sector, 50-site **collaborative effort integrating housing, financial inclusion, economic development and health to improve overall community health.**

- Co-developed framework to guide site activities, facilitated learning, and provide technical assistance to sites.
- Outcomes included: health industry capital investments in low-income areas; new affordable housing partnerships with health sector; and local policies that included racial equity in decision-making.

### INVESTMENT FUND | Community Health Investment Subcommittee Member

Recruited by head of fund for community development expertise to guide deployment of \$400M in investments for housing, social services, and small business to improve community health.

### FOOD BANK | Board Member

Serve on board of one of the largest foodbanks in the country and nonprofits. **Played leadership role in implementing diversity, equity, inclusion strategy.**

### COMMUNITY DEVELOPMENT COALITION | Executive Board Member

Served as treasurer for national advocacy organization dedicated to social justice issues in Asian American and Pacific Islander communities across the country.

## Social Impact Publications | Thought Leadership

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“**Combatting Climate Change,**” Newspaper, June 17, 2019

**Healthy Communities** Online Publication, February 2018

“**Reduce Economic and Racial Disparities,**” Blog, July 2016

“**Impact Investments,**” Investment Review, Volume #, Issue #, 2010.

“**Financing Needs of Small Business,**” (Primary author), Policy Report, July 21, 2010.

“**Small Business Finance,**” Investment Publication, Volume #, Number #, 2009.

## Education

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UNIVERSITY, SCHOOL | **Master in Public Policy**

UNIVERSITY | **Bachelor of Arts, Communications Studies**, Magna Cum Laude, Phi Beta Kappa

FOUNDATION | **Public Affairs Fellow**