

Profile

Impact investing and community development strategist and fundraiser with a track record of developing innovative and effective retail investing vehicles and programs, raising impact capital, and measuring impact. A collaborative systems-thinker with a passion for driving social and organizational change.

Skill Summary

- Fundraising of impact capital (debt, grants, guarantees) from HNW, RIA, corporate, and capital markets
- Investor relations and back-office management
- Impact reporting and outcomes tracking
- Federal subsidy applications (NMTC, FA, CMF)
- Earned and paid marketing (social, digital, PR)
- A-Z impact investing product design including securities exemptions and compliance
- Organizational and programmatic strategic planning
- Executive Team and Board-level liaison

Work Experience

LOW INCOME INVESTMENT FUND (LIIF), San Francisco

LIIF has deployed \$3 billion of public and private capital over the past 36 years in support of projects that have built opportunity for 2.2 million low-income people across 31 states. As an S&P-rated nonprofit loan fund, LIIF is widely regarded as an innovative, impact-first financial institution with a track record of creating special purpose funds and loan products that build healthier communities. LIIF's \$850 million portfolio includes affordable & supportive housing, childcare facilities, healthy food stores, K-12 schools, health clinics, and transit-oriented community facilities.

Impact Investment Officer (November 2016 – July 2021)

Manager, Impact Capital (July 2021 – Present)

- Researched, developed, and launched LIIF's Impact Note, a public debt security for retail, HNW, DAF, and corporate investors to invest in LIIF's revolving loan fund.
- Manage the fundraising, investor relations, branding, reporting, and strategic direction for LIIF's Impact Note, including registration in 22 states with \$19 million in AUM from more than 40 investors.
- Assisted with LIIF's inaugural S&P credit rating ("A-" 2019, "A" 2021) and the \$100 million, 7- & 10-year green bond issuance (underwritten by Morgan Stanley and JP Morgan Chase) that received over \$1 billion of commitments from investors such as PIMCO, TIAA-CREF, and Neuberger Berman.
- Manage LIIF's suite of annual federal applications, resulting in >\$135 million of successful awards - \$120 million New Markets Tax Credits (2017 & 2020), \$9.75 million Capital Magnet Fund (2018 & 2020), \$5.2 million Federal Assistance (2017 & 2019), \$1.8 million Rapid Response Program (2021).
- Contributed to numerous successful public and private RFPs for the management of catalytic special purpose impact capital - \$40 million County of Alameda, \$4 million DC Department of Housing and Community Development (DCHCD), \$1 million Community Foundation for Greater Atlanta, and more.
- Manage LIIF's impact measurement and reporting, including quarterly impact reports and improvement of LIIF's proprietary Social Impact Calculator, which provides investors with an estimated dollar value of impact for their investment by using social science research to translate outputs into a monetized dollar value of social benefit outcome.
- Serve as a thought leader, writing for blogs and outlets and speaking at industry events such as the SRI Conference, SOCAP, and Confluence Philanthropy.
- Led the RFP for LIIF's 401K plan to source a new financial advisor and recordkeeper that will lowered fees, increased transparency, and introduced ESG options for participants.

VALUES ADVISOR, San Francisco

Values Advisor is a collaboration with Confluence Philanthropy that is revolutionizing the way investors find values-aligned financial advisors through a curated database and personalized matchmaking.

Co-Founder (June 2016 – Nov 2016)

- Conducted extensive market research before developing the concept into a business plan and testing a beta version of the platform with the initial cohort of financial advisors.
- Secured \$75k of seed funding from impact investors that took the company through ideation.

INVEST WITH VALUES, New York

Invest with Values is a free educational resource that connects the dots between related investment areas including local banking, community investing, impact investing, and socially responsible investing.

Development Manager (October 2013 – June 2016)

- Worked hand-in-hand with the Founder to lead the strategic redesign of the site, adding news, forum, and social connectivity.
- After the rebranding, Forbes called Invest with Values the “One Stop Site for Impact Investing”.

SHARED INTEREST, New York

Shared Interest uses loan guarantees from impact investors to unlock commercial financing for microenterprises, small businesses, cooperatives and low-cost housing providers throughout Southern Africa.

Research & Planning Associate (November 2013 – January 2015)

- Researched and identified gaps and opportunities in the South African economies where Shared Interest was expanding its services as a result of a grant from the Ford Foundation.
- Cultivated a \$300,000 pipeline of philanthropic and below-market-rate debt from IGOs, foundations, and individuals that supported Shared Interest in its expansion into Mozambique.

MY COLLEGE LANDLORD (MCL), Los Angeles

MCL was a web-based social enterprise that matched college students with affordable, vetted off-campus housing opportunities and provided social functionality to match roommates, sublet, and negotiate rent.

Founder (September 2010 – November 2013)

- Hired and managed a team of 5 to build and launch team and worked closely with technical team members to take my idea from concept to realty by creating a product that matched my vision for network of connected and empowered collegiate renters.

Education

PRESIDIO GRADUATE SCHOOL (PGS), San Francisco

PGS is the first graduate program founded on triple-bottom-line business principles and was recently nominated by the New York Times as “the place to go if you want to change the world”.

- **MBA, Sustainable Management (August 2014 – May 2016)**
- **Board Member (August 2015 – May 2016)**

OCCIDENTAL COLLEGE (OXY), Los Angeles

OXY is in the top tier of liberal arts schools, known for having a politically active student body and being one of the most racially and socioeconomically integrated private colleges in the country.

- **BA, Diplomacy and World Affairs (August 2006 – May 2010)**
- **CIEE study abroad at Khon Kaen University in Thailand (December 2008 – May 2009)**

Community Engagement

COW HOLLOW SCHOOL (CHS), San Francisco

CHS is a preschool that is committed to nurturing and educating students with an emphasis on social justice.

Board Member and Chair of Strategic Planning Committee (June 2019 – June 2021)

- Led the implementation of the school's strategic plan and crafted the capital strategy that will enable the school to purchase a permanent building and increase its diversity and inclusivity.

RSF SOCIAL FINANCE (RSF), San Francisco

RSF is a nonprofit loan fund, founded in 1984, that offers innovative opportunities to invest, give, and get funding that generate positive social, economic, and ecological impact.

Integrated Capital Fellow (August 2015 – May 2016)

- Identified food borrowers for RSF's Sustainable Food Systems portfolio and pitched prospective borrowers to RSF's internal investment committee.

MISSION INVESTORS EXCHANGE (MIE), San Francisco

MIE is an international network of 200 foundations and endowments dedicated to deploying impact capital.

MBA Fellow (June 2015 – August 2015)

- Collaborated with the Council of Michigan Foundations on behalf of MIE to create a state-based preservation fund and expand the impact investing ecosystem in the state.

TAHOE TRUCKEE COMMUNITY FOUNDATION (TTCF), Truckee

TTCF is a \$30 million community foundation that was in the process of aligning its endowment with its mission.

MBA Consultant (January 2015 – May 2015)

- Drafted an investment plan and strategy to establish a portfolio of place-based impact investments.

NATURAL RESOURCES DEFENSE COUNCIL (NRDC), New York

NRDC is an environmental advocacy group with over 3 million members. The FOOD+ENTERPRISE conference, which I was supporting on NRDC's behalf, is a conference at the intersection of investing and food systems.

Advisor, FOOD+ENTERPRISE (December 2014 – April 2015)

- Coordinated panel topics and speakers, led a Key Performance Indicator (KPI) working group, and facilitated day-of operations of the 2-day conference.