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Quarterly Design Team Call

07.01.26

Welcome

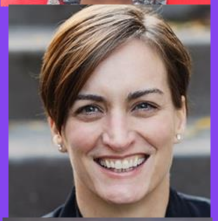
Core Team

- FRBNY Visiting Scholar Tyler Norris, MDiv. (co-convener)

- Leslie Walker, MD (co-convener)

- David Aylward, JD (chief strategy officer)

- Tiffany Manuel (chief solutions officer)



- Carley Riley, MD (chief learning officer)

- Kelly Kelleher, MD (site lead – Columbus, OH)

- Kristine McCoy, MD (lead of site coaching, model fidelity and adaptation)

Agenda

- Welcome, Team introductions, and Flow of the hour — Leslie Walker
- The IIF Opportunity — Tyler Norris
- Making Missing Markets — David Erickson
- Cincinnati IIF Demonstration — Carley Riley
- Communities
  - Columbus — Dena Chisolm, Kelly Kelleher
  - Anne Arundel County — Pam Brown
  - Upper Cumberland — Mark Farley and Richard Taylor
- Solutions Lab: Dr. T
  - Collaboration planning, Scaffolding, Flourishing Clubs/Coops — Kristine McCoy
- Finance Architecture — David Aylward and finance leaders
- Fundraising and Finance — Dr. T and Tyler
- Next steps — Tyler *et al*

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The IIF Opportunity

Making Missing Markets

Wednesday, November 18, 2026 | Federal Reserve Bank of New York

Link: https://www.newyorkfed.org/outreach-and-education/making-missing-markets

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CINCINNATI DEMONSTRATION SITE

Building the Missing Market for Flourishing: A Cross-Sector Capital Strategy

At the Federal Reserve Bank of New York • May 22, 2026

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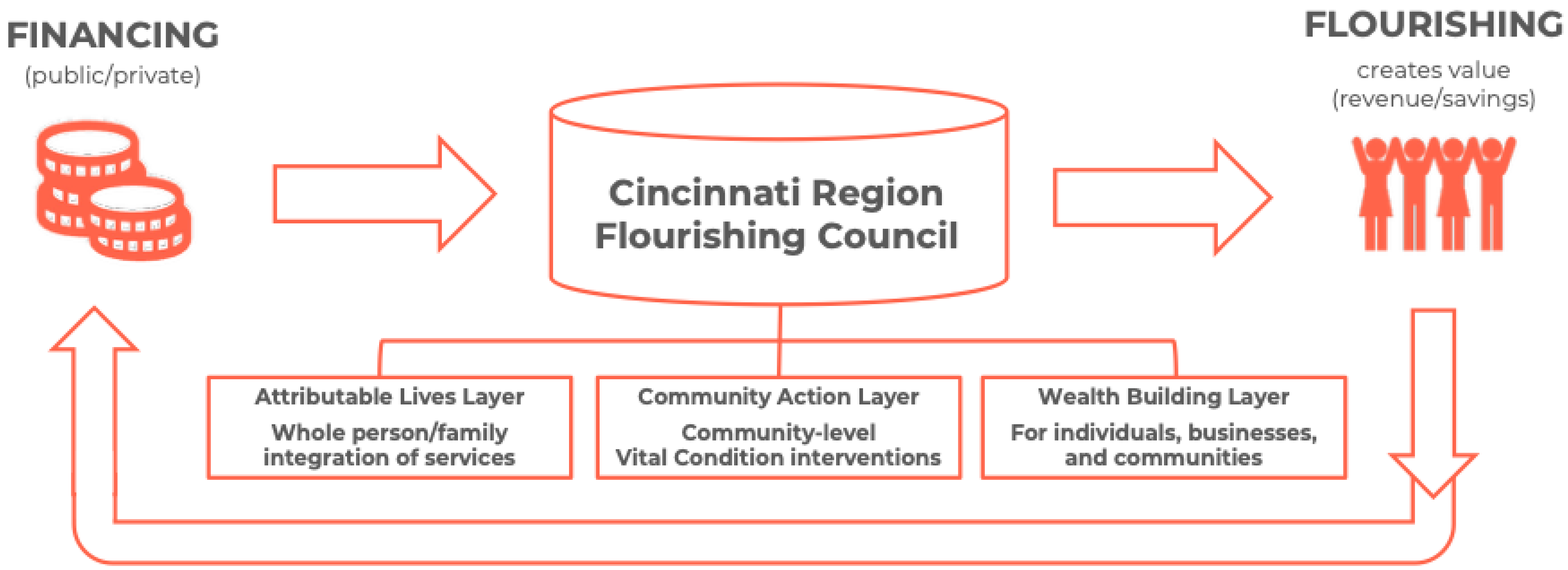
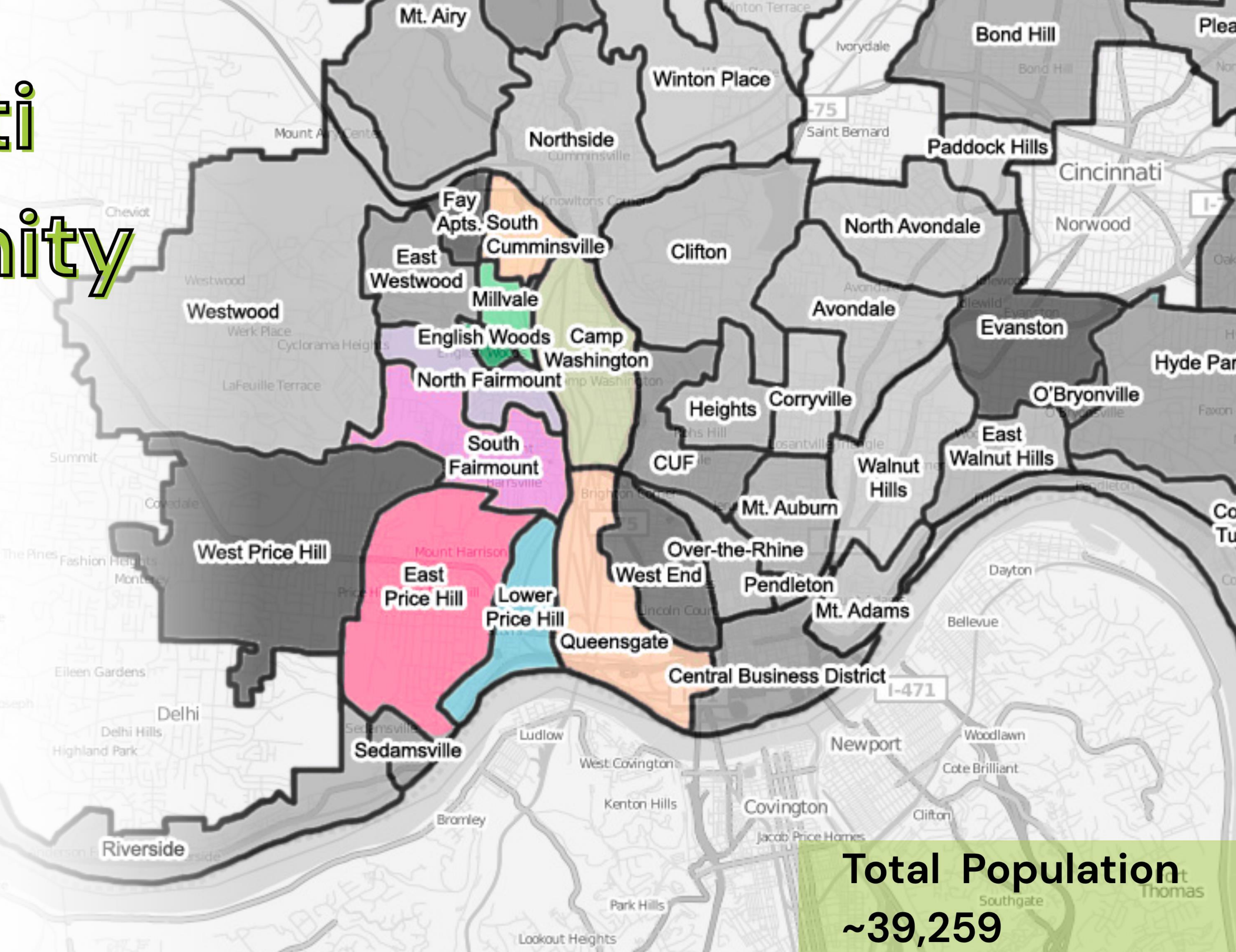
The Flourishing Model



- ★ Dynamic Learning System based on a Social Innovation Model
- ★ Create output so other communities can apply this model

Cincinnati Opportunity Corridor



Total Population
~39,259

Columbus

Columbus

- Working to apply lessons learned from Ohio InCK to risk stratification and navigation of the complex Ohio care coordination landscape.
- Exploring engagement opportunities with missing market design teams including Arts, Community Ownership, and Community Health Workers
- Participating in a Promise Neighborhood proposal that could align with a Columbus IIF delivery community
- Monitoring how federal and state policy may influence Medicaid managed care, public health, and health system financial stability

Anne Arundel

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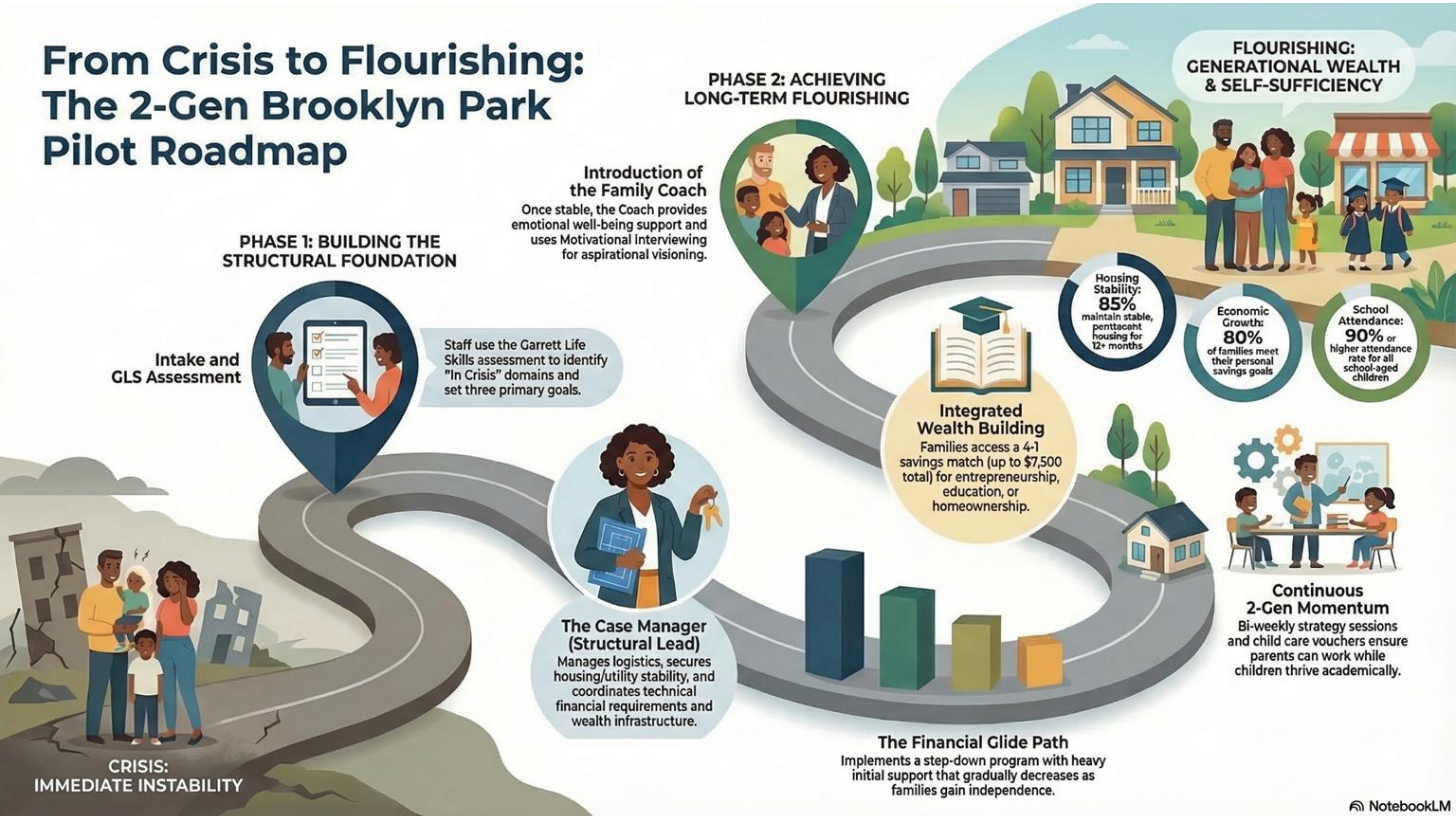
From Crisis to Flourishing: The 2-Gen Brooklyn Park Pilot Roadmap
CRISIS: IMMEDIATE INSTABILITY
PHASE 1: BUILDING THE STRUCTURAL FOUNDATION
Intake and GLS Assessment
Staff use the Garrett Life Skills assessment to identify "In Crisis" domains and set three primary goals.
The Case Manager (Structural Lead)
Manages logistics, secures housing/utility stability, and coordinates technical financial requirements and wealth infrastructure.
The Financial Glide Path
Implements a step-down program with heavy initial support that gradually decreases as families gain independence.
PHASE 2: ACHIEVING LONG-TERM FLOURISHING
Introduction of the Family Coach
Once stable, the Coach provides emotional well-being support and uses Motivational Interviewing for aspirational visioning.
Integrated Wealth Building
Families access a 4-1 savings match (up to $7,500 total) for entrepreneurship, education, or homeownership.
Continuous 2-Gen Momentum
Bi-weekly strategy sessions and child care vouchers ensure parents can work while children thrive academically.
FLOURISHING: GENERATIONAL WEALTH & SELF-SUFFICIENCY
Housing Stability: 85% maintain stable, penttacent housing for 12+ months
Economic Growth: 80% of families meet their personal savings goals
School Attendance: 90% or higher attendance rate for all school-aged children
NotebookLM

Upper Cumberland

Upper Cumberland

- **The Core Challenge**: Rural Communities face distinct hurdles
  - Large territorial boundaries dilutes resources and access.
  - A lack of localized philanthropic organizations equipped to finance essential pilot projects.
  - Reliance on government funding brings rigid mandates and regulations.

  Our Vision: “To become a national leader in helping rural children and youth flourish, creating a replicable standard for rural community development across the United States.”

  Target Sectors:
  - Healthcare & Public Health
  - Justice & Public Safety
  - Education & Child Welfare
  - Workforce & Economic Development

Upper Cumberland

- **Phase One: Planning & Infrastructure**
  - Capacity Building
    - Building on existing funding we will develop the three levels of Governance & Oversight
  - Core Staffing
    - The foundation of this localized work requires a dedicated, highly qualified team consisting of an Executive Director, Operations Manager, and a Data Specialist.
  - Evidence-based Design
    - UCHRA and TICA staff are actively researching and developing proactive, evidence-based programs designed specifically to generate measurable fiscal and social cost savings over time within Cumberland County and the Broader Upper Cumberland region.

- **Phase Two: Implementation & Scalability**
  - Funding
  - Programmatic Deployment
  - Family Flourishing Club "Success Plans" Platform Deployment
  - Neighborhood/Community Level Investments
  - Family Wealth Building

Upper Cumberland

- **The Three-Tiered Governance & Oversight**
  - **Community Level:**
    - Led by key local supporters in Cumberland County acting as the "Quarterback" entity. This tier guarantees authentic localized buy-in, coordinates grassroots support, and monitors field execution.
  - **Regional Level:**
    - Facilitated by a Regional Resource Team representing stakeholders from across the Upper Cumberland region. This tier unifies key resource agencies and regional leaders to coordinate actions, share resources, and align programming.
  - **State Level:**
    - Composed of a statewide policy and stakeholder team. This board assists the region by identifying and developing necessary legal and policy changes required to permanently implement and sustain the Investing in Flourishing model.

We are ready to begin work!

Solutions Lab

Solutions Lab

Four integrated pillars create investment-grade readiness.

The Lab builds with communities so readiness reflects community self-determination, local assets, and investor-legible evidence.
Each pillar converts aspiration into a concrete capability required by IIF's Flourishing Councils, Flourishing Clubs, Fiscal Partners, and National Network.

1

Readiness diagnostics

Assess community conditions across trust, convening, operations, measurement, governance, and finance readiness.

2

Co-design governance + outcomes

Facilitate Flourishing Council formation, outcome definition, shared savings logic, and civic compact development.

3

Flourishing Engine readiness

Prepare the technology and data layer: integration, data sharing, outcome tracking, and AI-enabled synthesis.

4

Structured peer learning

Use cohort calls, convenings, learning repositories, and site exchange to accelerate replication and build evidence.

Collaboration Planning & Scaffolding

POLICY ENVIRONMENT

- Statute
- Regulation
- Policy
- Usual Practice

- Funding—braiding, blending & other flexibilities
- Shared staffing
- Data systems procurement
- Data sharing agreements
- Data Reporting to multiple funders

COMMUNITY/NEIGHBORHOOD ENVIRONMENT

- Existing resources & service delivery models
- Existing depth of collaboration

- Filling resource gaps
  - Integrated
  - External

- Flourishing and Fiscal Metrics
  - Engaging members in selection/buy-in

- Flourishing and Fiscal Communications
  - Dynamic vs periodic
  - Internal to Member vs public

Flourishing Clubs/Coops

- **MEMBER RECRUITMENT/RETENTION**
- **MEMBER LEADERSHIP STRUCTURE**
- **STAFFING MODEL**
  - Executive
  - Companions/Navigator

MEMBER SUPPORT SYSTEMS

- Programmatic
- Financial
- Human
  - Companion/Navigator
  - Peer
- Virtual
- Crisis systems

DYNAMIC SUCCESS PLANNING

- Family
- Individual
  - Parent
  - Child/tween/adolescent

MILESTONES & CELEBRATIONS

MAINTAINING FOCUS ON FLOURISHING
while achieving the Financial KPIs that drive sustainability

Finance Architecture

Market and Finance Architecture

- Market and finance architecture committee
- Fiscal support for Flourishing Councils
  - Partnering with finance leaders of Flourishing Councils
  - Predict savings and income streams by sector
  - Convert some of streams to income: shared savings
  - Help address "free rider" challenge
  - Combine philanthropy, impact investing, and commercial capital
  - Structure investment; transitional capital stacks
  - Long term goal
- Down the road: "Flourishing Finance Impact Framework" with guidelines and standards

Model and Demonstration Finance Architecture

Model a typical community; model demonstration communities

- Budget for Flourishing Council and Layer 1 (attributable lives) Flourishing Club/Co-op
- Projected downstream beneficiary sectors, ROI amounts, and timing
- Sample shared savings agreements and auditing; projected Council revenue
- Sample financing and capital stack initially (local and national)
  - commercial lending
  - impact lending
  - anchor institution lending
  - philanthropic balance sheet supports; philanthropic loans and grants
- Sample transitional features
- Capital stacks and examples of linkages with Layer 2 (neighborhood) projects
- Long-term goals

Market Architecture Committee: Recruiting Pioneers

- Philanthropy: grants; nonrecourse loans; balance sheets for credit enhancement, loan guarantees, stop loss, etc.; philanthropic program related investments
- Impact investor (lenders)
- Local anchor institutions, especially major employers
- Commercial lenders
- Buyers of flourishing bonds
- Experts in outcomes finance in health, employment, social services, education, child welfare, justice, community development

Fundraising & Finance

Next Steps

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Open Dialogue and Q&A