

Strategies for Program-Related Investing

Vincent Lyles, M&I Community Development Corporation president

Vincent Lyles joined Marshall & Ilsley Corporation in 2006 as president of the M&I Community Development Corporation (M&I CDC). During his three years of leadership, M&I CDC's investment portfolio has grown from \$65 million to \$95.6 million. In 2006, M&I was awarded a \$75 million NMTC allocation and Lyles led the M&I team that successfully deployed the allocation. Prior to joining M&I, Vincent Lyles was the director, Public Finance, at Robert W. Baird & Co., Incorporated, Milwaukee, WI, from 1995 through 2006. Lyles serves as a corporate board member of Encore Development Group, LLC; Generation Growth Capital, Inc.; and Wisconsin Housing Preservation Corporation, Inc; and he is a member of the Greater Milwaukee Committee. Lyles' volunteer activities include: first vice chair, Goodwill of SE Wisconsin and Metro Chicago, Inc.; executive board member, Marcus Center for the Performing Arts; board member of the Next Door Foundation; and an advisory board member, City of Milwaukee Housing Trust Fund and Local Initiatives Support Corporation, Inc. He earned a bachelor's degree in history and a juris doctorate from the University of Wisconsin – Madison.

Peter Berliner, PRI Makers Network managing director

Peter Berliner is the Managing Director of the PRI Makers Network, a national association of foundations that are making Program Related Investments as a way to advance their philanthropic goals. Prior to coming to the Network, Peter served as the Program Director and Senior Program Officer at the Paul G. Allen Family Foundation. He is the former Executive Director of The Children's Alliance—a state-based public policy advocacy organization. Peter has a Masters in Public Administration from the University of Puget Sound and a Masters in Teaching from Oberlin, College. He serves on the Boards of Directors of Thrive by Five-Washington and YouthForce; and is a past-president of the Board of Directors of Philanthropy Northwest.

Kathryn Dunn, Helen Bader Foundation community investment officer

Kathryn J. Dunn is Community Investment Officer at the Helen Bader Foundation, where she manages an \$11 million Program Related Investment fund that makes loans, loan guarantees, and equity investments in projects that further the Foundation's charitable mission in Wisconsin. A Foundation employee since 1997, Dunn developed the Foundation's Economic Development program, which aims to improve business and employment opportunities in Milwaukee and has awarded more than \$20 million in grants since it was established. Dunn serves as co-chair of the Milwaukee Foreclosure Partnership, chairs the Milwaukee Area Workforce Funding Alliance, is a board member of the Public Policy Forum, is treasurer of Generation Growth Capital, LLC and serves on the Governor's Council on Workforce Investment. Dunn is a certified Economic Development Finance Professional by the National Development Council. Before joining the Foundation, she was vice president of the Wisconsin Women's Business Initiative Corporation. She has also held positions at the Milwaukee Enterprise Center and the Wisconsin Humane Society. She holds a Masters in Business Administration and a Bachelors degree in journalism, both awarded from the University of Wisconsin - Milwaukee.

Kelly Lucas, Community Foundation of Greater South Wood County CEO/president

Kelly Lucas has been President/CEO of Community Foundation of Greater South Wood County since 1996. The foundation, in partnership with the Ford Foundation, earned a 2008 Council on Foundation's Critical Impact Award for an integrated, grassroots approach to community economic development. She is the lead organizer of a new rural initiative to close the skills gap by aligning resources, strategies, capacity, policy and coordination across a regional workforce system – "Workforce Central" is one of two rural sites in the U.S. selected to participate in the National Fund for Workforce Solutions. As a "Knight Community Information Challenge" recipient, the foundation is also researching how and where local citizens get their news and creating a plan for disseminating information that is transparent, broad-reaching and easily accessible. Lucas serves on various steering committees, including the Council on Foundation's Community Leadership Team, Community Foundation Division of the Wisconsin Donors Forum and the National Taskforce on Community Leadership.