



LINCOLN INSTITUTE
OF LAND POLICY

2021–2022 Annual Report

Finding answers in land

New Possibilities in Higher Education

The Lincoln Institute of Land Policy has a long history of transforming higher education when it comes to land policy, urban planning, and municipal finance. Our commitment to higher education was a founding tenet that has led to unique partnerships with colleges, universities, and other institutions around the world. Today, our reach extends from the United States to Latin America, China, South Africa, and, most recently, Spain's National University of Distance Education (UNED).

In the past, our programming largely consisted of seminars, certificates, and one-off courses meant for working professionals, but we were not in a position to offer credit-bearing courses, let alone a master's degree.

That changed in 2021, when we joined forces with Claremont Lincoln University (CLU)—a nonprofit graduate university in California—to launch a master's in public administration (MPA) program, with courses and degree pathways designed and taught by Lincoln Institute staff, including leadership. The partnership also includes \$100,000 to help offset tuition costs for fellows, to recognize the rising costs of higher education and our ongoing commitment to equity.

Throughout the academic year, we produced and taught five all-new asynchronous courses on core Lincoln Institute topics such as urban sustainability and scenario planning. Fully leveraging the online format, we incorporated multimedia case studies, explainer videos, and professionally recorded lectures to sustain engagement and enrich content. These investments in production allowed instructors to deliver their material in new and layered ways. Dozens of students were able to learn directly from the key players in their case studies—at low cost and without the limitations of a traditional classroom.

Conversations are already underway with CLU to develop a new master's in land policy and a team-based certificate program for municipal employees. Together with the Spanish-language master's in land policy and sustainable urban development at UNED, from which the first cohort of 44 students graduated in December 2022, these offerings share knowledge from programming we have led for generations. By offering graduate-level credits and degrees, we expose those invested in our core concerns to sound theory and proven practice in the wider world while actively working in the field.

We are thrilled to open this new chapter in higher education for the Lincoln Institute—and we could not be more inspired by the possibilities ahead.



KATHRYN J. LINCOLN *Chair of the Board and CIO*

GEORGE W. McCARTHY *President and CEO*

Our Mission

The Lincoln Institute of Land Policy seeks to improve quality of life through the effective use, taxation, and stewardship of land.

A nonprofit private operating foundation, the Lincoln Institute researches and recommends creative approaches to land as a solution to economic, social, and environmental challenges. Through education, training, publications, and events, we integrate theory and practice to inform public policy decisions worldwide.



Lincoln House, the longtime home of the Lincoln Institute, was renovated over the last two years and reopened in spring 2022 for Cambridge staff. Source: © Robert Benson Photography



With locations in Cambridge, Massachusetts; Washington, DC; Phoenix, Arizona; and Beijing, China, we organize our work around the achievement of six goals: low-carbon, climate-resilient communities and regions; efficient and equitable tax systems; reduced poverty and spatial inequality; fiscally healthy communities and regions; sustainably managed land and water resources; and functional land markets and reduced informality.

Lincoln House (back view). Source: © Robert Benson Photography

Low-Carbon, Climate-Resilient Communities and Regions

We work to promote land policies to reduce and adapt to the effects of climate change.



Our Impact

- **Trained local and regional governments globally** to promote land-based finance and climate-positive planning practices as a new technical partner of the Transformative Action Program (TAP) at ICLEI
- **Partnered with the American Planning Association** on the first *Trend Report for Planners*, featuring nearly 100 emerging trends for planners to use in long-range decision making and strategic foresight processes
- **Connected land use strategies to the fight against climate change** for more than 90 leaders in the field at expert roundtables held virtually in conjunction with several major international convenings
- **Launched the new hybrid course**, “Land Policies and Climate Action in Latin American Cities,” marking the first incorporation of scenario planning into a Lincoln Institute Spanish-language course
- **Cohosted the November 2021 Beijing Forum** on “Pathways to Decarbonizing the Planet of Cities,” with Peking University, on China’s decarbonization strategies
- **Engaged 30 climate journalists** from around the world at the April 2022 Journalists Forum on the central role of land in the climate crisis, including sessions on land use conflicts, finance practices, migration, and more
- **Commissioned seven projects** that demonstrate how scenario planning can address climate change in land use strategies, such as anticipating population changes due to climate-related migration



The Consortium for Scenario Planning developed interactive virtual reality settings to allow people to “experience” wildfire and urban heat, and then choose interventions under different future scenarios.

Source: Scott Foust Studios

Top: The Lincoln Institute was admitted as a nongovernmental official observer of the United Nations Framework Convention on Climate Change (UNFCCC) at COP26, allowing participation in meetings and conferences in the UNFCCC process. Source: COP26/Flickr

Sustainably Managed Land and Water Resources

We work to promote innovative, integrated land and water conservation practices, policies, and resources.



Our Impact

- **Held a one-week “training the trainer” course on managing natural resources** and a new national spatial planning system in July 2021 at Peking University Shenzhen Graduate School for nearly 40 participants and a fall 2021 session for professionals from seven countries at the International Center for Land Policy Studies and Training’s (ICLPST) 147th Regular Session on Infrastructure Development and Planning
- **Joined more than 400 representatives** of governments, NGOs, enterprises, and the public from over 30 countries at the NGO Parallel Forum of UN COP-15 on Biodiversity in Kunming, Yunnan Province, China, in September 2021
- **Broadcast the Third Global Congress of the International Land Conservation Network (ILCN)**, held jointly with Fundació Catalunya la Pedrera and the European Land Conservation Network in December 2021, with 34 sessions featuring 137 speakers who reached more than 900 registrants in 89 countries
- **Convened the fifth annual Academics for Land Protection in New England (ALPINE) Summer Institute** at the Schoodic Institute in Winter Harbor, Maine, to immerse students and young professionals in key issues facing large landscape conservation in the United States
- **Explored opportunities for collaboration and learning** with leaders and scholars at the May 2022 Community and Conservation Land Trusts Preparatory Meeting, in advance of a planned working paper and a colloquium on key themes

A virtual team in the second Large Landscape Peer Learning Initiative (LLPLI) cohort developed long-term conservation strategies, including prescribed burns, for Canada’s Rice Lake Plains. *Source: Chelsea Marcantonio/Nature Conservancy of Canada*



Top: This farmer was compensated for not using pesticides in the Longwu Water Source protected area of China’s Zhejiang Province through a program of the LLPLI.

Reduced Poverty and Spatial Inequality

We work to increase access to the resources and opportunities that communities need to thrive.



Our Impact

- **Explored in partnership with the Urban Institute and the Future of Small Cities Institute** how smaller legacy cities use community-driven strategies to achieve climate resilience and equity in the spring 2022 “Greening America’s Small and Midsize Cities” webinar series
- **Cohosted the Housing Solutions Workshop** in fall 2021 with Abt Associates and the NYU Furman Center’s Housing Solutions Lab, convening senior leaders from five small and midsize cities and counties—like the City of Bethlehem, Pennsylvania—to share strategies that address affordability and other local challenges
- **Pursued new research in the United Kingdom**, including by Dr. Lucy Natarajan of University College London on civil society’s connection to land policy, and a June 2022 report under the direction of University of Sheffield Professor Philip McCann on the country’s most fragile local economies
- **Commissioned a series of profiles through the European Council of Spatial Planners (ECTP-CEU)** on the policies and actions needed to implement a revitalized approach to spatial planning and an equitable COVID-19 recovery across the continent
- **Concluded the first Legacy Cities Community of Practice cohort** with teams that developed projects on engaging local citizens, supporting minority-owned businesses, and transforming vacant land

A recent report on local land market regulation and the use of derelict land in the United Kingdom recommends how fragile local economies can resist economic shocks and repurpose land—for instance, by creating this public skate park in Sheffield City. Source: *Sheffield: The Outdoor City*



Top: The “Greening America’s Small and Midsize Cities” webinar series covered how communities in cities like Cincinnati, Ohio, can achieve climate resilience and equity. Source: *Shutterstock/Bryan Busovicki*

Functional Land Markets and Reduced Informality

We work to improve the distribution of benefits from public investment.



Our Impact

- **Expanded use of the pedagogical land markets game ePLUS** to six new courses and 250 participants, including in the Urban Management and Local Development Certificate Program at Universidad Comunera (UCOM) in Asunción, Paraguay, and to educators across Latin America
- **Trained 70 university professors** from 23 universities in 11 Latin American and Caribbean cities in urban economics issues through a new professional development course
- **Conducted a study** exploring how Detroit, Michigan, and other jurisdictions could benefit from an innovative approach to valuing land for property tax purposes
- **Launched a call for research proposals** in late 2021 to examine the effects of climate adaptation measures on property values and to identify strategies for communities to equitably finance and advance climate goals

Top: New research analyzed the effects of Outorga Onerosa do Direito de Construir (charges for building rights), a land-based financing instrument used in São Paulo, Brazil, over the last 20 years, to fund social housing, transportation, and other infrastructure projects.

Source: Tuca Vieira

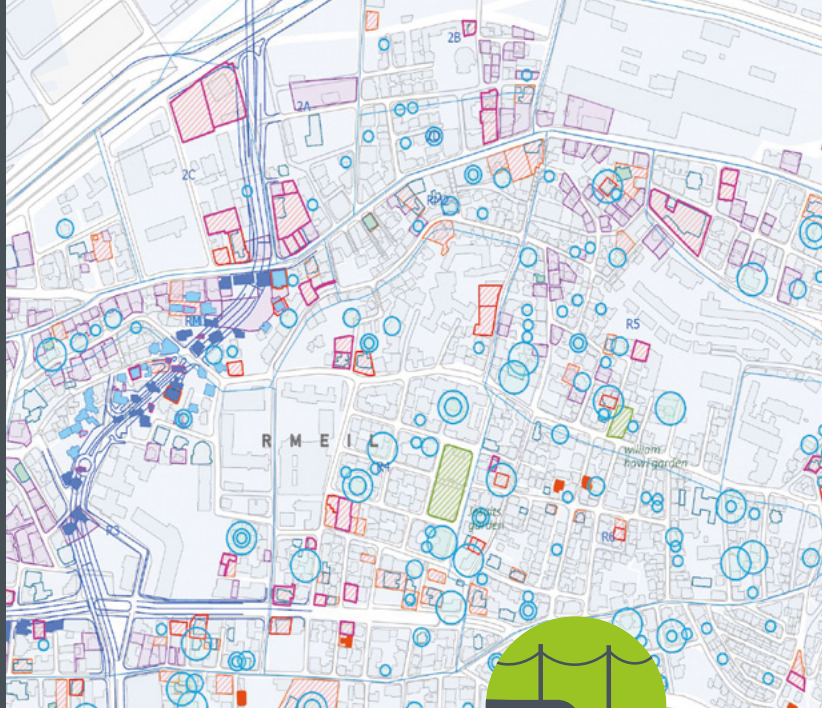


This landmark report features a comparative overview of the political and legal frameworks supporting land value capture implementation, as well as opportunities and tradeoffs.

- **Published the world's first *Global Compendium of Land Value Capture Policies*** in partnership with the Organization for Economic Cooperation and Development (OECD) and with assistance from the German Agency for International Cooperation (GIZ), showing how a range of land value capture approaches have been implemented in 37 OECD countries and 23 others
- **Completed a multiyear project analyzing land use regulations and governance** across 22 Latin American metropolitan areas, with a focus on enforcement and policies to prevent the spread of informality

Fiscally Healthy Communities and Regions

We work to enable local governments to deliver services and infrastructure and to invest for the future.



Our Impact



To watch “Land Value Capture, Explained,” visit lincolnst.edu/lvc-explained

- **Created “Land Value Capture, Explained,”** a 10-minute video that clearly illustrates how communities can recover land value increases resulting from public action with instruments that promote social equity and finance public goods
- **Launched the master’s in land policy and sustainable urban development,** in partnership with Spain’s National University of Distance Education (UNED), a one-year online program on theoretical and policy tools that also offers 10 full and 20 partial scholarships to students from Spain and Latin America

- **Celebrated the centennial** of Colombia’s use of betterment contributions with “100 años de Contribución de Mejoras en Colombia,” a series of eight virtual events with partners like the World Bank, UN-HABITAT, OECD, and more
- **Connected dozens of local and national investors to community investment opportunities** in New Orleans, Louisiana, and Cincinnati, Ohio, through the Accelerating Community Investment (ACI) initiative
- **Updated the Fiscally Standardized Cities (FiSC) database,** which provides detailed data on local government finances for over 200 of the largest U.S. cities from 1977 to the present
- **Advised South Africa’s National Treasury and the Development Action Group (DAG)** on the adoption of land value capture tools, notably inclusionary housing policies and developer charges, in the cities of Cape Town, eThekweni, and Stellenbosch

Top: The Lebanon Land Policy Dialogues, organized by the Lincoln Institute and the Beirut Urban Lab, helped multisector land experts, public agents, developers, and activists investigate links between land policy and fiscally healthy cities and communities. Source: Beirut Urban Lab

Efficient and Equitable Property Tax Systems

We work to improve revenue systems that fund vital public investment and services.



Our Impact

- **Informed a Detroit City Council report** on the application of alternative approaches to land taxation, such as taxing land at a higher rate than buildings to provide tax savings for 96 percent of homeowners, while increasing capital investment and reducing foreclosures
- **Provided expert guidance on valuation of hotels and income-sensitive relief for homeowners** to 46 judicial officials representing 19 states at the annual National Conference of State Tax Judges
- **Led a virtual seminar** for the Riga, Latvia, City Council and other public officials on proposals for market value system reform and how to maintain stable revenue despite the disruptive effects of COVID-19 on property markets and taxpayer pressure for relief
- **Hosted presentations at the 2021 annual conference of the International Association of Assessing Officers** on statistical valuation techniques in developed areas with scarce vacant land sales by Aleksandrs Elkins of the Latvian State Land Service and Risto Peltola of the National Land Survey of Finland

- **Developed a geospatial data-based tool** to assess the economic and environmental performance of localities with the China Aero Geophysical Survey and Remote Sensing Center for Land and Resources



The Peking University–Lincoln Institute Center for Urban Development and Land Policy (PLC) worked with Chinese scientists to remotely map and survey localities, such as this area between Lake Taihu and the Yangtze River, and handled color processing to portray data visually.

Top: Lincoln Institute experts spoke about targeted methods of property tax relief for homeowners with presentations to the Idaho Property Tax Symposium in Boise (pictured) and to the Montana Revenue Interim Committee in Helena. *Source: Getty Images*



Spotlight on Our Centers



BABBITT CENTER
FOR LAND AND WATER POLICY

Babbitt Center for Land and Water Policy

Increasing water shortages in the Colorado River Basin have amplified the need for the Babbitt Center for Land and Water Policy's continuing work at the nexus of water management and land use planning. This year, the Center expanded its efforts to protect Tribal Communities' water interests and has begun assisting agricultural communities in achieving water-resilient futures.

The Babbitt Center serves as the manager, funder, and fiscal agent for the Water and Tribes Initiative, and, in summer 2021, we established with partner funders a Native American Graduate Fellowship Program in Land and Water Management, which established 16 summer internships and four scholarships for Native American students.

The Babbitt Center helps agricultural communities in the American West to achieve water-resilient futures. Source: Getty Images

The Growing Water Smart Program expanded its reach throughout 2022. In April, Growing Water Smart convened sister cities along the U.S.–Mexico border to discuss cross-sectoral land and water collaboration opportunities. The program also hosted its first agricultural workshop in the San Luis Valley region of Colorado in June, released two *Communities on Course* videos featuring program alumni cities, and launched a new training cohort of five Arizona communities. In addition, Growing Water Smart partnered with the State of Utah Department of Natural Resources, Western Resource Advocates, and Utah State University's Center for Water-Efficient Landscaping to bring the program to Utah.

With the American Water Resources Association (AWRA), the Babbitt Center cohosted the July 2021 "Connecting Land and Water for Healthy Communities," a conference accompanied by a special edition of *IMPACT Magazine*, a featured collection in AWRA's peer-reviewed journal, and a call to action to the profession and policy makers. *Integrating Land Use and Water Management: Planning and Practice* by Erin Rugland also marked the Babbitt Center's first Policy Focus Report, highlighting best practices to improve coordination between land planning and water resource management.

Visit babbittcenter.org

Top: Water shortages throughout the Colorado River Basin have amplified the need for new policy and planning in many communities. Source: Getty Images



Center for
Community
Investment

Center for Community Investment (CCI)

The Center for Community Investment (CCI) celebrated a major milestone in 2022, marking half a decade of helping local leaders unlock the investment they need for their communities to thrive.

Alongside this anniversary, CCI introduced several new programs. Connecting Capital and Community (3C), launched in 2021 and funded by JPMorgan Chase, takes aim at racial inequities in the housing ecosystem by expanding homeownership for Black and Latinx homeowners and preserving housing affordability in six U.S. cities. The Health Partner Investment Action Lab (HPIAL), a partnership with NeighborWorks America, assists community development organizations and health institutions to collaborate on upstream investments in affordable housing. With the National Council of State Housing Agencies, CCI also created the Healthy Housing, Healthy Communities (H3C) initiative to support state housing finance agencies in working with hospitals and health plans to finance affordable housing.

Visit centerforcommunityinvestment.org



A result of CCI's Connect Capital program, the Invest Appalachia project has enabled an array of downtown revitalization projects, including public art like this mural in Hazard, Kentucky. Source: *Foundation for Appalachian Kentucky*

The Purple Line Housing Action team and partner Kaiser Permanente, participants in CCI's Accelerating Investments for Healthy Communities (AIHC) program, notched a major victory when they helped Prince George's County, Maryland, implement its Right of First Refusal, which had never been used despite being law since 2013. As a result, the county was able to preserve the affordability of four properties totaling hundreds of units in the face of potential displacement spurred by a major investment in the transit line.

Top: CCI's work with Invest Appalachia has accelerated the distribution of local foods into underserved Appalachian Ohio communities. Source: *Rural Action*

Spotlight on Our Centers



CENTER FOR
**GEOSPATIAL
SOLUTIONS**

Center for Geospatial Solutions (CGS)

The Center for Geospatial Solutions (CGS) continues to apply its cutting-edge geospatial technology and data analytics to support government, nonprofit, and corporate partners across North America.

In spring 2022, CGS launched the Internet of Water Initiative, which aims to modernize existing systems for managing, coordinating, and sharing water data among government agencies and private organizations. In partnership with the U.S. Department of Energy's Oak Ridge National Laboratory, the Internet of Water team at CGS is examining opportunities for developing sustainable, small hydropower and nonpowered dams that can improve climate and energy resilience.



Oak Ridge National Laboratory partnered with CGS and its Internet of Water Initiative for energy resilience through sustainable hydropower.
Source: Courtesy of Oak Ridge National Laboratory, U.S. Dept. of Energy

The Nature Conservancy of Canada (NCC), the country's largest conservation and restoration organization, engaged CGS in November 2021 to build a new data model and integrated technology infrastructure to dramatically improve operational efficiencies that will enable more effective land management.

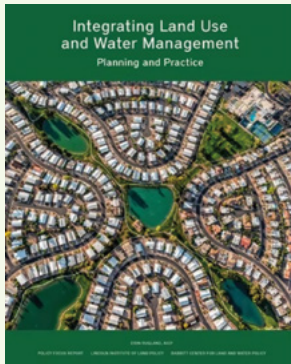
Closer to home, CGS created the Colorado River Basin GIS Data Portal, which informed the Babbitt Center's *Hardest Working River in the West* StoryMap. CGS is also developing the Geospatial Open Data Portal, which houses 650-plus geospatial data sets, maps, and applications aligned with the Lincoln Institute's goals, centers, and programs.

CGS has also begun working with multiple partners—from local land trusts to federal agencies—to create an interactive map and a new mapping framework related to the Biden Administration's America the Beautiful 30x30 conservation initiative. Stakeholders can use the mapping framework to quickly weigh different benefits and impacts of conserving certain landscapes, and CGS has facilitated ongoing dialogue toward identifying “consensus landscapes” to prioritize for conservation. Together, partners are now better able to focus their collective conservation efforts to conserve 30 percent of America's lands and waters by 2030.

Visit cgs.earth

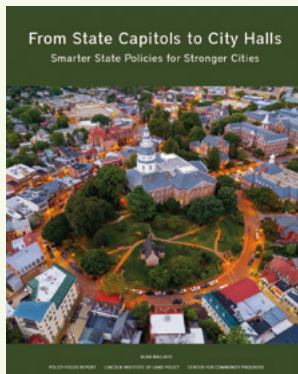
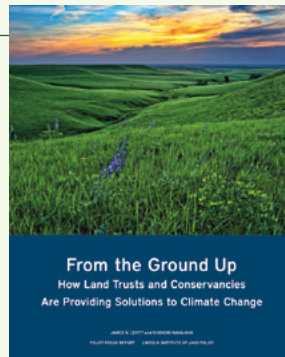
Top: CGS created unique new maps to identify potential “consensus landscapes” that stakeholders could agree merited conservation through the Biden Administration's America the Beautiful 30x30 conservation initiative, which aims to conserve 30 percent of American's lands and waters by 2030.

New Publications



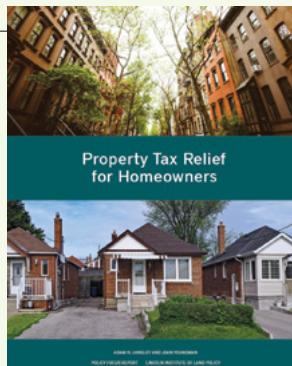
Integrating Land Use and Water Management: Planning and Practice by Erin Rugland, plus its accompanying policy brief, introduces readers to best management practices that enable local governments and water providers to integrate the two systems, supported by case studies from several U.S. communities. **FEBRUARY 2022**

From the Ground Up: How Land Trusts Are Responding to Climate Change by Jim Levitt and Chandni Navalkha offers examples of successful initiatives along with guidance for private and public sector stakeholders to boost civic organizations' implementing natural climate solutions. **FEBRUARY 2022**



From State Capitols to City Halls: Smarter State Policies for Stronger Cities by Alan Mallach details the complex relationship between state policy and local revitalization and shows how policy makers can enable more equitable, healthier cities with decent education, jobs, housing, and healthcare. **MARCH 2022**

Property Tax Relief for Homeowners and the policy brief by Adam H. Langley and Joan Youngman are the go-to resources for information about the options that U.S. states have to provide property tax relief for homeowners—without compromising municipal fiscal health or services. **NOVEMBER 2021**



MARCH 2022



Megaregions and America's Future by Robert D. Yaro, Ming Zhang, and Frederick R. Steiner provides updated demographic, economic, and environmental information on U.S. megaregions for urban and regional planners, policy makers, academics, and decision makers in transportation, environmental protection, and development agencies.

DECEMBER 2021



Infrastructure Economics and Policy: International Perspectives, edited by José A. Gómez-Ibáñez and Zhi Liu, compares infrastructure across countries and sectors with chapters by leading international academics and practitioners on the latest approaches to policy, implementation, and finance.

Visit www.lincolnst.edu/publications.

Our books are sold by Columbia University Press and distributed by Ingram Publishing Services.

Partnerships

Thanks to our supporters who have helped us **expand our reach and impact** during the past year:

1772 Foundation, Inc.

Lisa Cashdan and Peter Stein

JPMorgan Chase & Co.

Enterprise Community Partners, Inc.

The F.B. Heron Foundation

Highstead Foundation

Robert Wood Johnson Foundation

The Kresge Foundation

NeighborWorks America

The California Endowment

Weeden Foundation

The Funders of the Water and Tribes Initiative

Our Anonymous Funders

Financial Summary

Fiscal Year July 1, 2020–June 30, 2021, and Fiscal Year July 1, 2021–June 30, 2022*

Assets			Revenues		
	FY2021	FY2022		FY2021	FY2022
Operating Cash	1,054	1,800	Net Investment Revenue	203,331	(111,401)
Investments	746,990	608,939	Gifts/Grants Received	4,981	8,758
Buildings and Equipment	26,814	35,277	Publications and Other Revenue	423	870
Other	27	32			
TOTAL ASSETS:	774,885	646,048	TOTAL REVENUE:	208,735	(101,773)
Liabilities			Expenses		
Line of Credit for Capital Improvements	30,683	38,826	Program	23,463	26,635
Deferred Excise Tax	3,731	1,610	Operations and Administration	4,917	4,841
			Fundraising	347	611
			Investment Oversight	227	998
			Lease Termination Fee	900	–
TOTAL LIABILITIES:	34,414	40,435	TOTAL EXPENSES:	29,854	33,085
Net Assets			Change in Net Assets for the Year		
	740,471	605,613		178,881	(134,858)
Total Liabilities and Net Assets					
	774,885	646,048	Net Assets, Beginning of Year	561,589	740,471
			Net Assets, End of Year	740,471	605,613

* Numbers rounded to thousands

Praise from Our Partners

"The Lincoln Institute introduced deliberative dialogues that for the first time allowed Lebanese stakeholders with divergent worldviews to sit around the same table and build a collective understanding of current and future land challenges, reflect on existing practices, and speak of feasible alternatives."

— **Mona Fawaz, Professor in Urban Studies and Planning,
American University of Beirut**

"The Housing Solutions Lab will have long-lasting benefits for our community, and the guidance on best practices and policies from the Lincoln Institute have helped us remove barriers and increase equitable access to housing opportunities for our residents."

— **Jacob Gonzalez, Planning Manager for Community and
Economic Development, City of Pasco, Washington**

"The UNED-Lincoln Institute master's degree program is already generating real impact among a multidisciplinary cohort from 10 countries. The constant interchange of knowledge and experience will be felt across the land use law, climate change, and public participation arenas."

— **Marta Lora-Tamayo Vallvé, Professor of Administrative Law,
Universidad Nacional de Educación a Distancia (UNED)**

Cover: The second Large Landscape Peer Learning Initiative (LLPLI) cohort includes a virtual team from the Chesapeake Bay Watershed, where protecting water quality and climate resilience are paramount concerns. *Source: NOAA/USGS*

Design: Studio Rainwater

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**LINCOLN INSTITUTE
OF LAND POLICY**

