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# Building an Ownership Lens Investing Movement

## Summary Proposal – July 2025

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### Background and Context

Over the past 18 months, a wave of conferences and idea forums on employee, community, and individual ownership of assets has surfaced with one consistent refrain: “We need a home base to keep working together.” Participants from dozens of gatherings focused on wealth building for workers and communities have asked for an organizing hub that links efforts like narrative-building, impact metrics, policy, and awareness under a single roof.<sup>1</sup>

These events have already attracted investors, lenders, businesses, labor groups, academics, and nonprofits that care about expanding ownership of enterprises and real assets. Yet, activity remains siloed. For instance, employee stock ownership plan (ESOP) advocates brainstorm in one corner, cooperative financiers in another, employee ownership trusts in another, community-ownership champions in yet other spaces, and those focused on individual ownership of assets like homes in another. Convening feedback underscores that pulling these segments into one “big tent” is essential to match the momentum—and eventual scale—achieved by earlier field-building efforts such as impact investing.

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<sup>1</sup> Examples include: 2023 Shared Ownership of Enterprise convening (PDI, Rockefeller, Ford); Employee Ownership Ideas Forums (2023-2025); Assemble100 (Aspen, Bridgespan/Integrated Purpose, Gary Community Ventures); Neighborhood Economics convenings (2023-2025); National Center for Employee Ownership (NCEO) Annual Conference (2024-2025); Ownership Capital Lab webinars; Ownership Economy Summit; Rutgers’ Annual Kelso Workshop; SOCAP23/24; Wealth Solutions Lab (Aspen, Bridgespan).

These examples (a) summarize practitioner issues and (b) serve as evidence regarding the need for such an initiative as described in this proposal: [“Advancing Financing Initiatives for Shared Ownership of Enterprise” - Takeaways report](#) (November 2, 2023) and [ASSEMBLE100 Report: Ownership Investing](#) (September, 2024).



A set of pain points have been communicated across recent convenings which have included the following gaps: lacking a common through-line across actors' strategies and theories of change; a coordinated communication/narrative; consensus around impact standards; opportunity to learn from one another and identify cross-learnings between shared ownership models. Other issues conveyed included duplication of effort from siloed work; power imbalances across actors; and internal conflicts among major actors in the field.

The result is that capital flows to shared-ownership ventures remain a fraction of what is possible, and households locked out of asset ownership continue to fall behind.

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Quotes from community members:

- *"There is a community that wants to form and continue working together."*
- *"We are at a moment in time and need more collaboration and field building to really take this work to scale."*
- *"There is a lot of energy to collaborate, but the range of actors in the space makes it very difficult to create silver bullet solutions. Collaboration likely needs to have different segments of the market that operate both independently but also coordinated."*

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## Proposed Solution: The OLIM Ecosystem Platform

Over 2024, an Informal Interim Steering Committee (IISC) has thus taken shape toward developing a functional platform to support a diverse, coordinated, and committed network that advances ownership lens investing, complete with a strong communications and outreach strategy.<sup>2</sup> A first phase of this initiative would focus on North America, with potential for international chapters in the longer-term.

OLIM—the Ownership Lens Investing Movement—is a practitioner-led platform designed to knit the field together and dramatically grow investment that broadens ownership and closes wealth gaps. Three core design principles guide the platform:

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<sup>2</sup> The IISC currently includes the following organizations. Upon launch of the OLIM Platform, members of the community would work together to formalize a democratic co-created governance structure: 1worker1vote, Center for Community Investment, CommonShare, Exit to Community (E2C), Gary Community Ventures, Michael Golden, National Center for Employee Ownership, Ownership Capital Lab, Purpose Trust Ownership Network, Rutgers Institute for the Study of Employee Ownership and Profit Sharing, StreetWell, The Democracy at Work Institute, The Aspen Institute, The Predistribution Initiative (PDI), Transform Finance, WaterBottle Cooperative.



Principle	How it Works	Why it Matters
<b>Bottom-up community of practice</b>	Open-access virtual hub plus regular convenings where investors, advocates, researchers and entrepreneurs share real-time questions and co-create answers	Encourages continuous learning, peer support and transparent problem-solving
<b>Action-oriented working groups</b>	Task-forces—in areas such as narrative, impact standards, policy, structure design and more—identify gaps and potentially launch joint initiatives	Turns ideas into tangible products (e.g., messaging toolkits, metrics frameworks) that the whole field can use
<b>Lightweight shared infrastructure</b>	A Network Coordinator plus lean digital tools keep the ecosystem map current, stitch insights across groups and host quarterly cross-group dialogues	Provides neutral facilitation without creating another heavyweight institution; resources flow to collaboration, not overhead

## Mission, Vision, and Strategic Focus

- **Mission:** *We aim to fuel measurable growth of shared ownership by integrating it as a priority investment strategy that asset owners and allocators, asset managers and lenders seek out across asset classes.*
- **Vision:** *Our vision is that significant growth in the financing of shared ownership measurably addresses our societal wealth gaps by increasing the household balance sheets of historically marginalized workers and families.*
- **Strategic Focus:** *We convene practitioners and host actionable working groups to realize a goal of 25% of all capital being allocated to support shared ownership, including growing the proportion of all sales of privately-held businesses in the U.S. We recognize that increasing worker and community voice strengthens outcomes for all stakeholders.*

## Activities and Structure

At the heart of the platform are **working groups** that serve as the engines of learning and action focused on collective action needs. Each group focuses on a core area—such as narrative



development or co-creation of impact standards—and is led by dedicated co-stewards. These groups function as collaborative problem-solving spaces where participants map current activity, identify gaps, and, as relevant, design joint initiatives aligned to field needs. The community will also convene periodically through cross-group dialogues and shared events, ensuring that insights and innovations are connected across topic areas and inform a broader field agenda. Other working groups have been proposed by members of the community, and may be launched after this initial set. Proposed ideas include: investment structures, public policy, research, and academic curricula.

The platform will be supported by a **Network Coordinator**, a dedicated staff role responsible for maintaining the shared digital infrastructure, managing coordination across working groups, and facilitating quarterly steering committee sessions to synthesize cross-cutting themes. This person will also oversee the initial **ecosystem mapping project**, aligning activities across working groups and ensuring visibility into the landscape of organizations, strategies, and relationships. Their work will be essential to weaving together the community’s decentralized efforts into a cohesive movement infrastructure. In addition to collaboration and mapping, the platform will be a center for learning, even for new entrants, thus adding to members’ efforts in bringing more capital into the space.

To ensure the platform remains nimble and grounded in field needs, **direct funding will support only the shared infrastructure** (i.e., the Network Coordinator, stipends for working group leads, and digital infrastructure). While the platform will maintain relationships with funders and share field-level insights, it is not designed to aggregate capital. Rather, individual organizations will continue to pursue fundraising for their respective projects—whether standalone or in service of broader field outcomes. This approach preserves the platform’s role as a neutral convening body and reinforces its function as a learning commons for all who seek to advance ownership-centered investing.

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## Initial Targets

- Solidify the goal of catalyzing the allocation of 25 percent of all newly deployed capital in relevant private markets toward shared-ownership models.
- Establish impact standards and a unified narrative that can be adopted by investors, policymakers and media.
- Launch in the United States, then expand the practitioner network nationwide, with potential for future chapters abroad as momentum grows.



In its first 12 months, OLIM will track:

- Growth in the number and diversity of committed members across investor, enterprise and community segments.
- Launch and progress of working groups against clear deliverables (e.g., draft impact-metric set; narrative playbook).
- Uptake of platform resources by newcomers entering the ownership-investment space.
- Media mentions, and stakeholder surveys confirming the platform adds material value to their efforts.

Longer term, OLIM will measure the multiple of capital mobilized, policy wins influenced, and improvements in household balance sheets linked to ownership-expanding investments.

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### What This Means for a Wider Audience

- *For investors* → Clear and consistent narrative, a center for resources on ownership lens investing across asset classes and models, and credible impact data lower the barriers to placing capital in ownership-expanding vehicles.
  - *For entrepreneurs & workers* → Simplified pathways to financing for employee, community or trust-based ownership increase resilience and wealth-building potential.
  - *For communities & policymakers* → A unified voice and data-backed evidence base supports policy reforms that make broad-based ownership easier to scale through financing.
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### Call to Action

Momentum is building, but collaboration infrastructure is a missing ingredient. By participating in, championing or funding the OLIM Ecosystem Platform, stakeholders can participate in a coordinated movement capable of shifting billions toward equitable ownership—and, in turn, toward a more inclusive economy for all.