

**CFLeads**

Community Foundations  
Leading Change



# CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)  
Meeting #1  
January 28, 2025

## Welcome!



**CFLeads**

Community Foundations  
Leading Change

# Congratulations!



**Community  
Foundation  
Boulder County**



**Greater Milwaukee  
FOUNDATION**  
*greater together*



Fairfield County's  
**Community  
Foundation**

TOGETHER WE THRIVE

THE  
WINSTON-SALEM  
FOUNDATION



**WICHITA**  
FOUNDATION



the  
**Yellow Springs  
Community  
Foundation**



Foundation for  
**Appalachian  
Kentucky**



**THE  
PITTSBURGH  
FOUNDATION**

For a greater Pittsburgh.

**KALAMAZOO  
Community  
FOUNDATION**





Community Foundation Serving Boulder County

Wichita Foundation

Kalamazoo Community Foundation

Fairfield County's Community Foundation

The Winston-Salem Foundation

## Day One Agenda

---

1. Introductions
2. Community Leadership
3. Urban Institute
4. Demographic Profile Presentations #1
5. TheCaseMade
6. Demographic Profile Presentations #2
7. Adjourn

Dr. Leonard M. Brock, Vice  
President for Learning and  
Impact, CFLeads

## Meeting Objectives

---

**Objective #1:** Develop peer connections to advance greater economic mobility across communities.

**Objective #2:** Expand understanding of community leadership practices.

**Objective #3:** Deepen understanding of local economic mobility strategies.

## Meeting Norms

---

1. Please keep cell phones muted.
2. Take space and make space.
3. Listen carefully- everyone is a learner and everyone is a teacher.
4. Share lessons but respect confidentiality
5. Have fun! Take care of yourselves and each other.
6. Be comfortable with being uncomfortable.
7. Anything else?



# About CFLeads

## ABOUT CFLEADS

---

**CFLeads is the country's national network of community foundations committed to community leadership.**

Through CFLeads, hundreds of community foundations from across the U.S. come together to strengthen their community leadership muscle, share field innovations, and tackle the key issues of our time.

### MISSION

Our mission is to help community foundations build strong communities by advancing effective practices, sharing knowledge and galvanizing action on critical issues of our time.

### VISION

We envision a world in which community foundations are vital partners in building communities where all residents are prosperous, healthy, and secure.



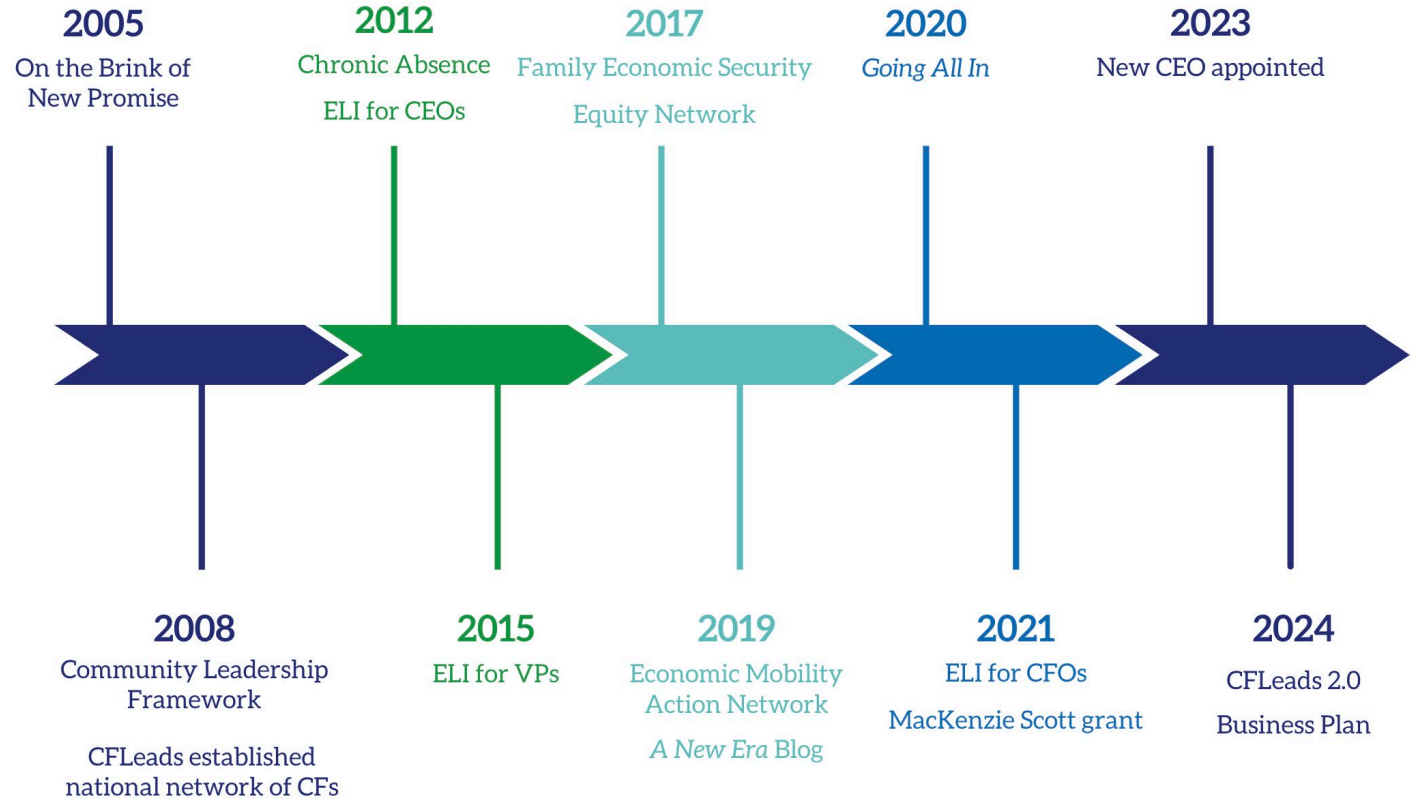
# HISTORY

---

## *On the Brink of New Promise – 2005*

Recommended three shifts:

1. Institution to community
2. Financial assets to LT leadership
3. Competitive independence to coordinated impact



CFLeads is the country's **national network of community foundations** committed to **community leadership**.

Through CFLeads, hundreds of community foundations from across the U.S. come together to:

**strengthen their community leadership muscle,**

**share field innovations, and**

**tackle the key issues of our time.**



# CFLeads

---

Community Foundations  
Leading Change

**14 Innovative Board of Directors**

**14 Talented Staff Members**

**70+ Committed Community Foundation Investors**

# CFLEADS BOARD OF DIRECTORS

---



**ISAIAH OLIVER, CHAIR**  
President  
The Community Foundation  
for Northeast Florida



**ROSE BRADSHAW,  
VICE-CHAIR**  
President & CEO  
North Texas Community  
Foundation



**SIMEON BANISTER**  
President & CEO  
Rochester Area Community  
Foundation



**DAVID CICILLINE**  
President & CEO  
Rhode Island Foundation



**STUART COMSTOCK-  
GAY**  
President & CEO  
Delaware Community  
Foundation



**EILEEN CONNOLLY-  
KEESLER**  
President  
Community Foundation of  
Collier County



**MICHELLE FOSTER**  
President and CEO  
The Greater Kanawha Valley  
Foundation



**ELLEN GILLIGAN**  
Former President & CEO  
Greater Milwaukee  
Foundation



**FELECIA L. LUCKY,  
SECRETARY**  
President  
Black Belt Community  
Foundation



**SHELLY O'QUINN**  
CEO  
Innovia Foundation



**RANDY ROYSTER,  
TREASURER**  
President and CEO  
Albuquerque Community  
Foundation



**LISA SCHROEDER**  
President and CEO  
The Pittsburgh Foundation



**TONIA WELLONS**  
President and CEO  
Greater Washington  
Community Foundation

# CFLEADS STAFF

---

**CFLeads**

Community Foundations  
Leading Change





# Economic Mobility

Amanda Holm Hartigan,  
Project Director, CFLeds

# CFLeads Economic Mobility Team



**Dr. Leonard M. Brock** (he/him)

*Vice President for Learning and Impact*

[lbrock@cfleads.org](mailto:lbrock@cfleads.org)

617-226-9903

Contact for any team questions or changes and TA suggestions



**Amanda Hartigan** (she/her)

*Project Director*

[ahartigan@cfleads.org](mailto:ahartigan@cfleads.org)

617-226-9913

Contact for homework and any general EMAN questions



**Enida Jeteric** (she/her)

*Program Manager*

[ejeteric@cfleads.org](mailto:ejeteric@cfleads.org)

617-226-9906

Contact for logistical questions including meeting travel and financial aid



**Kellie Alexander** (she/her)

*Network Engagement Manager*

[kalexander@cfleads.org](mailto:kalexander@cfleads.org)

617-226-9914

Contact for My Community or communication questions

# ECONOMIC MOBILITY IS A PRIORITY FOR COMMUNITY FOUNDATIONS

We know from our recently concluded **2023 *Issues of Interest*** survey that economic mobility remains a top priority for community foundations.

In fact, we saw an **18- percentage point increase** in community foundations that are ***very*** or ***extremely*** interested in economic mobility compared to our 2019 results.

In 2023, **48 community foundations were interested in general economic mobility** (84% of respondents, which was an 18-percentage point increase since 2019 (66%).

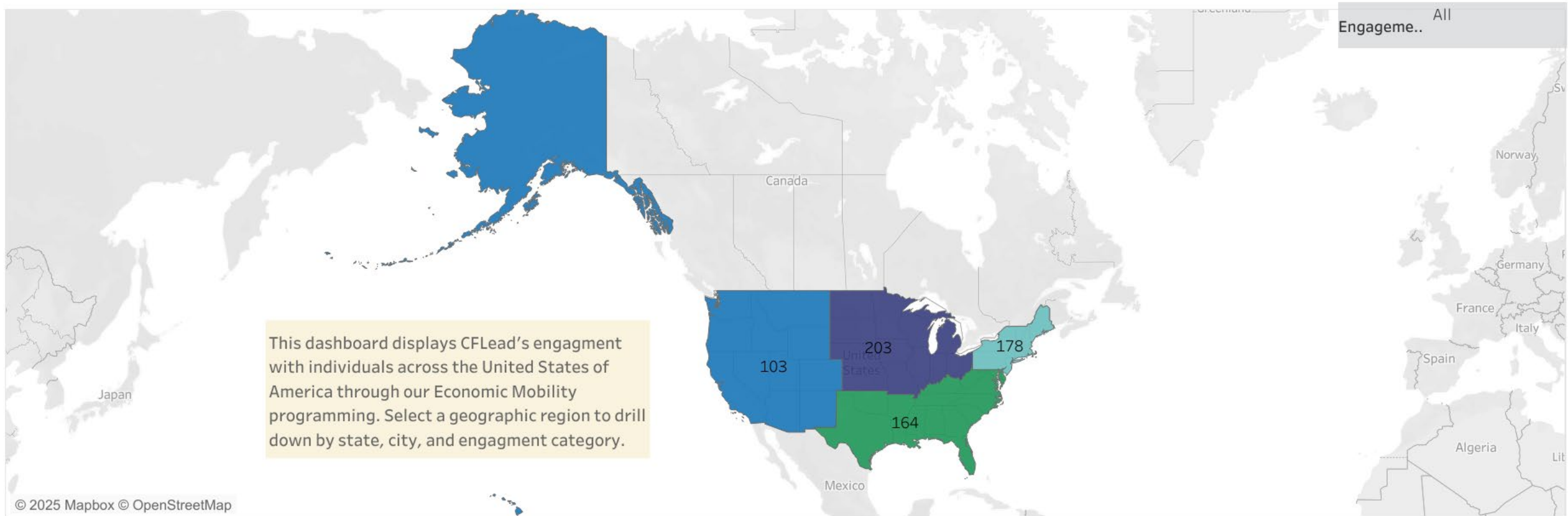


## FINDINGS & OUTREACH ---

In the summer of 2023, we **engaged** with community foundations from across the country to gather relevant information regarding the **challenges and needs** of the field re: economic mobility. Through interview-style discussions with **over 40** community foundations, we were able to identify several key themes that will help inform our **Gates funded** economic mobility programming for 2024 and 2025.

# 2024 INSIGHTS

## 2024 Program Engagements by Region



# Introduction Activity

Amanda Holm Hartigan,  
Project Director, CFLeads

# Community Leadership

Meghan Cummings.  
Senior Vice President, Strategy,  
Impact & Operations, CFLeads



# **What is Community Leadership?**

Impact  $\neq$  Assets

Impact = Better Community  
Outcomes



## COMMUNITY LEADERSHIP ---

The community foundation is a **community partner** that creates a **better future for all** by pursuing the community's greatest opportunities and addressing the **most critical challenges**, inclusively uniting **people, institutions and resources** from throughout the community, and producing significant, widely shared and lasting **results**.



# Community Leadership Compass





The image features a solid dark blue background. In the top-left corner, there is a yellow triangle pointing downwards, partially overlapping a larger orange triangle pointing downwards. In the bottom-right corner, there is a yellow triangle pointing upwards, partially overlapping a larger orange triangle pointing upwards. The text "The Five Competencies" is centered in the middle of the page in a white, bold, sans-serif font.

# The Five Competencies

## ELEMENTS OF EFFECTIVE COMMUNITY LEADERSHIP

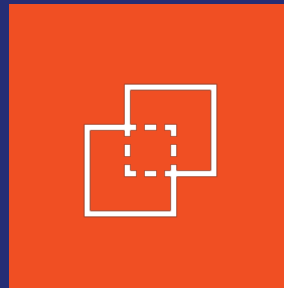
---



**Engaging Residents**  
in envisioning  
and shaping  
community



Commissioning,  
sharing, using  
**Local Data**



Working  
**Across Sectors**



Shaping  
**Policies and Systems**



**Marshalling Resources**  
from public and  
private sources

## COMMUNITY LEADERSHIP BY A COMMUNITY FOUNDATION

### DEFINITION AND OUTCOME

The community foundation is a community partner that creates a better future for all by pursuing the community's greatest opportunities and addressing the most critical challenges, inclusively uniting people, institutions and resources from throughout the community, and producing significant, widely shared and lasting results.

### FIRST-LEVEL BUILDING BLOCKS



**CFLeads**

Community Foundations  
Leading Change

**15 Minute Break:**  
**Grab some snacks!**



*Sign up for our newsletter*

# Urban Institute

Will Engelhardt and  
Lily Robin

# Demographic Profile Presentations, Part 1

## Demographic Profile Presentations ---

### **Presenters focus on:**

1. Learning Challenge
2. Target Populations
3. Theory of Change
4. Strategic Objectives

### **Audience:**

1. Add questions or comments to the Google Form on next slide

## Question Submission

Please be sure to include:

- Your name
- Your Community Foundation
- Presenter's Community Foundation

\*Link to this form can also be found on  
**My Community**





## Demographic Profile Presentations

---

1. Community Foundation Boulder County
2. Fairfield County's Community Foundation, Inc.
3. Foundation for Appalachian Kentucky
4. Greater Milwaukee Foundation
5. Kalamazoo Community Foundation

*10 minutes for each team's presentation*

*Audience: please submit your questions or comments on the google form.  
CFLeads will collect them after each presentation to share with the  
presenting CF following review.*

# Networking Lunch

*Broadway Terrace - Second Floor*



*Sign up for our newsletter*

# DrT and TheCaseMade

Dr. Tiffany Manuel,  
TheCaseMade

# Networking Activity

Amanda Holm Hartigan,  
Project Director, CFLeds

# 15 Minute Break



*Sign up for our newsletter*

# Demographic Profile Presentations, Part 2

## Demographic Profile Presentations ---

### **Presenters focus on:**

1. Learning Challenge
2. Target Populations
3. Theory of Change
4. Strategic Objectives

### **Audience:**

1. Write your questions or comments on the index cards

## Demographic Profile Presentations

---

1. The Pittsburgh Foundation
2. The Winston-Salem Foundation
3. Wichita Foundation
4. Yellow Springs Community Foundation

*10 minutes for each team's presentation*

*Audience: please submit your questions or comments on the google form.  
CFLeads will collect them after each presentation to share with the  
presenting CF following review.*



# Day One Closing Remarks

Kellie Alexander,  
Network Engagement  
Manager, CFLeds

## Closing Action Items

---

1. Review Demographic Profile Questions
2. Consider your Learning Challenge and identify your question for Peer Coaching
3. San Diego Dinner Recommendations on My Community

## Day Two ---

1. Bring your nametag
2. Breakfast starts at 8am on the Broadway Terrace
3. Day Two will focus on Peer Coaching

**CFLeads**

Community Foundations  
Leading Change



# CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)  
Meeting #1, Day One  
January 28, 2025

# Thank you!



**CFLeads**

Community Foundations  
Leading Change



# CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)  
Meeting #1, Day Two  
January 29, 2025

## Welcome!



## Meeting Objectives

---

**Objective #1:** Develop peer connections to advance greater economic mobility across communities.

**Objective #2:** Expand understanding of community leadership practices.

**Objective #3:** Deepen understanding of local economic mobility strategies.

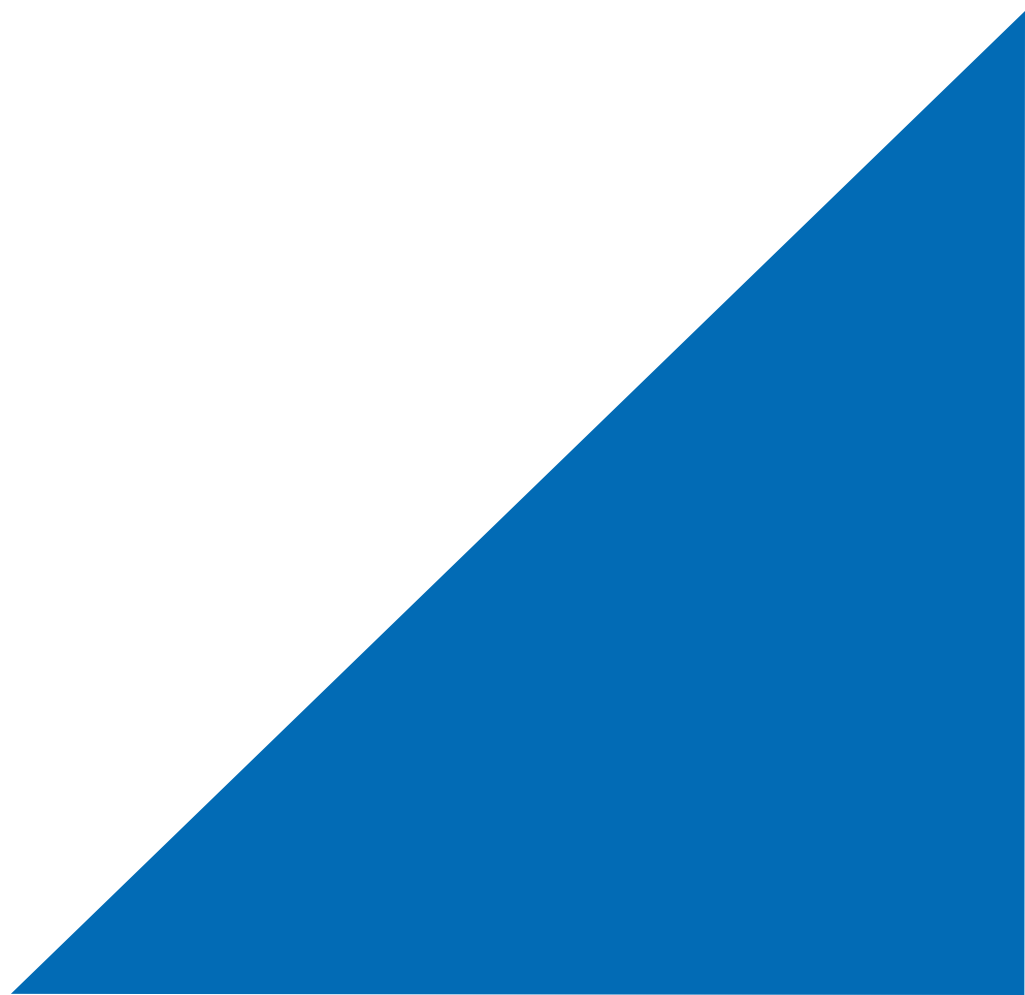
## Meeting Norms

---

1. Please keep cell phones muted.
2. Take space and make space.
3. Listen carefully- everyone is a learner and everyone is a teacher.
4. Share lessons but respect confidentiality
5. Have fun! Take care of yourselves and each other.
6. Be comfortable with being uncomfortable.
7. What else?

## Day Two Agenda

---

1. Facilitated Conversation
  2. Peer Coaching Overview
  3. Peer Coaching Groups
  4. Debrief
  5. Adjourn + Next Steps
- 



# Facilitated Conversation

Dr. Leonard M. Brock, Vice  
President for Learning and  
Impact, CFLeads

## Guiding Questions

---

- How are the changes in the current political environment impacting your community foundation? Your economic mobility work?
- What are you most concerned about?
- Who are your allies and partners in this space? Where are you turning for trusted and reliable information?
- What can CFLeads do to further support you?

# Peer Coaching Guidelines

Dr. Leonard M. Brock, Vice  
President for Learning and  
Impact, CFLeads

## Peer Coaching Format

Each team will be allotted up to 45 minutes to:

1. Describe the area you are seeking coaching. Express this as a question: “How do I...” or “What do I need...” **(10 minutes)**
2. Answer clarifying questions posed by members of the cohort. These should not be leading questions, but simply questions to gain greater clarity. They will not offer coaching at this time. **(10 minutes)**
3. Step out of the meeting while the group reflects on the feedback to give your team. If you are meeting virtually, we will remove your team from the virtual meeting main room and place you in a waiting room for a break. **(10-15 minutes)**
4. Receive advice from your peers. We will ask you to rejoin the group in the main meeting room where you will receive coaching from the cohort. If you are meeting virtually, we will move you back to the main meeting room (you do not need to take any action). **(10 minutes)**
5. **Identify one action or commitment that emerged from the advice. “What’s resonating with me is...” or “Where I’d like to take this next is...”**

# Peer Coaching Example

## Learning Challenge

1. Community Foundation XYZ is interested in developing a comprehensive housing impact initiative. This collective impact initiative would bring together key community partners focused on housing access and provide local leaders with the skills and resources needed to catalyze housing availability and affordability in their community.

## **First Peer Coaching Question**

What steps should we take to identify who should be at the table and other organizations interested in joining this collective impact initiative?

## **Second Peer Coaching Question**

Now that we have gathered, how do we identify and prioritize housing challenges?

## **Third Peer Coaching Question**

Now that we determined key priorities, how should we gain momentum to add additional partners, funding, and support?

# Peer Coaching Best Practices

1. Stick to time
2. Identify one specific question as your Peer Coaching Question
3. Clarifying questions only please
  - Leading questions suggest a particular answer. Instead of “Have you tried...”, ask “What have you tried?”

## Peer coaching teams ---

### **Group 1: Facilitated by Dr. Leonard M. Brock and Kellie Alexander in Opal Room**

- Foundation for Appalachian Kentucky
- Yellow Springs Community Foundation
- Kalamazoo Community Foundation

### **Group 2: Facilitated by Amanda Hartigan and Rachel Reiss in Pearl Room**

- Fairfield County's Community Foundation, Inc.
- Wichita Foundation
- Greater Milwaukee Foundation

### **Group 3: Facilitated by Meghan Cummings and Enida Jeteric in Ivory Room**

- Community Foundation Boulder County
- The Winston-Salem Foundation
- The Pittsburgh Foundation


## **Agenda**

- Round #1
- Break (Snacks on 2<sup>nd</sup> Floor)
- Round #2
- Round #3
- Lunch


**You'll be with your peer  
coaching groups until  
Lunch!**



## Peer Coaching Debrief *with your team*

1. What feedback resonated with you?
  2. What actions steps should you take back to your community foundation?
  3. What actions steps should partners take?
  4. What question(s) might you bring to the next meeting?
- 

## Demographic Profile Debrief

- Describe the process of developing the demographic profile.
  - What questions or concerns popped for your team?
  - Did you have any challenges accessing the data for your profile?
  - Question and answer session with teams
- 

**CFLeads**

Community Foundations  
Leading Change



# CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)  
Meeting #1, Day Two  
January 29, 2025

# Thank you!



Closing



Event Survey



## Next Steps

---

1. TA Offerings
2. Meeting #2 Homework
3. Check-in Calls

# CFLEADS FORUM 2025

CFLeads

Community Foundations  
Leading Change

## SAVE THE DATE

APRIL 1 - 3, 2025 | INDIANAPOLIS, INDIANA

*Courageous Community Leadership: Innovation, Inclusion, and Impact*



CO-HOST



IN PARTNERSHIP WITH



## UPCOMING OFFERINGS

---

# CFLeads

---

Community Foundations  
Leading Change

- 2025 Secretary's Awards for Public-Philanthropic Partnerships **Call for Entries** is due on **February 7**.
- CFLeads inaugural **Fellowship Program** information session is on **February 19**.
- Council on Foundations **Leading Locally** Conference is **June 10-12**.
- IMCA **National Economic Mobility and Opportunity Conference** is **May 21-23**.
- Learn how to **become a CFLeads' Investor!**

[www.cfleads.org](http://www.cfleads.org)



**CFLeads**

Community Foundations  
Leading Change



# See you in Atlanta, GA

Economic Mobility Action Network (EMAN)  
Intermediate Cohort Meeting Two

*May 13-14, 2025*

