



Economic Mobility Action Network Intermediate Cohort Meeting #1

Date: January 28-29, 2025

Location: The Westin Bayview

Wi-Fi: Westin_CONFERENCE
Password: CFL25

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.

Day 1 Agenda

7:45 a.m.

Breakfast and check-in

Participants will first check in with CFLeads staff outside of the Opal Room on the 2nd floor and receive their convening materials ahead of an informal breakfast.

Breakfast will take place on the Broadway Terrace right by the Opal Room on the 2nd floor.

8:30 a.m.

Welcome + CFLeads Overview

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

CFLeads staff will welcome EMAN Intermediate Cohort participants to the first in-person meeting and:

- Provide an overview of CFLeads and introduce staff
- Review the agenda, goals, and objectives of the meeting

<p><i>Amanda Hartigan, Project Director, CFLeads</i></p>	<ul style="list-style-type: none"> • Establish norms for the meeting and share feedback process • Provide time for participants to begin networking
<p>9:15 a.m.</p> <p><i>Meghan Cummings, Senior Vice President, Strategy, Impact & Operations, CFLeads</i></p>	<p>Community Leadership and the Core Competencies</p> <p>Participants will develop a deeper understanding of embracing a community leadership role when approaching economic mobility work and available resources including the five core competencies and Framework for Community Leadership.</p>
<p>9:45 a.m.</p>	<p>Break</p>
<p>10:00 a.m.</p> <p><i>Will Engelhardt, Director, Training and Technical Assistance, Urban Institute</i></p> <p><i>Lily Robin, Senior Research Associate, Urban Institute</i></p>	<p>Urban Institute</p> <p>Urban Institute staff will provide a brief overview of the Upward Mobility Framework and provide a demonstration of the newly released Upward Mobility Data Dashboard. Then The Winston-Salem Foundation will provide examples of how they've implemented aspects of the Upward Mobility Planning Guide for Local Action. The session will conclude with a group exercise on developing a theory of change.</p>
<p>11:30 a.m.</p> <p><i>Community Foundation teams</i></p>	<p>Demographic profile presentations, Round 1</p> <p>Community foundation teams will have the opportunity to present their demographic profiles for 10 minutes each.</p> <ul style="list-style-type: none"> • Community Foundation Boulder County • Fairfield County's Community Foundation, Inc. • Foundation for Appalachian Kentucky • Greater Milwaukee Foundation • Kalamazoo Community Foundation

<p>12:30 p.m.</p>	<p>Lunch – Broadway Terrace</p>
<p>1:15 p.m.</p> <p><i>Dr. Tiffany Manuel, Founder and CEO, TheCaseMade</i></p>	<p>DrT and TheCaseMade Presentation</p> <p>Dr. Tiffany Manuel from TheCaseMade will talk with you about how to make the strongest possible case for your economic mobility work using data and other persuasion strategies found in her book, Case Made! 10 Powerful Leadership Principles that Win Hearts, Change Minds, and Grow Impact.</p>
<p>2:45 p.m.</p> <p><i>Amanda Hartigan, Project Director, CFLeads</i></p>	<p>Peer Connections</p> <p>Participants will engage in a facilitated activity designed to support peer connections.</p>
<p>3:00 p.m.</p>	<p>Break</p>
<p>3:15 p.m.</p> <p><i>Community Foundation teams</i></p>	<p>Demographic profile presentations, Round 2</p> <p>Community foundation teams will have the opportunity to present their demographic profiles for 10 minutes each.</p> <ul style="list-style-type: none"> • The Pittsburgh Foundation • The Winston-Salem Foundation • Wichita Foundation • Yellow Springs Community Foundation
<p>4:15 p.m.</p>	<p>Closing</p>
<p>4:30 p.m.</p>	<p>Adjourn Day 1</p>

Day 2 Agenda

Day 2 Agenda	
8:00 a.m.	Breakfast
<p>8:30 a.m.</p> <p><i>Dr. Leonard M. Brock, Vice President for Learning and Impact, CFLeads</i></p>	<p>Welcome to Day 2! Opening Conversations</p> <p>The day will begin with a facilitated conversation designed to provide a space for participants to share their thoughts, ideas, and concerns in the current climate.</p>
<p>9:15 a.m.</p>	<p>Peer Coaching Overview</p> <p>CFLeads will provide an overview of the peer coaching process including coaching guidelines and groups.</p> <p>Group 1: Facilitated by Dr. Leonard M. Brock and Kellie Alexander</p> <ul style="list-style-type: none"> • Foundation for Appalachian Kentucky • Yellow Springs Community Foundation • Kalamazoo Community Foundation <p>Group 2: Facilitated by Amanda Hartigan and Rachel Reiss</p> <ul style="list-style-type: none"> • Fairfield County’s Community Foundation, Inc. • Wichita Foundation • Greater Milwaukee Foundation <p>Group 3: Facilitated by Meghan Cummings and Enida Jeteric</p> <ul style="list-style-type: none"> • Community Foundation Boulder County • The Winston-Salem Foundation • The Pittsburgh Foundation
<p>9:30 a.m.</p>	<p>Peer Coaching Begins</p> <p><i>Round 1</i></p>

<p>10:15 a.m.</p>	<p>Break</p>
<p>10:30 a.m.</p>	<p>Peer Coaching <i>Round 2</i></p>
<p>11:15 a.m.</p>	<p>Peer Coaching <i>Round 3</i></p>
<p>12:00 p.m.</p>	<p>Lunch – Broadway Terrace</p>
<p>1:00 p.m.</p> <p><i>Amanda Hartigan, Project Director, CFLeads</i></p>	<p>Debrief Time</p> <p>Participants will have the opportunity to debrief their experience, respond to demographic profile questions, and share their thoughts on the peer coaching experience.</p>
<p>2:00 p.m.</p> <p><i>Kellie Alexander, Network Engagement Manager, CFLeads</i></p>	<p>Closing and Next Steps</p> <ul style="list-style-type: none"> • CFLeads Forum: April 1-3, 2025 • Upcoming TA opportunities: Urban Institute and TheCaseMade • Preparing for the next meeting: details shared by March 1, 2025
<p>2:30 p.m.</p>	<p>Adjourn</p> <p>See you in Atlanta: May 13-14, 2025!</p>