

CFLeads

Community Foundations
Leading Change



CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)
Meeting #3
July 8 - 9, 2025

Welcome!

Wi-Fi: HotelWash_Meeting



Day One Agenda ---

1. Welcome and Networking Activity
2. PolicyLink Presentation
3. Small Group Conversations by Role
4. Lunch
5. Urban Institute Policy Training
6. Community Foundation Pair-Ups
7. Celebrations!

Join us for Happy Hour tonight at 6:00p.m. ET

Meeting Objectives ---

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

Objective #2: Deepen understanding of how community foundations can impact their economic mobility strategies through policy and advocacy.

Objective #3: Collaboratively reflect on cohort experience and design future connections and engagement.

Meeting Norms ---

1. Please keep cell phones muted and use the microphone.
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. Get comfortable with being uncomfortable.
6. Have fun! Take care of yourselves and each other.

Flip Chart Activity ---

Participate throughout the next two days and answer these prompts:

1. Who did you meet through the cohort that you are grateful for?
2. Who are you planning to connect with after this cohort?
3. What is one action item you are leaving this cohort with?
4. Shoutout someone who did something extra special!

Networking Activity

Amanda Hartigan,
Director of Programs
and Learning,
CFLeads

PolicyLink

Michael McAfee,
President and CEO,
PolicyLink

15 Minute Break:

Grab some snacks!

Small Group Conversations By Role



Small Group Conversations by Role

- Community foundation CEOs
 - Community foundation board members
 - Data partners or staff members
 - Community foundation program staff
 - Government partners
 - Policy staff
- 

Small Group Conversation Starters

1. Share a reflection on PolicyLink's presentation and what you took away from this morning.
 2. What progress or challenges (peer coaching or strategic) have surfaced over the year since you've applied for this cohort?
 3. What work still needs to be done?
 4. What recent changes or pivots have you made to your work?
 5. Share a recent win in your economic mobility portfolio of work.
 6. How can cohort participants be a help moving forward?
- 
- A green triangular graphic is located in the bottom right corner of the slide, pointing upwards and to the left.

Lunch

Grand Ballroom



Sign up for our newsletter

Urban Institute Policy Training

Martha Fedorowicz,
Training and Technical
Assistance Manager,
Urban Institute

15 Minute Break:

Grab some snacks!

Community Foundation Pair-Ups

Amanda Hartigan,
Project Director,
CFLeads

Community Foundation Pairs

- Community Foundation for Greater Buffalo | Rochester Area Community Foundation
- Community Foundation of Greater Dubuque | Scranton Area Community Foundation
- Cambridge Community Foundation | Community Foundation for a greater Richmond
- North Texas Community Foundation | Foundation for the Carolinas

- **ACT for Alexandria/Innovia Foundation**
You will have about 25 minutes per CF team to share your policy homework and action items from the Policy Change Toolkit. Please share the elements of your deliverable where feedback would be most helpful.

Community Foundation Pair Guidelines

Share your Local power Map and Local Policy Issue with your community foundation partner and focus on:

- What existing local governance or civic bodies hold influence over economic mobility outcomes? Who is currently setting the local agenda?
- Has this process evolved how you think about your local policy agenda or ongoing economic mobility strategy?
- What supports do you need to help fill the gaps you've identified in representation or voice?
- How might your foundation use its institutional capital (data, dollars, relationships, convening power) to support this work?

EMAN 2024-25 Celebrations!

EMAN Next Steps ---

1. Spend Down of the Subgrant by end of 2025
2. Utilize TA Offerings by end of 2025
3. Complete Cohort Survey will be shared soon
4. Case Study Interview will begin in the Fall

Alumni Offerings ---

EMAN Alumni Community of Practice

- Launch Call: November 19th at 1 - 2:30 pm ET
- Quarterly calls will include topic area discussions, resource sharing, updates on EM work, and peer coaching sessions

Online Engagements

- Listserv - Opportunity to quickly connect with your EM alumni to request and share information
- LinkedIn Group – Opportunity to stay professionally connected and share relevant resources with your network of economic mobility peers
- My Community – Where CFLeads will share relevant updates and additional engagement opportunities

In-Person Engagements – *To be announced*

CFLeads

Community Foundations
Leading Change

Thank you!



**NORTH TEXAS
COMMUNITY
FOUNDATION**



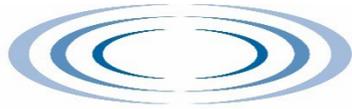
THE COMMUNITY
FOUNDATION
ROCHESTER, NY



Cambridge
Community Foundation

**Community
Foundation**
OF GREATER DUBUQUE

INNOVIA
FOUNDATION



Community Foundation
for Greater Buffalo

MAKE THE MOST OF YOUR GENEROSITY

**SCRANTON AREA
COMMUNITY FOUNDATION**
CREATING CHARITABLE CONNECTIONS SINCE 1954



ACT for ALEXANDRIA
A COMMUNITY FOUNDATION

**FOUNDATION FOR
THE CAROLINAS**

community
foundation
for a greater Richmond





Kevin Howard, Gates Foundation

CFLeads

Community Foundations
Leading Change



Economic Mobility Action Network

Advanced Cohort
2024-25



Closing Action Items ---

1. Bring your nametag tomorrow
2. Breakfast begins at 8:00a.m. in the Grand Ballroom
If you are leaving tomorrow afternoon, please check out before heading to breakfast
3. Join us for Happy Hour tonight at 6:00p.m. ET

CFLeads

Community Foundations
Leading Change



Economic Mobility Action Network

Advanced Cohort
2024-25



CFLeads

Community Foundations
Leading Change



CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)
Meeting #3, Day Two
July 8 - 9, 2025

Welcome!



Day Two Agenda

1. Peer Coaching Overview
2. Peer Coaching Groups
3. Lunch with Greater Washington Community Foundation
4. Spotlights and Closing
5. Adjourn

2:15 p.m. ET Departure for Site Visit with Manumission

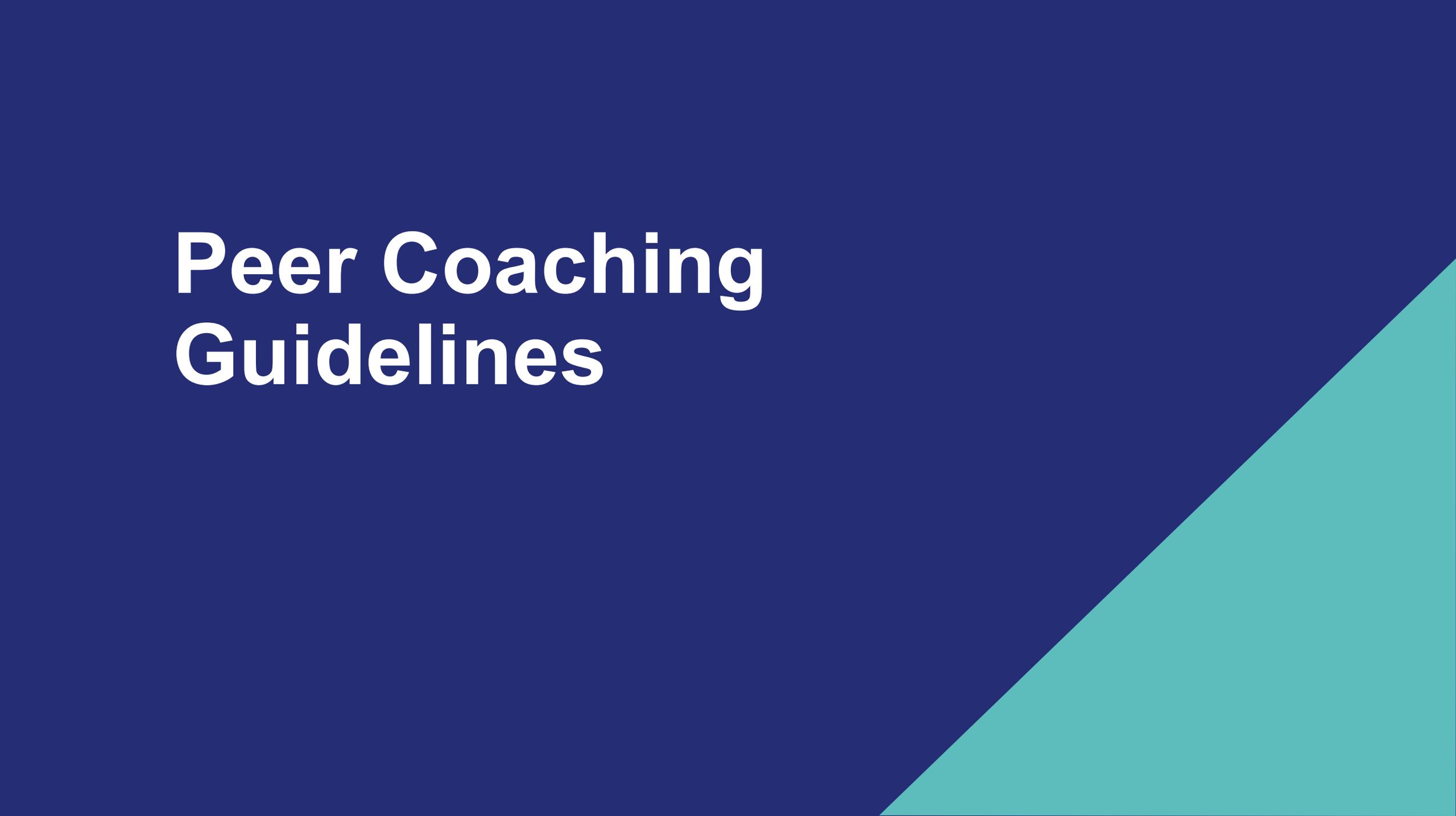
Meeting Objectives ---

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

Objective #2: Deepen understanding of how community foundations can impact their economic mobility strategies through policy and advocacy.

Objective #3: Collaboratively reflect on cohort experience and design future connections and engagement.

Peer Coaching Guidelines



Peer Coaching Timeline Overview

- You will be with your groups until lunchtime.
- We will have 5-minute breaks in between each round of peer coaching. Snacks will be available outside the Grand Ballroom.
- Groups 2 and 3 will reconvene and have team time after their third round of coaching while Group 1 completes their fourth round.

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...”

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 teams

Group 1: Facilitated by Dr. Leonard M. Brock and Kellie Alexander in Freedom I (Lobby Level)

- Rochester Area Community Foundation
- Scranton Area Community Foundation
- North Texas Community Foundation
- Cambridge Community Foundation

Group 2: Facilitated by Amanda Hartigan and Brianna Lee in Freedom II (Lobby Level)

- Community Foundation for a greater Richmond
- ACT for Alexandria
- Innovia Foundation

Group 3: Facilitated by Mary Thomas and Enida Jeteric in Grand Ballroom (Lower Level)

- Community Foundation for Greater Buffalo
- Foundation For The Carolinas
- Community Foundation of Greater Dubuque

Agenda

- Round #1
- Round #2
- Round #3
- Round #4 (Group 1 Only)

You'll be with your peer coaching groups until lunch. Snacks will be available outside of your peer coaching room.



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?
- 

**Lunch with Greater
Washington Community
Foundation and Partners**

Perspective from a Local Community Foundation

Dr. Marla Dean, Senior Director, Health Equity and Maternal Health Funds, Greater Washington Community Foundation

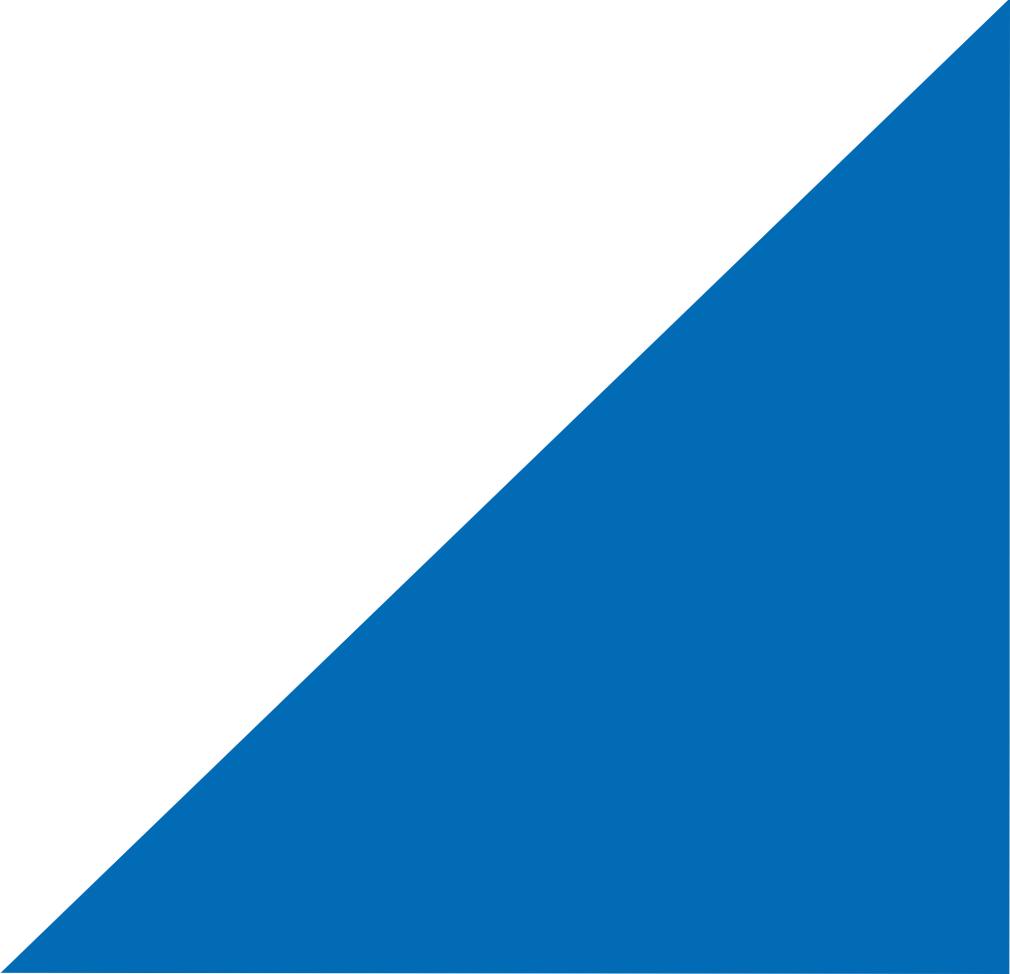
Kimberly Perry, Executive Director, DC Action

Kendra Oates, Director, Center for Financial Inclusion, Greater Washington Urban League

Share out ---

1. Who did you meet through the cohort that you are grateful for?
2. Who are you planning to connect with after this cohort?
3. What is one action item you are leaving this cohort with?
4. Shoutout someone who did something extra special!
5. Anything else you would like to share?

Event Survey



EMAN Next Steps ---

1. Spend Down of the Subgrant by end of 2025
2. Utilize TA Offerings by end of 2025
3. Complete Cohort Survey will be shared soon
4. Case Study Interview will begin in the Fall

UPCOMING EVENTS

- CFLeads and ABFE **Sustainable Development Goals Community Foundation** Cohort application is **currently open**
- **ELI for CEOs 2025-26** Cohort application is **currently open**
- Applying Behavioral Science to Unlock Donor Generosity webinar on **July 30**
- **National Funders Webinar** on **Tuesday, August 19** – *Registration coming soon*
- The next **Gathering designed for African American Community Foundation CEOs** is taking place **October 19-21** – *More information coming soon*

www.cfleads.org

CFLeads

Community Foundations
Leading Change



Closing Items ---

1. Head to the lobby for the site-visit departing at 2:15 p.m. ET
2. Leave your nametag on your tables
3. Peer coaching notes and comprehensive follow up will be shared soon

CFLeads

Community Foundations
Leading Change



CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)
Meeting #3, Day Two
July 8 - 9, 2025

Thank you!

