

CFLeads

Community Foundations
Leading Change



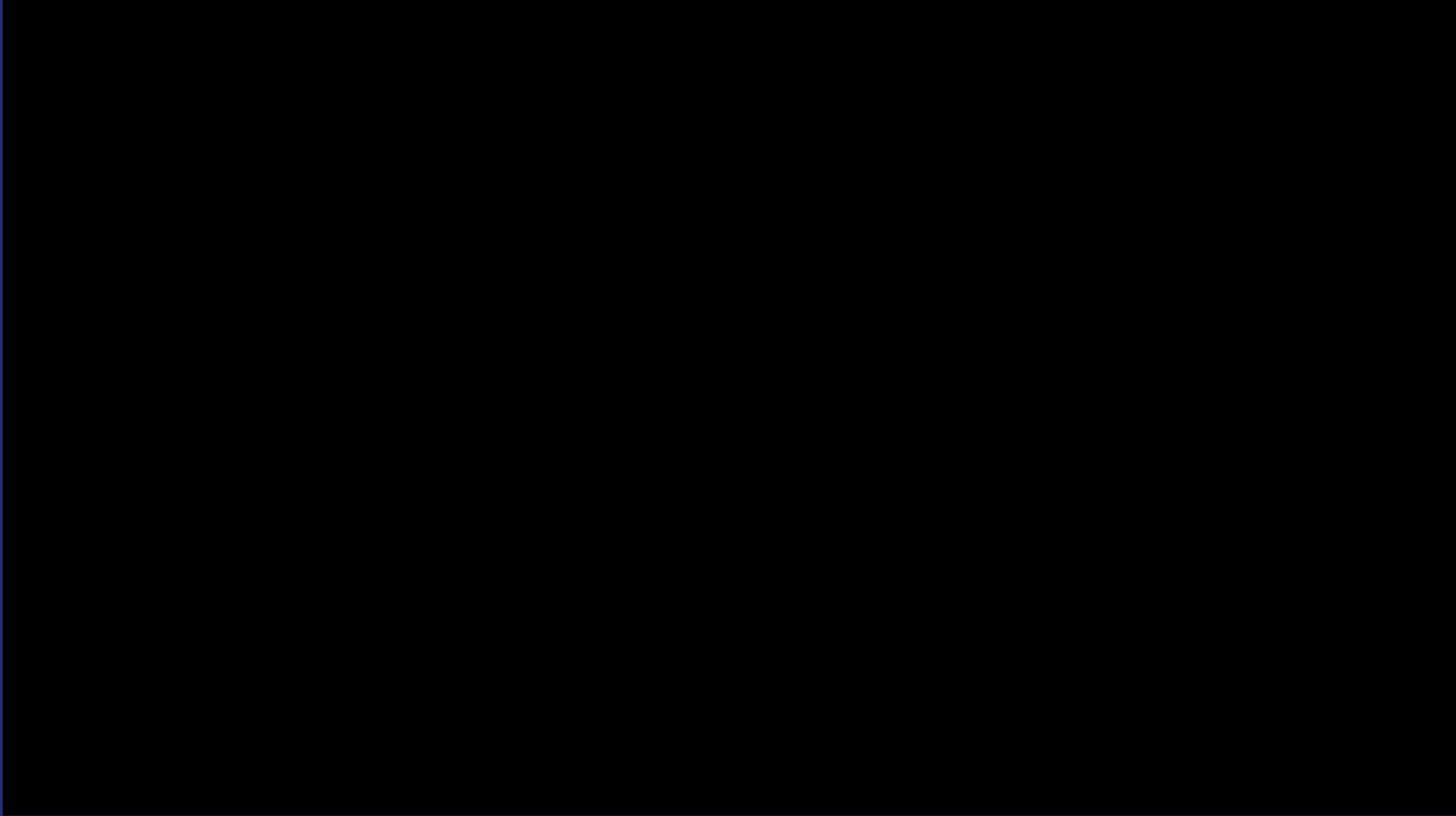
CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)
Intermediate Meeting #3
September 16 – 17, 2025

Welcome!

Wi-Fi: Wyndham Conference
Password: Wyndham1





Mary L. Thomas, CFLeads

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Day One Agenda ---

1. Welcome and Networking Activity
2. The Boston Foundation 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

The Boston Foundation and Partners

Soni Gupta,
Associate Vice President
for Community Wealth,
The Boston Foundation

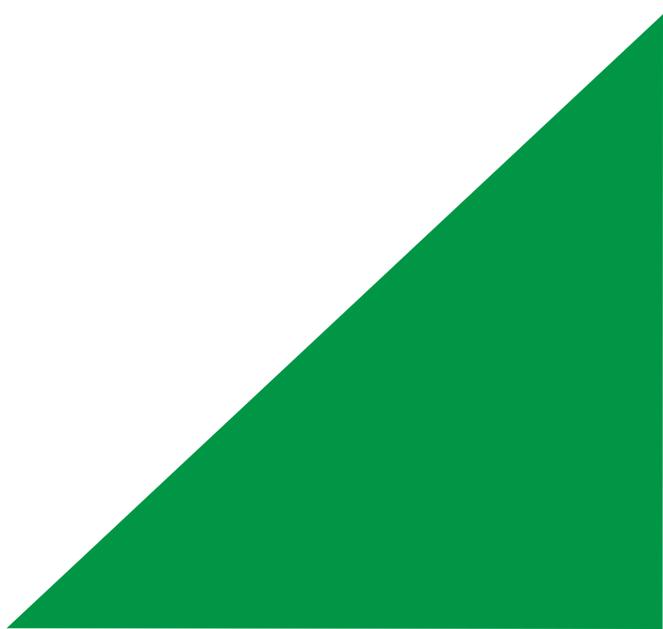
15 Minute Break:

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
 - Community partners
 - Policy staff
- 

Small Group Conversation Starters

1. Share a reflection on The Boston Foundation'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?
- 

Lunch

Ballroom



Sign up for our newsletter

Policy and Advocacy Workshop

Tina Chelidze,
Senior Manage of Innovation
& Impact, Yale Tobin Center
for Economic Policy

15 Minute Break:

Grab some snacks!

Community Foundation Pair-Ups

Amanda Hartigan,
Director of Programs and
Learning, CFLeads

Community Foundation Pairs

- The Pittsburgh Foundation | Winston-Salem Foundation | Community Foundation Boulder County
- Greater Milwaukee Foundation | Kalamazoo Community Foundation
- Foundation for Appalachian Kentucky | Wichita Foundation
- Fairfield County's Community Foundation | Yellow Springs Community 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 the Subgrant by the end of 2025
2. Utilize TA Offerings by the end of 2025
3. Complete the Cohort Survey which will be shared by Equal Measure starting September 19
4. Case Study Interviews will begin in November – Kellie will contact Team Leads for scheduling

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

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Thank you!



**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.

Community
FOUNDATION





Kevin Howard, Gates Foundation

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Economic Mobility Action Network

Intermediate Cohort
2024-25



Closing Action Items ---

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

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Intermediate Cohort
2024-25



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CFLeads Economic Mobility

Economic Mobility Action Network (EMAN)
Intermediate Meeting #3, Day Two
September 16 – 17, 2025

Welcome!



Day Two Agenda

1. Peer Coaching Overview
2. Peer Coaching Groups
3. Lunch with Boston Indicators
4. Spotlights and Closing
5. Adjourn

2:15 p.m. ET Departure for Site Visit to Chelsea, MA

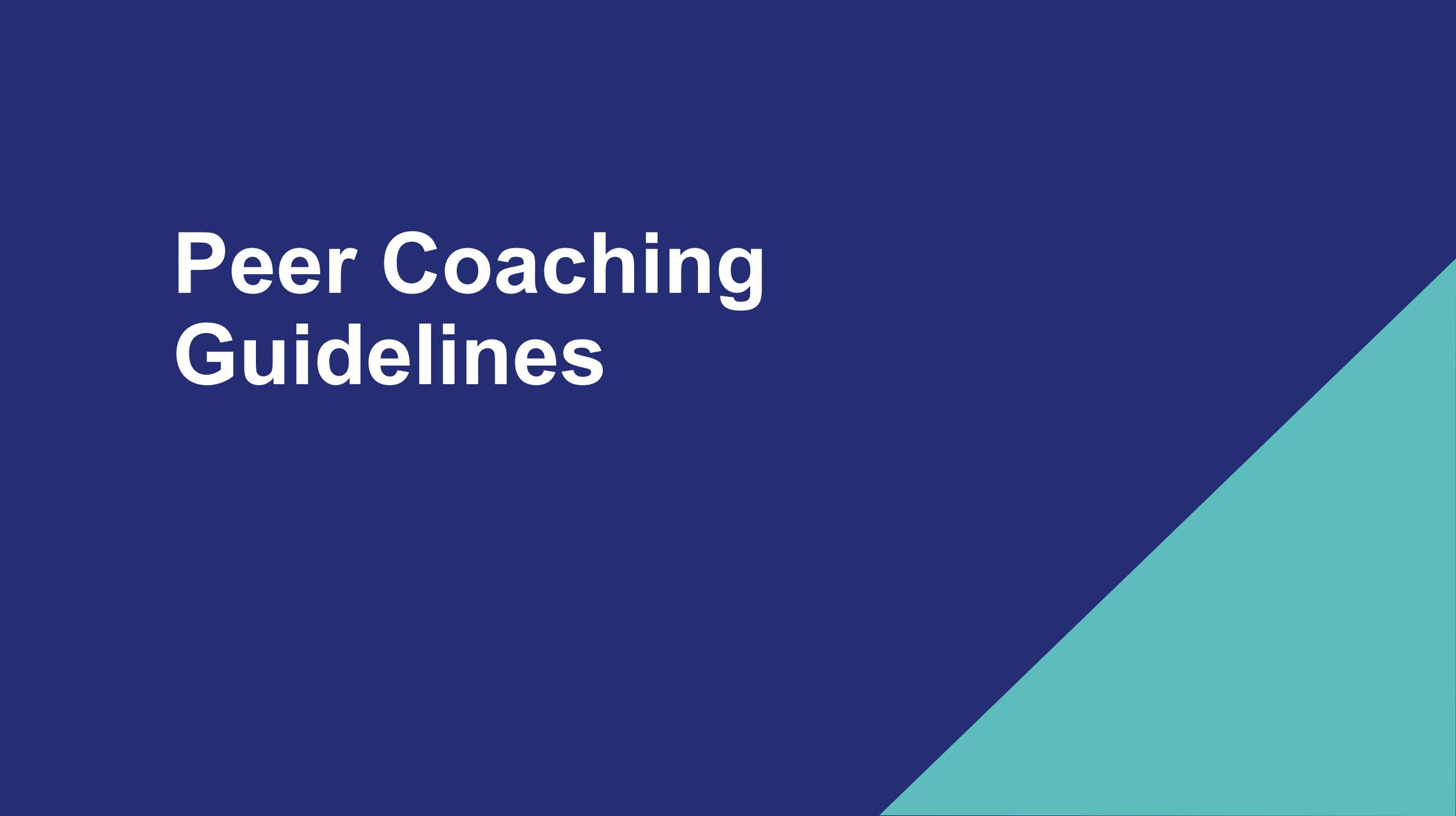
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Peer Coaching Guidelines



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. There will be additional debrief time after the final round.
- Snacks will be available outside the Beacon Ballroom.

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 Commonwealth AB (15th floor)

- Foundation for Appalachian Kentucky
- Community Foundation Boulder County
- The Winston-Salem Foundation

Group 2: Facilitated by Amanda Hartigan and Rachel Reiss in Capitol AB (15th floor)

- Yellow Springs Community Foundation
- The Pittsburgh Foundation
- Greater Milwaukee Foundation

Group 3: Facilitated by Enida Jeteric and Lily Acton in Beacon Ballroom (15th floor)

- Wichita Foundation
- Kalamazoo Community Foundation
- Fairfield County's Community Foundation, Inc.

Agenda

- Round #1
- Round #2
- Round #3

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?
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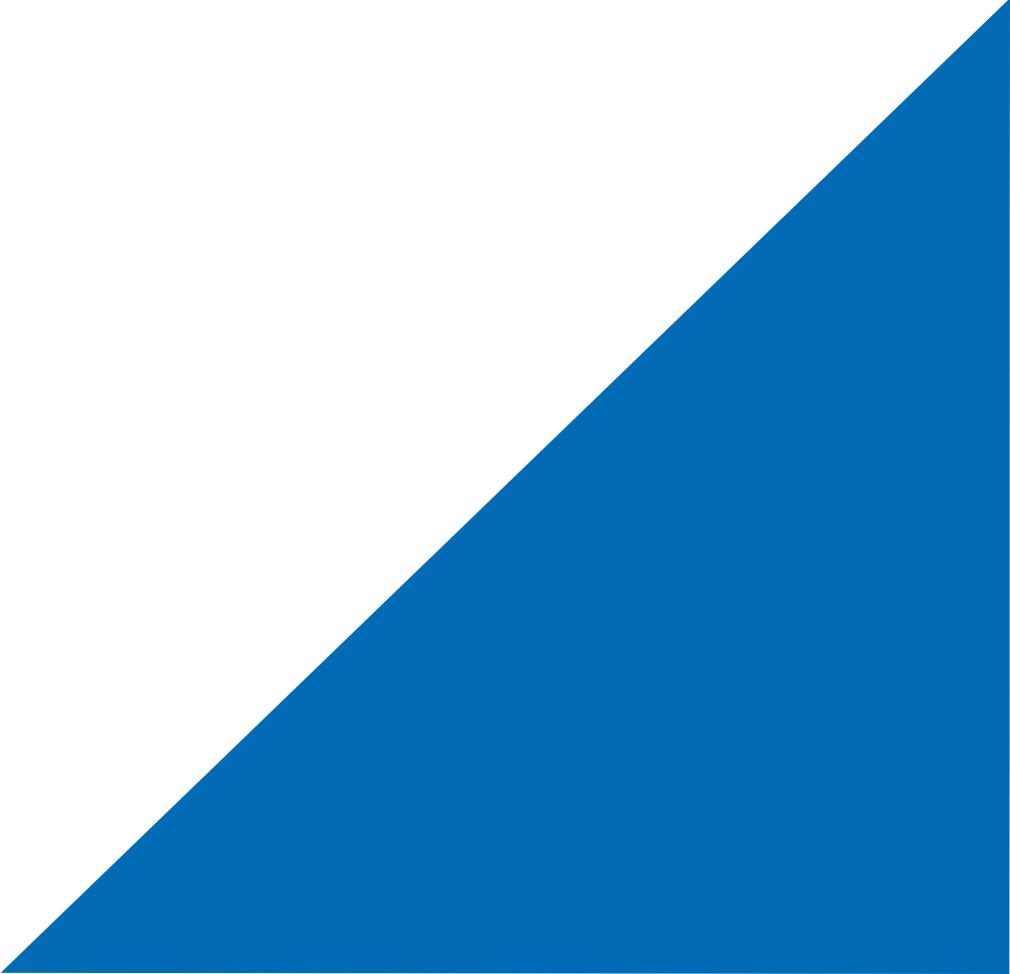
Lunch with Boston Indicators

Luc Schuster,
Executive Director,
Boston Indicators

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 ---



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In-Person Engagements – *To be announced*

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

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Thank you!

