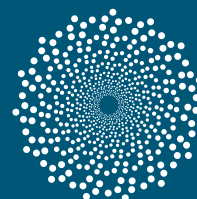


Jacksonville's Community Wealth Building Roundtable

Local Government
Convenes to Seed
a New Idea for
Community
Development

Michelle Barth



DEMOCRACY
COLLABORATIVE

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**Local Government Convenes to Seed a New
Idea for Economic Development**

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Executive Summary

Jacksonville, Florida, is a growing metropolis in the northeastern part of the state, a transportation hub that is at a crossroads of America's rail and port networks. Yet like many American cities, some of Jacksonville's 870,000 residents live in deep poverty, often concentrated in neighborhoods that suffer from chronic disinvestment. And like most cities, Jacksonville finds itself challenged to address these issues.

How can Jacksonville build community wealth in disadvantaged neighborhoods, particularly in historically underinvested

Michelle Barth served as Deputy Chief of Staff for City of Jacksonville from 2011 to 2015.

Northwest Jacksonville? Members of the Interfaith Coalition for Action, Reconciliation, and Empowerment (ICARE), a network of 38 local congregations, posed this question to the city's mayor in 2012 when they asked him to host a community wealth building roundtable.

The mayor, Alvin Brown, agreed that the Community Wealth Building (CWB) strategy was worth exploring as a new approach to inclusive economic development. CWB seeks to develop the resources that already exist in a municipality to create locally-owned businesses that pay a living wage while giving workers a share of the profits they generate. The new businesses provide services and products to stable “anchor” institutions so that more of the anchor's purchasing power is channeled inside the city. Employee-owned businesses have the added advantage of being less likely to move, creating a long-term investment in community well-being.

While an exciting prospect, the strategy requires new partnerships and the support of a wide range of stakeholders. The mayor directed his senior staff to organize a citywide Community Wealth Building Roundtable to introduce the idea to residents, nonprofits, and businesses while also exploring key existing initiatives. After the conference, which was held over two days in March 2014, the City launched a task force to review the recommendations that emerged, and begin formulating ways to make the economic development strategy a reality. Even though Mayor Brown did not win re-election in 2015, his successor has continued to support implementation of the community wealth building strategy in Northwest Jacksonville.

Jacksonville was the first city government in the country to host this kind of a convening, but it is unlikely to be the last. Since Jacksonville held its roundtable, two cities—Roches-

ter, New York and Richmond, Virginia—have launched their own community wealth building efforts. This report provides a guide for other cities interested in organizing a conference and building support for a community wealth building initiative—covering everything from identifying an area of the city that would benefit from the initiative, to working with outside consultants, to identifying and engaging stakeholders, attracting sponsors, organizing a conference, and conducting follow through. The conference is only one piece of a larger organizing effort, and significant preparation and outreach needs to be done in launching a successful Community Wealth Building initiative.

While Jacksonville’s story hardly provides all of the answers about how to do this work, my hope is that some of the lessons we learned might make this path easier for others. In this paper, I have tried to provide the beginnings of a “toolkit” to guide city governments and community groups in this community-building work. Some of these lessons include:

Getting Started

- Identify early on the Who (main advocates), What (elements you need for a successful event), When (look ahead for conflicts with all key partners), Where (public accessibility is crucial), and How (what are your standard operating procedures for procurement, general counsel review, administrative support, etc.).
- Introduce the CWB concept to leadership across the political, business, community and nonprofit communities.
- Be mindful of study fatigue. Many low-income communities feel “studied out.” Be clear from the beginning this is *not* another study; it’s an action plan to build wealth.
- Carefully consider and narrow down a designated focus area—you can expand the program once you establish it as a successful model.
- Engage local organizations to advocate for a CWB effort, and involve them in the planning process and all follow-up initiatives.

Communications

- Remember to include in your communications plan those who will ultimately have to “approve” the effort, as well as individual resident leaders in the areas you hope to elevate through this process. Reach out early to faith-based leadership.
- To build trust, it is important to present information “on the record” at community or committee meetings whenever possible. Formal presentations can often help.

Logistics

- Have a clear “ask” when meeting with others.
- Carefully review all options to fund your CWB launch, whether through grants and sponsorships, trust funds, or inclusion in the general budget. Look for opportunities for in-kind contributions and program segment sponsors.
- A visit to a city with a successful CWB project can both educate and inspire your core team to move forward. To maximize these benefits, it is important to prepare your team in advance and identify your goals before you take the trip.
- If working with an out-of-town technical assistance partner, be sure to work closely with that team since you will have local relationships that the partner will lack. Grouping like-institutions together can often be an effective means to increase meaningful feedback.
- Consider holding a separate briefing for anchor institution and corporate CEOs. This can be a good way to engage top leadership to support a CWB effort.
- Highlight and use local products at every step of the process you can. “Walk the Talk” about the economic benefits to the community by sourcing locally wherever possible.
- Request materials as you secure commitments—such as high-resolution logos, photos and speaker bios, and signed sponsorship documents. Plan in advance to avoid a last-minute rush.
- Generate separate agendas for each program day or event, and create a “Run of Show” to help manage everyone’s expectations for the day and keep everything on schedule.
- Make use of formal question cards to manage public comments.

- Consider asking all participants to complete a “Commitment Card” to indicate how they will continue to be involved and will support furthering the CWB effort.

Post-conference strategy implementation

- Hold a separate public meeting to unveil the post-conference report, and provide printed copies to key stakeholders, elected officials, and sponsors, as well as the local library. Create a separate page on your web site to house all relevant documents.
- Carefully consider all sectors if forming a follow-up task force or committee, and assure these meetings comply with local public notice requirements and are accessible by all.
- If possible, establish a dedicated office that is accountable to the mayor with funding oversight from the council or commission.
- Stick with it. Remember why you started down this journey in the first place—neighborhoods, and those who live there, are counting on you.

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Throughout the text, I have sought to provide guidance regarding the lessons we learned. Key recommendations are also noted throughout the text with a key symbol.

Jacksonville's Community Wealth Building Story

Overview

Jacksonville, Florida's Community Wealth Building Roundtable in March 2014 was an important organizing tool for introducing this strategy for inclusive economic development to the city. But Jacksonville's CWB story began with the election of Alvin Brown as mayor in 2011. The first African-American to hold the office in city history and the first Democrat in two decades, Brown won by just over 1,500 votes—a margin of less than one percent—in his first bid for elected office. One of Mayor Brown's major policy initiatives was to encourage economic inclusion, particularly focusing on people and neighborhoods which were historically "left behind" in Jacksonville's overall economic growth. ICARE (Interfaith Coalition for Action, Reconciliation and Empowerment), an advocacy group made up of 38 congregations representing more than 30,000 residents, asked the mayor to consider Community Wealth Building as a way to address economic inequities and secured his commitment to host a day-and-a-half long roundtable to look more closely at this model for Jacksonville.

Community Wealth Building (CWB) is a systemic inclusive economic development strategy that focuses on the development of community-owned enterprises—usually small, for-profit businesses owned by the employees living in the area—that can generate living wage jobs and business ownership for residents of low-income communities. One way to do this is to develop community-owned businesses, or cooperatives, that can meet the procurement needs of large "anchor" institutions such as hospitals and universities—organizations that are tied, or "anchored," to the area and unlikely to relocate to another city. For example, the University of North Florida is unlikely

to close its campus in Jacksonville and move the entire organization to Atlanta. Such anchor institutions are also typically nonprofit or public in ownership, giving them a public-serving mission. They also have large procurement needs. The concept, then, is to link their institutional spending power with community-based businesses. As these community-owned businesses meet an increasing number of institutional needs, they increase the personal wealth of the worker-owners, and as a result build the wealth of the community as a whole.

Jacksonville covers over 800 square miles, nearly the entirety of Duval County. It is the largest city by area in the continental United States following the consolidation of the city and county governments in 1968. With a population of just under one million residents, it boasts a growing downtown, is home to the NFL's Jacksonville Jaguars, and to the beautiful St. Johns River running through its core. The city also has two Navy bases, wonderful beaches, and three Fortune 500 companies headquartered there, including the national freight company CSX. As with many big cities, despite these assets, not all neighborhood infrastructure was maintained or improved at the same rate. Nor do all neighborhoods have easily accessible resources to secure opportunities to build wealth or share in the benefits of economic growth. These disparities plagued the larger community for decades, and were the subject of repeated inquiry and study. Many of the recommended solutions over the years worked as intended, but some did not, and others were shelved or never funded. Everyone was ready for something different.

One area of the city long bypassed by traditional economic development is known as "Northwest Jacksonville," a quadrant that is sometimes referred to in city planning maps as including "Health Zone 1." Many residents in Health Zone 1 suffer from poor health and poverty. The area also has high unemployment and crime, generally low educational attainment, aging amenities, and unstable housing conditions. Still

the area has many positive assets, including a rich history, community members dedicated to improvement, and organizations focused on change such as the New Town Success Zone near Edward Waters College, a historically black college/university. Additionally, the nearby Eastside is home to an initiative launched by the Jacksonville affiliate of the Local Initiative Support Corporation (LISC), which is leading an ongoing community revitalization effort that could be highly compatible with the Community Wealth Building model.

A. Our Conference Planning Process: the RFP

The advocacy coalition ICARE met with the administration regularly to promote a Community Wealth Building initiative as a city-led project. Planning began in earnest in 2013, when the mayor assigned the task of managing the process to senior staff. I was assigned the role of lead coordinator as the Deputy under the Chief of Staff. In the early stages, ICARE and its Jobs Committee met with senior staff from the administration and the office of economic development, as well as key community leadership from local nonprofits, including The Community Foundation. Since Jacksonville was among the first local governments to lead such an effort, there were few guideposts to follow or “best practices” to rely on.

We mapped out a plan for how the city could explore Community Wealth Building, and by the summer of 2013 the City of Jacksonville’s procurement office issued an RFP for a technical assistance partner to help develop a local strategy. The RFP asked for support in organizing the following key elements:

1. site visits for the contractor to scope out conference speakers and help build interest for a community wealth building initiative;
2. a learning journey to Cleveland, Ohio, for Jacksonville stakeholders to see an existing community wealth building initiative;
3. a “roundtable” community conference; and
4. a report back to the City on the conference findings.

The Democracy Collaborative, which had worked with Cleveland on its Community Wealth Building project, was the lowest cost qualified bidder and was selected.

B. Stakeholder meetings

The initial team of city staff and community leaders identified key stakeholders and anchor institutions to schedule for interviews. After an initial round, we decided to expand the interviews to a broader range of people. We eventually met with about 60 stakeholders. These pre-conference meetings were critical tools to enable us to introduce the proposed development strategy, get critical feedback regarding that proposed strategy, gain knowledge of community assets that might be leveraged, identify potential speakers and existing local projects to feature at the conference, and sound out which institutions might be interesting in helping build out the strategy in a way that met community needs. These visits were also a vital part of helping to address any distrust people might have had for what was, after all, a new, unfamiliar initiative. Stakeholders included elected officials (particularly City Council members), nonprofit leaders, community-based organizations, and business and anchor institution leadership. These meetings helped re-shape our strategy—what started as plans for a small focused group roundtable of perhaps 40 people expanded to a larger conference encompassing a broader section of the community and a CEO breakfast briefing for anchor institution, business and government leaders.

C. Learning Journey

Seeing a Community Wealth Building project in action was an important factor in establishing a framework to move forward, so plans were made to organize a learning journey to Cleveland, Ohio. One big challenge had to be addressed: a heavily restricted executive office travel budget. One of the stakeholders we engaged early in the process, the Jessie Ball duPont Fund, agreed to consider underwriting the team's travel costs

to Cleveland. The City applied for and was awarded a travel grant.

Two members of the administration, one representative from the Office of Economic Development, and the president of The Community Foundation of Northeast Florida, made the trip to Ohio in February 2014. What the team learned strengthened their commitment to move the project forward in Jacksonville, and everyone returned with a renewed sense of urgency.

D. The Conference

We held the conference in March 2014. In all, more than 100 people participated in the conference and an important pre-event breakfast briefing for CEOs.

E. Post-Conference Review

The Democracy Collaborative pulled together a report summarizing the conference findings with recommendations on next steps. We held a second public meeting in June 2014 for participants to review the results and recommendations.

F. Task Force Launched

In October 2014, the Mayor appointed a task force to review the report recommendations and develop an implementation strategy. The staff took great care to ensure that representatives from all sectors were included on the task force: business, nonprofit, faith-based, government and community organizations. The task force met for the first time in January 2015, and the overall management of the city's CWB effort moved from the mayor's office to the city's Office of Economic Development. The city issued a second RFP in May 2015 for a market study to better inform the task force about the opportunities within the procurement departments at some of the largest anchor institutions in the area.

G. Looking Ahead

A new administration assumed office on July 1, 2015. While the change in leadership delayed the process to some extent, in 2016 the new Mayor named a Director of Strategic Partnerships who is charged, among other things, with coordinating the city's CWB effort. The person selected for this role was an active participant in the initial CWB process. A recommended market study is underway, and a local community development corporation has offered to help with implementation. Of course, much remains to be done. However, the CWB concept has begun to take root, and work, both in the City and in the community, is underway to continue the effort.

STEP 1: Build Support and Identify CWB Focus Area and Key Stakeholders

Regardless of the structure of your local government, whether yours is a small town with six commissioners or a large city like Jacksonville with 19 council members, the first step in pursuing a Community Wealth Building strategy is to **introduce the concept** to leaders across the political, business, community, and nonprofit arenas who will play a role in making it work, and to **clearly identify the area** of your city where you hope the effort will take place. It is also important to pull together a wide range of municipal staff from Economic Development, Community Engagement/Outreach, Social Services, Legislative Affairs, Housing, Planning, etc., to help you make key initial decisions.

A. Identifying the Focus Area

Even before you start organizing a conference, you need to identify the area where you will focus your Community Wealth Building effort. If you are in a big city, there may be a number of neighborhoods that would be logical candidates for a CWB effort. In Jacksonville, our team asked several questions to narrow our focus:

- What areas are experiencing difficulty attracting employers for their residents?
- What areas have been widely studied in the past, offering a data-rich foundation for the team to base their work?
- What areas have the highest concentration of identified need?
- In what areas are there assets, such as potential community partners, which provide an opportunity to change those conditions if appropriate investment is made?
- Are there place-based anchor institutions, such as hospitals and uni-

versities, as well as businesses willing to partner with the city and community groups to identify areas of neighborhood-based business opportunity?

We also considered the potential funding pools that could support the effort, and areas that already had a well-developed network of nonprofit assistance in place. Your neighborhood focus area may eventually change, but you have to start somewhere. Once you establish a “pilot” and prove the model works in one community, you can expand to other neighborhoods.

Jacksonville selected the Northwest quadrant, with an emphasis on the section that corresponds with Health Zone 1. This area has high levels of unemployment, numerous poor health indicators and high rates of chronic conditions, and high poverty. These neighborhoods were also the primary areas of concern for the city and the project’s main advocate, ICARE.

At the same time, it is important to point out that Northwest Jacksonville also has many assets, including the New Town Success Zone near Edward Waters College, a private, historically black college, which could serve as a local anchor; and the nonprofit LISC (Local Initiative Support Corporation) which has an ongoing community revitalization effort in the nearby Eastside that is compatible with the Community Wealth Building model. The existence of these assets is critical, because such assets are the building blocks that make a CWB strategy viable.

B. Identifying Key Stakeholders and Funding

It is vital early in your conference planning to identify key stakeholders whose support you are enlisting and who need to understand what community wealth building is all about. In Jacksonville, we considered project partners in four main areas: 1) political partners, 2) key participants, 3) funding and sponsorship prospects, and 4) practical partners and event logistics.

1. Political Partners: Consider who will ultimately need to “approve” the CWB initiative. In Jacksonville, this included the mayor, city council members who represented the focus area, the chairs of committees that would take up any legislation related to the CWB effort, council members engaged in economic development, and leaders of the independent agencies, who could also be considered anchors. We held meetings with key senior staff (chief of staff; federal, state, and local policy directors; chief administrative officer; community engagement officer; outreach team; public affairs office, economic development leaders, and others) early in the process to brief them on the goals and expectations of the effort, and kept them updated regularly throughout the process.

Having a sound “inter-governmental” strategy is important. As expressed by Chris Hand, Chief of Staff for Jacksonville Mayor Alvin Brown from 2011-2015:

It is important to secure official governmental backing as early as possible in the process, even if that simply means a resolution of support from the relevant city/county council or commission. An early appropriation would be even better. Potential corporate and nonprofit partners are far more likely to participate if they know the local government has made community wealth building a priority.



Present on the record wherever possible.

Once you determine which legislative committees may have oversight or may be voting on potential legislation, meet with the chair and vice chair—in many cities, and certainly in Florida, these will have to be separate meetings because of Sunshine Law requirements. Request time at the next full committee meeting to present the strategy. To ensure that everyone has access to the information, supplement this official presentation with individual meetings with the council

or committee members, email follow-ups of the information and/or the presentation to both the members and their aides, and printed copies of all materials. It may seem redundant, but taking these steps, and documenting that you have done so, gives everyone ample opportunity to learn about the project and helps minimize the risk of overlooking or excluding key political partners.

2. Key Participants: When identifying key participants, consider the nonprofits, community activists, faith-based institutions, businesses, philanthropic foundations, and anchors that should be included as CWB partners. Remember to include those already working in your focus area, and to survey the work of anchors such as hospitals and higher education institutions to determine if they are conducting research or programs in the area as well. Jacksonville also included the independent authorities that manage electric, water and sewer utilities, transportation, the seaport and airports, along with many state and federal government entities and military installations, since they are important community anchors.

a. A Note on Identifying Anchors: Anchors are at the heart of the CWB approach, so having them on the team early is critical. Common types of anchors include hospitals, universities, community foundations, and local government itself. This status of being tied to the community both by mission and by sunken capital means that these nonprofit and governmental institutions have a direct stake in improving the their community, since they are a part of it and, unlike for-profit corporations, cannot move. This being said, getting anchors on board is not always easy and it is important to identify allies within the institutions who can organize their colleagues.

b. Community Voices: Ultimately, Community Wealth Building focuses on the *community*, so it is important to include individual resident leaders who are the “voices” for the areas you

hope to elevate as a result of this process. The team in Jacksonville presented the CWB plan at the area Citizen Planning Advisory Committee (“CPAC”) meeting, which also served to put the effort “on the record” with the participating neighborhood associations.



Reach out early in the process to faith-based leadership in the focus area. Neighborhoods where a CWB strategy is most needed often have one or more churches that serve as “local anchors,” and their leaders are strong voices for the community.

c. Economic Development & Business Partners: In addition to reaching out to anchors, including local businesses and economic development organizations is vitally important. Consider large employers, your office of economic development, local chambers of commerce, civic council leadership, and professional associations, and invite them to participate. Help them understand how a CWB strategy is key to the region’s overall economic development.

d. Media: If you plan to invite media to your event, remember to connect with your municipality’s public information or press office early and develop a media plan. As you build support, you may attract media attention, so make sure your internal public affairs team has the information it needs to respond. Remember, your key partners watch the news too, so media serves as an opportunity to solidify support, as well as attract new partners. Strong media attention can also help legitimize your effort in the eyes of the public, and those elected to represent them.

3. Funding & Sponsorship Prospects: If you are planning to seek conference sponsors, these relationships must be formed early on. Estimating your budget can help you know how much you need to raise.

There are three main ways to pay for the planning phase of a CWB conference: grants or public-private partnerships with dedicated sponsors; public trust funds; or including the cost of the strategy development events within your general budget. There are advantages and disadvantages to each.

a. Grants & Sponsorships: Private grants, sponsorships and in-kind contributions (especially for food and materials) can help eliminate public funding controversy and avoid a lengthy budget process. Coordinate with your grants office to see which grant funds would be appropriate, whether they have to be authorized by the city council, and if you need a sponsorship agreement letter from your general counsel. Understanding the process in advance can help ensure you stay on the correct path to appropriately receive funds and avoid having to introduce emergency legislation to authorize their use.

b. Trust Funds: Many cities have established trust funds, which may cover the cost of a roundtable or conference in part or full. This gives you the advantage of perhaps funding your event more quickly because it is a single source, although you may have to present your case many times to obtain the funds. Your city policy director or city council liaison may be able to alert you to other existing city funds that a CWB initiative would compliment, as well as provide guidance on which department it is in and the rules for accessing it.

c. General Budget: You may seek to include the costs for a CWB initiative in your city's general budget, but that usually requires a longer lead time, and you will need to establish this effort as a priority with your colleagues (such as the chief of staff, budget officer, and council liaison) and any department head whose budget will include the line item. You will also need to speak with members of the city council finance committee or budget review committee, attend budget hearings, and be prepared to defend its inclusion in the annual budget.

The advantage of this funding method is that it will securely allocate funding for the project. Moreover, obtaining legislative support for funding is a strong indicator of overall support for the CWB effort as a whole. *Fully understand the legislative process before choosing this path.*

4. Details for Building a Budget and Other Event Logistics:

Who, What, When, Where, & How? Given the long lead times that are sometimes needed for government procurement and fundraising, map out the details you need for your budget early. Also, identify the departments within government that will have a role in the process. Getting these folks on board as partners in the beginning can help ease some of the hiccups and missed deadlines that may occur. Consider these questions:

- **Who is your main champion, and are they from the executive, administrative, or legislative branch?** It matters. Be sure you identify which department is *authorized* to request an expenditure, as well as whose approval is needed to make purchases.
- **What do you need for a successful event?** This includes everything from tables, chairs, discussion materials for break-out rooms, food, audio/visual equipment, sign-in tables, information packets, name tags, sponsor recognitions, speakers, etc. If you have a special events office, its staff will have indispensable wisdom in determining what you need. Secure all you can internally and plan for how to pay for the rest. To keep purchasing to a minimum, the Jacksonville team pulled from every source possible, including re-purposing previously used materials.
- **When do you hope to have your event?** Look ahead at the Council calendar, nonprofit event schedules, sponsor conflicts, and, *most importantly* your main champion's calendar and the availability of your technical assistance partner. It can be challenging to coordinate, but it is necessary. Jacksonville locked in the date months in advance.
- **Where are you planning to have the event?** It may be in a public building, convention center, or private facility like a hotel. Each will have their own benefits and requirements for scheduling, parking, access to transit, catering, etc. Jacksonville's conference was held in the Main

Library downtown, which had both a large room for the main session and available space for breakout sessions, media interviews, and refreshments. Its space was flexible enough that we could expand or contract the room size as needed based on the invitation list and RSVPs. It also was free other than a minimal internal services charge for security guards to open early to accommodate catering.

- **How do you secure everything you need for a successful event?**

Understand the needs of your city's procurement department, office manager rules for ordering supplies, lead time needed from your copy center or print shop/sign shop to prepare materials. Building your calendar early, especially if procurement has to issue any RFPs or if general counsel is involved (legal reviews require longer lead time), can help reduce stress as the event date nears.

a. Creating the Budget: You can construct a preliminary budget once you've established the logistics and size of the event. Everything for the event, including internal service charges and use of existing materials, has to be accounted for. Expenses associated with the event include facility costs, catering, signage, program printing, supplies (name tags, flip charts, folders, pens, etc.), speaker thank you gifts and sponsor recognitions, and postage for thank you and follow up letters. Breaking these down into segments also facilitates sponsorship asks. The budget does not need to be complicated, but should be inclusive.

b. Technical Assistance Provider Budget: Create a separate budget for a Technical Assistance (TA) consultant if you plan to use one, including production of the summary report or interviews. The funding for a TA partner may also be offset in part through private fundraising and sponsorship dollars.

C. Event Scale

The size of your event—whether it will be a roundtable or larger conference or summit—depends on your goals and capacity. We originally planned in Jacksonville to hold a mid-sized “roundtable” with a few dozen key stakeholders. Ulti-

mately, we expanded to hold a conference with over 100 attendees. What best suits your city will depend on the level of interest from your key stakeholders, and how developed your community is with regard to civic engagement and their expectations for inclusion.

1. Benefits of smaller scale: The small-scale roundtable approach enables a group of around 35 to 40 participants to focus their conversations on opportunities and needs. Organizers can assume that participants intend to move forward, and anticipate built-in support for the effort. You also face fewer restraints and requirements, and these events can be assembled on a more compressed timeline.

If, as the local government representative, you are able to identify private sector entities who are willing to take the lead in convening the effort, then this is a great way to move forward in an expedited fashion. The city's lead champion, whether from the executive, legislative, or administrative branch, can then participate at a level that suits their ability and desire. This format also enables your technical assistance consultant to focus their interviews more narrowly, and therefore compresses their time frame for reporting back as well.

2. Benefits of larger scale: A larger conference allows you to expand your invitation list to include more community partners. In Jacksonville, where many felt "study weary," this format also allowed us to build broader support for a CWB strategy. The administration felt that it was important to be broadly inclusive of all who would participate in, advocate for, or advise this CWB effort as it was introduced it to the city. The effort had to build trust, and the only way to do that was to "over communicate."

The result was a public conference with over 100 attendees, guest speakers, panel discussions, media, and breakout ses-

sions over a day-and-a-half period. Additionally, key sector and stakeholder CEOs and senior leadership were invited to an executive briefing breakfast at EverBank Field in the owner's suite, cohosted by the Jaguars Foundation and The Arthur Vining Davis Foundations. We presented the final report at a follow-up event, extending invitations both to everyone who attended the conference and the public-at-large. The combination of events fostered open collaboration and helped establish a solid foundation on which to gain support for a Community Wealth Building strategy. While this approach was more time-consuming, it did provide an opportunity for all key stakeholders to learn about the effort and determine how they wanted to be involved.

D. Background Research and Aligning Efforts

Most cities host many efforts to improve the quality of life for residents, especially in economically challenged areas. Understanding which of these efforts align with a CWB initiative and sharing that information with your technical assistance consultant can help reduce both the time and expense of hosting your initial event.

Nina Waters, president of The Community Foundation for Northeast Florida, traveled to Cleveland to undertake the “learning journey” with the Jacksonville delegation, and served on the city’s Community Wealth Building Task Force. She emphasizes the central importance of broader collaboration:

Having a “both and” conversation is critical. [Community Wealth Building] is the creation and incubating of new businesses, yes, but how do you shore up or expand things that are already happening in this venue as well? What does that look like? How do you not just create new things, but how do you work with the existing infrastructure? Jacksonville did a good job at that because we had the right people there in the beginning. You have to look at what other efforts are already underway that tie in with community wealth building.

Collaboration depends on knowing what other initiatives are ongoing that could support a CWB strategy. This requires a little research.

1. Existing Studies: Learn what research has been completed or is ongoing that can better inform your process or serve as background to introduce the need for a CWB approach. For example, did a member of the city council conduct an economic development study in their district, or was information pulled together for a grant application related to a particular neighborhood? Share the list with your technical assistance consultant and include relevant information in your briefings. This is also a good way to demonstrate how a CWB strategy builds on that research to build a plan to build wealth where it is needed most.

2. Existing Efforts: It is important to align your CWB effort with other work in the community. What other organizations are currently active in your focus area? Gauge whether their work could help support a CWB initiative and in particular, reduce the time between the initial summit and the market study. If another organization is already engaged in an effort that would benefit a CWB initiative, then leverage that relationship and partner with them. Not many communities have the luxury of duplicating efforts, so don't! Bring these partners in early. Also, aligning efforts with what has already been successfully done by the community makes CWB more of an inclusive, organic effort, rather than a "top down" approach.

E. Building Support.

Now that you understand the key "Where" (focus area), the "Who" (key stakeholders), and the "What" (a roundtable or a conference), you are ready to start building support by meeting with potential stakeholders and engaging with others to embrace the Community Wealth Building model as it moves forward.

1. Initial meetings: Identifying Interviewees: The first step to building support for a CWB effort is to speak with representatives from key sectors to better understand the challenges and opportunities that exist as you move forward. Whether you are conducting these interviews yourself, or with the help of a Technical Assistance partner, nonprofit, or even an internal data team, it's important to have one or two main contacts on your team who will be responsible for scheduling. They will also serve as the main points of contact for the participants throughout the project.

We used our meetings with about 60 stakeholders to introduce Community Wealth Building as a development strategy and better educate our team about our city's specific needs, listening to what issues they felt should be a priority, and what community assets they thought might be helpful. We also used these interviews to help us identify potential sponsors, speakers, and eventual implementation partners. We met with elected officials (particularly City Council members), nonprofit leaders, community-based organizations, and business and anchor institution staff. Your city's project lead should be part of each meeting, since that person is the local representative who understands the relationships between the various entities and can help navigate local issues. I also made follow-up thank you calls after the meetings.



Ask your internal team and senior leadership who should be included in your early outreach. They may identify individuals and organizations you overlooked in your planning stage.

The Jacksonville team grouped stakeholders by sector, and met with them as a group where appropriate. For example, perhaps all of the senior community engagement officers of your local healthcare institutions have regular meetings. This is a great opportunity to meet with them collectively to share the CWB concept and glean critical information about their

efforts in the area of the city where the CWB initiative may launch. Several people within a single organization may want to be briefed together. When this is the case, be sure at least one of them represents the senior leadership team, whose support is critical.

Our broad approach worked well for Jacksonville. As Nina Waters of The Community Foundation for Northeast Florida observed:

The City didn't work in a vacuum. We pulled together the core group and asked who else needed to be at the table. The City led, the City convened, and pulled in people. It was a collaborative approach.

Be realistic about how many of these meetings you and your partners can do. Set aside at least an hour for each meeting. Take into account travel time as well—it can be helpful to list that separately on your calendar. Don't overbook. If your technical assistance consultant is from out of town, you may need to plan a series of visits. Time is a commodity for your technical assistance provider, yourself, and those you are meeting with. Use it wisely.

You will also want to avoid budget season and the holidays to ensure most of your elected leadership are available.

Also, note that if you are using public funds, records from your technical assistance provider as a contractor may be subject to the open records laws of your state. Keep appropriate records (meeting notes, decision memos, etc.) to comply with these laws.

Before your meeting, it is helpful to send a one-page briefing paper that explains community wealth building. Bring packets with the same document and supporting articles to leave

behind; provide an extra for them to share with the senior management of their organizations. Email the same information with your thank you note and follow-up. It may seem like over-communicating, but it is better to send too much information than risk losing a potential partner because they lacked the information they needed.

2. Preparing the Briefing Materials: Most government officials and senior executives expect to have a “leave behind” with a clear “ask” as part of every meeting. Prepare briefing materials for them, their staff, and other community organizations. It also helps focus your conversation to maximize your meeting time. There are a few key elements that to consider as you prepare for these meetings.

a) Briefing Papers, Letters & Memos—the All-Important “Ask”: Many elected officials rely on formal memos or briefing papers to quickly inform them of the key elements of issues up for consideration. You may also send formal letters of invitation or introduction to your potential interviewees. Regardless of the format you adopt, be sure to include a one-page executive summary, more expansive information on the key elements, and information on how to learn more. You should also have a very clear “ask” stating exactly what you want them to do as a result of learning about this effort. Examples of clear “asks” may include:

- Meet with your city project lead and your technical assistance partner.
- Help identify other organizations and individuals to meet with.
- Information on previous efforts and initiatives in focus area.
- Any studies they are aware of that may be relevant to the CWB process.
- Join any learning journeys to see how CWB efforts have worked in other areas.
- Financial support of this effort, either all or in part.
- For elected officials, ask for their support of this effort if/when it comes before the committee.

b) *Presentations*: When thinking about the types of formal presentations you will make, a basic one should introduce the CWB concept, highlight key community indicators, and illustrate steps needed to implement a local program. This presentation is useful in speaking with community groups, to garner financial support, or to present at various legislative meetings where you will have a limited time to make your case—perhaps as little as three minutes.



Print the presentation and provide copies to the people you are meeting. Make the presentation available on any CWB website you establish. It should also be part of any case for support you email to others.

c) *Case for Support*: As you engage more groups on the CWB effort, you will likely receive inquiries from others asking to learn more. It is helpful to prepare one master “case for support” packet with your key points, one or two news clips or links about CWB success stories, a summary document from your technical assistance provider, and a copy of the proposal and/or formal presentation. This can also serve as the foundation for any press packets you may need to assemble.

3. Learning Journeys: If you are able to schedule a visit to a successful CWB model in another community, then do so. Whether you can include this as part of your annual travel budget or need to seek out grant funding, try to include some of the key stakeholders (particularly any potential project funders) as part of the trip. The City of Jacksonville sent a team including people from the Executive Office, Community Engagement Team, and the Office of Economic Development. A grant from the Jessie Ball duPont Fund also covered travel costs for another nonprofit partner, the president of The Community Foundation of Northeast Florida. The team traveled with the express purpose of investigating the Evergreen Cooperatives in Cleveland, meeting with the community founda-

tion leaders who funded the program there, and meeting with the local representative of Democracy Collaborative, which served as the project's convening technical assistance provider.



Have a clear vision of what information your team wants to gain from a learning journey.

Whether you focus on learning more about the costs associated with establishing a project, the potential number of jobs that could result, the benefits of participating, or how future projects may translate into community progress, discuss your goals and objectives for the trip ahead of time with your team. Make a list of the questions you hope to answer during the visit.

Be sure to prepare a summary report following the visit for the senior team and grant provider (if any). You also can share it with any city council committee who may have to authorize transfer of the grant funds or to whom you make presentations. It also helps refresh everyone's memory of the trip and allows you to easily reference key findings for future briefing papers.



4. Advocates: When building support for your CWB effort, be sure to engage local organizations to advocate for the project.

ICARE, the faith-based group that initially secured Jacksonville's commitment to this project, took the initiative to meet with City Council members and push for the development of a CWB strategy. Neither I nor the city's policy director were included in these meetings—and that was fine. This independent voice was important to demonstrate community support.

We came at the unemployment issue with a justice concern for our congregations in Jacksonville neighborhoods that are historically and systematically neglected by economic development and job recruitment initiatives. The strategy for lowering procurement and personnel costs for anchor institutions by starting green,

employee-owned businesses was simple to grasp. It quickly generated supporters across our congregations and with leaders in government, education, healthcare, philanthropy, and business. It is deeply gratifying to champion a model that is convincing and inspirational.

—Rev. Kent Dorsey, ICARE

If you don't have a coalition like ICARE in your community, you likely still have various partners and neighborhood associations with a deep interest in adopting a CWB strategy. Include them in your advocacy plan and empower them with the information they will need to contact elected officials and other partner organizations on behalf of the effort. As with any public engagement, be sure you meet with the groups to answer any questions before they start booking meetings, and ask that they let you know afterwards what questions were asked during those meetings so you can adjust your own presentations or "pitch deck" accordingly. The main thing is to show broad community support.

STEP 2: Planning a Successful Event—It’s Show Time!

You’ve built your budget and been meeting with your city’s stakeholders. Now is the time to get into the nitty gritty of organizing your event.

A. Building the Invitation List

As you build your conference’s invitation list, include political, nonprofit, anchor, financial, community, and corporate partners, potential funders and others who you identified as critical to the success of a CWB effort. Also invite the leadership of organizations with initiatives already underway that would complement a CWB strategy. It may also be helpful to invite those who may be opposed to or skeptical of a CWB effort as an opportunity to earn their support. As one conference attendee wrote of the diversity of the event in Jacksonville:

FANTASTIC! Cross-marketing these groups is critical as [silos] have precluded action for decades. Tenacity, staying power, flexibility!

—Lara Diettrich, Urban Planner



Review your invitation list well in advance with your main champion and senior staff, all of whom may recommend individuals who may be future partners or promoters of the effort.

B. Invitations

It is perfectly acceptable to create the invitations in-house. These can be as simple as a letter or an email, or as elaborate as a specially designed invitation card. Clearly indicate how to RSVP. Prepare a follow-up reminder email in advance to send the day before the event. In your promotional material, manage expectations for the event. Include information on the topics of discussion, and action items for attendees (e. g., pro-

vide feedback in breakout sessions), which can help encourage attendance. It is OK to “over-invite” since not everyone will accept. In our case, we sent out over 200 letters of invitation. Roughly 50 percent RSVP’d.

C. Executive Briefing



Consider holding a separate briefing for CEOs of anchor institutions and major companies.

This idea surfaced during our meeting with the Jaguars Foundation staff when they offered to host an executive briefing the morning of the conference for the participating organizations’ CEOs. This briefing turned out to be a highly successful way to engage the top leadership of the partner organizations, ensuring that they understood what the CWB process was about, and laying a foundation for future cooperation as we sought to execute the strategy. In our case, the Arthur Vining Davis Foundations offered to share the expense of the breakfast, which was held in the owner’s suite at EverBank Field (home of the Jacksonville Jaguars).

Having those two highly respected organizations tie their names to the effort helped define them as true partners for a CWB strategy, and went a long way to helping establish credibility. Just announcing this single event helped secure funders for the conference itself. In addition, for conference attendees, the knowledge that their executives were attending the breakfast encouraged greater participation and engagement.

Jacksonville also used the breakfast as an opportunity to formally thank the conference sponsors by presenting a locally made vase customized with a sponsor recognition tag. It was more memorable (and surprisingly less expensive) than a traditional plaque and matched the conference theme of highlighting local products. It also allowed the City’s main champion, the Mayor, to thank the CEOs directly, and served as a formal

reminder of the relationship between the sponsors and the CWB effort. The few sponsors not able to attend the breakfast were presented their gifts during the conference lunch break.

D. Sponsors

Identifying sponsors for the report, conference, or market study can be as simple as sending out a request letter to your key stakeholders and anchor institutions, or as complicated as putting together formal sponsorship packets complete with coordinating promotion or recognition schedules. Remember, you will need thank-you recognitions for your sponsors, so be sure to request a high resolution logo from them as soon as they commit (your graphics department will thank you!).

There are two basic ways that donors can support the effort: direct contributions and in-kind services.



To attract direct contributions, segment the costs of the event to seek specific support for different parts of the conference.

For example, in Jacksonville, the Community Foundation helped cover the cost of the lunch for the main program day. There were also unrestricted contributions that paid for both the conference and a portion of the cost for the technical assistance provider.

Be sure you know exactly what your city's rules are for processing these contributions before you begin soliciting them. Otherwise you may find yourself having to return checks or searching for the right accounting code before depositing and spending the money. These funds may need to be appropriated through a formal process, or deposited into a trust fund. If they must be appropriated, collect all of the checks at the same time so your office can file one piece of legislation rather than go back multiple times for council approval. Work with your accounting or budget office to find the best path forward.

In-kind contributions can significantly reduce the cost of your event. Jacksonville was fortunate to have a local restaurant owner who was willing to contribute the refreshment break on the first day of the event, and worked with a local non-profit caterer to reduce the cost of food services throughout the program. It is important to remember that even in-kind contributions often need an agreement or gift letter from the city procurement office, and in some areas these agreements may need to be administered by a grants coordinator. Again, understand your local requirements before you begin to solicit these types of contributions.

E. Location Logistics

Regardless of where you are holding your event, you should consider the logistic requirements and ask for help where needed. These considerations include parking instructions for attendees, access for wheelchair users, catering and staff, sign in tables, materials tables, catering area(s), internet access, audio-visual equipment and services, breakout rooms, directional and event announcement signage, and all the other physical needs to assure your event goes smoothly.

Jacksonville was fortunate to have a conference center within the main public library across the street from City Hall. This enabled early coordination and setup, and kept costs to a minimum. Personnel from the city's Office of Special Events staffed the check-in table, and city volunteers helped assemble materials for distribution. Remember to include an area that is accessible to the general public if you are holding the meeting in a public building—some community members might want to observe without participating, and there may be guidelines on public access to consider.

F. Local Focus



In keeping with the CWB model, use local products for your event wherever possible.

Many communities have a robust local business community and hosting a CWB conference or roundtable can be a great way to highlight the value of locally made products. While the cost may be slightly higher, you may find that local companies are more than willing to have their product featured given the audience that makes up your invitation list. Alexandra Rudzinski, who was with the City of Jacksonville's Office of Economic Development and her department's lead for the CWB effort, noted the power and importance of maintaining a local focus,

Years ago, companies would never think of NOT buying and hiring local. You would always buy from someone you knew or hire from within the community because personal relationships and connections mattered. It makes a huge difference by not draining money from the local economy... By living local too, everyone benefits. We create sustainable communities, encourage rising income and career paths for residents, improve surrounding property values, reduce our carbon footprint, have more spending available for education and workforce training, and reduce crime. In this new global economy, we are starting to rethink how to return to this principle, and cities such as Jacksonville are the thought leaders.

For our event, the main caterer was the Clara White Mission, a local homeless shelter that offers a nationally recognized culinary skills training program. The planning team researched local food products and shared this list with the Mission's catering team. The Mission worked the purchase of these local products into their bid. The planning team then researched each featured product and created tent cards telling the local story of the food presented at both the buffet table and meeting tables (an example is included in the appendices). We sought to "walk the talk" and showcase the benefits of using locally sourced materials. Everything from the morning coffee to the afternoon refreshment breaks featured a different local product. The response to this effort was tre-

mendous—it reflected the very heart of the CWB initiative, and helped introduce local products to key anchor institution decision makers. Indeed, one of the products featured from a pickle and olive producer not only led to direct donations, but also to the business owner teaching the culinary students to pickle their own vegetables grown in the Mission’s garden. This unexpected outcome illustrates the power of maintaining a local focus.

G. Program Structure

Whether you have a roundtable or a conference, attendees and staff will need a clear agenda and plan for the event. Jacksonville addressed this need by creating several documents.

1. Agenda: Create a separate detailed agenda for each day, and maintain separate agendas for each event, such as the executive breakfast and conference. These printed documents are also another opportunity to thank sponsors and showcase broad support by including names of speakers and panelists.

One lesson we learned in Jacksonville: produce a single-page agenda for the introduction on day one, and a new agenda to distribute with the materials packet on day two. This eliminates the need for attendees to remember to bring it back with them each day.

2. Run of Show: A “run of show” can help plan the flow of your event down to the minute. This document details the entire event—from welcome to close. The carefully assembled information enabled everyone to consider every moment of the day—from breaks to time to transition between speakers to Q&A—and helped build out a realistic agenda that fit the time available. Prepare for the attendance to drop off toward the end of the day, so be sure to cover your key areas early. A sample run of show is included in Section VIII.

3. Participant Packets: There are several pieces of information that all conference-goers should have in their packets. This includes the agenda, list of sponsors, relevant news articles, bios of speakers, and a summary of the CWB project plan (whether your own internal plan or that of your technical assistance partner). Jacksonville used volunteers to help assemble these participant packets in advance. If you are making copies in-house, check deadlines for your copy center or administrative staff so you can be sure to order in time for your volunteers to put them together. There may also be internal service charges to include in your budget.

We labeled and color-coded the packets with a dot to indicate which breakout group the participant should attend. A better practice is to simply color-code the name badges and use generic folders. Consider having blank name-tags that are presorted by color groups so you can accommodate last minute additions and keep the breakout group sizes balanced.

4. Q&A/Public Engagement: Plan to allow some open discussion time at the end of the day. You may wish to create a question card for written comments. Jacksonville also created a half-page “Commitment Card” to invite attendees to continue their involvement in the CWB process. A sample of this card is included in the appendices.

H. Panels

Our conference panels included out-of-town guests who were involved in community wealth building efforts, an overview of CWB by our lead consultant, and presentations about Jacksonville’s current initiatives. We took care to include local community and anchor partners, and invited our political partners to introduce the panels. This furthered our goal of fostering a deeper connection between the CWB process and our key stakeholders.

Jacksonville started the day with a panel on “National Trends and Models,” an afternoon panel on “Local Innovations and Possibilities,” and concluded with “Reflections on a Community Wealth Building Initiative in Jacksonville.” You may wish to have a separate green room where your panelists can gather before their segment. This will allow you to be sure everyone knows where to go, and gives you a chance for a final review of key themes before they present.

Include in your logistics plan to have large-print nameplates at each seat (double sided so the panelists know where to sit), notepad and pen, agenda or discussion guide, and a bottle of water. It’s also helpful to have one person designated to organize and refresh this set-up for each panel. Presenting a small token of appreciation following the discussion is a nice touch—and another opportunity for sponsorship. A local sweet shop or food item is always a hit.



Request a short bio and photo of your panelists as soon as they commit to speaking.

Include their bios in the conference packets, put them up on the screen as they are introduced (if you have audio-visual capabilities), and feature them on your project’s website. A sample speaker bio document is included in Section VIII.

I. Public Notices & Accessibility

If you are using taxpayer dollars to fund a CWB conference, or if you are holding the event in a public building, you may need to open the event to the general public. In addition, if more than one elected official is attending at the same time—likely if you invite your council members—then local or state law may also require that you publicly notice the meeting. Work with your public records officer, local policy director, or administrative office to be sure you are complying with all notice requirements.

As to accessibility, chose a location that is centrally located, with available parking and public transportation links. The site should also be accessible to meet ADA requirements. Based on your community's need, you may also wish to consider simultaneous interpretation in Spanish or another common language, sign language interpreters, and materials available in Braille. Check with your disability and public affairs/communications office director for referrals.

J. Media & Public Records

1. Media Plan: Consider meeting with your public affairs office early in the planning process. They can help develop a media plan to promote the CWB concept and highlight the good work of your team. This may include setting up pre-event interviews with print media, inviting key stakeholders to provide quotes for press releases, having your main champion promote the effort or roundtable on the local news, and discussing the event on local radio. Radio also offers you an opportunity to engage a range of multicultural communities in your area, including those who prefer to communicate in languages other than English. You may have reached out to multicultural associations for support and input during your stakeholder interviews; their leadership may be helpful in joining you on air. Your Public Affairs team can advise you throughout the process.

2. Press Kits and Interview Areas: Jacksonville set up a dedicated media check-in table and provided press kits that included the same materials conference-goers received, along with a press release. Inside the conference, we set up a workstation for print media—simply a marked table located near an outlet—and we had a public communications officer on-call for any media inquiries. A room outside the main meeting space was designated for media interviews, which enabled relative quiet but easy access to the area.

3. Public Records: If you are using tax dollars to finance the conference and broader CWB initiative, the materials you produce may be subject to public records laws. Know what you are required to keep and in what form, and whether or not formal minutes need to be taken of the conference itself. It's good practice to remind the speakers ahead of time that their talks will be on the record, and educate your technical assistance partner about the rules as well. Consider requesting copies of all the consultant's documents related to organizing the event for your files.

STEP 3: Following Up and Next Phase

A. Debrief

Following any major event, it is good practice to formally debrief with key staff and planning team members to discuss what worked well, and assess where you could improve for future events. In a separate meeting invite some of your original key advisors together to talk about what they learned from the conference process, as well as what issues came to their attention that require immediate follow-up. The event is just the beginning of a longer process, so at minimum, while the event is fresh in your minds, make notes to assist you as you move forward to the next phase of the effort.

B. Recognitions & Thanks

Now that you have successfully held your event, follow up with thank-you letters to the participants and speakers. This is also a good time to remind attendees of their commitment shared in comment cards. Remember to thank all of the staff who helped to pull this event together.

C. Commitment Cards

Jacksonville asked conference participants to complete a “commitment card” detailing how they would like to remain involved in the CWB effort. The card asked what type of organization they represented (hospital/university, nonprofit, business, faith-based, banking, government, or other) and how they would like to support the effort moving forward. Choices included: report back to their organization, do community outreach, assist with fundraising, or plan next steps. Jacksonville saw a 41 percent return rate on these cards, with 79 percent asking to assist with planning next steps. A sample card is included in the appendices.

After the conference, we scanned each card and compiled their information into a single summary document. We developed an email list of all attendees to supplement the master distribution list including all those we invited. The Jacksonville team made use of these lists regularly, sharing information from the technical assistance provider and inviting participation in similar events. Consistent communication is a good way to keep your network engaged.

D. Website

Creating a dedicated page on your city's website is a good way to catalogue the Community Wealth Building conference, documents, and press coverage. As word about the CWB effort and the event spread, it proved a convenient resource to direct people who wanted to learn more. In Jacksonville, this page was maintained in-house so its creation and maintenance presented no financial hardship to the city, while supporting the goals of increased transparency and accessibility.

E. Report Distribution

Share the final report about the conference findings, including concrete recommendations on steps to move forward with everyone involved in the effort. We sent the report to the entire conference email list and we posted it to our website. The Public Affairs office provided printed copies to the media as well.



Deliver printed copies of the final report to all the program sponsors, including the organizations that funded the learning journey early in the process. We also delivered copies to all elected officials and the public library.

Public “Report Out” Meeting: If your original event was open to the public, you may wish to host a public meeting to unveil the report's findings. In Jacksonville, the technical assistance partner returned to the city to help present these findings, and all of the invitees to the first event, including press, were

invited. We held the presentation in the same venue as the original conference. This follow up event was a great way to expand the circle of support for the CWB effort.

F. Moving Toward Implementation

Launching a successful Community Wealth Building platform requires building broad-based community support. One way to build consensus for new initiatives like CWB is to appoint a task force inclusive of community stakeholders, which is what we did in Jacksonville, managed by the Office of Economic Development. As city staffer Alexandra Rudzinski observed,

I think it is key for the private sector to take a strong leadership role with the City- [Community Wealth Building] is a true P3 partnership ... Jacksonville pulled a multi-industry task force together to better facilitate the coordination of community and economic development efforts and resources to urge the private sector to become more rooted in their communities, the ecosystems they live in.

We took great care that the task force reflected the sectors represented in the conference, including a representative of ICARE, the original advocate for the approach. The task force was created by executive order, with the Mayor appointing 12 members recommended by the project staff, and creating 3 ex-officio positions for a city council person and staff of the Jacksonville Transportation Authority and U.S. Department of Housing and Urban Development. City staff reached out to key stakeholders in advance to gauge their willingness to serve. Represented were anchors, nonprofits, community groups, business, government, and the public at large. They were given clear direction at the start, with staff support and a suggested timeline to complete their review.

One question the task force needed to answer in order to make comprehensive recommendations about the potential success of a CWB effort in Jacksonville was whether anchor

institutions actually had procurement needs that community-based businesses could fulfill. The City's Office of Economic Development put out an RFP for a market procurement study, with city staff doing a significant amount of preliminary work identifying key anchors by sector and seeking advice from a procurement company that advises large institutions.

The task force meetings are appropriately noticed and open to the public, with a city staff person assigned to facilitate activities, notifications, and maintain information on the website.

Final Recommendations & Closing Thoughts

Ultimately, even if you do everything right, your success will be judged by how well the strategy is implemented. Regardless of the form—task force, blue ribbon panel, a public-private partnership organization, a philanthropic-led effort, or other form—to be successful there must be a dedicated infrastructure and staff to implement the program over time. The advantage of having the effort led by local government is the need for public involvement and accountability, and the ultimate transparency inherent in public records. Looking back over Jacksonville’s process, Chris Hand notes other ways the city might have moved forward.

While we created Jacksonville’s long-term Community Wealth Building structure and process through executive order, a stronger approach to promote sustainability would be the establishment of a dedicated office within city or county government that is accountable to the Mayor with funding oversight from the city/county council or commission. Another approach would be to make that office accountable to a board of key community stakeholders appointed by the Mayor and approved by the city/county council or commission, similar to how independent authorities operate in Jacksonville and many other municipalities. Either scenario lowers the risk that a Community Wealth Building initiative ends with the administration that launched it. If multiple arms of local government have approved and funded the structure and process, they will have more of a vested interest in sustaining the mission over time.



One final recommendation for launching a community wealth building strategy is to stick with it. I kept a Post-it note on my desk that read, “We have done so much with so little for so

long, we are now qualified to do anything with nothing. Don't talk about it; be about it."

As pressure on government to downsize continues, it may be tempting to put off moving forward with the development of a Community Wealth Building strategy in lieu of more immediately visible efforts. But if those efforts really created the type of long-term sustainable change most cities are looking for, we would not be looking for new approaches. Yes, laying the foundation for a successful CWB effort takes time—and can include some painful conversations. However, the more critical the potential impact is on your neighborhoods in need, the more important it is to stay at the table. Prioritize this effort. Set project goals and calendar them. Make *your* team accountable for benchmarks along the way, and engage assistance of others early and often. Community Wealth Building—and your leadership—will make a difference for countless families for years to come. Go "be about it!"

Afterword

Although Jacksonville's story is more one of considerations when *launching* a Community Wealth Building effort rather than *implementing* a specific strategy (as of yet), one interesting result has been the integration of this model's ideals across a broad spectrum of the community, independent of local government-led efforts. Since so many of the original conference-goers were from the city's local nonprofit community organizations already active in the focus area, the CWB "language" is now embedded in multiple local discussions about how to improve the lives of those living in distressed communities. Some of these discussions have inspired promising partnerships.

A relatively new group of nonprofits engaged in food, nutrition and health related efforts in Jacksonville reviewed a Technical Assistance Grant opportunity with the U.S. Department of Agriculture in August 2015. They agreed it would be best for two to apply jointly for a grant to fund plans for a proposed retail grocery store connected to a retail-modeled food bank, with a community kitchen and training opportunities in the northwest quadrant of Jacksonville, a food desert and the focus area of the original CWB effort.

When discussing the idea, more than one member of the group (most of whom attended our conference) referenced the Community Wealth Building model, and suggested that the retail grocery be employee-owned so it would generate more benefits for the community at large.

While the exact implementation of the Community Wealth Building model in Jacksonville remains to be seen, the fact that over a year after the conference stakeholders continue to discuss its potential for transforming communities contin-

ues is promising. It also reaffirms that for this area, expanding the event so that it included a broader segment of community partners was exactly the right thing to do. Indeed, it was this inclusive approach that has given the model the best chance for success by extending “ownership” of the concept beyond City Hall. The seed is planted, and many hands are now nurturing the growth of this transformative model for our community.

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Acknowledgements

This author would like to thank Ted Howard and Steve Dubb of The Democracy Collaborative for inviting me to write this paper, and for their and Dave Zuckerman's support of the CWB effort in Jacksonville. Their team made many concessions and investments of both time and financial resources to launch the project in Jacksonville. Thanks as well to Steve Dubb, Alexandra Rudzinski, and David Zuckerman for reviewing this paper. I would also like to thank former Jacksonville Mayor Alvin Brown and Chief of Staff Chris Hand for their leadership on this effort, the members of ICARE for bringing the CWB concept forward in Jacksonville, staff assistants Grace Pettus and Carol Wells, former Public Affairs Officer Lauren Bankert, Alexandra Rudzinski with the Office of Economic Development, The Hon. Mia Jones who co-chaired the initiative from the beginning, and the many sponsors, partners and members of the City of Jacksonville and the CWB Task Force who helped move this project forward.

Community Wealth Building Roundtable *Agenda*

**Jacksonville, Florida
March 27-28, 2014**

Organized by:

Office of Mayor Alvin Brown, City of Jacksonville
The Democracy Collaborative at the University of Maryland
Interfaith Coalition for Action, Reconciliation and Empowerment
(ICARE)

Presenting Sponsor:

Mayo Clinic

Supporting Sponsors:

The Arthur Vining Davis Foundations
Baptist Health
Brooks Rehabilitation
The Community Foundation for Northeast Florida
Hightide Burrito Co.
Jessie Ball duPont Fund
Jaguars Foundation

Appendix A: Agenda

Community Wealth Building Roundtable

AGENDA

March 27, 2014

- 3:00 p.m.** **Refreshments:** Courtesy of Hightide Burrito Company
- 3:30 p.m.** **Welcoming Remarks:**
- Mayor Alvin Brown, City of Jacksonville
 - The Hon. Kim Daniels, Jacksonville City Council, At-Large Group 1
 - Ted Howard, Executive Director, The Democracy Collaborative
- Participant introductions and expectations for Roundtable*
- 4:30 pm** **Refreshments/Networking**

March 28, 2014

- 9:30 a.m.** **Continental Breakfast:** Ashley Street Catering, Clara White Mission
- 10:00 a.m.** **Welcome:** - Jacksonville Mayor Alvin Brown
Introductions of new participants
- 10:15 a.m.** **Framing Remarks:**
- Dr. Steve Dubb, Research Director, The Democracy Collaborative
- 10:30 a.m.** **Plenary Panel: National Trends, Developments, & Models**
- Alicia Philipp, President, Community Foundation for Greater Atlanta
 - Bill Generett, CEO, Urban Innovation 21 (Pittsburgh, PA)
 - Angela Lust, Senior Vice President, Amarillo Area Foundation
 - John Hamilton, President, City First Enterprises (Washington, D.C.)
 - India Pierce Lee, Program Director for Neighborhoods, Housing, and Community Development, The Cleveland Foundation
- Noon** **Lunch:** Ashley Street Catering, Clara White Mission
Sponsored by The Community Foundation for Northeast Florida
- 12:30 p.m.** **Speaker:** Nina Waters, Community Foundation for Northeast Florida
Introduced by Councilwoman E. Denise Lee, District 8

Appendix A: Agenda

- 1:00 p.m. Plenary Panel: Local Innovations and Possibilities**
- *Panel Introduction by Councilman Warren Jones, District 9*
 - Rev. James Wiggins, St. Paul Lutheran Church, Co-President, Interfaith Coalition for Action, Reconciliation and Empowerment (ICARE)
 - Michael Fleming, Managing Director and Head of Public Affairs and Community Relations, Technology & Service Centres for the Americas, Jacksonville, Deutsche Bank
 - Paul Tutwiler, CEO, Northwest Jacksonville Community Development Corporation
 - Ju'Coby Pittman, CEO and President, Clara White Mission
 - Ignacio Esteban, CEO, Florida Community Loan Fund
- 2:30 p.m. Breakouts: Building a Community Wealth Agenda Locally**
- Three groups facilitated by morning plenary panelists
Breakout Introduction by Councilman Dr. Johnny Gaffney, District 7
- How can we strengthen and expand existing efforts?
 - What could be created with new and additional philanthropic, city, and state investments?
 - What are priorities for action in the Jacksonville area?
- 3:30 p.m. Break:** Ashley Street Catering, Clara White Mission
- 3:45 p.m. Plenary Discussion:** Report-back from small groups
- 4:15 p.m. Closing Plenary Panel: Reflections on Possibilities for Building a Community Wealth Agenda and Initiative in Jacksonville**
- Panel Introduction by The Hon. Reggie Fullwood, State Rep., Dist. 15*
- Earnie Franklin, Florida Blue/City of Jacksonville Director of Public-Private Partnerships
 - Dr. Irvin PeDro Cohen, Executive Director, New Town Success Zone
 - Janet Owens, Director, Local Initiatives Support Corporation (LISC), Jacksonville
 - The Hon. Mia Jones, Mayor's Office, City of Jacksonville
- 5:00 p.m. Closing Remarks:**
- Ted Howard, Executive Director, The Democracy Collaborative
 - Mayor Alvin Brown, City of Jacksonville

Thank you for taking the time to learn about this important initiative!

For more information, please visit: www.Community-Wealth.org

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Community Wealth Building Roundtable

WALK THROUGH AGENDA

Thursday, March 27, 2014

3:00-3:30 pm Refreshments: Courtesy of Hightide Burrito Company

3:30 pm Welcoming Remarks

3:30 pm Steve Dubb introduces himself and declares the Jacksonville Community Wealth Building Roundtable has begun. Introduces staff of The Democracy Collaborative. Thank you to the City of Jacksonville, ICARE and our sponsors (Mayo Clinic, The Arthur Vining Davis Foundations, Baptist Health, Brooks Rehabilitation, The Community Foundation for Northeast Florida, Hightide Burrito Co., Jessie Ball duPont Fund, and the Jaguars Foundation. Acknowledges the support of the Mayor's staff, including Deputy Chief of Staff Michelle Barth. Invites Mayor Alvin Brown to welcome the assembled.

3:32 pm Remarks by Mayor Alvin Brown, City of Jacksonville. Welcome to the Jacksonville Community Wealth Building Roundtable. When I was elected Mayor, I pledged to make a difference for all communities in Northwest Jacksonville. Two years ago, ICARE came to me to suggest that The Democracy Collaborative at the University of Maryland come to Jacksonville. I have since learned that the Collaborative is an organization which has received national attention and which has played a catalytic role—working with the Cleveland Foundation, local universities and hospitals, and the Cleveland Foundation, the oldest community foundation in the country—to develop a community wealth building strategy in Cleveland that employs low-income residents in jobs in businesses that they also own through the mechanism of an employee-owned cooperative. Two central principles of community wealth building are to address the problems we face in low-income communities by building on assets and strengths that are already in place and using community ownership of business to build wealth. Today, we assemble here with the knowledge that reducing poverty in Jacksonville will only occur through the collective effort of the people of our fine city. I look forward to the discussions and thank all of you assembled for your participation in this important endeavor.

3:40 pm Steve Dubb introduces The Hon. Kim Daniels, Jacksonville City Council, At-Large Group 1. Councilwoman Daniels, in addition to serving on City Council is a pastor at two churches and is the founder of Operation Boomerang whereby transitional assistance is provided to convicted felons. Welcome Councilwoman Daniels.

3:41 pm Remarks by The Hon. Kim Daniels, Jacksonville City Council, At-Large Group 1: Welcome to the Community Wealth Building Roundtable. Over the course of today and tomorrow we will be hearing from a range of speakers — both

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nationally and locally – that are working to find ways to empower low-income communities not with a hand-out, but with a hand-up. It is important to note that ICARE, a church-based community network in Jacksonville, brought this approach to the City’s attention. I am proud of Mayor Brown for launching this effort. I hope you join me in welcoming Ted Howard, Executive Director of The Democracy Collaborative and a community wealth building pioneer who has led the development of the Evergreen Cooperatives initiative that brings jobs, wealth building, hope, opportunity, and a ladder up for ex-offenders and low-income communities, to kick off Jacksonville’s first Community Wealth Building roundtable.

3:45 pm Introductory remarks by Ted Howard

3:50 pm Six-minute YouTube video on the “Greater University Circle Initiative”

3:56 pm Concluding remarks by Ted Howard

4:00 pm Steve Dubb asks participants to briefly introduce themselves and state in one sentence what they hope to see from the Roundtable.

Participant introductions and expectations for Roundtable

4:28 pm Steve Dubb wraps up the introduction remarks. Thanks everyone for participating. Thanks to the Mayor and the Honorable Kim Daniels for their kind remarks. Reminds everyone that doors will open at 9:30 am and proceedings will start the following morning at 10 am sharp.

4:30 pm **Refreshments/Networking**

March 28, 2014

9:30 am **Continental Breakfast:** Ashley Street Catering, Clara White Mission

10:00 am Steve Dubb re-introduces himself and declares the second day of the Jacksonville Community Wealth Building Roundtable has begun. Thank you again to the City of Jacksonville, ICARE and our sponsors (Mayo Clinic, The Arthur Vining Davis Foundations, Baptist Health, Brooks Rehabilitation, The Community Foundation for Northeast Florida, Hightide Burrito Co., Jessie Ball duPont Fund, and the Jaguars Foundation. Invites Mayor Alvin Brown to address the assembled.

10:02 am Remarks by Mayor Alvin Brown, City of Jacksonville. Thank you for being here.

We are here today at a unique event: the Jacksonville Community Wealth Building Roundtable. Thank you to ICARE for bringing this opportunity to the City’s attention. I know it took a little longer than you may have hoped, but we

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are here and are looking forward to learning more about the potential of the community wealth building approach in Jacksonville.

While we are proud of the good work that has been done in Workforce Development and Economic Development in the City in recent years, we understand it is not enough. We cannot simply continue to do what we have in the past and expect dramatically different results. We must be bold, and we must be willing to take risks.

At the same time, we want those bold strategies to be informed by the best available evidence from other cities. It is in that context that I am pleased to host this Jacksonville Community Wealth Building Roundtable for us to consider integrated social enterprise strategies for creating living-wage jobs with existing on-the-ground efforts in Jacksonville. This community wealth building approach—sometimes called “The Cleveland Model”—has attracted nationwide attention and earned recognition from both the federal Department of Housing and Urban Development and the Federal Reserve.

Let me add that one of the most impressive characteristics of what has been done in Cleveland is the way the Evergreen Cooperatives and the Greater University Circle Initiative have pulled together local government with the philanthropic community, anchor economic institutions such as hospitals and universities, available state and federal funds, and other city and neighborhood organizations into a common effort to make the most of the city’s existing resources to more effectively combat unemployment and poverty. Already it has spawned imitators in such varied locations as Amarillo, Texas; Atlanta, Pittsburgh, and our nation’s capital – and now, possibly, here in Jacksonville.

Here in the River City we are blessed to have strong anchor institutions and a strong philanthropic community. Further, we understand that the success depends not just on passing a measure in City Council or adding some items to the budget, but in getting our partner institutions to work together towards common goals in a constructive, integrated way. This includes not only City government and public entities like the port authority and the public schools, but also our partners in the university, health care, business, and philanthropic communities. For those community partners who are here today, I extend a special welcome—and an invitation to listen closely—to what our guest speakers today have to say.

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| 10:08 am | <i>Introductions of new participants:</i> Steve Dubb asks participants to briefly introduce themselves and state in one sentence what they hope to see from the Roundtable. |
| 10:15 am | Framing Remarks: Steve Dubb, Research Director, The Democracy Collaborative (PowerPoint) |
| 10:25 am | Steve Dubb: We have an esteemed panel and their complete bios are in your registration packet. But briefly, the members of this panel are: first, Alicia Philipp, President of the Community Foundation of Greater Atlanta, who will |

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discuss the Atlanta Lettuce Works project. Second, Bill Generett, CEO of the Urban Innovation 21 economic development organization, will introduce us to the Pittsburgh Wealth Building Initiative. After Mr. Generett, Angela Lust, Senior Vice President of the Amarillo Area Foundation, will discuss their wealth building initiative in the Texas Panhandle. Following Ms. Lust, John Hamilton, President of City First Enterprises, a community development financial institution, will speak about the Community Wealth Building Initiative being launched in the metropolitan Washington DC region. Lastly, India Pierce Lee, P Program Director for Neighborhoods, Housing, and Community Development of The Cleveland Foundation, will conclude the panel with her presentation on Cleveland's Greater University Circle Initiative and Evergreen Cooperatives.

10:30 am	Steve Dubb introduces Alicia Philipp, President, Community Foundation of Greater Atlanta
10:31 am	Alicia Philip offers remarks and shows PowerPoint on Atlanta Wealth Building Initiative
10:42 am	Steve Dubb introduces William Generett, CEO, Urban Innovation 21
10:43 am	William Generett offers remarks and shows PowerPoint on Atlanta Wealth Building Initiative
10:54 am	Steve Dubb introduces Angela Lust, Senior Vice President, Amarillo Area Foundation
10:55 am	Angela Lust offers remarks and shows PowerPoint on Atlanta Wealth Building Initiative
11:06 am	Steve Dubb introduces John Hamilton, President, City First Enterprises
11:07 am	Bill Generett, offers remarks and shows PowerPoint on Community Wealth Building Initiative of Washington, DC region
11:18 am	Steve Dubb introduces India Pierce Lee, Program Director for Neighborhoods, Housing, and Community Development, The Cleveland Foundation
11:19 am	India Pierce Lee offers remarks and shows PowerPoint on Greater University Circle Initiative in Cleveland, Ohio.
11:30 am	Steve Dubb facilitates 30-minute question-and-answer session.
11:58 am	Thank you to all of the panelists. The City of Jacksonville has provided a small gift to show their appreciation for your contributions.
Noon	Lunch: Ashley Street Catering, Clara White Mission <i>Sponsored by Community Foundation for Northeast Florida</i>
12:30 pm	Acknowledgement of sponsors

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12:35 pm Steve Dubb introduces E. Denise Lee, Council Member, District 8.

E. Denise Lee, Councilwoman for District 8 has long been committed to public service, having spent 20 years on the Jacksonville City Council, in the Florida House of Representatives and as an appointed member of the Jacksonville Civil Service Board. As City Councilwoman, Lee takes pride for her work supporting community development in her district, including a theater renovation project, park development, and housing for neighborhood residents. Please welcome E. Denise Lee.

12:37 pm E. Denise Lee, Council Member, District 8

The Community Foundation of Northeast Florida celebrates its 50th anniversary this year, our state's largest and oldest community-serving philanthropy. We are fortunate to have Nina Waters, who has been President of the Foundation since 2005, here with us to provide some brief remarks on today's events. The Community Foundation for Northeast Florida is our state's oldest community foundation, and also the largest. Accomplishments include launching the Foundation's Quality Education for *All* initiative in 2005, which led to the creation of the Jacksonville Public Education Fund, and culminated in the announcement of a \$50 million fund for local education investment. The initiative has received recognition and support from the Pew Partnership for Civic Change, the Aspen Institute and the Mott Foundation.

12:40 pm Nina Waters

I am glad to see many in this room who I recognize and to meet others I do not know. And it is a pleasure to be here to address this very important gathering. I am proud to be able to address this Community Wealth Building Roundtable and we are glad to have been able to do our part and be a sponsor of this event.

Last month, I was part of a delegation, funded by the Jessie Ball DuPont Fund, to do a site visit of the community wealth building initiative under way in Cleveland, Ohio. It was February and it was pretty cold out there— temperatures were so cold that they dropped into single-digit territory before we flew home. I tell you— it really makes you appreciate that Florida sunshine!

But despite the frigid weather, it was well worth the trip.

For our 50th anniversary — and we at the Community Foundation for Northeast Florida are very proud of being the oldest and largest community foundation in Florida — we have adopted the slogan: “Fifty years of giving back. Going forward.” And that slogan is certainly appropriate in this context.

There is no doubt that the Community Wealth Building approach represents a new path of “going forward” in a way that we have not been fully considered to date in Jacksonville.

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We know that Jacksonville has done great things — and you will hear more about them at the panel following this lunch — but we also have many things that we can learn from others. I hope our community takes to heart some of the things we heard this morning from Cleveland, from Washington DC, from Atlanta, from Pittsburgh, and from Amarillo and uses that information to inform new and creative community wealth building efforts at home. What emerges, surely, will be unique to Jacksonville, but we can build on the hard knowledge and experience that these resource people have learned through the hard knocks of experience.

We also know that our City has had many studies in recent years. We are all well aware of the health and economic disparities, as noted by Steve Dubb briefly earlier this morning. The question put to us, however, is the following: Will, the Jacksonville community, including foundations like us, hospitals and universities, city government, public agencies, business, nonprofits, and the faith community come together into a common effort to make the most of our existing resources, so that we in Jacksonville can more effectively create jobs, reduce health disparities, and build community wealth?

Because a common effort is what it will take. When we were in Cleveland, we saw the 3.25-acre greenhouse. We visited the ecologically efficient Evergreen Cooperative Laundry. And we saw many of the 85 workers who are the direct beneficiaries of the Evergreen network of employee-owned cooperatives that has inspired so many. We also learned about initiatives that we hadn't heard about, such as the Neighborhood Connections mini-grant program that India Pierce Lee talked about briefly this morning, which builds local community capacity.

We also got a chance to see a bit “under the roof” if you will. We saw that building community wealth—not just as a slogan, but as a reality — requires staff time, capital, operating support, and many partners. In short, while it would be possible to adopt a program here or there without too much effort — and that would be worthwhile. But the opportunity in front of us is so much more — to really work toward transformational change in some of the hardest-hit neighborhoods of northwest Jacksonville.

The Community Foundation for Northeast Florida stands ready—not to fund the entire effort, which would be far beyond our capacity — but to join with others in Jacksonville to assist in the development of a Community Wealth Building Initiative.

What will this involve? Even at the end of the day, we will only have an outline of the specifics. I look forward to the report-backs from the breakout groups, which will be compiled by The Democracy Collaborative and will be helpful in planning next steps.

But while the specifics will only emerge over time, I did want to outline a few key principles that should guide this effort.

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First, we know that Northwest Jacksonville residents have heard promises before. The failure to deliver has hurt community trust. This history has to inform any decisions we make and we must err on the side of under-promising and over-delivering.

Second, I am convinced that any long-term sustainable change starts simply with establishing relationships between the organizations in this room that may not think they share the same goals.

Third, we recognize that whatever goals we set must also include the community. And I am glad to see so many community members in this room today.

Fourth, we know that community wealth building has many facets. You heard about some this morning and you'll hear about some of those in our community after lunch. To maximize our impact, we need to think carefully about how we can build off of what we have and think about whether — and how—we as a community want to take on this effort.

The work of community wealth building is inspiring. I hope you too leave inspired as you hear the stories this afternoon of some of the great work that is being developed, not just outside our community, but here in Jacksonville today.

Thank you for your attention — and for your participation in helping the Community Foundation of Northeast Florida and Jacksonville go forward into a better future.

12:50 pm Steve Dubb: Thank you, Nina. The City of Jacksonville has provided a small gift as a token of their appreciation for your contributions.

Everyone please enjoy your lunch and get ready for our next panel, which will start in 10 minutes.

1:00 pm **Steve Dubb introduces Warren Jones**, Council Member, District 9: Like our previous City Council Member E. Denise Lee, Councilmember Jones has spent decades in public service, serving on City Council from 1979 and 1999 before returning to Council in this current term. On Council, Jones has advocated for infrastructure and job creation.

1:01 pm Warren Jones: As a lifelong resident of District 9, I understand that we must increase job opportunities by building community wealth and providing economic development for our communities. This panel, which is titled “Local Innovations and Possibilities,” highlights some of the leading efforts in our communities, as well as exploring how we might build on those achievements. As with the morning panel, each of the panelists will offer a 10-minute overview of their work and then at the end there will be a half hour for questions from the audience. There will be fewer PowerPoint presentations with this panel, but I believe we will see a couple of video clips that highlight some of the work that is already taking place in northwest Jacksonville.

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Rev. James Wiggins of the St. Paul Lutheran Church and Co-President of the Interfaith Coalition for Action, Reconciliation and Empowerment, better known as ICARE, will begin the panel and will discuss how ICARE came to learn of the Evergreen Cooperatives and their hopes. After Rev. Wiggins, Michael Fleming, Managing Director and Head of the Global Business Services (GBS) Center, Jacksonville, Deutsche Bank, will discuss the Jacksonville Military Veterans Coalition and how that coalition provides a model for how the Jacksonville community works together. Next, Paul Tutwiler, Executive Director of the Northwest Jacksonville Community Development Corporation will discuss the group's community building and commercial renovation work. Following Mr. Tutwiler, JuCoby Pittman, CEO and President of Clara White Mission will discuss her group's work including their urban farming initiative and their supply contract with Sysco. Last, Ignacio Esteban, CEO of the Florida Community Loan Fund, will present information on their community development financing, including their support of a number of projects in Jacksonville.

So let us all please welcome Reverend Wiggins.

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| 1:05 pm | Rev. James Wiggins offers remarks on why ICARE cares about job creation and community wealth building. |
| 1:16 pm | Steve Dubb introduces Michael Fleming, Managing Director and Head of the Global Business Services (GBS) Center, Jacksonville, Deutsche Bank |
| 1:17 pm | Michael Fleming describes how the military veterans coalition brought Jacksonville together. |
| 1:29 pm | Steve Dubb introduces Paul Tutwiler CEO, Northwest Jacksonville Community Development Corporation |
| 1:30 pm | Paul Tutwiler offers remarks and shows brief video (2-3 minutes) on commercial corridor work in Northwest Jacksonville. |
| 1:41 pm | Steve Dubb introduces Ju'Coby Pittman, CEO and President, Clara White Mission. |
| 1:42 pm | JuCoby Pittman offers remarks and shows brief video (4 minutes) on Clara White Mission and their urban farming initiative. |
| 1:53 pm | Steve Dubb introduces Ignacio Esteban, CEO, Florida Community Loan Fund. |
| 1:54 pm | Ignacio Esteban offer remarks and presents a PowerPoint on the work of the community loan fund. |
| 2:05 pm | Steve Dubb facilitates 20-minute question-and-answer session. |
| 2:25 pm | Thank you to all of the panelists. The City of Jacksonville has provided a small gift as a token of their appreciation for your contributions. |

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- 2:27 pm** **Steve Dubb introduces Dr. Johnny Gaffney**, Council Member, District 7
- Councilmember Gaffney has been a minority lender for the past 10 years and serbanking executive (Branch President) for the former Barnett Bank of Jacksonville.
- 2:28 pm** Brief remarks by Council Member Gaffney:
- Dr. Johnny Gaffney, Council Member, District 7**
- You’ve heard from the national experts and you have heard from local leaders. Now is the time for the work to begin! Each group will be co-facilitated by speakers from this morning’s panel. You should have a colored mark (marked either in pink, green, or yellow) on your folder, which tells you which breakout room to go to *[Indicate which color corresponds to which room]*. Each room will also have one Democracy Collaborative representative. Participants are divided into sectors, but you will all address the same questions and then each group will choose a presenter to highlight what you discuss to the group as a whole.
- You also have “commitment cards” in your folders — please fill these out after your breakout session. It is the breakout groups that will help move us from theory to action.
- So, with no further ado, please move toward the appropriate breakout room.
- 2:30 p.m.** Breakouts: Building a Community Wealth Agenda Locally
Three groups facilitated by morning plenary panelists
Group 1: David Zuckerman, Alicia Philipp, Jason Washington
Group 2: Ted Howard, John Hamilton, India Pierce Lee
Group 3: Steve Dubb, Angela Lust, Bill Generett
- 3:30 pm** **Break:** Ashley Street Catering, Clara White Mission
- 3:45 pm** Steve Dubb facilitates report-backs from break out groups.
- 4:00 pm** **Steve Dubb introduces State Representative Reggie Fullwood**, who, in addition to his role in the state legislature is also the executive director of a local community development corporation. Welcome State Representative Fullwood.
- 4:02 pm** **State Representative Reggie Fullwood**
- Today has been a day full of rich conversations. Having been born and raised in this city and being a graduate of Edward Waters College, I know the neighborhood very well. I look forward to the closing remarks of the panel to help us think about how to move forward from here. This panel is structured somewhat differently, with four panelists offering brief 5-7 minute reflections on the events that have transpired, with a focus on outlining possible next steps.

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First, Earnie Franklin of Florida Blue, who currently serves as the City’s Director of Public-Private Partnerships, will offer his observations. Next, Irwin Pedro Cohen, Executive Director of New Town Success Zone, will give us his remarks. Following Pedro will be Janet Owens, Director of Jacksonville LISC (Local Initiative Support Corporation), who will highlight how community wealth building might be integrated with LISC’s ongoing EPIC Communities initiative—EPIC, by the way, stands for “Empowering People Inspiring Change,” which is clearly a theme of this entire conference. Last, State Representative and Special Assistant to the Mayor Mia Jones will offer her remarks.

So let’s all now welcome Mr. Franklin:

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| 4:07 pm | Brief remarks by Earnie Franklin, Florida Blue/City of Jacksonville Director of Public-Private Partnerships |
| 4:14 pm | Steve Dubb introduces Irwin Pedro Cohen, Executive Director, New Town Success Zone |
| 4:17 pm | Brief remarks by Irwin Pedro Cohen, Executive Director, New Town Success Zone |
| 4:24 pm | Steve Dubb introduces Janet Owens, Director, Local Initiatives Support Corporation (LISC), Jacksonville |
| 4:25 pm | Brief remarks by Janet Owens, Director, Local Initiatives Support Corporation (LISC), Jacksonville |
| 4:32 pm | Steve Dubb introduces The Hon. Mia Jones, Mayor’s Office, City of Jacksonville |
| 4:40 pm | Steve Dubb facilitates 10-minute question-and-answer session. |
| 4:50 pm | Thank you to all of the panelists. The City of Jacksonville has provided a small gift as a token of their appreciation for your contributions. |
| 4:51 pm | Steve Dubb introduces Ted Howard, Executive Director, The Democracy Collaborative |
| 4:52 pm | Brief remarks by Ted Howard |
| 4:59 pm | Steve Dubb introduces Mayor Alvin Brown, City of Jacksonville |
| 5:00 pm | Concluding remarks by Mayor Alvin Brown, City of Jacksonville |
| 5:05-5:30 pm | Break down of event |

Appendix C: Commitment Card

Thank you for attending the Community Wealth Building Roundtable!

We invite you to join us in continuing this conversation.

Please indicate how you would like to help support this effort moving forward: (check all that apply)

☐ Review Final Report ☐ Attend Future Meetings ☐ Be Considered for a Leadership Role ☐ Stay on Email list

(Please print clearly):

Name: _____ Title: _____

Company/Organization: _____

Organization Type: ☐ Anchor ☐ Nonprofit ☐ Training ☐ Faith-Based ☐ Financial ☐ Community Engagement ☐ Other

Address: _____ Zip Code: _____

Phone: _____ ☐ Cell ☐ Home ☐ Work (Please indicate which number)

Email Address: _____

Do you receive the Mayor's E-mail Updates? ☐ Yes ☐ No Would you like to receive the Mayor's E-mail Updates? ☐ Yes ☐ No

Use the space on the back of this page to let the Mayor know your thoughts on this event. You may also mail this form or write to Mayor Brown directly at the address below, send via fax, or send an email to MayorBrown@coj.net

Event: Community Wealth Building Roundtable Date: March 28, 2014

117 W. Duval St., Suite 400 • Jacksonville, FL 32202 • Phone: 904-630-1776 • Fax: 904-630-2391

Thank you for attending the Community Wealth Building Roundtable!

We invite you to join us in continuing this conversation.

Please indicate how you would like to help support this effort moving forward: (check all that apply)

☐ Review Final Report ☐ Attend Future Meetings ☐ Be Considered for a Leadership Role ☐ Stay on Email list

(Please print clearly):

Name: _____ Title: _____

Company/Organization: _____

Organization Type: ☐ Anchor ☐ Nonprofit ☐ Training ☐ Faith-Based ☐ Financial ☐ Community Engagement ☐ Other

Address: _____ Zip Code: _____

Phone: _____ ☐ Cell ☐ Home ☐ Work (Please indicate which number)

Email Address: _____

Do you receive the Mayor's E-mail Updates? ☐ Yes ☐ No Would you like to receive the Mayor's E-mail Updates? ☐ Yes ☐ No

Use the space on the back of this page to let the Mayor know your thoughts on this event. You may also mail this form or write to Mayor Brown directly at the address below, send via fax, or send an email to MayorBrown@coj.net

Event: Community Wealth Building Roundtable Date: March 28, 2014

117 W. Duval St., Suite 400 • Jacksonville, FL 32202 • Phone: 904-630-1776 • Fax: 904-630-2391

Appendix D: Menu



Menu Featuring Local Products, including:

Breakfast

Bold Bean Coffee Station
Assorted Pastries - Biscotti's Bakery
Fresh Seasonal Fruit - Beaver Street Farmers Market
Indian River Orange Juice

Lunch

Broccoli Salad - Clara White Mission - White Harvest Farms
BBQ Beef Brisket - Jenkins BBQ
Smoked Sausage - Azar
Sweet and Smokey Honey BBQ Sauce - featuring local Honey
Rosemary Roasted Potatoes - Clara White Mission Garden of Hope and
White Harvest Farms
Fresh made Cole slaw - White Harvest Farms Cabbage
French Pantry fresh baked bread - Garlic Toast
Assorted Desserts – Cinottis Bakery

Afternoon Break

Bold Bean Coffee Station
Fresh Brewed Tropical Tea with Fresh Mint (CWM Garden of Hope)
Assorted Sweets – Peterbrooke Chocolates
Relish Tray - Olive My Pickle

www.AshleyStreetCatering.com

About the Author

Michelle Barth has over 20 years of experience in government service, community engagement, strategic marketing and communications, and non-profit leadership. Her background includes work as a Regional Director for the U.S. Senate, Vice President of a regional video production company, development work in the human services and arts sectors, and as coordinator of the first municipal launch of a Community Wealth Building effort in her role as the Deputy Chief of Staff for the Mayor of Jacksonville, Florida. Michelle is a Rotary Foundation Ambassadorial scholar and has served on the boards of numerous nonprofits and community leadership programs.

The Democracy Collaborative

The Democracy Collaborative, a nonprofit founded in 2000, is a national leader in equitable, inclusive, and sustainable development. Our work in community wealth building encompasses a range of advisory, research, policy development, and field-building activities aiding on-the-ground practitioners. Our mission is to help shift the prevailing paradigm of economic development, and of the economy as a whole, toward a new system that is place-based, inclusive, collaborative, and ecologically sustainable. A particular focus of our program is assisting universities, hospitals, and other community-rooted institutions to design and implement an anchor mission in which all of the institution's diverse assets are harmonized and leveraged for community impact.

<http://democracycollaborative.org>
<http://community-wealth.org>

Design by John Duda, The Democracy Collaborative
Typography by Kate Khatib, Owl Grammar Press
CC map imagery from Stamen & Open Street Map



Community Wealth Innovators Series

Best practices and lessons learned from key leaders in the field