



Sparking the conversation in your community

A DIY guide to planning your own community wealth building summit

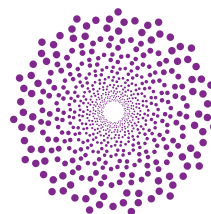
Justine Porter

In April 2016, a group of residents in Poughkeepsie, New York organized a summit that brought together more than two hundred community members to discuss how community wealth building models could be applied and implemented locally.

The purpose of this paper is to share information on how the event came to be, what its goals and objectives were, what it achieved and, most importantly, what steps you can take to plan your own.

Community Wealth Innovators Series

Best practices and lessons learned from key leaders in the field



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Poughkeepsie, NY—located between New York City and Albany on the Hudson

Asking ALL the Questions

In the Spring of 2015, I sat in on a lecture from Ted Howard about the Democracy Collaborative and their work alongside the Evergreen Cooperatives.

As a resident of the small city of Poughkeepsie, NY, Ted's words on the need for an inclusive approach to economic development rang true. Poughkeepsie has a population of just over 30,000 people, a poverty rate of nearly 30%, and an unemployment rate creeping towards 15% (though closer to 20% for Black and Hispanic residents).¹

While listening to his case studies on the Evergreen Cooperatives, I couldn't help but draw parallels between the challenges in Cleveland and the challenges in my city. As in Cleveland and other cities across the country, Poughkeepsie struggles to close its poverty gap despite a tremendous amount of resources.

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I left that lecture wanting to look into how I could start implementing community wealth building in my own community.

Let me take a moment to tell you about the resources in my city. We have:

- Five colleges
- Two hospitals
- Three large music/event venues
- Our city government offices
- Our county government and judicial offices
- A wealth of nonprofit organizations
- A vibrant arts community

Despite major economic anchors and a Main Street with an active business community, as in many communities across the country the term “economic development” too often just means business attraction. **What if we redirected economic development dollars away from business attraction and into opportunities to grow or create local businesses that serve local anchor institutions?**

Business attraction approaches to economic development often lack inclusive strategies to create opportunities for unemployed members of the local workforce, and are overly reliant on attracting outside dollars. While there are certainly cases out there in which business attraction *has* worked, numerous studies have shown us that economic development dollars are better invested in serving current city residents, rather than potential future ones.²

My questions were (and are!): how can we take the 30% of our city that lives below the poverty line and connect them with jobs that pay living wages? How can we cut our unemployment rate and our poverty rate by 10%? 25%? 50%?

Trying to find answers to these basic questions leads to more concrete questions about the resources that could be most easily redeployed, and the unnecessary barriers to local prosperity that can most easily be removed:

- Are local hospitals and colleges able to hire from the pool of unemployed city residents?
- What jobs are currently open and could those jobs be filled by the local workforce if the skills gap was addressed?
- Are local anchor institutions and business able to buy more locally, thus allowing local businesses to grow and hire more?
- Is public transportation limiting what jobs people are and are not able to hold within the city? (For example, shifts for jobs at our local mall start at 5am, but the bus does not run until 6am).
- Could economic development dollars allocated for business attraction be redistributed to help Main Street businesses grow to hire more employees?
- In regard to all of the above, where is the low-hanging fruit? What can we address today and what can we plan to address in the future?

The more questions I asked, the more questions that I had. And the more that I talked to community members, the more I realized that every single person in our city wants to solve these problems but no one person, organization, or government can make that change alone: turning a city's economy around involves everyone working together.

And then this question hit me—**what if I was able to bring together community members, business owners, decision makers, students, activists, farmers, employees of colleges, universities, nonprofits, and anyone else who would come, and spread the word about community wealth building, provide some really relatable and inspiring examples and then start a collective conversation about how to make it happen?**

What if through an event like this, I could get someone who works in HR at a university or in purchasing at a college, and a founder of a business to all consider how to integrate the economic well-being of our city residents into their day-to-day operations?

An overview of what went into the event and how it played out

Over the course of eight months, I organized the Poughkeepsie Community Wealth Building Summit with the help of a planning team and the support of a number of local organizations.

An estimated 500 hours of volunteer planning went into executing this event. This includes everything from extensive research and site-visits, to interviews, stakeholder meetings, website building, speaker/sponsor/partner outreach, event marketing, running the actual day of the event—and everything in between.

What were the goals of the event?

The Poughkeepsie Community Wealth building Summit brought together community leaders from anchor institutions, government, businesses, nonprofit organizations, and community interest groups to:

- Learn about models of inclusive economic development that have been successfully implemented in other cities.

- Engage in discussions about how such models could be applied to Poughkeepsie.
- Consider how each aspect of an organization (from HR to purchasing to marketing) and each kind of organization (whether a hospital or a pizza shop) can play a role as an agent of economic revitalization.
- Identify, connect, and empower individuals and organizations who are allies in the movement to implement an inclusive model of economic development.

So, did it work? What were the outcomes?

Over 200 people participated in the Summit, including community, nonprofit, and business stakeholders, as well as interested members of the general public. A list of participating organizations can be found in [Appendix A](#).

The agenda incorporated a welcome from government officials, an introduction to the community wealth building model, case-studies from other communities that are implementing community wealth building programs, an overview of the current state of anchor institution involvement in Poughkeepsie, break-out sessions on how community wealth building can apply to different anchor institution departments (hiring, purchasing, food & dining services, etc.), and workshops on specific related topics. The full agenda can be found in [Appendix B](#).

There were a number of positive outcomes from the summit:

- Conversations continue on how to implement alternative models of economic development—the need for a different approach and a name for

that approach has been seeded throughout the community.

- The community has taken ownership of the event and numerous groups have reached out to me with requests for specific workshops or goals for the second annual event.
- Mass Design, a human-centric design firm, offered its services free-of-charge to any anchor institution wanting to bring programs to Main Street. Vassar College is exploring moving staff housing to Main Street.
- A group of representatives from city colleges is working to create a class that students from each university can take together.
- As a result of this event, the event organizers have easier access to community leaders and community groups. This means that future discussions and projects will gain traction more easily.

The decentralized model that we adopted in organizing the summit involved putting the knowledge and tools into the hands of representatives from each organization so that they could incorporate changes within their own sphere of influence. How the information provided at the summit influenced participants will be measured at next year's event.

Offering Solutions

Recently, a person who does business attraction for our local economic development organization said that they had been wanting to make the case to move away from business attraction and towards investment in local assets. Before our summit, he added, he didn't have any tangible examples or a name to call the approach he wanted to switch to. This is a small victory and was really what we were trying to achieve with this event—to give community decision makers information and tools to apply to their own day-to-day work practices.

Plan Your Own Summit!

If you want to get started, there's no better time to start than right now. Here's an outline of the steps to help you with getting your own event off the ground.

These steps don't necessarily have to be done in order. Mix them up or do them simultaneously. The outline is also not a one-size-fits-all model—it's just what worked for us during our first time around!

Do your research

Planning a summit on this model, whether you're calling it community wealth building or something else, means that you need to have a solid grasp on how the model has worked in other communities and ideas for how these models can be applied within your community.

Read and read and read and read. Download some of the multitude of case studies from the Democracy Collaborative's website. Borrow some of Michael Shuman's books from the library. Dig into the websites of some of the organizations that you read about.

Look for case studies that are specifically relevant to some of the challenges that you see in your city .

Start throwing the idea out there. Gauge interest & make friends.

A word from the wise

Spend time researching, but don't get stuck here. You don't have to have all of the answers to get started. In fact, the entire purpose of planning a summit is to capitalize on your community's collective skills and knowledge. Doing your homework is important, but what's even more important is diving in!

Talk to your friends. Talk to business owners in places that you frequent. Then bring it up with some local nonprofit groups and employees at anchor institutions. Grab coffee with your council member. Really, just put the idea out in front of as many people as possible. (By

the time you get into the mayor's office or on the phone with the hospital president, you'll have your pitch down!)

If you come at people with a lengthy presentation on economic development and why it should be this way and not that way, you're going to lose attention.

Start simple and tell a story. Talk about a specific case that you identify with and how you want to explore doing that in your community. Listen to needs that are identified by others. Learn about existing projects that you may not have known about.

Your goal with these meetings is two-fold:

Identify your allies. For those who are really on board (and there will be many), ask them if you can continue to bounce ideas off of them as you move through the process.

Start to think about your agenda. By identifying specific issues through these conversations that are important to your community members, you'll be able to build an event agenda that is relevant and engaging. Take notes.

Outline your budget

Creating a rough budget will help you get an idea of what you need to do to make your event happen. If you're going to be

Lesson learned

One of the most common questions that people had about community wealth building is what the business case for buying or hiring locally is. Having examples in your mind of different cases that worked in similar communities is helpful in answering these questions. Knowing specific statistics about your community can also be helpful in making your case. :

How much did your local hospital pay out in charity care last year? How are they involved in the community?

By lowering the unemployment rate through local hiring and local sourcing initiatives, hospitals can decrease the local unemployment rate, which in turn can allow health care organizations to deepen their mission to include improving the health of the community in which they are based, reduce the pernicious effects of the social determinants of poor community health, and ultimately decrease expenses such as charity care.

How many people are unemployed in your city? Having a specific number rather than a percentage makes addressing the problem more tangible.

What economic development projects are in the pipeline in your area? Will they have a positive impact upon the well-being of those living at or below the poverty line?

How many vacant homes are there in the city? Employing individuals to get homes repaired and sold means both new jobs and an increased tax-base.

Beyond these and other specific examples, there is, of course, the long-term altruistic goal that hospitals, colleges and businesses should play an active role in improving the well-being of the communities that surround them.

asking for sponsorships, donations, or a free space, knowing what you need early on will be helpful in your conversations with community members.

- What are all of your event costs?
- How much do you need to raise for the event?
- Are you going to cover these costs with a grant? Through ticket sales? Sponsorship? All of the above or something else?

Lesson learned

When you stumble upon a naysayer, don't try to push the issue on them. Ask them questions about their perspective, thank them for their input, and then prove them wrong by planning an amazing event.

One of the first people that I reached out to was our Chamber of Commerce president. I met him for coffee. At the start of our meeting, he said that he only had 10 minutes to meet and said that the Chamber was already doing everything that I was trying to do. After 10 minutes, he was sharing stories and frustrations with me and ended up skipping his next meeting to brainstorm. When I followed up by e-mail, however, we were back to square one and he said that he could not support my event and discouraged it as I was doing exactly what the Chamber was in place to do. (Read: stepping on toes). I dropped this and moved on. A few weeks before the event, we reached out to the Chamber again and they reiterated that they wanted no involvement with the Summit.

We also received e-mails from students who threatened to lead a protest outside of the event. They stated that community-centric events should be free. I explained our sliding-scale pricing system and even shared information on our budget. In the end, there was no protest and the students agreed to disagree.

Lesson learned

When I first started planning, I was hesitant to set up meetings because I didn't have a specific ask. My agenda wasn't written, my ideas were vague, my pitch wasn't quite down yet. What I eventually figured out was that the best questions to have were:

- Would an event like this be helpful to your work? How?
- What would you like to see come out of an event like this?
- Is anyone that you know of doing work like this locally?
- Who else should I talk to about this event?

A sample of the budget and ticket prices that we used for our event can be found in [Appendix C](#).

Spend time dreaming

Set aside time to outline some of the following questions. Take a first pass by yourself so that you can better wrap your head around what it is that you want to do. Then take a second pass with your supporters.

- What do you want to achieve through your event? What do you want the event outcomes to be? What do you need to accomplish in order to consider your event a success?



The planning team meets with mayor Rob Rolison. Getting a meeting with the mayor took four months. Our first appointment was scheduled three months out and was then pushed back by a month. Going into this meeting, we weren't sure how the city's new mayor would respond to our project. Fortunately, he embraced it whole-heartedly and eventually even gave me an award for service to the city. For our second summit, I e-mailed the mayor about sitting down to discuss the event's agenda and received an immediate response from him with a time to meet the following week. This is a great example of how planning a first introductory summit is an important step in laying the foundation for future actions.

- What do you want to communicate to your attendees?
- What do you need to do at your event to get to those outcomes? What do you need to do before your event to get to those outcomes?
- Can you achieve these outcomes through one event? Or is this going to be a multi-year affair?
- Who do you want to have in the room?
- How are you going to get in touch with all of those organizations and individuals?
- How can you make the event inclusive?
- Where will the event be held?

You don't need to answer all of these questions in their entirety to get started but you will need to answer them eventually, so there's no harm in getting started now.

Put Together a Planning Team & an Advisory Board

Once you have your planning team and your advisory board confirmed, you can really get cracking.

The Big Debate

Through conversations and polls, I've found that attendees who live in Poughkeepsie feel strongly about keeping the conversation focused on our city, while those who attended from outside our city or represent regional organizations pushed for the event to have a broader focus. There are pros and cons to doing either.

We're going to keep it Poughkeepsie-focused for now and look to find ways to integrate information sharing.

What's the difference between the planning team and the advisory board?

On your planning team, you want community members who can commit 3–5 hours per week (and maybe slightly more during the week or two leading up to the event). For your advisory board, you are looking for community members that work with local nonprofit groups or anchor institutions, who can help as needed—maybe with getting in touch with different individuals or groups or looking over some of your ideas.

Before you reach out to individuals to invite them to join your planning committee, outline each of the positions that you think you'll need to fill. An outline of the roles that we established for the 2016 Community Wealth Building Summit is listed in [Appendix D](#).

Pick a Place & Set a Date

Lesson Learned

Our planning team consisted of working professionals and students, and so we found it difficult to find regular times to meet together. We also found that larger meetings, though fun, were often not the best use of our time. As a result, we found that the best system for us was for me to weekly or bi-weekly meetings with each team member.

While this system may not work for everyone, as someone who is motivated by deadlines, having to finish all deliverables for partnerships by a Monday, sponsorships by Tuesday, marketing by Wednesday, etc. was particularly helpful in staying on top of each aspect of the event and in giving each aspect in-depth focus.

Bounce ideas off of people

I regularly e-mailed other people with conference work and asked for their input, and not just my planning team and advisory board!

Getting feedback on the agenda or a structure of a certain workshop or how the registration page looks from a community member or a speaker is not only a great way to build a better event, but it's also a nice way to build community ownership of the event.

You can do this! If you want to move forward with your event, you just need to confirm the date and tell the world (and yourself) that this event is going to happen.

When selecting a date, look at the calendars of area organizations to ensure that you're not conflicting with other major events, testing periods, breaks, religious holidays, etc.

Make a website & set up registration

Shouldn't this step be later in the process? Nope.

How much time do you need to plan this event?

Anything more than a year is likely too much time, while anything under 7—8 months would not give you an adequate amount of time to properly plan.

We estimate that 500 hours of volunteer time went into the execution of the 2016 event.

Get all of the information that you have up and out there as soon as possible. Once you start sharing your website, word will spread faster and people will start reaching out to you.

Don't worry about not having a completed website. Treat your website as a living document. When a new speaker is confirmed, add them to your website and spread the word on social media.

Here are a few items that you should include on your website:

- The name/date of the event
- A short description of the event and its goals
- A case study or two
- Your story—why is this event important to you?
- Information on your planning team and advisory board
- How to register
- A blog where you post event updates as they come in

Pro-tip

I used to manage a community event space/art gallery, and so when it came time to set up a website, I reached out to people that I knew in the arts community to help me out!

Very talented photographers sent me photos to use on the website. One gentlemen even spent a Sunday afternoon walking around Poughkeepsie, taking photos for our site.

Lesson Learned

We held our event in a beautiful space at Vassar College. Vassar College could not have been a more supportive partner.

While the space was amazing and helped to engage Vassar staff, for the second annual event, we plan to host the event on our Main Street so that it's more accessible to community members and so that individuals who may not normally come to Main Street have a reason to visit!

As you get further along, you should add:

- The agenda
- Speakers
- Sponsors
- Partners

There are a few different websites out there that you can use to set up registration for events. Some of them charge

a flat-fee, some of them charge a percentage. All sites have different pros and cons.

Getting this set up sooner rather than later is key to getting your event onto calendars and having the word spread.

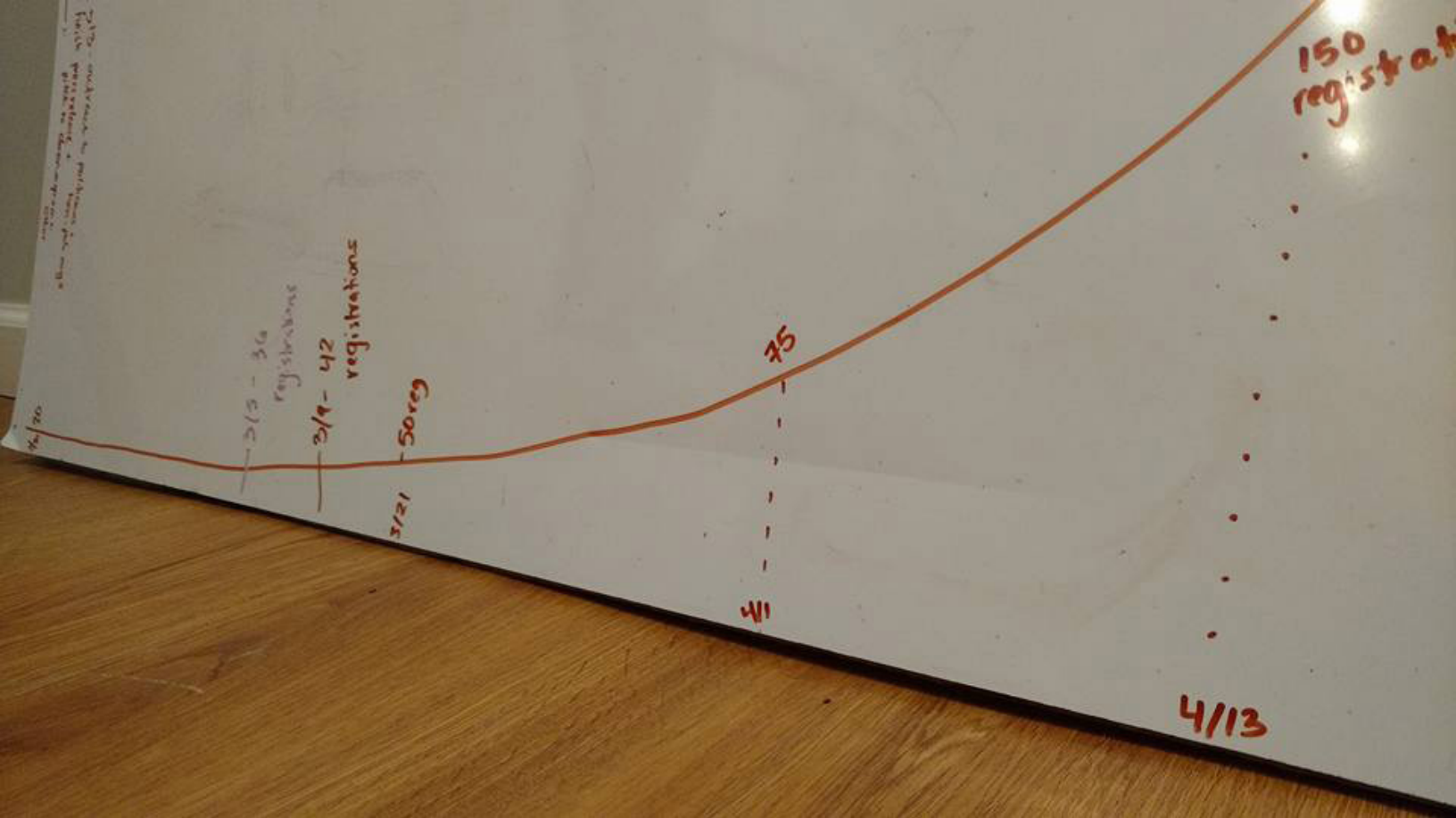
One of the single most challenging aspects of planning a conference is that event attendees always (always, always) register at the last-minute. In fact, if you were to plot out registrations over time, most event registration curves will fill an exponential curve. For your own sanity, plot out how you think that registrations will come in several months in advance and refer back to this as you move through the process. When you have moments of doubt over whether or not anyone is going to show up on the day of the event, this chart will keep you grounded.

Define the structure of your event

Will your event be held over one day? Two days? Something in between?

We set our event up as an all-day affair with an evening reception on the night before. For the 2017 event, we plan to do an evening reception, an all-day conference and then a half-day





of workshops and community tours on a Saturday. We're still in the planning phases so that all might get jumbled up.

Spend time thinking through the different options and talking this over with members of your advisory board and planning team.

Write the Agenda

Writing an agenda is like writing a curriculum—you need to figure out what you want your attendees to walk away with. Through your agenda, you are telling a story to your attendees and offering them opportunities to engage in conversations while working towards solutions.

On your agenda, there are a number of different types of sessions that you can include. Here are a few examples:

Evolving agenda process

For the first round of my summit, I had a very specific set of topics that I wanted to engage attendees in: that hospitals, colleges, nonprofits and businesses can and should play a role revitalizing our economy by hiring and buying locally.

I certainly got lots of feedback, but I essentially defined and programmed the agenda myself.

While we're going to keep to a similar theme for the 2017 event, I plan to solicit session and workshop ideas from community through an RFP process.

- **Singular presentations:** one speaker, talking on a specific topic.
- **Moderated panel discussions:** 3–4 speakers and a moderator discuss a topic.
- **Workshops:** A moderator leads a interactive workshop in which attendees come away with specific knowledge or skills.
- **Working groups:** Attendees break into groups to work on finding a solution to specific challenges.
- **Open-topic sessions:** For those who wanted to discuss a related topic that was not on the agenda, we set time aside for to poll the audience on what they wanted to talk about and then self-select into groups.

Put a basic form of your agenda together and put the draft on your website. It doesn't have to be perfect—your agenda will evolve as you go through the planning process.

Invite Speakers

Identify community members and invite them to join in on your agenda. You will likely also want to have speakers from outside of the area join you.

A sample speaker invitation can be found in **Appendix E**.

While sending an invitation by e-mail is the first step, confirming speakers will often involve a number of follow-up e-mails as well as discussions over the phone. Keep in mind

Lesson Learned

We had a number of incredible speakers come to our event to speak about how they had implemented a project that falls under the category of community wealth building. We had these speakers participate on a moderated panel, which was great, but not enough! Next time around we will plan to have one-on-one Q&A sessions with each person representing a case-study so that attendees can pick their brains about how they made their projects happen and how it can be applied locally.

that this step will take time and should be done over the course of a few months. To save yourself time, be sure to keep track of who you invited for each session and who has and has not accepted the invitation. Spreadsheets are your friend.

Form Partnerships

Establishing partnerships with area organizations will help your event on a number of levels. Partnerships can be structured in a number of ways. For the purpose of this event, we asked our partners to promote our event via their channels in exchange for a discounted registration rate for their staff.

Forging partnerships helps to get the word out about the event, ensures that key community groups will be present, gives you the opportunity to have a conversation with different groups and take their ideas about the event into consideration, and—if you are adding partners to your event website—builds the legitimacy of the event.

PCWBS partners are listed in [Appendix G](#).

Reach out to sponsors

Once your website includes an agenda with a handful of speakers, a few partners, and a clear picture of what you are working to accomplish, it's time to start outreach to sponsors.

Create a document in PDF form that you can send to potential sponsors. This document should include:

- An overview of the event
- Event goals
- Information on who will attend
- The target audience and number of attendees
- What sponsors will get out of their sponsorship
- Sponsorship levels and pricing

Consider who potential sponsors may be. Hospitals, colleges, larger nonprofit organizations, and local businesses are good places to start looking. Take a look who sponsors other community events. Keep in mind that it is especially important that the person doing sponsorship outreach know the event inside and out.

PCWBS sponsors are listed in [Appendix F](#).

Invite. Everyone.

Our event was specifically targeted at decision-makers of area hospitals, colleges, nonprofit organizations, government, and business. With that said, we also invited other employees from those organizations (not just the executive directors), as well as representation from community activist groups, students, farmers, and just regular community members.

One of the worst parts about planning an event that the entire community is invited to is that there will inevitably be at least one group or person who finds out about the event the day before or the week after and says, “hey, why wasn’t I invited?”

Do your best to regularly ask community members who should be in the room. Make outreach a regular part of your day, but recognize that you can’t possibly reach out to everyone.

Market Your Event

Inviting community stakeholders and establishing partnerships will get you on the right foot for spreading the word, but there are a few other best practices:

Lesson Learned

A few weeks before the event, I received a phone call from a nonprofit organization that provides transitional housing for children after they are taken out of their homes by Child Protective Services and before they are placed with a foster family or in a residential program.

They pointed out that the nonprofit human services industry have a huge impact on the local economy and they wanted to know why this industry wasn’t included on any of the panels.

This was a great point and not one that we had considered. We weren’t able to work them into the agenda last year, but it’s on the table for next year.

Provide regular event updates. Marketing an event such as a conference involves providing regular updates as the event unfolds. Every two to four weeks, send out an e-mail with event updates to your list. Updates can include:

- New speakers/sponsors/partners
- Interesting sessions added to the agenda
- Milestones in terms of the number of people registered
- Deadlines for registration

Build a mailing list. Put together a list of your contacts and add it to a free newsletter website. Allow people to sign up for your updates through your website. Regularly add contacts to the list.

Use motivational messaging. On your website, in your e-mails, and through social media, express excitement for your event in everything that you do.

Attend and speak at community meetings. I found that once I started talking about this event, I was invited to speak at different community meetings, classes, service organizations, churches, board meetings, staff meetings, etc. Getting on the agenda of local meetings as well as council meetings can be a good way to spread the word. Be sure to bring a mailing list

Engaging anchor institutions

This event **is not** about saying to a hospital or a college, "hey, you should do more locally! Shame on you for not buying local!" This event **is** an opportunity to bring all players to the table to have a discussion on how more can be done.

Frame your language on your website and in your invitations and communications in a positive way to make sure that anchors don't feel as though they're going to be put in a tough spot. That's not to say that you can't ask the hard questions, but consider this a start of a longer relationship.

In our planning, we found that it was easy to get connected with employees of colleges, but extremely difficult to even find names of hospital employees. We had a list of all of the positions that we wanted to have represented at the event and picked away at gathering names and contacts over several months.



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Submit an opinion piece to your local paper!

In the lead-up to our event, I co-authored an article with a member of the event planning board. We highlighted a local business that is doing good and creative work in hiring homeless individuals. By connecting with a local college, this company was able to grow and hire more employees. The article was not only a good way to get the word out to a wider audience, but it also was an easy item for people to share.

You can read the article here:

<http://www.poughkeepsiejournal.com/story/opinion/valley-views/2016/04/19/summit-reveal-strengths-community-wealth-building/83197520/>

sign-up form so that you can keep interested people posted on how to register.

Plan out your day-of logistics

When it comes to the actual day of your event, there are quite a few things that you will need to plan for. Here are some of them:

Surveys

Is there any information that you want to collect from your attendees? We conducted an initial short survey at the start of the summit and a longer feedback survey at the end of the event.

Meals

This is one of the biggest cost centers for any event. Are you serving lunch? Coffee? Snacks?

If you are hosting an event at a college campus or a hotel, where you will most likely need to use the venue's menu, prices will be higher, but all you have to do is put your order in and you're done.

You can cut event costs significantly if you host your event in a space that allows you to select your caterer. If you go this route, you'll have a lot more to handle in terms of logistics, follow-up, and clean-up. If you're in an area that has restaurants within eating distance, it might be worthwhile to consider setting up a voucher system.

Volunteers

Events certainly don't run themselves! We had volunteers sign up to assist with putting directional signs up before the event, signing in all attendees, assisting with clean-up throughout

the day and at the end of the day, making sure that each room was set up as needed, and much more.

AV

Consider if you need a projector, microphone, lighting, etc. You'll also want to have an MC!

Printing

What do you need to print for your event? Do you want to print badges or have attendees fill those in on their own? Do you plan to print an agenda? Where will your attendees be parking and do you need signs to get them from the parking lot to the conference room?

How can you integrate sustainability into your event?

If you're hosting an event about local buying, you're going to need to have local food at your event. Here are a few things to consider:

- Can you avoid paper/plastic dishware?
- Can you avoid printing excess paper?
- Are you able to include carpooling suggestions in your communications to attendees?

Post-event planning

After putting months of work into one day, **the big question is what's next?**

This isn't just a question that we asked ourselves once the event is over—it's also a question that we asked ourselves and were asked by others throughout the entire planning process. While there is no right answer to this question, not having a follow-up plan may make it difficult to gain initial buy-in.

The Day-Of (!!!)

In the lead-up to the event, do your best to make sure that you have no jobs on the day-of. Something will pop up so if you delegate everything and free yourself up, you'll be better able to manage.

Something will go wrong and that's ok. Expect the unexpected, roll with the punches, take the time to engage in the program that you and your team created, and enjoy the day!

The 2017 Summit—Would you do it again?

One of the biggest learnings that I took away from our 2016 Community Wealth Building Summit was that one conversation is not enough. Continuing the conversation, organizing more meetings, and above all moving in the direction of implementation is not impossible to do on a volunteer basis—but it is certainly a challenge.

Participants came out of the Summit with new energy, planning new meetings, and nurturing plans for further convening and actions. While I certainly tried to stay connected with all of these groups, doing so with a full-time job was challenging and ultimately not personally sustainable.

With that in mind, changes that I would make for a second summit fall not only into the operational bucket, but also into the personal one. Some of these changes include:

Define a structure for future initiatives. Our city government does not have a plan to tackle many of the challenges that we addressed at the summit. This is surprising to me—we have a 30% poverty rate and no plan for addressing this problem.

When a country decides, say, to decrease its reliance on fossil fuels, one of the first steps it takes is to set a date and a target percentage for renewable energy generation. For example, Jamaica aims to source 20% of its energy from renewable sources by 2030. When it comes to democratizing wealth and reducing poverty within our communities through job creation, why can we not set similar goals?

In planning for future summits, one of my priorities is to work with our city administration to identify and define economic development priorities so that the convening can be used as a tool to advance these goals.

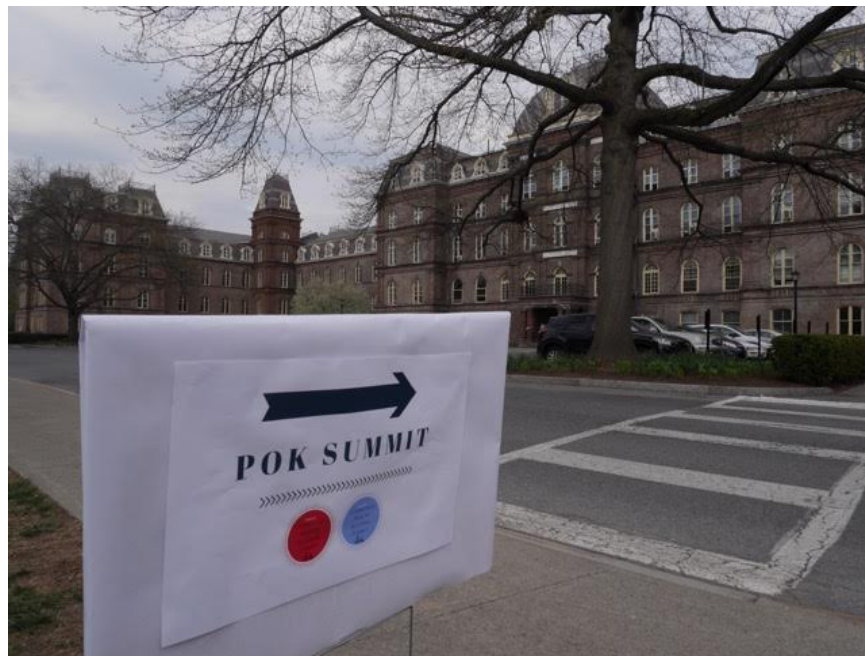
Focus conversation on action-items. Our first Summit laid the foundation for identifying allies, forming partnerships, learning about where the gaps in service within the community are, and getting the conversation started. For future iterations of this community event, I would like to focus sessions and workshops around identifying actionable items. Can we, as a community, form an agreement on what we need to do to move forward? Can businesses and community anchors make a commitment to increased community involvement? Can we collectively form an organization that will continue the work that is identified at the Summit?

Releasing a request for proposals for summit content and delegate management of panels. The content of the first event focused squarely on the role of anchor institutions in the community. While this will be a central theme at the next event, the fact that this summit was the one time that all of our community decision-makers gathered together means that it is an opportunity to add other topics relating to economic development to the table. Many individuals and groups had specific requests, so I plan to collect these ideas in a formalized way and then work with some individuals to integrate their topics into the event. Working with community members

on different sessions will not only increase ownership in the event, but it will also allow me to delegate major aspects of the planning.

Hosting the event downtown and decentralizing the sessions.

Last year’s event was hosted at Vassar College, which is located on the periphery of the city of Poughkeepsie. The plan for the second event is to host it in a downtown space that is accessible to most city residents by foot or public transportation. Breakout sessions and workshops will be scheduled in different community spaces within a three to four block radius of our central meeting space. While there are pros and cons to organizing an event this way, it’s a great opportunity to increase foot traffic downtown. The downside of this approach is that coordinating meals will be a bit more involved than filling out an order form at Vassar College. My plan here is to work with local businesses to set up a voucher system. 🌸



Vassar College, the location of the 2016 summit

Appendices

Appendix A: Organizations Represented at the Poughkeepsie Community Wealth Building Summit

- Abilities First
- National Association of Women Artists
- Antidote Collective / BEAHIVE / Re>Think Local
- Arts Mid-Hudson
- Bard MBA in Sustainability
- Barrett Art Center
- Bottom Line Business Services
- Bridges to Community
- Center for Civic Engagement & Leadership at Marist
- City of Poughkeepsie
- Community Foundations of the Hudson Valley
- Cornell Cooperative Extension Dutchess County
- CRD Analytics
- Culinary Institute of America
- CUNY
- Democracy Collaborative
- Digital Empire
- Downtown Poughkeepsie Partnership
- Dutchess Community College
- Dutchess County
- Dutchess County Department of Community & Family Services
- Dutchess County Legislature
- Dutchess County Planning and Development
- Dutchess County Workforce Investment Bureau
- Dutchess One Stop Career Center
- Dutchess Outreach, Inc.
- Dutchess Tourism
- Dutchess Outreach
- Dyson Foundation
- Ecopracticum
- Empire State Development
- Engaging People in Change (EPIC)
- Entrepreneur360
- Etsy.org
- Family Services
- Flockworthy
- Fowler Lake LLC
- Greyston Bakery
- HealthQuest
- Highway Displays, Inc.
- Hispanic Heritage Committee
- Hoop for a Better Tomorrow
- HRHCare
- Hudson River Housing
- Hudson River Sloop Clearwater
- Hudson River Valley Resorts
- HVFCU
- Indoor Organic Gardens of Poughkeepsie
- iSER Consulting, LLC
- KeyBank
- Kirchoff Companies
- LCS Companies
- Lift Economy
- Local Economies Project
- Marist College
- Marist College Liberty Partnerships Program
- Mass Design Group
- McDonald's
- Mid-Hudson Heritage Center
- MidHudson Regional Hospital
- Moody's
- My Place Pizza
- New Energy Events
- North River Roasters
- Northeast Sustainable Agricultural Working Group
- NYS Sustainable Business Council
- Office of Innovation and Strategic Initiatives, City of Rochester
- Omega Institute

- Omega Institute
- Orange County Planning Department
- Pattern for Progress
- Peter van Schaick
- Photographer
- Poughkeepsie Adventist Church
- Poughkeepsie Community Wealth-Building
- Poughkeepsie Earth Day
- Poughkeepsie Farm Project
- Poughkeepsie High School
- Public Defender
- Re>Think Local
- Real Skills Network
- Rescuing Leftover Cuisine/Vassar College
- Rose Gallery of the Arts
- Scenic Hudson
- Schwartz Heslin Group
- Student Conservation Association
- Sustainable Biz Solutions
- Sustainable Hudson Valley
- Sweet Willy's Treats
- Tallie Carter Law, PC
- Tarn Consulting
- The Culinary Institute Of America
- The PoliFi Project Inc.
- Think Dutchess
- Town of Poughkeepsie
- Union Hospital
- Vassar College
- Wolters Kluwer

APPENDIX B: 2016 SUMMIT AGENDA

April 22, 2016

Vassar College

Villard Room

8:00 am - 5:00 pm

Registration Required

Registration & Coffee in the Rose Parlor - 8:00am - 9:00am

Enjoy coffee from North River Roasters, Poughkeepsie's very own coffee roaster!

Part I - Plenary Sessions - 9:00am - 12:00pm

Opening Statement: #Poughtential: Building a Positive and Vibrant Poughkeepsie

- **Justine Porter**, Conference Director, Poughkeepsie Community Wealth Building Summit

Joint Welcome Remarks

- **Rob Rolison**, Mayor, City Of Poughkeepsie
- **Todd Tancredi**, Supervisor, Town Of Poughkeepsie

Keynote Address - What is Community-Wealth Building?

Based in Cleveland, Ohio, the Democracy Collaborative is a national leader in equitable, inclusive and sustainable development through Community Wealth Building. This initiative sustains a wide range of Advisory, Research and Field Building activities designed to transform the practice of community/economic development in the United States. In this keynote address, Jessica Bonanno will introduce community wealth building as a model and speak about successful examples.

- **Jessica Bonanno**, Director Of Strategy Development & Operations, The Democracy Collaborative

Community Wealth Building and Local Economies

In this discussion, panelists will discuss the role that community wealth building played in their city or institutions.

Panelists will discuss why anchor institution involvement in cities is important. As well as answer the question; how have other cities successfully collaborated to build community wealth? And what would the impact of a unified commitment of anchor institutions to the city of Poughkeepsie be?

- **Holly Emmons**, Food Service Manager, Union Hospital
- **Henry Fitts**, Director Of Innovation, City Of Rochester
- **Patrick James**, General Manager, Healthy & Sustainable Communities, Greyston Bakery
- **Michael Murphy**, Executive Director, Mass Design Group
- **Dr. Kafui Ablode Attoh**, Professor, Center For Worker Education, City University Of New York (Moderator)

Poughkeepsie Anchors

Representatives from hospitals, universities, nonprofits and arts organizations will share an overview of their institution's vision of their involvement with the local community and economy.

- **Geoffrey L. Brackett**, Executive Vice President, Marist College
- **Dr. Pamela Edington**, President, Dutchess Community College
- **Dr. Catharine Bond Hill**, President & Professor Of Economics, Vassar College
- **Ron Hicks**, Assistant County Executive, Dutchess County

- **Paul Hochenberg**, Executive Director, Mid-Hudson Regional Hospital
- **Ann McMackin**, President, Vassar Brothers Medical Center
- **Jessica Bonanno**, Director Of Strategy Development & Operations, The Democracy Collaborative (Moderator)

Lunch - 12:00pm - 1:00pm

Price of lunch is included in the ticket registration. Enjoy!

Part II: Breakout Sessions - 1:00pm - 2:30pm

Please note that during each break-out session, panelists will present briefly before the dialogue will be opened to the audience.

How could a more collaborative environment facilitate and expedite change? In what ways is each organization limited by the challenges in the city and what do we need to overcome these challenges?

Dining and Food Services

Agriculture is a major driving force behind the Hudson Valley's economy. With over 5,000 farms that are largely family-owned and operated, the farming sector has a gross economic impact of \$810 million.

Each local institution has undertaken initiatives to source a portion of food from local farms and businesses, while also reducing waste. With hundreds of meals to serve each day, institutions are unable to source all resources from the local economy due to their need for large quantities of products year-round.

In this discussion, panelists will touch on the following:

- *What percentage of food is sourced locally?*
- *How is local sourcing measured and what targets have been set for the future?*
- *What barriers prevent institutions from sourcing additional food products from within the Hudson Valley?*
- *What food items are easiest to source locally and which items would institutions like to source locally if available?*
- *What is the process for local farms and food producers to become a vendor for a college or hospital?*

Panelists:

- **Tracy Lerman**, Communications Manager, Northeast Sustainable Agricultural Working Group (Moderator)

- **Robert “Skip” Backus**, Ceo, Omega Institute
- **Emily Baksa**, Marketing Coordinator, Campus Dining Services, Marist College
- **Darryl Mosher**, Professor & Sustainability Committee Member, Culinary Institute Of America
- **Bryan Swarthout**, Director Of Budgets And Enterprise Services, Vassar College

Buying Local: Purchasing on an Institutional Level

When hospitals, colleges, nonprofit organizations and businesses make a commitment to source a percentage of their goods and services locally, they make an impact on the economy.

Re>Think Locals’ Indie Impact study found that a market shift of just 10% from chains to independents would retain an additional \$475 million in the regional economy every year. In this session, panelists will discuss:

- *How have minority and woman-owned business policies influenced how colleges and hospitals purchase?*
- *Is any preference given to local businesses? Can preference be given to local businesses?*
- *What supplies or services would purchasing departments like to source locally that they are currently unable to?*
- *What is the process for becoming a vendor for each institution?*
- *Where are local institutions currently banking?*
- *What are the barriers to banking with smaller banks?*
- *What would make it possible to overcome some of these barriers and to shift a portion of operating budgets to local institutions?*
- *If an institution is already banking locally, how was the transition to local banking made?*

Panelists:

- **Tim Allred**, Vice President, Hudson River Valley Resorts
- **Anthony Dibendetto**, Manager Of Food Purchasing, Culinary Institute Of America
- **Karen Gallagher**, Buyer, Vassar College
- **Christina Kearney**, Controller, Department Of Budget And Finance, Marist College
- **Lucinda Poindexter**, Executive Director, Re>Think Local (Moderator)

Human Resources

Colleges, hospitals and nonprofit organizations are among the largest employers in the city of Poughkeepsie. In this discussion, panelists will touch on the following:

- *What are the barriers that Human Resources officers experience in hiring from within the local economy?*
- *What positions and departments are most easily able to hire locally?*
- *What training and resources do we need to develop locally so that anchor institutions can more easily pull from the local workforce?*

Panelists:

- **Irene Buccieri**, Assistant Director Of Strategic Recruitment, Marist College
- **Esther Couret**, Director Of Human Resources, Dutchess Community College
- **Linda Malave**, Director Of Resident Services, Hudson River Housing
- **Ruth E. Spencer**, Associate Vice President Of Human Resources, Vassar College
- **Christopher Pels**, Director Of Human Resources & Risk Management, Family Services (Moderator)

Community Engagement

Anchor institutions engage with the surrounding community in different ways. In this discussion, panelists will touch on the following:

- *What are the best practices in community engagement?*
- *What is missing from institution and student engagement in the community?*
- *How can we overcome these barriers?*

Panelists:

- **Melissa Gaeke**, Director, Center For Civic Engagement And Leadership, Marist College
- **Cammie Jones**, Community-Based Learning Coordinator, Dutchess Community College
- **Tim Massie**, Senior Vice President For Marketing, Public Affairs And Government Relations, Health Quest
- **Dr. Kathleen M. Merget**, Associate Vice President And Dean Of Student Affairs, Culinary Institute Of America

- **Jen Rubbo**, Program Manager, Environmental Cooperative At The Vassar Barns, Vassar College
- **Wendy Maragh Taylor**, Adjunct Professor, Marist College (Moderator)

Sustainability

From households to board rooms, sustainability movements have grown exponentially over the last few years. Each college and institution has a different approach to sustainability. Marist and the Culinary Institute both have volunteer committees, while Vassar has a full-time sustainability coordinator. In this discussion, panelists will touch on the following:

- *What are the goals and barriers of existing sustainability movements?*
- *How can we overcome these barriers?*
- *What are the best practices for implementing future initiatives?*

Panelists:

- **Dr. Jessica Boscarino**, Assistant Professor Of Political Science, Co-Chair Of Marist Sustainability Committee
- **Alistair Hall**, Sustainability Coordinator, Vassar College
- **Bobby Perillo**, Professor & Sustainability Committee Member, Culinary Institute Of America
- **Jessica Ridgeway**, Planner (Sustainability), Orange County Planning Department
- **Melissa Everett**, Executive Director, Sustainable Hudson Valley (Moderator)

Coffee Break in the Rose Parlor - 2:30pm - 3:00pm

Enjoy coffee from North River Roasters, Poughkeepsie's Coffee Roaster

Part III: Workshops - 3:00pm - 4:30pm

During this final segment of the conference, attendees will participate in workshops on implementing.

Integrating Sustainability Practices into your Business

In this hour-long workshop, business owners, nonprofit and community leaders will learn to improve their bottom-line by integrating sustainability and community-consciousness into day-to-day operations.

- **Erica Dorn**, Managing Director, Etsy.org
- **Eugenia Manwelyan**, Co-Founder And Director, Eco Practicum

Applying Open Hiring Practices: The Greyston Model

Based in Yonkers, NY, Greyston Bakery has established itself as an anchor of the local economy. The Bakery, whose goods you might have sampled in a pint of Ben and Jerry's ice cream, says that they don't hire people to bake brownies, they bake brownies to hire people. In this workshop, Patrick James, General Manager of Health & Sustainable Communities at Greyston, will share information on the businesses model of revitalizing the Yonkers economy by hiring at-risk individuals.

- **Patrick James**, General Manager, Healthy & Sustainable Communities, Greyston Bakery

Open-Topic Workshop: Building Strong Local Economies

Have a solution that wasn't discussed or want to go even deeper? Join this session and discuss your topic in a focus-group setting.

- **Shawn Berry**, Lift Economy

Part IV: Closing Session - Next Steps & the Way Forward - 4:30pm - 5:00pm

- **Poet Gold**, Administrative Director, Real Skills Network, Spoken Word Artist

Appendix C: 2016 Poughkeepsie Community Wealth Building Summit Budget

Income	
Item	Income
Ticket Sales (average of \$25 paid/person)	\$5,000
Sponsorship	\$7,000
Total	\$12,000.00
Expenses	
Item	Cost
F&B—(\$20/person. X 200)	\$4,000
Event venue set-up/clean-up	\$300
Speaker travel	\$1,000
Printing	Sponsored
Website (\$26/month)	\$312
Supplies (ink, pens, flip pads, etc).	\$500
Total	\$6,112
Net Profit	\$5,888.00

As this event was volunteer organized, we did not take planning hours into account. Also not listed here is costs of the several dozen coffee and lunch meetings that we had.

2016 Community Wealth Building Summit Ticket Prices

All tickets were listed on a sliding-scale basis and attendees could pay what they wanted.

Ticket Category	Price
Full-price	\$100
Speakers	\$0 (suggested donation for \$30 - \$50)
Students	\$0 (suggested donation of \$10)
Nonprofit organization employee	\$20

Appendix D: Poughkeepsie Community Wealth Building Summit Planning Team Roles

Government relations/anchor institution engagement

- Set direction of project
- Liases with City of Poughkeepsie and Dutchess County government to get input and ensure participation, buy-in, collaboration, etc.
- Builds relationships with city government employees in related departments (purchasing, for example)
- Conduct interviews/meet where necessary
- Liaise with city of Poughkeepsie Anchor institutions
- Conduct interviews
- Work with marketing and operations directors to create and implement an outreach strategy

Partnerships/Sponsorships

- Connect with relevant nonprofits, businesses, organizations
- Handle exhibition hall

Marketing

- Create outreach strategy and develop outreach tools (language)
- Build structure for registration
- Manages website, social media, etc.
- Play a role in developing invitation list

Program

- Manage the agenda - content,
- Manage some speaker logistics (invitations, follow up, registration, etc.)
- Research different speakers

Operations

- Manage logistical details for food and beverage
- Manage budget

- Work with Program on speaker logistics/budget
- Work with Marketing to develop a system for managing registrations
- Work with Marketing to develop fee structure for those not directly invited

Student Engagement

- Develop structure for inviting students from each university and area high schools
- Create database of relevant student groups
- Distribute relevant materials to student groups
- Manage student registration

Volunteer Coordinator

- Outline volunteer roles for day-of event
- Recruit and manage volunteers to assist with event logistics (directing people as they arrive, registering people, assisting with cleanup, etc.)

Appendix E: Sample Speaker Invitation Letter

Dear President Hill,

On behalf of the Poughkeepsie Community Wealth Building Summit, I am delighted to invite you to participate in the as a speaker in our inaugural event.

The Summit will take place at Vassar College on April 22, 2016 and will bring together community stakeholders to discuss and create a shared vision of economic development for the city of Poughkeepsie.

Organized primarily through panel discussions, breakout sessions and workshops, the purpose of the summit is to clearly **define opportunities for collaboration and alignment of community development efforts between anchor institutions and local organizations**, to gather expertise to train attendees on localized models of economic development that have worked in cities across the country. The summit will ensure that all stakeholders can play an active role in co-creating an action-oriented plan for overcoming challenges within our city.

We would specifically like to invite you to participate on the **Poughkeepsie Anchors** session. The session, which is scheduled to take place on the **morning** of April 22nd, is outlined as follows:

The Poughkeepsie Anchors Session

Leaders from hospitals, universities, nonprofits and arts organizations in Poughkeepsie will share an overview of their institution's vision of their involvement with the local community and economy.

The session will be presentation-free.

To view the complete agenda please visit:
<http://communitywealthsummit.com/agenda>

I would be most grateful if you would confirm your availability to participate at your earliest convenience.

Thank you in advance.

Yours respectfully,
Justine

Justine Porter
Conference Director
Poughkeepsie Community Wealth Building Summit
A conference to create shared prosperity in Poughkeepsie

Appendix F: 2016 Sponsors



Appendix G: Event Partners



Endnotes

- 1 "United States Census Bureau." United States Census Bureau, 2010, factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF.
- 2 Shuman, Michael. *Local Dollars, Local Sense: How To Shift Your Money From Wall Street To Main Street And Achieve Real Prosperity* (White River Junction, VT: Chelsea Green Pub., 2012).

About the Author

Justine Porter is a social enterprise operations professional with experience in creating and implementing conscious programs. She is the Director of Operations for New Energy Events. Prior to starting this positions, Justine worked in various grassroots and operational capacities for socially-conscious businesses and organizations. Previous roles include Development & Operations Manager for Della, a fair trade fashion company in Ghana, Grassroots Coordinator for Falling Whistles, a campaign for peace in the Congo, Volunteer & Outreach Coordinator for Habitat for Humanity and Arts & Outreach Coordinator for Hudson River Housing.

Justine has traveled and worked in 30+ countries since 2010. She holds dual degrees in International Relations and French Language & Literature from SUNY Geneseo and an MBA in Sustainability from Bard College. She was the youngest recipient of the 2014 Hudson Valley 40 under 40 award. Justine is passionate about finding systems-level solutions to inequality through community building and resident engagement.

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.

Learn more:

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

Design by John Duda, The Democracy Collaborative
CC map imagery from Stamen & Open Street Map