



Project Phoenix Convening #4

January 23 - 26, 2017 In Boston, MA

LOCATION

- For the opening welcome Jan. 23, 5:30pm go directly to the restaurant Bin 26 Enoteca, 26 Charles Street (8 min. walk from hotel).
- For accommodation and meetings Jan. 24, 25 and 26: The Liberty hotel, 215 Charles Street, in Beacon Hill, the heart of downtown Boston. Three miles from Logan Airport.

PURPOSE:

1. Closing Project Phoenix:

- a) Update where we have come to after a year of cohort learning.
 - What do we envision as the new economy
 - What do we mean by "just transition?"
 - The most promising experiments we've seen?
 - What are we still grappling with?
- b) Conclude the narrative strategy work with Center for Story-based Strategy
- c) Create a plan for sharing our learning with the broader funder field

2. Supporting continued collaboration among Phoenix alum

- a) Identify convenings in 2017 where alum can continue learning and strategizing.
- b) NFG groups: Democratizing Development and Fund for a Just Economy.
- c) How to move forward with ideas for action
 - Investing in community projects - a learning track and a possible pooled funding track.
 - Exposing PRI/MRI officers to Phoenix ways of thinking.

- Opportunities with the Just Transition Fund.
3. **Stimulating learning on the ground where big ideas could find practical application.** Mutual learning with a range of grassroots and nonprofit field leaders, funders and private sector and government actors in an urban setting, Boston.

AGENDA

Monday, January 23, 2017

Bin 26 Enoteca, 26 Charles Street (8 min. walk from hotel)

| Time | Min | Activity |
|--------|-----|---|
| 5:30pm | 45m | Welcome, Convening launch at Bin 26 Enoteca, 26 Charles Street (8 min. walk from hotel). |
| 6:15pm | | Dinner and Drinks |
| 8:00pm | | End |

Tuesday, January 24, 2017

The Liberty hotel, West Cedar Room during the day.

Field trip to meet with local groups at night.

| Time | Min | Activity |
|--|----------------|---|
| 8:00 | 60m | Breakfast at the hotel (buffet outside the West Cedar meeting room) |
| MORNING: A PHOENIX VIEW ON JUST TRANSITION AND NEW ECONOMY AFTER 1 YEAR | | |
| 9:00 | 1h + 40m | After 1 year of learning together...What has emerged as distinctly “Phoenix?” <ul style="list-style-type: none"> • What is the new economy we envision? • What do we mean by “just transition?” <p>Starting presentation from Aditi Vaidya and Jose Garcia Followed by conversation.</p> |
| 10:40 | 20 | Break |
| 11:00 | 1h +30m | What are the most practical, viable and scalable solutions in the next 3-5 years that could get to the new economy we envision? <ul style="list-style-type: none"> • Urban? Rural? • San Diego 2.0 or 3.0? • In the new political environment? |

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| 12:30p m | 75m | Lunch |
| AFTERNOON: OPEN SPACE FOR THE CONVERSATIONS WE STILL WANT TO HAVE | | |
| 1:45 | 1h +15m | Open space for conversations people want to have before Phoenix ends |
| 3:00 | | Break |
| <p>EVENING FIELD TRIP TO LEARN FROM JUST TRANSITION WORK IN BOSTON <i>Location:</i> Old Oak Dojo, 14 Chestnut Place, Jamaica Plain (a 25 min. drive from hotel)</p> <p>Session planned by Aditi Vaidya and Aaron Tanaka</p> <ul style="list-style-type: none"> • 4:00 Meet in lobby to board coaches transporting cohort to Old Oak Dojo • Arrive: Drinks (featuring Guillermo’s specialty drinks!) and dinner • 5:30-7:00 Joint learning with constellation of local actors <ul style="list-style-type: none"> ○ Aaron Tanaka, Center for Economic Democracy ○ Alexie Torres-Fleming, Access Strategies Fund (Executive Director) ○ Guillermo Quinteros, Solidago Foundation (Program Dir.) and See Forward Fund ○ M. Elena Letona, Executive Director, Neighbor to Neighbor Massachusetts ○ Penn Loh, Lecturer & Director of Community Practice, Tufts University/ Urban & Environmental Policy & Planning ○ The Hyams Foundation - David Y. S. Moy, Program Officer - Civic Engagement, Jocelyn V. Sargent, Executive Director ○ Prentice Zinn, Director, GMA Foundations • 7:00-8:00 Networking time, more drinks and food • 8:00 Transportation back to the hotel | | |

Wednesday, January 25, 2017
The Liberty hotel, West Cedar Room during the day.
Evening dinner at Aiden and Harlow restaurant (private room) + After party at The Liberty

| Time | Min | Activity |
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| 8:00 | 60m | Breakfast at the hotel (buffet outside the West Cedar meeting room) |
| MORNING PART 1: NARRATIVE STRATEGY | | |
| 9:00 | 2h | Narrative Strategy Workshop - <i>Christine Cordero, Center for Story-based Strategy</i> |

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| 11:00 | 20m | Break |
| MORNING PART 2: SELF-ORGANIZING: HOW MIGHT WE WORK DIFFERENTLY GOING FORWARD? | | |
| 11:20 | 1h + 10m | <p>How might you push the boundaries of your work going forward? What might you start doing differently?</p> <p>Organizing ourselves towards comprehensively supporting a viable just transition in the next 3-5 years.</p> |
| 12:30 | 60m | Lunch |
| AFTERNOON: ORGANIZING OUR PEERS | | |
| 1:30 | 1h | <p>How might we organize other funders to push the boundaries of their work going forward? What could they start doing differently?</p> <ul style="list-style-type: none"> • Including a presentation of the Shake the Foundation initiative with the consultant, Jennifer Near (proposal in the cohort Dropbox) |
| 2:30 | 15m | Break |
| AFTERNOON: SELF-ORGANIZING: CONTINUED COLLABORATION AFTER PHOENIX ENDS | | |
| 2:45 | 1h + 45m | <p>How to proceed on ideas that have been identified?</p> <ol style="list-style-type: none"> 1. Convenings in 2017 where Phoenix alum can meet and continue to learn and strategize together. <ul style="list-style-type: none"> • Other ways we want to keep strategizing together? 2. Ideas people want to collectively move <ul style="list-style-type: none"> • Investing in community projects - a learning track and a possible pooled funding track • Exposing PRI/MRI officers to Phoenix ways of thinking • Opportunities with the Just Transition Fund 3. Learning about each other's work to support collaboration <ul style="list-style-type: none"> • Peer consulting 4. Opportunities to get involved in the NFG Democratizing Development and Fund for a Just Economy groups. |
| 4:30 | | Break |
| <p>6:00-8:00 Dinner at Aiden and Harlow restaurant, 40 Brattle St, Cambridge, MA 02138 (a 15min. direct trip on the Red Line subway, or a 15min. drive if you decide to use a cab/car)</p> | | |
| <p>CLOSING EVENING AFTER PARTY back at The Liberty hotel Cohort open mic, DJ & drinks</p> | | |

Thursday, January 26, 2017
The Liberty hotel, Esplanade room

| Time | Min | Activity |
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| 8:00 | | Breakfast at the hotel (buffet outside the Esplanade meeting room) <i>Videoing individual interviews for future Phoenix public website</i> |
| MORNING PART 1: OPEN SPACE | | |
| 9:00 | 30m | Checking-in: Insights, updates, burning questions Set up open space |
| 9:30 | 60m | Open space |
| 10:30 | 20m | Break |
| MORNING PART 2: CLOSING AS A LEARNING COMMUNITY | | |
| 10:50 | 60m | Sharing circle: <ul style="list-style-type: none"> • What's been the value of Phoenix for you? What's changed or evolved over the past year? • Requests of your peers going forward? |
| 11:50 | 10m | Break |
| 12:00 | 20m | Appreciations of each of the people in the community |
| 12:20 | 10m | Closing and good-byes |
| 12:30 | 60m | Optional boxed lunch <i>Videoing individual interviews for future Phoenix public website</i> |
| 1:30 | | End Convening |