

Activating Anchor Institutions to Build Thriving Communities in South Florida

December 11, 2017, 11:30 a.m. to 2:30 p.m.



PRESENTED BY:



Citi Foundation



Anchor Institution Initiative to Build Healthy Communities

OVERALL GOAL

Maximize the economic power of place-based institutions, such as hospitals and universities, to build a thriving and prosperous South Florida

BACKGROUND

Health Foundation of South Florida has established Community Building and Economic Prosperity Initiative to support the scalability of strategies that engage anchor institutions in practices that maximize the economic wellbeing of communities and its residents. The creation of this initiative is based on the recognition that improvement in health requires addressing such as income, education, housing, transportation, and other neighborhood characteristics.

Anchor institutions include universities, hospitals, municipal governments, and other entities that are "rooted in place". Increasingly, institutions are realigning their institutional resources to revitalize their communities as a way to build health and economic wellbeing.

PHASE 1 ASSESSMENT

Health Foundation has engaged The Democracy Collaborative, a nationally recognized nonprofit organization and leader in community wealth building strategies, for the assessment phase.

The goal of the assessment is to better understand current practices, gaps, and opportunities that would inform efforts to maximize the vast resources of hospitals, universities, and other local community impact.

The assessment includes interviews with key stakeholders that oversee human resources, procurement, community benefits, and community engagement among other departments or roles.

The following institutions in South Florida are currently participating in Phase 1: Florida International University, University of Miami, Holy Cross Hospital, Memorial Health System, Miami Dade College, and Baptist Health South Florida.

COSTS

Health Foundation of South Florida and Citi Foundation are covering all costs associated with the assessment.

Two Approaches to Economic Development

Drivers	Community Wealth Building	Traditional Approach
 <p>Place</p>	Develops under-utilized local assets of many kinds, for benefit of local residents.	Aims to attract firms using incentives, which increases the tax burden on local residents.
 <p>Ownership</p>	Promotes local, broad-based ownership as the foundation of a thriving local economy.	Supports absentee and elite ownership, often harming locally owned family firms.
 <p>Multipliers</p>	Encourages institutional buy-local strategies to keep money circulating locally.	Pays less attention to whether money is leaking out of community.
 <p>Collaboration</p>	Brings many players to the table: nonprofits, philanthropy, anchors, and cities.	Decision-making led primarily by government and private sector, excluding local residents.
 <p>Inclusion</p>	Aims to create inclusive, living wage jobs that help all families enjoy economic security.	Key metric is number of jobs created, with little regard for wages or who is hired.
 <p>Workforce</p>	Links training to employment and focuses on jobs for those with barriers to employment.	Relies on generalized training programs without focus on linkages to actual jobs.
 <p>System</p>	Develops institutions and supportive ecosystems to create a new normal of economic activity.	Accepts status quo of wealth inequality, hoping benefits trickle down.

Created by the Democracy Collaborative for the Cities Building Community Wealth report
Published November 2015



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For more info, visit:
democracycollaborative.org/cities



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Meeting Purpose

To explore opportunities for place-based institutions to utilize their procurement systems, employment pipelines, and community investments/community benefit activities to improve economic inclusion in South Florida and support their own institutional goals and priorities.

Agenda

- 11:30-12:00pm **Lunch and Networking**
- 12:00-12:15pm **Welcoming Remarks**
Steven E. Marcus, CEO & President, Health Foundation of South Florida
Karen Gilmore, Vice President and Regional Executive, Federal Reserve of Atlanta, Miami Branch
Janisse Schoepp, AVP, Health Foundation of South Florida
- 12:15-12:30pm **The Economic Opportunity Landscape in South Florida**
Ned Murray, Associate Director, Florida International University Metropolitan Center
A discussion on labor market, wage, and housing trends for low-and-middle income workers in South Florida.
- 12:30-1:30pm **The Anchor Effect: Building Community Health and Wealth**
Ted Howard, CEO & President, The Democracy Collaborative
Lucy Kerman, Sr. Vice Provost, University and Community Partnerships, Drexel University
A conversation on the role anchor institutions play in community wealth building, the benefits of adopting an anchor mission, and strategies for becoming more engaged in building an inclusive economy.
- 1:30-2:20pm **Moving Forward with an Anchor Mission**
Todd Greene, Vice President, Community and Economic Development, Federal Reserve of Atlanta
Sameera Fazili, Senior Adviser, Federal Reserve of Atlanta
A discussion among meeting participants on (1) the value of adopting the anchor mission for your own institution; and (2) entry points, barriers, and opportunities for implementation of anchor strategies that enhance organizational mission attainment and community development.
- 2:20-2:30pm **Wrap Up & Next Steps**
Inés Hernandez, SVP & South Florida Market Manager, Citi Community Development
Janisse Schoepp, AVP, Health Foundation of South Florida

SPEAKER/FACILITATOR BIOS

Sameera Fazili is a senior visiting adviser to the Federal Reserve Bank of Atlanta's community and economic development (CED) group specializing in economic mobility and inclusive growth issues. Sameera has spent her career working in domestic and international economic development, with a focus on access to finance, social enterprise, and economic inclusion. Prior to joining the Atlanta Fed, she served as a senior economic policy adviser at the White House's National Economic Council and at the Treasury Department. At the White House she worked on retirement, consumer finance, and community and urban development, while at Treasury she worked on both domestic and international economic policy. Before her time in government, she was a clinical lecturer at Yale Law School, where she taught in the community and economic development program. She also worked at ShoreBank, the nation's first community development bank. Her work in finance has spanned consumer, small business, housing, and microfinance. She received her law degree from Yale Law School and her bachelor of arts in social studies from Harvard College.



Todd Greene is vice president and leads the community and economic development department at the Federal Reserve Bank of Atlanta. Greene has oversight for research, policy, and outreach initiatives that promote inclusive economic growth with a focus on small business, housing, community and economic development finance, and human capital and workforce development in all or portions of Alabama, Florida, Georgia, Louisiana, Mississippi, and Tennessee. At a national level, Greene leads the Federal Reserve System's human capital/workforce development working group in the Community Development function. He has published and presented on various economic and workforce development related topics and is the coeditor of the recent book *Transforming U.S. Workforce Development Policies for the 21st Century*.

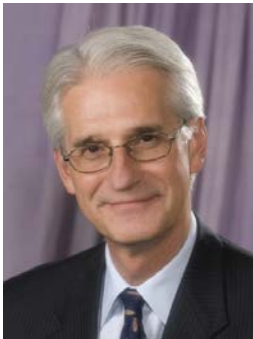
Previously, Greene was a member of the general faculty at Georgia Tech where he led various centers and programs related to applied economic development, including the Community Policy and Research Services group, the Center for Manufacturing Information Technology, and the Program in Science, Technology, and Innovation Policy.

Greene earned his undergraduate degree from Harvard University and holds master's degrees from Washington University and Georgia State University. He has completed executive education programs at Stanford University Graduate School of Business and Universidad ESAN (Lima, Peru). Greene is on the board of directors and is a member of the governance committee of the International Economic Development Council, is vice chairman of the Atlanta CareerRise Leadership Council, and is a member and past chairman of the Georgia Economic Developers Association. He currently serves on the Augusta University Board of Visitors and the board of directors for the Georgia Early Education Alliance for Ready Students (GEEARS), and is a member of the Southern Economic Development Council.



Ines Hernandez is driven by her passion and commitment to building inclusive and thriving communities. As the South Florida Market Manager for Citi Community Development, she is in the privileged position to develop and catalyze innovative initiatives that address the prosperity gap in South Florida.

During her 15-year career in community development, Ines honed cross-sector relationships and skills in applied research, program development, collaborative facilitation, public policy formulation, and public affairs. In her prior role as Principal of Civica Consulting Group Inc., Ines advised municipalities, nonprofits, and philanthropies on how to use data to advance community and economic development initiatives. For instance, as lead consultant for The Social Compact (Washington, D.C), Ines used research data to show the untapped market potential of low-income neighborhoods. Working in concert with Emerging Markets, Inc. (Los Angeles, CA), she used this data to attract major financial institutions and supermarkets to these underserved areas. Finally, during her tenure as Communication Director of the American Red Cross of South Florida, she utilized story-telling techniques to inform and influence the public dialogue. She applies this skill in community development by crafting communication strategies that help to build the good will required to sustain and grow innovative programs. Ines gives back by serving on the Board of Directors for Miami Homes for All, the South Florida Community Development Council, and Health Foundation of South Florida and is the co-chair of the advisory committee for the New Leaders Council of Miami.



Ted Howard is the co-founder and President of The Democracy Collaborative. Previously, he served as the Executive Director of the National Center for Economic Alternatives. In July 2010, Mr. Howard was appointed the Steven Minter Senior Fellow for Social Justice at The Cleveland Foundation, a position he held for four years. Working with the Foundation, he was a member of a team that developed the comprehensive job creation and economic inclusion strategy that resulted in the widely reported Evergreen Cooperative Initiative. In recent years, he has headed up consulting teams to help U.S. Mayors and other civic leaders develop comprehensive wealth building initiatives in Jacksonville (FL), Richmond (VA), Rochester (NY), Albuquerque (NM) and elsewhere. In a recent article appearing in the United Kingdom, the Guardian newspaper praised his “infectious enthusiasm [that] has made him the defacto spokesperson for community wealth building” around the world.

Mr. Howard lectures frequently about community wealth building, including at major conferences such as the Clinton Global Initiative-America, the New Economics Conference of the UK Labour Party, the National Community Reinvestment Coalition, the German Marshall Fund Brussels Forum, the Co-operatives United World Conference (Manchester, England), the Environmental Protection Agency’s Equitable Development Workshop, and regional Federal Reserve Banks, as well as at numerous universities including the University of Pennsylvania, MIT, Michigan State, Georgetown, University of Toronto, University of Lancashire, and Yale.

He is the author of numerous articles appearing in popular and community development publications, including most recently The Chronicle of Philanthropy. His most recent writings include a chapter on “Economic Democracy” in *Achieving Sustainability: Visions, Principles and Practices* (Macmillan) and a chapter on “The Essential Connection: Environmental Sustainability, Community Stability and Equitable Development” in *Ensuring a Sustainable Future: Making Progress on Environment and Equity* (Oxford University Press).

Mr. Howard serves on the board of directors of BALLE (the Business Alliance for Living Local Economies) and LIFT (a national organization dedicated to engaging young Americans in combating poverty in our nation’s core urban areas). He is also a member of the National Advisory Council of the Build Healthy Places Network.



Dr. Lucy Kerman is Senior Vice Provost for University and Community Partnerships and founding Executive Director of the Lindy Institute for Urban Innovation at Drexel University. Dr. Kerman is responsible for providing strategic direction to support the University's vision for its neighborhood initiatives, and directs Drexel's civic engagement efforts. A primary role is to align Drexel's academic and administrative resources to create a coordinated and comprehensive approach to community revitalization, including investments in housing, economic development, retail, clean and safe, education, and health/wellness.

Among many projects, Dr. Kerman leads the planning and implementation of the Dornsife Center for Neighborhood Partnerships, a new "urban extension center" in Drexel's neighborhood that will engage all of the University's college and schools in community problem solving. She also works closely with Drexel's School of Education and the School District of Philadelphia to improve the public schools near Drexel's campus. Before coming to Drexel, Dr. Kerman served as Vice President of Policy and Planning at the Urban Affairs Coalition. Dr. Kerman was also a member of the president's staff at the University of Pennsylvania, where she helped to coordinate Penn's West Philadelphia Initiatives, a comprehensive community revitalization effort in that neighborhood.



Dr. Ned Murray, AICP, is the Associate Director of the Florida International University Metropolitan Center. Dr. Murray has over 20 years of professional and academic experience in city planning and economic development.

Dr. Murray is a leading expert in the areas of urban planning and economic development. He has served as principal investigator (PI) on many landmark planning and economic studies in South Florida including the City of Miami Florida East Coast (FEC) Railway Corridor Strategic Redevelopment Plan, which resulted in the development of Midtown Miami including the recently completed Miami-Dade County Prosperity Study. He has also authored many of the leading housing studies in South Florida in the past ten years for Broward, Miami-Dade, Palm Beach, and Monroe Counties and recently served as Principal Investigator on the Broward County Housing Linkage Fee Nexus Study and Rental Housing Study for Palm Beach and Martin Counties. Dr. Murray developed the "Municipal Scorecard for Affordable Housing Delivery©" model which was used in the Palm Beach and Broward Counties' affordable housing needs assessments.

Dr. Murray is the former editor of American Planning Association Economic Development Division (APA/EDD) publication, News and Views and has presented and written numerous articles on urban planning and economic development including published articles in Economic Development Quarterly, the Economic Development Journal and the Journal of Public Affairs Education. He holds a Ph.D. in Urban and Regional Planning with a concentration in economic development from the University of Massachusetts at Amherst and is a professionally certified planner with the American Institute of Certified Planners (AICP).



Justine Porter is Manager of Advisory Services for The Democracy Collaborative.

Justine is a social enterprise operations professional with experience in creating and implementing social programs and a passion for finding systems-level solutions to inequality through community building and resident engagement. Prior to starting at The Democracy Collaborative, Justine worked in various grassroots and operational capacities for a number of organizations. Previous roles include Director of Operations for New Energy Events, an events company focused on Caribbean renewable energy policy; 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 from SUNY Geneseo and an MBA in Sustainability from Bard College.



Janisse R. Schoepp, PhD, MPH is Associate Vice President of Programs, Policy and Special Initiatives at Health Foundation of South Florida. Working with staff, Board members and local, state, and national health leaders and outside experts, Dr. Schoepp supports strategies for grantmaking, explores new areas of potential interest, initiates special projects, and leads the way in identifying opportunities to advance the Foundation's mission through public policy. She is also currently leading the Foundation's newest Special Initiative: Community Building and Economic Prosperity Initiative, which seeks to activate anchor institutions, such as hospitals and universities, in community wealth building strategies to address social determinants of health. In addition, Dr. Schoepp oversees the Foundation's Healthy Eating Active Communities Priority Area. In 2012, she

was selected as a fellow of the Terrance Keenan Institute for Emerging Leaders in Health Philanthropy founded by Grantmakers in Health.



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(Attendee List as of 12.8.2017)

Allegany Franciscan Ministries

Daniel Gibson
Regional Vice President, Miami-Dade
Email: dgibson@afmfl.org

Bank of America

Erin Sutherland, BA
Vice President, Community Relations Manager
Email: erin.sutherland@bankofamerica.com

BankUnited

Claire Raley, MPA
Senior VP, Community Development and Outreach
Email: craley@bankunited.com

Baptist Health South Florida

Rooney Brodie, MPH
Director of Community Health & Wellness
Email: rooneyb@baptisthealth.net

Bill Duquette, MPH
CEO, Homestead Hospital
Email: BillD@baptisthealth.net

Michelle Mejia, MHA
Associate Vice President, West Kendall Baptist Hospital
Email: MicheleM@baptisthealth.net

Vanessa Rodriguez Ramos, MPA
Manager, Population Health
Email : VanessaR2@BaptistHealth.net

Janette Sanchez, ATTY
Associate Vice President Tax, Senior Counsel
Email: JanetteS@baptisthealth.net

Broward College

Nancy Botero, MA
VP of Advancement and Executive Director of the
College's Foundation
Email: nbotero@broward.edu

Broward County Public Schools

Leslie M. Brown, MA
Chief Portfolio Services Officer
Email: leslie.brown@browardschools.com

Mary C. Coker, MBA
Director, Procurement & Warehousing Services
Email: Mary.coker@browardschools.com

Danielle Mamede
Manager, Procurement & Warehousing Services
Email: Danielle.mamede@browardschools.com

Broward Health

Jasmin Shirley, MSPH
Senior Vice President, Community Health Services
Email: Jshirley@browardhealth.org

Peter Nyamora, MPA, SPHR
SVP, Chief HR Officer
Email: panyamora@browardhealth.org

Camillus House

Hilda Fernandez, BA
Chief Executive Officer
Email: hfernandez@camillus.org

Catalyst Miami

Gretchen Beesing, MSW
Chief Executive Officer
Email: gretchenb@catalystmiami.org



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Citi Bank Community Development

Inés Hernandez, MPA
Senior Vice President & South Florida Market Manager
Email: ines.hernandez@citi.com

Valeria Perez-Ferreiro, MPP
Vice President and Program Manager
Email: valeria.perez@citi.com

Drexel University

Lucy Kerman, PhD
Senior Vice Provost
Email: lek37@drexel.edu

Early Learning Coalition of Miami-Dade

Pamela Hollingsworth, M.Ed
Senior Vice President, Office of Strategic Initiatives &
Program Development
Email: phollingsworth@elcmdm.org

Federal Reserve of Atlanta

Sameera Fazili, JD
Senior Adviser
Email: Sameera.Fazili@atl.frb.org

Karen Gilmore
Vice President and Regional Executive
Email: karen.b.gilmore@atl.frb.org

Todd Greene, MPA, HRM
Vice President, Community and Economic Development
Email: Todd.Green@atl.frb.org

Florida International University

Emily Gresham, MBA
Assistant Vice President for Research, Innovation,
& Economic Development
Email: emily.gresham@fiu.edu

Joe Hornstein, BA
Director, Corporate Relations, FIU Foundation
Email: jhornste@fiu.edu

Saif Ishoof, JD
Vice President for Engagement
Email: saif@fiu.edu

Kelly Loll, CPM
Director of Purchasing
Email: kloll@fiu.edu

Ned Murray, PhD, AICP
Associate Director, The Metropolitan Center
Email: murrayn@fiu.edu

Joliett Vega-Klucsevsek, MS
Workforce Excellence Manager, Talent Acquisition &
Management
Email: joliett.vega@fiu.edu

Holy Cross Hospital

Kim Saiswick, Ed.D
Director, Community Outreach & Community Benefit
Ministry Officer
Email: Kim.Saiswick@holy-cross.com

Jackson Health System

Laura Hunter, MBA
Senior Vice President, Strategic Planning & Business
Development
Email: LHunter@jhsMiami.org

Matt Pinzur, MBA
Vice President, Strategic Communication
Email: matthew.pinzur@jhsMiami.org



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Junior Achievement of South Florida

Laurie Sallarulo
President, CEO
Email: laurie@jasouthflorida.org

Memorial Health Systems

Marilyn Camerota
Director, Community Services
Email: mcamerota@mhs.net

Miami Children's Hospital

Nancy Humbert, ARNP
Executive Vice President
Email: Nancy.Humbert@mch.com

Miami Dade Beacon Council

Sheri Colas-Gervais
Vice President, Economic Development
& Urban Initiatives
Email: scolas@beaconcouncil.com

Michael A. Finney, HRM

President and CEO
Email: mfinney@beaconcouncil.com

Miami-Dade College

Iliana Castillo-Frick
Vice-Provost, Human Resources
Email: ifrick@mdc.edu

Maria Carla Chicuén, MSc

Assistant to the College President, Special Projects
Email: mchicuen@mdc.edu

Sheldon Edwards, MBA

Manager, Minority & Small Business Enterprise
Email: sedward2@mdc.edu

Miami-Dade County Government

Commissioner Daniella Levine Cava, MSW
District 8
Email: dlcava@miamidade.gov

Jason T. Smith, MBA

Chief of Staff to Commissioner Levine Cava
Email: JTSMITH@miamidade.gov

Miami-Dade County Public Schools

Lisa Martinez, MA
Chief Strategy Officer, Office of the Superintendent
Email: lmMartinez@dadeschools.net

Ron Y. Steiger, MBA

Chief Financial Officer, Financial Services
Email: RSteiger@dadeschools.net

Northern Trust

Carol F. Fine
Senior Vice President, Banking Relationship Advisor
Email: cff1@ntrs.com

Nova Southeastern University

Farzanna S. Haffizulla, MD
Assistant Dean for Community and Global Health
Assistant Professor at the Department of Medical Education
College of Allopathic Medicine
Email: fhaffizull@nova.edu

Johannes Vieweg, MD

Founding Dean of NSU College of Allopathic Medicine
Email: jvieweg@nova.edu

Saint Thomas University

Irma Becerra, PhD
Provost and Chief Academic Officer
Email: ibecerra@stu.edu

South Florida Community Development Coalition

Shekeria Brown, MURP
Executive Director
Email: shekeriab@southfloridacdc.org

South Florida Health Care Journalist Association

Rachele Hendricks Sturup, DHSc
Journalist
Email: rh802@mynsu.nova.edu

South Florida Hospital News, LLC

Charles Felix
Publisher & Owner
Email: charles@southfloridahospitalnews.com



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The Democracy Collaborative

Danny Fisher-Bruns, MBA
Consultant, Engaged Practice
Email: dfisherbruns@democracycollaborative.org

Ted Howard
President
Email: thoward@democracycollaborative.org

Justine Porter, MBA
Manager, Advisory Services
Email: jporter@democracycollaborative.org

The Miami Foundation

Charisse Grant, BAJ
Senior Vice President for Programs
Email: CGrant@miamifoundation.org

United Way of Miami-Dade

Mary Donworth, MBA
Group Vice President, Community Impact
Email: mdonworth@unitedwaymiami.org

University of Miami

Robin Bachin, PhD
Assistant Provost for Civic and Community Engagement
Email: rbachin@miami.edu

Erin Kobetz, PhD, MPH
Senior Associate Dean for Health Disparities
Email: ekobetz@med.miami.edu

Beverly Pruitt, JD
Assistant Vice President, Workplace Equity and
Performance Optimization
Email: b.pruitt@miami.edu

Urban League of Broward County

Courtnee Biscardi, MPA
Senior Vice President of Operations & Strategy
Email: cbiscardi@ulbcfl.org

Germaine Smith-Baugh, Ed.D
President and CEO
Email: gsbaugh@ulbcfl.org

Women's Fund of Miami-Dade

Allie L. Martinez
Director, Community Impact
Email: allie@womensfundmiami.org

Health Foundation Board Members

Michael De Lucca, MHM
President
Broward Regional Health Planning Council
Email: mdelucca@BRHPC.ORG

Barbara Ronda, MHSA
Board Member
Email: bcfonte@gmail.com

Everett Wilson, Esq
Partner, Healthcare Practice Group
Email: everett.wilson@akerman.com

Special Guests

John Moreno Escobar, MPA
JME Consultants, President and Founder
Email: jhn.morenoescobar@gmail.com

Ben Starrett
President, Founder, Funder's Network for Smart Growth
and Livable Communities
Email: LBStarWorks@gmail.com

Pilar Guzman Zavala
President
Half Moon Empanadas
Email: pilarguzman2012@gmail.com

Meryl Davids-Landau
Independent Reporter
Email: meryldavids2@gmail.com

Presenters' Missions and Activities

Citi Foundation



City Foundation

The Citi Foundation works to promote economic progress and improve the lives of people in low-income communities around the world. We invest in efforts that increase financial inclusion, catalyze job opportunities for youth, and reimagine approaches to building economically vibrant cities. The Citi Foundation's "More than Philanthropy" approach leverages the enormous expertise of Citi and its people to fulfill our mission and drive thought leadership and innovation.

Learn more at <http://citigroup.com/citi/foundation/philanthropic-focus.htm>



Federal Reserve Bank of Atlanta

The Community and Economic Development (CED) program of the Atlanta Federal Reserve works to activate financial, human, and social capital to foster the conditions that facilitate economic growth in the Southeast. Through action-oriented research, conferences, and expanding networks on these topics and others, the Atlanta Federal Reserve aims to be a valuable resource to help foster economic growth and opportunity in low and moderate-income communities.

Learn more at frbatlanta.org/community-development



Health Foundation of South Florida

Health Foundation of South Florida exists for charitable, scientific and educational purposes to advance the health and well-being of the people of Broward, Miami-Dade and Monroe Counties. The Health Foundation's grantmaking approach facilitates and supports efforts at the neighborhood, county and regional levels to improve the health status of underserved individuals and families.

Learn more at hfsf.org