Session Descriptions

The course consists of highly interactive sessions - four core sessions and two optional ones - that build an arc from seeing this work in action to emerging with the vision and tools to take action. In between each session, participants will work offline on materials and resources curated for the course.*

Wednesday, October 21 - #1: “Jumping In: Learning from Leading Practitioners - and Unpacking Key Lessons Learned.” Real-life case studies occupy the first half of this session, describing strategies and outcomes of both building new community-centered capital vehicles and forging campaigns and collaborations to change the behavior of mainstream capital pools. Following this, course participants - in the course of making their first introductions - share feedback, with Transform Finance staff interjecting questions and key background information to guide the upcoming sessions.

Wednesday, October 28 - #2: “Vision, Values … & Valuation.” Participants come to know each other better through hearing (primarily in pairs and small groups) each other’s statements of vision and values towards capital becoming a positive force in their communities. This provides an important contrast to the picture we then view of how capital operates, particularly with disenfranchised, marginalized communities – with analysis of the various wizards that stand behind the curtain, i.e. the core building blocks of the capital markets and the financial ecosystem.
Wednesday, November 11 - #3: “Conflict, Conviction & Collaboration: Influencing Mainstream Capital / Building our Own Capital.” This entire session consists of hands-on exercises exploring varying strategies aimed at either amassing/controlling or leveraging/influencing capital. The aim is to provide basic understanding of the key elements of a community investment fund like like Ujima or a “CDFI” like Self-Help, Native American Bank, or the Hope Enterprise Corp, and, the key factors and actors behind major “influencing” strategies like shareholder resolutions, setting standards for equitable investments and intervening in noxious financial transactions.

Wednesday, November 18 - #4: “Let’s Get Real: Revisiting David and Goliath.” Lofty visions are wonderful, but what is involved with bringing them to fruition? In this session, participants explore the conditions and capacity involved with either acquiring/building capital or exerting significant influence over it. (This last point may be characterized as David learning to build slingshots … or, alternatively, building alliances with giants!) The session culminates with a focus on taking action.

Wednesday, December 2 - #5. (Optional) “Rolling Up the Sleeves.” This session is dedicated to helping you go deeper – applying all the key themes relevant to your situation – and further developing your initial action plan; or alternatively, dig into a couple of case studies to deepen your understanding of the mysteries of capital, and means of influencing it or building alternatives. This session will have the extra support of a team of coaches – Transform Finance allies working within finance.

Wednesday, December 9 - #6. (Optional) “It’s All About You.” An ‘open space’ session that will be designed by participants in sessions 4 & 5 based on the group’s strongest interests and needs. (Yes, your very own customized module!)

* The “homework” is structured to require less than 2 hours - and note that some sessions have multiple weeks between.