



# Community Benefits Agreements: A Tool for Creating Good Jobs — Transcript

Hosted by the Aspen Institute Economic Opportunities Program and Jobs to Move America, October 23, 2024

## Description

Announcements of a big employer moving to town, or a large infrastructure project, can often spark excitement. Local communities see the potential for big benefits, including new and better jobs and other investment in community needs. Too often, however, these benefits do not materialize. Community Benefits Agreements (CBAs), binding agreements created between community groups and organizations like real estate developers or large employers, are a powerful alternative that ensure people have a real say in shaping the outcomes these new investments will create for their communities.

[Jobs to Move America](#) (JMA) is a national leader in leveraging CBAs to improve jobs and provide opportunities for historically disadvantaged communities and workers. CBAs have allowed JMA to build consensus between affected workers and employers on policies that would benefit the community — from reformed hiring practices to improved training and protecting workers from discrimination.

In this webinar — which took place on October 23, 2024 — we hear from experts and practitioners about their experiences implementing CBAs and leveraging them to improve job quality in their communities.

This event was co-hosted by JMA and the [Aspen Institute Economic Opportunities Program](#) (EOP). It is part of EOP's [Job Quality in Practice](#) webinar series, which examines the strategies and approaches practitioners are using to improve job quality and expand economic opportunity.

For more information about this event, including video, audio, transcript, and additional resources, visit:

<https://www.aspeninstitute.org/events/community-benefits-agreements-a-tool-for-creating-good-jobs/>

## Speakers

### **Jay Mehta (Opening remarks)**

*Manager of Community Benefits Agreement Resource Center, Jobs to Move America*

Jay Mehta leads Jobs to Move America's (JMA) Community Benefits Agreement Resource Center (CBARC). He began his work with JMA in December 2019 as the Senior Researcher for New Jersey and most recently served as Northeast Director, overseeing JMA's programs in New York and New Jersey.

He has 20 years of domestic and international research, campaign and election-related experience. Jay previously worked for the UNITE HERE Union, where he was successful in raising standards, organizing opportunities and developing key community and political stakeholder relationships for hotel, airport and casino workers throughout North America. Following his time with the union, Jay also served as an issue and opposition researcher for the Working Families Party and directly prior to joining JMA, worked as an independent research and creative consultant.

Jay received his Bachelors in Philosophy and Religion from Flagler College ('02) in St. Augustine, Florida and a Masters in Diplomacy, Law and Global Change from Coventry University in England ('03).

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### **Erica IHEME**

*Co-Executive Director, Jobs to Move America*

Erica IHEME (e-ham-a) is the Co-Executive Director for Jobs to Move America. She is an educator, organizer and strategic researcher. Erica earned both her Bachelor's and Master's degrees in Urban Planning from Alabama A&M, a Historically Black University (HBCU) based in Normal, Alabama.

Erica spent the past 17 years building unions as an organizer all over America in several industries including hospitals, public sector, head starts, higher education, and homecare. During her time in academia, Erica focused her energy on university administration and research. Outside of organizing and research, Erica is a mother, artist, and community builder.

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### **Amanda Woodrum**

*Co-Director, ReImagine Appalachia*

Amanda Woodrum is Co-Director for ReImagine Appalachia, focusing on issues found at the intersection of health, energy, equity and the economy. After living in New York City and experiencing 9/11, she returned to Ohio determined to make the state the kind of place she wanted to live. She joined Policy Matters Ohio in 2007 after receiving a master's degree in economics and a law degree from the University of Akron. She conducts research on the role transportation, energy, health and anti-poverty policy can play to promote a more sustainable and equitable economy in Ohio.

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### **Grace Adcox**

*Senior Climate Strategist, Data for Progress*

Grace Adcox is the senior climate strategist at Data for Progress (DFP). At DFP, she leads climate polling and message testing research, using data to support movement partners advancing climate action at the city, state, and federal levels, and to ensure the equitable deployment of community-centered climate infrastructure under federal climate policies. Grace formerly served as assistant director of the Research on Conflict and Collective Action Lab at Vanderbilt University, carrying out multidisciplinary research projects on political violence, protest, and social movements.

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### **Matt Helmer (Moderator)**

*Managing Director, Economic Opportunities Program, The Aspen Institute*

Matt Helmer is the managing director at the Aspen Institute Economic Opportunities Program and re-joined the program in April 2022. Matt's work focuses on developing research, conversations, narratives, and tools that advance job quality, economic security, and race and gender equity for workers with low- and moderate-incomes. Matt helps curate EOP's Opportunity in America discussion series, oversee the Job Quality Center of Excellence, and lead EOP's work on employee ownership. He also facilitates leadership development programs and manages various research projects. Matt is the author of numerous research publications, issue briefs, case studies, and book chapters. His writing has been featured in The Hill and Fast Company. He worked for the Institute's Workforce Strategies Initiative (WSI) from 2009 to 2014. With WSI, Matt researched community college and nonprofit partnerships and construction pre-apprenticeship and apprenticeship programs, facilitated the Sector Skills Academy, and supported the Reinventing Low-Wage Work and Working in America discussion series.

Before rejoining the Institute in 2022, Matt worked for the Seattle Housing Authority (SHA), where he led a team of analysts and project managers charged with advancing the agency's strategic priorities. Matt helped lead the development and implementation of workforce

development and asset building programs, eviction prevention strategies, and trauma-informed practice. Before joining SHA, Matt was a senior policy analyst at the Seattle Jobs Initiative, where he evaluated workforce development programs and conducted research on job quality and economic development issues in the Seattle region. Prior to coming to the Institute in 2009, Matt worked for a local nonprofit in Seattle supporting immigrants and refugees, served in Damascus as a senior English language fellow for the US State Department, and was a Peace Corps Volunteer in Tonga. He has bachelor's and master's degrees in teaching English to speakers of other languages from Southern Illinois University and a master's degree in public administration from the University of Washington. Matt lives outside Seattle with his wife and two sons and enjoys spending time with them exploring the beaches, mountains, and forests of the Pacific Northwest.

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## Transcript

### **Matt Helmer (00:00:08)**

Welcome everyone. I'm Matt Helmer, the managing director at the Aspen Institute's Economic Opportunities Program, and it's my pleasure to welcome you to today's conversation, Community Benefits Agreements, A Tool for Creating Good Jobs. This is an event we're co-hosting with our colleagues at Jobs to Move America and I want to start by just expressing our deep appreciation to Jay, Erica, Valerie and all the other colleagues at JMA that played such a vital role in bringing this event together. Today's event is part of our Job Quality and Practice series. This is a series where we try to highlight practical ideas and strategies that a ray of organizations can really use to address what we at EOP think of as the biggest economic opportunity challenge we face, which is fixing work. Before we start, many of you know the drill, we'll do a quick review of our technology via Zoom for those of you joining us.

First and foremost, everyone is muted. Second, please use that Q&A button at the bottom of your screen to submit and up vote questions. We will try to get to as many of those as we can. We also got a lot of questions submitted ahead of time. No guarantees we'll get to yours, but we're going to do our best to cover as much ground as we can in today's conversation. Please share your perspective, ideas, examples, resources and experiences in today's chat. We have a pretty large audience we're expecting to join us today, so hoping for a lively conversation there as well. At the end of today's event, we'll have a quick feedback survey that'll open up in your web browser. Please fill that out. We always appreciate hearing what people think about the events we host, and if you choose, we encourage you to post about this conversation on the social media platform of your choice, our hashtag is #talkopportunity.

If you have any technical issues that pop up during the webinar, please message us in the chat or email us at [eop.program@aspeninstitute.org](mailto:eop.program@aspeninstitute.org). As always, we're going to record this event and we're going to share that with everyone who registered and attended via email. We'll also post it

on our website so that people will be able to view this later as well. If you need closed captions, they are available for this discussion, just click that CC button at the bottom of your screen.

So let's get started. One of the common questions we often hear at EOP throughout many years of being here is that my community is about to get this big investment and it's going to create a lot of jobs. And the question for a lot of people is how do we make sure those are good jobs? How do we make sure this investment that's going to create these jobs creates jobs for the people that need access to them the most? And that's a very difficult set of questions to answer as there's so much to understand about what one's context is, what's going on in their community, what assets and infrastructure they have to leverage and draw on. But it's increasingly clear, I think, that Community Benefits Agreements are one tool that communities can draw on to make sure that they have a voice in what happens to their community and really have a voice in saying how these investments can benefit from them.

And as we're going to explore today, how can Community Benefits Agreements really be a tool for addressing those questions around how we make sure these investments lead to good jobs and how do we make sure these investments open up access to those good jobs for those who most critically need them? As you all know, this is of course an increasingly relevant and timely conversation because of all the federal investment that's landing in communities around the country, and that's going to be landing in communities around the country in the years ahead, mostly because of a number of big pieces of legislation that have passed. We have the Inflation Reduction Act, we have the Bipartisan Infrastructure Act, and we have the CHIPS Act, and there's going to be a lot, billions of dollars kind of hitting the streets in the years ahead that holds an enormous opportunity for people in communities to be able to access good jobs. But realizing that opportunity is another challenge and one that we need to be mindful of.

But I think it's been encouraging to see from this administration, from the Department of Energy and other agencies about how much they're intending for these investments to indeed live up to the promise of good jobs. And a lot of these agencies, including the Department of Energy, are really encouraging the use of CBAs. But CBAs are still a relatively new tool and developing and negotiating, implementing, monitoring and enforcing one can get a little bit complex, right? So that's what we're here to better understand today is how does a CBA work and how can I use them in my own community to promote job quality and to make sure that my community really has a voice in making sure these investments pay off and pay off for the people that need them?

So in today's event, we're going to hear first from Jay Mehta at Jobs to Move America. Jay leads the Community Benefit Agreement Resource Center for JMA and is going to provide us a quick overview and introduce us to some tools that JMA has developed around CBAs. After Jay speaks for a few minutes, we're going to transition to the panel discussion about CBAs and really learn from our expert panel about how we can effectively design and use CBAs. So I'll introduce

those folks in just a few minutes, but let me turn it over to Jay to get us started. Thanks, Jay for being here.

**Jay Mehta (00:05:32)**

Thank you, Matt for the introduction and thank you to the Aspen Institute's Economic Opportunity Program for co-hosting this webinar, to my colleague Erica Itheme and our extraordinary CBA thought partners, Amanda Woodrum from ReImagine Appalachia and Grace Adcox from Data for Progress for joining us as well. My name is Jay Mehta. I serve as a manager for Jobs to Move America's new initiative, the Community Benefits Agreement Resource Center, or CBARC for short. At JMA, we aim to harness the power of public spending, to build partnerships between clean technology, manufacturing companies and the workers and communities most impacted by the development of these facilities and the production of these facilities. We advocate and advance equitable family sustaining job creation, expanded access to training for historically underrepresented groups and long-term sustainable benefits for workers and their communities. We'd like to take a comprehensive approach to our work and have helped pioneer the successful use of Community Benefits Agreements or CBAs to create high quality, inclusive jobs in the manufacturing sector.

With the launch of our new CBARC program, we aim to use our considerable experience and community benefits to serve several purposes, to engage with high road clean tech companies and employers wishing to work with communities on CBAs, to facilitate conversations and negotiations between these companies and community and labor stakeholders, to educate, advise and assist community organizations in developing and negotiating enforceable CBAs that really center community labor and the environment, to conduct research and act as a clearinghouse and resource library for CBA concepts, ideas, and best practices, and to organize community coalitions to collectively negotiate high road agreements with companies that are open to this process. Right now, as Matt has mentioned, advocates and practitioners of community benefits are in the unique position. Federal agencies such as the Department of Energy have, for the first time, prioritized and acquired the development of community benefits plans for grant applications.

In addition, multiple other state and local agencies and officials are thinking about similar kind of collaborative efforts to maximize the benefit of these public investments. If these are done right, these community benefit plans can become actionable and accountable Community Benefits Agreements that can foster collaboration between a project developer and operator, community and labor, really promote sustainability and help to maximize the benefits to community workers and families, as well as the companies, create recruitment, training and pathways for highly skilled and diverse workforce that's representative of the community and reduce the likelihood of turnover and promote retention of a skilled and inclusive workforce.

In addition to the webinar today, today, we're also proud to launch our CBARC website, it's cbarc.org which will serve as a hub and a resource library for those seeking to learn more about

CBAs. And in the coming weeks and months, we'll be growing our library to include more case studies, templates, best practices, and other resources to further develop community benefits and community benefits frameworks. Really excited for this work to come in and collaborating with so many amazing thought partners and stakeholders in this kind of community benefits arena. Today's panel will hopefully serve as an informative and useful resource for those interested in learning more about CBAs and also those are actively pursuing this community benefits work.

Before I pass it back to Matt and our wonderful panel, I just also want to give a special thank you to JMA's generous philanthropic organizations and funders, including BuildUS, The Family and Workers Fund, and the Get Love Foundation that have allowed us to really develop, grow, maintain, and further our CBA and CBARC work. Thank you again, and I'll pass it back on to Matt.

**Matt Helmer (00:09:41)**

Great, thanks so much, Jay. You know, JMA is really a thought leader and a leading practitioner in this space, so I encourage you all to check out the great resources they have around CBAs. So let's dive in with our panel and let me introduce them. So joining us today we have Amanda Woodrum, who's Co-Director of ReImagine Appalachia. We have Erica Iheme, Co-Executive Director at Jobs to Move America, and we have Grace Adcox, Senior Climate Strategist at Data for Progress. So I wanted to get started today and ask all of you just to introduce yourself and tell us a little bit about your organization. Maybe give us a reflection on what you have seen as some of the benefits of CBAs, and let's not bury the lead too much. Let's give the audience out of the gate here one practical tip or piece of advice you want them to walk away with in developing and implementing a CBA and how they should think about that. So Erica, let's start with you.

**Erica Iheme (00:10:40)**

Hey, so I'm Erica Iheme, Co-Executive Director with Jobs to Move America. Actually starting next week, I'll be moving into my new role as organizing director to help build out our thought practices around how we actually organize to get to CBAs. But like Jay said, JMA is a national advocacy thought leader, grassroots organizing organization that focuses on using these tools to create good jobs in green manufacturing. And the way we do that is through winning CBAs, but also by making sure that the rules are right on the policy level to make sure that we can actually win enforceable CBAs in all manufacturing. Green manufacturing, particularly when we're thinking about this evolving economy that we are building, it is very interesting that we're moving into this green economy and we're just working to make sure that we have good jobs in green manufacturing.

And one practical tip I would leave, or one note I would make, is that CBAs are a path for communities to be in true partnership with companies that are housed in their communities, that actually help collaborate to create the definition of what it is to have a good job and work collaboratively to actually make it happen. If you do it right.

**Matt Helmer (00:12:08)**

Thanks, Erica. Grace, let's turn to you next.

**Grace Adcox (00:12:11)**

Yeah, thank you so much for having me, Matt and thank you to The Aspen Institute, and to Jobs to Move America for having me here. My name is Grace Adcox and I am the Senior Climate Strategist at Data For Progress. We are a think tank and polling firm that works to arm communities, advocates, policymakers, researchers, and other partners with data-backed insights from the surveys we field, focus groups we conduct and policy research that we are doing. The climate team at Data for Progress, as Matt has already alluded to, has been really focused on the implementation of the Bipartisan Infrastructure Law, the Inflation Reduction Act, and the CHIPS and Science Act. So as part of that, we've had this really transformational opportunity with the Institution of Community Benefit's plans to think about the role that community engagement and benefits can play in the deployment of the climate infrastructure that is necessary for us to respond to the climate crisis.

And with that in mind, I think that just a couple of high-level insights that I would share, and Erica mentioned this, Jay's mentioned this, I think this will be a theme of the day, CBAs when done right can offer a means for inclusive participation, an opportunity for communities to express their concerns and needs surrounding some of these development projects and address environmental justice challenges, including through programs like Justice 40 while remedying bad paradigms of development, which I think Amanda might get into a little bit later, which is really where we saw community benefits plans emerge as a response to the broader community benefits movement and Community Benefits Agreements that we started to see in the late '90s and early 2000s.

If I could give one practical tip, I would say that the one thing that I'll caveat here is that CBAs are only as strong as they're written to be. You need to have really legally binding, enforceable benefits for a CBA to work as intended and that has come across in the research that we've been conducting on Community Benefits Agreements as other types of mechanisms as well for community engagement and benefits and I'm looking forward to sharing more about that later. But thank you again for the opportunity to be here.

**Matt Helmer (00:14:13)**

Great. And last but certainly not least, I'll turn it over to Amanda and Amanda, in addition to some of those other questions I had. If you want to add anything about where we are with the CBA movement and how we got to this point in time where the need for a CBA type of tool came from, that'd be great to add as additional context.



**Amanda Woodrum (00:14:30)**

Oh, I would love to do that. I am Amanda Woodrum. I'm the Co-Director of ReImagine Appalachia. We are a four-state coalition focused on what we call the Ohio River Valley of Appalachia, but better known to most folks nationally as coal country. And we are working to create a sustainable, equitable economy in this region and really transform it in Appalachia or coal country into leaders of the new clean economy. But we want to make sure that we're creating good union jobs and pathways out of poverty for disadvantaged communities in the process.

And I think if there's one key takeaway that you need to come out of this with that it would be if you care about job access, if you care about job quality, if you care about community voice on publicly funded projects, then this is what you need to pay attention to, Community Benefit Agreements, community benefit policies are really how we break down the silos between economic and workforce development and create real pathways out of poverty into good union jobs.

**Matt Helmer (00:15:54)**

Great. Thank you, Amanda.

**Amanda Woodrum (00:15:55)**

Did you want me to add the historical context or I can [inaudible 00:15:58]

**Matt Helmer (00:15:58)**

Yeah, go for it. Yeah, let's add that in the mix here too.

**Amanda Woodrum (00:16:01)**

So I like to put where we are at in what I call the community benefit movement in context, and that it really started with Community Benefit Agreements as a coalition of broad stakeholders reacting to bad economic development practices, what some folks might call low road economic development, but certainly not worker and community-centered. And I think where we're at now is we're moving away from having to fight each battle for each project towards this is how we want to do business, and that's what a community benefit policy is. If we want community and worker-centered economic development practices is the way we do benefits, community benefit policy is where it's at. And so if you care about those things, now's the time to really learn and get involved.

**Matt Helmer (00:17:10)**

Great. Thanks Amanda. And we'll come back to this kind of question of how do we begin to move more of this into the policy arena and systematize some of it, right? But for today's conversation, we've kind of broken into a couple segments. So we're going to start with just how

do you start building and negotiating an effective CBA? What are some of the early steps you need to take? What are some of the things you need to think about when you're engaging your community in this process? Where do you get started? And then we're going to turn to thinking about how we actually think about implementing the CBA, monitoring and enforcing it. But for this first segment, I've asked our great speakers here to think about those early stages of a CBA and some of the things they've learned along the way. So Amanda, I want to start with you, come back to you real quick here and have you talk to us a bit about what you think makes for a good coalition when it comes to a CBA and how job quality should really fit into the design of a CBA.

**Amanda Woodrum (00:18:15)**

Yeah, so I would say the broader your coalition is, the better, but at the very least, you want to at least attempt to bring organized labor, racial justice and environmental leaders together, because if they're all on the same page, you're a long way towards where you need to go to actually make it work and make it happen. And the key really is that making sure those diverse stakeholders are at the table, but then finding the real win for each stakeholders so you're not just making a bad project less bad, but making a good project even better and folks are actually excited about what's in there and they become key allies in actually making the project happen.

And so there's certain provisions that we know from experience that folks care about from each of those key stakeholder categories, and that's where we can think about staple provisions, for instance, job quality, like organized labor is going to want to see job quality. Who doesn't want to make sure the jobs that we create, especially with our taxpayer dollars are good jobs? So that's a key piece of it, and of course that's going to get your organized labor folks excited. Racial justice, a key thing that these groups often want to see is access to jobs for disadvantaged communities. So things like on-the-job training opportunities for apprentices and pre-apprentices, environmental groups want input on the project design and make sure that what the project comes up with or does, doesn't create any environmental harms and can actually be beneficial to the environment. So these are the key things you need to be thinking about that if you do them, folks are just actually excited about the projects.

**Matt Helmer (00:20:25)**

Could you maybe elaborate just a little bit more on the job quality staples? What are the menu of things you're thinking about when you're building job quality into a CBA?

**Amanda Woodrum (00:20:36)**

Sure, the gold standard for job quality is the use of a Project Labor Agreement, particularly on, well for construction projects, and that's essentially a Collective Bargaining Agreement for the duration of a contract. You'll want to see labor standards, safety standards, job standards, living wages for racial justice and access to jobs. You also want to be thinking about percent of the work hours going towards apprentices and pre-apprentices. And you want to be thinking about

a percent of those hours, perhaps half of the, say, if 25% are local hire, that half of those come from disadvantaged communities and how do you define disadvantaged communities? And you want to be thinking about things like targeted hiring processes to make that work.

**Matt Helmer (00:21:45)**

Great. Thanks for that extra little bit. Erica, let's dive into some of JMA's work maybe in Alabama through a little bit of a case study maybe. What have you learned about in Alabama kind of laying the groundwork for building and maintaining a successful campaign and coalition to really get to a successful CBA?

**Erica Itheme (00:22:06)**

Yeah, I mean, it's true Alabama does hold the largest plant for the company New Flyer and Carfare which were NFI group companies. It was really a national effort. So Alabama was like ground zero where a lot of the coalition building and stuff happened, but it was really a national effort that took teams all over the country. I didn't mention it before, but JMA has teams in, at that time it was California, Illinois, New York and Alabama, and we've expanded beyond that. But the thing is, it's really stepping back before we even talk about organizing and talking about community building is understanding the right opportunity and looking at a set of criteria to help define what is a valuable opportunity. So how much of their product is being purchased by public spending? What are the biggest markets that their products are being sold in? Are they companies that are receiving public subsidies from local governments to move their businesses there?

The research component is one that could be slept on if you're not careful, and it's really important to be lifted up and considered because you can't even start building a campaign for Community Benefits Agreements if the right opportunity doesn't present itself. So first understand the opportunity, but second, once you do that, go into the community and find people from that community to start organizing themselves. So as JMA, like what we do is we hire locally, homegrown people to actually go out and organize the communities in that area to actually go to actually get to a Community Benefits Agreement. Once you get to that place of getting the coalition established and framed out, it's important to start thinking about what's the story that needs to be understood? What is it that the community is struggling with?

So for the Alabama case study, Alabama A&M University led a southern manufacturers report, which created a data set that never existed before that actually polled members of the community and plant workers within these automobile and manufacturing companies across Alabama and actually produced a report that talks about quality of life in those communities, but also within those plants to just give the coalition but also the public a good understanding of what is it like to be a southern manufacturing worker. There was a second part of that series that came out of a joint project between Alabama, A&M and Jackson State. They had a larger lens that looked at both Mississippi and Alabama communities and manufacturing workers. And that right there is what gives you the opportunity to start defining the narrative that needs to be told.

It helps the coalition understand what are the issues and struggles that they want to see resolved, and it also sets the tone for what it is to be negotiated about once you get to a place of getting a Community Benefits Agreement.

So once you actually get that coalition framed out and start organizing them, I think Amanda just mentioned something like this, you want to go a very diverse, comprehensive collective that includes, like for the Alabama coalition, it was environmental groups, faith groups, civil rights groups, labor worked hand-in-hand at the table with us, environmental groups all working collectively. And the common goal was good jobs for Alabama manufacturing workers. And for this particular case, it was to get a CBA in the Anniston area, but also nationally for NFI workers and that's what we were able to accomplish. But then also the workers play a key part because you can't really talk about good jobs until the worker has an opportunity to voice what it means to be a good job, what are the challenges and struggles they face, but also what would be the ideal situation for them?

And so really engaging the workers in the process is pretty critical, and that's very early on in the process, so that's why we don't even approach CBA campaigns without our labor support, our partnership with our labor partners who work hand-in-hand to be able to move these efforts forward because ultimately we want to see these green manufacturing jobs be good jobs, but also good unionized jobs. And once you get all of those pieces together, and I didn't even mention the policy piece, but I'm sure my sister's on the panel are going to talk a lot about the policy, but JMA, we spend a lot of time thinking about getting those rules right, because without the rules being right, I mentioned it earlier, if the rules ain't right, it's really hard to set the conditions to be able to get a real CBA set up and actually implement it, but also thinking about the legal strategies that could kind of parallel this whole process that's always happening throughout this movement of getting to a Community Benefits Agreement.

So it's not just as simple as a community calling the employer, sending them in the middle of the room and saying, "Hey, we want a CBA and we want all these things." It is a really strategic, thoughtful process that includes a lot of partners, including our partners in philanthropy and individual givers. We work with them as thought partners because they're investing into an idea that we believe that we could actually move and they actually work hand-in-hand. So it's organized across the board at every level, and that's the groundwork that's necessary in order to be able to get to a CBA. Finally, making sure that you're having the right people on your team, got to have research, you got to have a policy person, got to have an organizer, you got to have a legal person. If you don't have all those components or access to any of those components, tap into your coalition, pull on those resources until you're able to resource it, but you have to figure out how to work collaboratively at every level with every partner at the table. That's the key.

**Matt Helmer (00:27:58)**

Yeah, there's so much great information in that answer, Erica. I appreciate that so much. I guess one quick follow up would be, as you bring these diverse coalitions together, it sounds nice, right? But I'm sure it's super messy and I'm sure all kinds of challenges come up when it comes to maintaining that coalition and I'm curious if you could maybe talk a little bit about some of the common challenges you see in collaborations and maybe some strategies that you've seen work to resolve conflicts as they come up.

**Erica Iheme (00:28:29)**

Yeah, so I mean, I come out of 20 years of labor organizing, so I've been in a lot of coalition spaces. I've seen good coalitions, I've seen coalitions implode. I've seen them fall out and completely dismantle and just give up on the dream. I've seen it all. So when we came to Alabama, I think the first thing that was important is that we had a team member, Patricia Todd, who was deeply embedded in the Alabama community statewide, who actually started building out the coalition based on her relationship. So there was already an element of trust there. We always say at JMA, progress move at the speed of trust, and if there's trust, you're able to progress the movement together. But also creating a culture of norms where we're able to be transparent with each other. We're able to have hard conversations. We have a culture of having courageous conversations.

When somebody does something that's kind of weird or foul, we talk about it immediately. We work through challenges together. Fortunately in Alabama, there was such an appetite for us to be able to do this kind of work together. We typically aligned on quite a few things, and when there were [inaudible 00:29:41] moments, we would just have a conversation about it, figure out a plan, and move on. And I think that we kept the goal in front of everything. Ego and pride have no space when you have a goal as big as what we had, and that's what kept us moving forward. And so being able to communicate, being able to have those hard conversations, being able to always take people back to, but why are we here? Because if you lose focus of that and let pride or ego get in the way, you will lose your coalition.

So these are three-year campaigns, four-year campaigns. You have to figure out how to keep a coalition positively engaged for that duration of time in order to be able to get you over the finish line. And once you get over the finish line, take you through the implementation phase which is a whole nother beast that I'm not ready to talk about at this point of the talk, but you gotta just, you got to be able to talk about what matters by setting group norms and realizing who's your folks and who's not your folks because sometimes there's some people that's not appropriate to sit at the table. And I hate to say that, but it's the truth. If they're not aligned with your vision and your mission and your values, you're actually going to be creating more work for that coalition to be able to ... Yeah, if that person doesn't have a strategic role in that state or that community, that actually is a key stakeholder position, you have to figure out who to play with.

**Matt Helmer (00:31:10)**

Right. Right. So much in there again, but one of my takeaways is people should find their Erica in their community. But Grace, let's turn to you. Your work is focused on understanding the impact of CBAs, and you've done a lot of research in this space, and your team has also put together a large database of CBAs for others to kind of consult and digest. What are you learning about how communities are designing CBAs and some of the common components they have as well as how they're approaching this design and implementation process?

**Grace Adcox (00:31:43)**

Yeah, that's a great question, Matt, and I think it's really invigorating to be on a panel with some of these organizers that are doing the hard work on the ground when I'm approaching it from a more academic perspective, a little bit higher level, I'd say. But I'll start by saying I think that the folks that are on this call, the folks that are on this panel probably get the whys of a CBA, at least from the perspective of communities and workers. We want good job quality, we want local benefits. We want local engagement and participation to level the playing field with developers. What I'll actually get into is the what, the how, the who, and I think that that's really what we've been learning from our database work, which has been done in collaboration between World Resources Institute and Data for Progress. We wanted to understand not only how CBAs have played out so far in terms of the who, the how, the what, but also how other kinds of community benefits tools have been used.

I think Amanda is the one who mentioned earlier Project Labor Agreements as a gold standard for labor. This is really, I think, an essential part of a CBA if you're talking about the development of a large-scale urban project where construction is the main sort of avenue by which folks are going to be able to engage in getting benefits with local job hiring, hiring for disadvantaged workers, and those kinds of elements. So there's a little bit of a difference I would say when we're talking about cross-sectoral, cross-regional policy and actual agreements that are in the field that are in play for community benefits. In terms of who, I think that we can really define community in a lot of different ways. We've seen Community Benefits Agreements that are very explicit about tying it to perhaps the location in which a project is built within census tracts or other ways of defining the geography for a community to be defined within a Community Benefits Agreement.

We've also seen communities defined by the coalitions that emerge in response to a development project. We've seen it defined by a select group of organizations that come together. We've seen it defined by the cities or municipalities that get involved as signatories of a project, and typically the other person entering into that is the developer. So it's a two-way agreement that is going to allow for some organization or group or collective of individuals even to represent those community interests. When it comes to what we've seen included within Community Benefits Agreements, I will say that because of the way that this movement emerged, labor benefits are centrally involved in almost all agreements that we've reviewed. Beyond that though, we certainly see the educational benefits, affordable housing benefits,

environmental benefits like environmental remediation or funding for parks are also things that start to emerge pretty frequently in the kinds of projects that we've reviewed as part of our work so far.

The other thing that I will add in here is just the how. I alluded to this in the beginning with my what's my one takeaway? The how is really, I think, the most essential part to get right for a CBA. You need to have very specific benchmarks for what a developer is committing to and promising as part of a project. Not only should those benchmarks be specific in themselves, but there also should be some opportunity for monitoring enforcement and verification that benefits are being delivered as they have been promised to be delivered as part of a project. I think in order to evaluate best practices or the success of a CBA, you have to be able to understand where those benefits are delivered? And how did that shape the community outcomes for that community hosting a project?

If we come out of it and there's no difference in a community before and after, perhaps that suggests we need to look a little bit more critically on the CBA process and there are great examples of strong, really well-structured CBAs where there are these enforcement tools and there are also really weak examples of CBAs that can cut back against the aims that we have in mind for the development of equitable jobs that are coming out of these projects and ensuring that, especially when large taxpayers' sums of money are going into subsidies for developers, that really the communities are seeing meaningful benefits out of that process. And so I'll pause there in case you have any follow-up questions, but just a high level on some of what we've heard, there really are, I think, a lot of differences when you're talking about unique sectors as well as unique geographies when we're talking through what CBAs may look like.

**Matt Helmer (00:36:10)**

Great. That's great. Before we turn to the next section of the conversation on implementation and enforcement, I want to get to a couple audience questions. And I think this first one probably can go to you Grace, but certainly Amanda and Erica feel free to weigh in here. What data do we have that's been collected that show that CBAs result in positive outcomes? And have folks studied kind of how key CBA provisions, which ones make the most difference in terms of positive outcomes? So really a question about what research do we have that CBAs kind of work I think?

**Grace Adcox (00:36:47)**

That's a great question. I think that because CBAs are often negotiated between a private developer and it can be a private coalition or it can be a public entity, we don't always know what is in a CBA. It's, I think, perhaps unintuitive. To me, I think all of those should be public. We should see what communities are getting out of projects and what developers are promising in order to hold them accountable for the delivery of such benefits. But often we just don't have that information. It's considered proprietary, it's not released publicly or it's released as a press release in summary. And so that is a challenge in terms of evaluating CBAs. When we look

instead at specific projects where we have seen the very public release of that data, one thing that comes to mind for me is like the LAX development project and the CBA that was involved with that.

There's some really cool environmental remediation pieces entailed that include ongoing monitoring, air quality testing and enforcement measures. And you can track from the time that CBA was negotiated until now, how that has impacted air quality in the area surrounding that development project. But again, a lot of this comes down to project level individual evaluations. One thing that we're trying to do is systematize this a little bit. I'll probably talk a little bit more about studying Detroit's Community Benefits Ordinance, which is to the point about policy and requiring community benefits as a policy. Detroit's Community Benefits Ordinance is a really useful case because it's been around since 2016 so we have quite a bit of data on what it's like to institute CBAs as a requirement for any project that hits a certain financial threshold. But again, it's very tricky to do that sort of evaluation, and a lot of it's happening on a very piecemeal basis.

We've got great examples like the New Flyer project that JMA was talking about and that Erica and both Jay have spoken about today, but we can look at that project and evaluate it, but it's really difficult to put it in conversation with all the others because there's so much variation that we see overall between projects.

**Erica Iheme (00:38:48)**

... go Amanda.

**Amanda Woodrum (00:38:53)**

I would just love to - to me, it's just a matter of common sense. We all know that you get what you pay for, except we don't seem to realize that that applies to construction and how we use our taxpayer dollars. The community benefit movement was a reaction to low-bid contracting practices, which resulted in low wage work, often bringing in workers from out-of-state or at least out of the community, a lack of safety on site as well as shoddy building practices and all of those things have economic implications. Low wage leads to high poverty, that costs the community. Shoddy building practices, you're going to waste energy, you're going to have to do more remediation because the building's going to start falling apart. We get what we pay for and what the community benefit movement brings is real value to our taxpayer dollars, not just to the project itself, but to the community as a whole. And it's just an obvious win.

**Matt Helmer (00:40:18)**

Erica, you were going to jump in, go ahead.



**Erica Itheme (00:40:21)**

I mean, for me, during my tenure as Co-ED, I was thinking a lot about the impact of CBAs and manufacturing spaces. So we know that a lot of the companies that we look at are in low-income areas, are probably rural areas, urban areas, high unemployment rates or underemployment is an issue in these communities. And so one thing that, and it's actually housed in the CBARC Center, we're developing an impact assessment to look at wages over time. The surveys that are collected during the manufacturing studies, it's asking people what is their wages? What were they making? What are they currently making? And just being in the real world as a citizen in the community but then each CBA has a pipeline where we're actually identifying marginalized citizens in the community and actually putting them in the pipeline to get them into these plants.

And it's not just with New Flyer, it's with BYB, all the companies that we've worked with, Proterra, they all had an opportunity to do workforce development, recruitment and pre-apprenticeship pipeline, moving them into the system. So obviously if you were unemployed or underemployed before you actually got a CBA, then you got into that pipeline. Once you get into that pipeline, manufacturing jobs traditionally pay more, not that more is great or good, but it's actually more than the average worker in that area. So we look at what that looks like when they first start in the pipeline and then their matriculation process, once they get certifications, apprenticeship programs, but also once they form their union because these workers are not ratifying a union contract without a raise in it. So what does those wages look like? And then those wages are actually committed over a period of time.

So just looking at the series of time and ideally what has happened 10 years from now, we'll be able to look at the census and look at those census blocks and say, okay, the average worker in this community made this much money, but because of the work that we did with CBAs and manufacturing, because you're also raising the standards. If this company partners and becomes a CBA partnership and they get the best workforce, everybody's going to want to work there because their jobs are going to be better. So it's going to actually raise the standards of that community, and you can actually look at the impact over time economically of what that will look like. So I think right now, I like when Amanda says CBA movement. One of the parts of the CBA movement that I feel like we're moving into now is really trying to identify the opportunities to actually collect empirical data to look at the impact of these CBAs.

And so that's what we need to start thinking about. What are the questions that we could be asking? And where can we actually find the data or what tools can we use to actually create the data sources to be able to start telling these stories over time? Because impact matters. I want to be able to look back 10 years from now and say, I sacrificed all these years of my time to win CBAs so that we could see this go from this to that. I want to see the evidence.

**Matt Helmer (00:43:25)**

Right, right. Well, I want to get to one more audience question because I think this one came up in some of the pre-submitted questions, and it's one that I think is on a lot of people's minds too. Childcare is a huge barrier for so many people in the United States today when it comes to juggling that responsibility with work. And there's some questions of whether any childcare components have been negotiated into a CBA. So that's one piece of it. And I think the other thread to this is related to transportation. A lot of these investments that are coming down the road are going to be building facilities and manufacturing facilities and whatnot and locations that maybe are quite a distance from people who really need those jobs. Have you all seen any transportation benefits negotiated in CBAs? So kind of twofold, childcare and transportation. Have you seen those come up in terms of CBAs?

**Grace Adcox (00:44:19)**

I can jump in first. Just one thing that I'll note is we've definitely seen childcare and childcare facilities, especially funding for educational institutions as being some of the benefits that have come out in several CBA negotiations. I'm not sure that I can think immediately of any transportation-specific benefits, but that could definitely be a blind side on my part. We certainly have seen childcare as an essential need that has come up in focus group conversations we've had, communities have shared that that's an important need that they would want to have negotiated as part of a CBA as well as in practice, CBAs and other agreement types having childcare benefits involved.

**Erica IHEME (00:45:06)**

I would say that's the dream, right? To be able to negotiate those types of, I mean wraparound services are so critical to getting chronically unemployed and underemployed to be able to even get a leg to stand on to even get into the workplace. I think that's the big limitation. So when the opportunities do present themselves, people fall short because they can't get to work or they can't get their kids, they don't have childcare for their kids or those types of limitations do come up. I can say, I'm not going to name the company, but when we were doing community negotiations, one of the coalition members, one of the suggestions from the coalition to be negotiated on was this company makes buses, so let's put buses in the community and let them get people back and forth to work.

But basically the way we mitigate that, trying to figure out how to get the wraparound services to the workers that are going into the pre-apprenticeship program is we have a workforce development coordinator that works with community groups that actually do direct services and actually provide those types of resources. And their job is to find those, they're like case workers. Their job is to help find those resources to set these workers up for success, because a lot of these workers, they're from marginalized groups, so that means, you know you got women, single mothers, people who probably been system impacted, Black people who are always left out of the workforce in a serious way. People who are immigrants have English as a second language. Like these people already have those limitations and barriers.

And we would like to be able to get to a point where we're negotiating CBAs that actually take on these things but one of our things with JMA is we try not to take any economics from the company. We try not to take any money from the company, it's really about a community partnership and the company partnership and finding the resources that's already established to be able to make things move forward because we got to work together to get it done.

**Matt Helmer (00:47:07)**

Amanda, did you want to weigh in on this one?

**Amanda Woodrum (00:47:09)**

I would love to. I think those are really important components of breaking down the barriers to employment that can in fact be addressed through community benefits. I think it's two of the most important pieces of a good Community Benefit Agreement, our community benefit policy revolve around making sure there's access to the jobs created, ensuring for instance that public transportation stops at the job site shows up in a lot of different Community Benefit Agreements, and it should be a policy. We have to stop building stuff where workers can't get to it. And with childcare, there's actually a recent agreement that I think the steelworkers helped negotiate, and I want to say the company is Constellium that I just learned about this, but they negotiated a childcare center in their Community Benefit Agreement. And so yeah, I think those are two very important components of a larger whole with a focus on access to jobs for disadvantaged communities.

**Matt Helmer (00:48:25)**

Great. Super helpful. So let's get into this next section of the conversation, thinking about implementation, monitoring, enforcement. Grace, you mentioned a while ago that you've been working with some colleagues in Detroit where there's actually an ordinance requiring CBAs. Talk to us a little bit about that ordinance and what you've learned about implementation there.

**Grace Adcox (00:48:49)**

Yeah, happy to. And I'll say again that this is something that we've been working on in collaboration with the World Resources Institute. This really emerged out of starting first with a national survey of public opinion toward community benefits. We wanted to understand how people might react to community benefits writ large, and it turned into a really productive and helpful collaboration for us where we started to look into where community benefits policies exist. Detroit was the first city, first major US city to adopt a Community Benefits Ordinance back in 2016. And what does that mean? It means that any development project that's high impact, which is defined in Detroit as receiving \$75 million in investment from a developer or receiving significant subsidies from the city which can include land, that can include tax breaks, to ensure the communities where that project would be cited, could negotiate a Community Benefits Agreement in order to receive additional benefits from those development projects.

And I think that it's particularly of note that this happened in Detroit, a city that has suffered from historic disinvestment. The white flight in Detroit is a major challenge that has impacted its

economic development. The leaving of the major car manufacturers really shaped Detroit's economic development and so instituting this ordinance in 2016 was seen as an opportunity to embed community benefits as part of new development and entice development in the city. And so the way that this Community Benefits Ordinance is structured is such that when a project is being announced that hits this threshold, the community is involved in a couple of different ways. So first, the city council will make sure that folks that are in the impact area of the development project are aware of it. They institute then a neighborhood advisory council, which is partially elected, partially selected by city council members and offices in Detroit to be able to identify nine figures who can be involved in negotiating for significant community benefits as part of these development projects.

This is all overseen by the Civil Rights Inclusion and Opportunity Office at the City of Detroit, which really oversees just the way that this process unfolds. And people meet repeatedly in the same way that folks have more organically had negotiations to arrive at CBAs, but with a more prescriptive, policy-oriented approach to ensure that a Community Benefits Agreement is what comes out of a development project before that development project is breaking ground in Detroit. And so to talk a little bit about what we've learned from the implementation of that policy, World Resources Institute and Data for Progress started with a landscape overview, just studying the literature around Detroit's Community Benefits Ordinance, the CBO, as well as doing interviews with stakeholders representing the city council, people who'd been involved in Neighborhood Advisory Councils, the NACs that I mentioned, as well as other folks that are in Detroit's ecosystem.

And a lot of the folks on this call, including Amanda and Jay from JMA and ReImagine Appalachia, to get a sense from experts, practitioners, folks that are in this space, what are some of the takeaways from what we've learned in the past eight years since Detroit's Community Benefits Ordinance took effect? And what we've seen is there has been some leveling of the playing field. Communities have received pretty significant benefits out of the development projects that went forward through the CBO process in Detroit. Some of those benefits are educational, some of them are job-related, many of them have other elements as well, including a lot of environmental impacts that we've seen, but also we've seen some challenges. And I think that this is really our takeaway from the paper. This is forthcoming, we'll be publishing it in the next couple months that is currently under our review process right now.

But from these interviews that we did and the literature review, talking with experts in space, we've found that a CBO is first of all, not a silver bullet. The Community Benefits Ordinance has done some to address that disinvestment, the austerity that we've seen, and also just the general racial and economic inequality that we've seen in Detroit. But we also think that there's some room for improvement. One challenge that I think I will probably be relying on as an anecdote when talking about Detroit CBO for the coming months is CRIO, which is that the Civil Rights Inclusion Opportunity Office had one person overseeing 300 different benefits commitments under several different CBA projects that went through the CBO. That to me is not

effective monitoring verification or enforcement. And again, this was 2019, I know that CRIO, CRIO has staffed up a little bit since then, but there are some challenges.

And one place we saw that emerge was with Stellantis, which was formerly Chrysler, the car manufacturer in Detroit funded an expansion where they were emitting horrible, toxic pollution that actually instead of going through the CBO remediation process where the city council would say, "hi Stellantis, you are committing a violation of air quality issues here." What we saw instead is that Michigan's federal or state level Department of the Environment was what stepped into ensure that there was an effective response to the violations that were happening from the developer. I say this not to cast doubt or aspersions against Detroit CBO, I think that it goes a really far away in terms of being a more successful way to embed community benefits as a policy, ensuring that projects that are receiving these taxpayer dollars are going back into communities in terms of job benefits and other kinds of benefits but just to say that there's room for growth, room for improvement.

And as we see other municipalities exploring or adopting their own CBOs, it's, I think, really valuable to look at what lessons we've learned with this example, given it's the first CBO that we've seen in a major US city, and it's been around for, at this point, a pretty long period and gone through a number of projects.

**Matt Helmer (00:55:03)**

Right. Thanks, Grace. Erica, I think what Grace is getting at in part is what you kind of relayed to me the other day, is that getting to the CBA, getting it signed is maybe just half or just a third of the battle, and that there's all these other challenges that pop up when it comes to implementation, when it comes to monitoring, when it comes to holding all the parties accountable. So I'm curious, what are some of your lessons learned in those areas and some of the strategies and tactics that you found helpful for post-CBAs have been signed, but how do we actually make this thing work?

**Erica Iheme (00:55:38)**

Yeah, I think everyone thinks the coup de grace is let's get the CBA signed and woo-hoo, pack up and go home. No. No. That's where the party gets started. So I think really making sure that your coalition is negotiating a CBA that's actually practical, that has tangible elements that could be achievable and accomplished in a real pragmatic way, making sure that you're seeking those things that could actually resolve the challenges of the community, but also benefit the employer. So just first putting that on the front end because you know, you don't want to get a pie in the sky CBA that's going to end up looking real pretty on paper and it ends up on somebody's bookshelf collecting dust, that is not what we need. So the implementation really is critical because that CBA also has to have teeth, which means it's enforceable.

Our CBAs are held together by arbitration, so just as our coalition partner and JMA is held accountable to the employer to hold our end of the agreement, the employer is held

accountable to us to hold our end of the agreement. So because of the nature of the relationship of this contract, we all take it very seriously. And so what helped us with implementation was really setting up a group of practice, a community of practice, of what does this relationship look like? How do we satisfy the needs of this Community Benefits Agreement? Let's set some goals and timelines of when we want to accomplish these things, which was also, in some parts, written into the CBA. So there's specific timelines and stuff written into the CBA, and those are held together by arbitration. So okay, we want to do a pipeline workforce development, build out a pre-apprenticeship program, who's going to do that work?

We want to take on racism and gender justice within the workplace, and somebody's going to have to create a third party reporting mechanism to be able to give workers an opportunity to go and file claims against the company if it comes up, a community partner has to be brought in to actually serve that role. We got to do debt clinics, find the resources, actually bring in attorneys and credit counselors to come in and do that type of work. But the thing that really made it work was having regularly scheduled meetings with the company to talk about the progress of these goals. Our CBAs have very specific metrics for hiring marginalized communities, 45%. Are they hitting those metrics? 20% of all promotions have to be from marginalized communities. Are we hitting those marks? How do we maneuver to actually get to that point?

So I mean, the team, the southern team that our current director now, Will Tucker, and his team was meeting with the New Flyer every week. I was meeting with them every quarter because that's when they were bringing their top leadership to hear the progress of those goals that was set. And New Flyer has done good, exceeding their goals because of that, but the implementation is critical. We had to staff up to be able to make sure that we have community organizers out there, finding the people to actually put into the pipeline, having a workforce development coordinator, working with the community to get them prepared to go and work into that job site, working with the community colleges to set up credential programs for manufacturing workers so they could have credits to go beyond New Flyer if they would decide to take other opportunities. Having a team available to actually work to make sure that these workers have an opportunity to form a union without opposition.

I mean, it's so many things that had to happen in the implementation process, and it was also time blind in a lot of places, and we had to hold our end just like they had to hold their end, so the teeth is really what's critical, but you have to make sure you have the capacity to be able to see it through, otherwise it's just a piece of paper.

**Matt Helmer (00:59:31)**

Right, right. Well, we're going to pivot to audience questions more here in a second, but Amanda, I want to let you weigh in here on some of the biggest challenges you've seen when it comes to implementation and monitoring enforcement and some strategies that you think people should be thinking about in that area?

**Amanda Woodrum (00:59:48)**

Well, I mean, I think I'll build on what Erica was saying, and I think this is another thing we need to be thinking about as we move from these one-off community benefit battles that secure one Community Benefit Agreement to making this the way we do business and policy is that we need to develop some level of consistency or standardization so that we can build out the social infrastructure that we need to make these things work. We want to put strong, aggressive goals in place, but then we need to build out the infrastructure to make it work and make it doable. And so this is where something like you want consistency in job quality, maybe every single project has a percent of work hours that go towards workers from high poverty census tracts. But then we start to build out a sustainable safety net like the training pipeline that we need.

And one of my favorite mechanisms to do this is called the Missouri Model. So essentially a percent of every single project is set aside into a community benefit fund, and then those resources are then used to help meet the other provisions of the Community Benefit Agreement. So it can be used to support things like transit access or childcare or pre-apprenticeship programming. It can be used to support groups like the NAACP or the Urban League or other racial justice leaders in recruiting from disadvantaged communities, from a trusted community-based organization. It can then also be used for the accountability pieces of the goal to make sure we're actually meeting goals. It could support, for instance, the work of a community benefit advisory board. And that board is funded in a sustainable way through this one half of 1% on every single project.

And I'll lastly say particularly this is an issue in Appalachia it's a good problem to have, but we're having a lot of projects come to Appalachia because there's extra bonus tax incentives and funding priorities if you invest in the region, which is great, but we cannot ask people to respond to every single project with a separate Community Benefit Agreement, a separate Community Benefit Advisory Board for that project. There has to be more of a holistic support system, and that's how we'll make Community Benefit Agreements work, and that's how we'll change the way we do economic development.

**Matt Helmer (01:02:44)**

Great. Thanks Amanda. Well, I could ask questions all day, but I want to make sure we get to a bunch of audience questions here. So I'm going to ask Jay to come back online here, and I'm going to start chipping away at some of these. So we've got a few questions around challenges with the business and employer partners in CBAs, right? I think at the very least, there's often a lot of fear from employers, developers and businesses about these types of agreements, if not outright resistance, right? So a question for anybody who really wants to weigh in, what have you learned about working with employers and how to navigate some of those tensions so that employers can maybe see the benefits of these type of agreements and engage in the process in a positive manner?

**Erica Itheme (01:03:30)**

Yeah, I'll take that one. I'll start it off anyways. I think just based on American tradition, there's always been opposition between corporations and the public. There's always been an adversarial relationship between labor and corporations. So anytime any group is working, trying to engage a corporation because that's not a part of our culture, the company's first reaction or natural reaction is to be like, oh, what is this? What are you trying to take from me? What do we have to pay? What do we have to do? And I think just the lack of understanding of what a Community Benefits Agreement really is, and the benefit it has for the company really gets in the way of our ability to be able to move these win-wins forward quicker. So that's why you have to use circles of influence to be able to get the company to the place where they're ready to actually have that conversation.

But I think that once the companies get locked in, and I've actually heard it, they see the value. Having an organized workforce. The rules are clearly defined and laid out. You know what your role is in management, they would know what their roles are as workers. There are systems of accountability tied into that. It's very clear. It's no question, it's no gray. When you have it very clearly defined that we're going to help recruit a workforce for you, a skilled workforce for you to get into your job, like one company said, "we could build new buildings every day, but we can't staff them, so what's the point?" So it's like we're helping build out the workforce and it's of local citizens from that community, which will be deeper invested in those, which means that you got longevity.

So it's like there's benefits to actually having a CBA from the employer standpoint, but the natural reaction is to push back. Ideally what'll happen if we do enough of these positive experience CBAs, lift up these employers as high road employees, help them build their businesses out because they're invested in their community so we're invested in them. It's a mutual relationship. Once they understand the value of that, then they'll be more apt to be able to engage in these conversations and would be calling in saying, "Hey, how can we get one?" That's the dream.

**Jay Mehta (01:05:37)**

One thing I would just add to, if that's okay, to Erica's point, I think going back to this question about there's a lot of community benefits conversations happening nationally. So we have CB, community benefits plans happening. We have community ordinances, we have frameworks, we have agreements. And really our approach has been to be very deliberate and intentional about what we want to achieve from the onset. And so I feel like if the company understands that the coalition is aligned with certain set of principles and a certain set of goals, it makes it a different conversation than just getting a, because sometimes CBAs are seen as corporate giveaway, here's \$30,000 to build a park, but that's not a CBA, that's just a giveaway. So I think being very intentional, doing that groundwork, organizing, understanding that we have to approach this from a very comprehensive perspective, and the company that's got to see us as a valuable, legitimate, equal partner in this conversation really helps.



And I think one of the things that we've learned, at least in the CBARC, in launching CBARC and this process is sometimes you need something in between to set that kind of level setting or that framework. So maybe before the CBA, there's a memorandum of understanding that these are going to be the ground rules or terms for negotiation. So we're kind of going in not saying we want all these things, but they understand that these are things that are most important to the community. And so it's something that's going to be evolving practice and something that will have to continue to be very deliberate and thoughtful and mindful about. But I think that there are certain steps that we can also take to make sure that we're all, as much as possible, values aligned and aligned on the same goal of coming to an actionable agreement and not just a plan.

**Amanda Woodrum (01:07:25)**

Yeah, I'd love to add on that.

**Matt Helmer (01:07:27)**

Go ahead.

**Amanda Woodrum (01:07:29)**

Yeah, we are thinking a lot about getting out of front of any one particular project or agreement and developing a set of community benefit principles that in theory could be applied to multiple projects. And going back to what Erica said about building trust, getting the agreement or the policy in place is just the first half of the job, there actually has to be trust between the partners on the ground. And so doing it away from the pressure of any one particular agreement gives you a lot more time to have those honest conversations that Erica was talking about and build trust and develop a common set of goals.

**Matt Helmer (01:08:19)**

That's great. I think this next series of questions may be a challenge with that, right? In terms of thinking about a standard set of principles, and I think this first part may be, Amanda, your best position to answer is, are there any special considerations for how we think about CBAs working in a rural environment and the challenges and opportunities that exist there? And the second part to this question is I think a lot of folks live in communities that don't have a lot of union density, and there may not be a lot of labor partners that they can engage in a CBA. So how do we think about CBAs in that context as well, where maybe unions and labors aren't as available or accessible in terms of helping push on job quality in a CBA arrangement?

**Amanda Woodrum (01:09:08)**

Yeah, no, that's a great question. And I think this comes down to organizing strategy in a lot of rural communities, one, they have limited resources and limited capacity, but two, they also have limited negotiating power. And especially in the Appalachia region, that has been exploited and extracted from and left largely in poverty, that sometimes any job is a good job

and they'll take anything they can get. And so part of the organizing strategy is getting people together and creating collective leverage, not just for one community, but across communities and regional approaches. And that's our take on it. And part of what we want to do with developing this set of community benefit principles is make it more regional so that any developer can't just shop around and find the least pushback. And I do like what Jay said about, I am really worried that this is going to be turned into negotiations for small slush funds for parks or whatever project. I don't think it's a good community benefit if there aren't job quality and job access provisions, period. End of story.

So that's got to be a part of it. And I do think that you can, there are groups, organizations that have relationships with labor, they have relationships with racial justice, and they have relationships with environment, and they're the folks that really should be, those trusted entities should be in the middle of this in bringing folks together, even if you have to make the region a little bit bigger.

**Matt Helmer (01:11:22)**

Erica or Jay, anything to weigh, or Grace, anything to weigh in on those questions about rural or geographies where maybe there's less union density and the opportunities, challenges that presents or?

**Erica Iheme (01:11:34)**

I mean, when Amanda was talking about Appalachia, I immediately thought about our work that we're doing in Imperial Valley on the Texas, California, Mexico border is desolate and you're driving 120 miles before you see the first town, in the middle of the desert, in the middle of nowhere but has workers in communities that would greatly benefit from unionized jobs, greatly benefit from CBAs. I think every household needs to have two CBAs, a Community Benefits Agreement and a Collective Bargaining Agreement period. That's the only way we're going to change this workforce. But I think that using your collective ability to think about it in two dimensions. So the first dimension is the local level capacity, finding resources that actually pour into that community to empower them to be able to find the resources to be stewards of change of their own communities while putting them in tandem with a larger coalition or a larger power base that could actually support their efforts because their reach is going to be limited.

And we also see this in rural Alabama as well when we're organizing our campaigns, having two, but then also having that national backup, being connected to these national programs. But it's all driven from the core area which is that local community helping finding resources for those organizations that's been doing the work because these groups are not popping up. These communities in Imperial Valley, they've been complaining about environmental justice for the last 30 years. So those groups are at least 30 years old. So it's not like they're new on the block. They just need resources to be able to find the capacity to be able to really push the efforts they need to move forward.

Labor will go anywhere. Labor is everywhere. We just have to give them a spring to drink from. If there's a spring to drink from and they understand, labor will show up, and we just have to create the opportunity and the conditions and then have the national and the statewide and the regional conversations happening to back up these rural communities because ultimately we have to pool resources to get these deeply impoverished areas over the finish line quite a bit.

**Matt Helmer (01:13:55)**

Great. Well two more final questions. What do people see or have you seen as the role of philanthropy in the CBA space? And another question, we have a large workforce development audience and we've touched on that a bit today. Where do workforce development webs, community colleges come into this process and what kind of roles do they play? So I'll open that up, both of those up to anyone who wants to respond there.

**Amanda Woodrum (01:14:26)**

Well, first of all, we're thinking a lot about potential best practices for community foundations, but obviously they can support, help launch the local community benefit fund that then can be used to build out the various pieces and parts you need for that social infrastructure. Every community really needs a community benefit coalition and somebody's got to coordinate that and that somebody needs to be trusted by a broad set of stakeholders. And that work is not free. Coordination is a job, so we're going to need resources to support the building of community benefit coalitions, enforcement, accountability, research, all those things to get started. And that'll help set the stage for really strong Community Benefit Agreements and policies.

And with boards, I mean, we talked a lot about, in community colleges, we talked about pre-apprenticeship and on-the-job training opportunities. I think there's a huge opportunity to connect the dots between workforce support and actual job opportunities and actual training opportunities and I feel strongly that those entities really need to be an important component of this work.

**Erica Itheme (01:15:59)**

I want to say I got four things actually, and this is kind of like some principles I've been shaping out. Thank God our philanthropic partners and individual donors have just been excellent partners. We call them partners because we are partners and collaborators in work. The first thing, I know we got to go, the first thing is it benefits the local organizations for you not to come in and put your expectations on what you want us to do, but trust that we have a plan and that we know the path to get there and invest in our vision and our path. So that would create a space where we actually get there quicker instead of being sidetracked by these projects just to get a paper chase, that doesn't benefit anybody.

The second thing is to invest in the local organizations that are doing the work. Be curious about what's happening on the ground. Find out who are the local groups that's been doing the work all these years, not just the big leagues, not the ones that's popular, not the ones that's being put

on all the platforms, but who are the ones they're partnering with? The big leagues. Who are they partnering with on the ground? Find out who those are and invest in them. Our funding partners have been doing a really good job investigating the local areas around Alabama, Mississippi and figuring out who else needs resources because the truth is we can't do it without the collective.

The third thing is really creating opportunities to put the work in front of other philanthropies. Philanthropists talk with each other all the time. They're meeting together all the time. Take an hour, pull together a talking session like this. You bring out a few community groups that's focusing on this thing that this group might be interested in. Let them talk about their work, showcase them and go about your business, and then let it go where it goes.

And then finally, the last thing is figure out a way to touch the ground. Go to that place. Go to that place. Don't just be 30,000 feet up in the air. Go to that place and see what it feels like, look like and that'll help you ... become an advocate for the work, because I'm seeing that philanthropy, they really have their own organizer network. Be an organizer for what it is you believe in, and if you believe in CBAs and you actually see it in practice, go and advocate to others ... go out and tell them what it's about. Share the ministry.

**Matt Helmer (01:18:10)**

That's a great point to end on. So much great information and advice and tips today. I know we didn't get to everything. We're really going to maybe have to have a part two for this one, seriously. But thank you, Erica, thanks Jay, Amanda, Grace, thank you so much for being here and sharing your perspective and expertise and for all the work you do. And thanks to our audience for the great questions and engagement in the chat. Sorry we didn't get to them all. I tried to get to as many as possible, but you have your resources right here on the screen in front of you with these organizations and these experts, I'm sure they welcome you to reach out anytime.

In the meantime, get ready to join us at two o'clock Eastern on November 20th for Workplace Democracy, Sharing Power and Decision-Making at Work. That's our next public event. Thank you again to our colleagues at Jobs to Move America for their incredible partnership on this and to our wonderful team at Economic Opportunities Program for helping pull today's event together, including Tony, Nora, Francis, Maureen, Leba and Merit, many others, and thank you to our colleagues at Architects for their great production of today's event. We'll see you next time. Thanks again.