

# Phase One: Pre-Feasibility Assessment

## Conducting the Assessment and Drafting the Report

To assess the viability of an Evergreen approach in a given city or community, a pre-feasibility assessment is advisable to gauge potential stakeholder commitment. The assessment should be conducted via in-person interviews with local leaders, supplemented by Internet research and phone interviews as necessary. Interviews should be conducted with stakeholders from business, community groups, foundations, government, labor, and anchor institutions to generate a report outlining the feasibility of an Evergreen adaptation or community wealth building effort based upon those different elements listed below. This report is in one sense an attempt at devising a strategy based on the assets already in place in the city or community. It is at the same time functioning as a central document whereby the variety of potential and/or actual stakeholders can begin to see a common vision for building community wealth locally.

One of the main purposes of the initial assessment is to be able to introduce the concept of community wealth building and the Evergreen model to other local leaders. That is, the pre-feasibility assessment, in other words, serves an *organizing*, as well as analytical, function. The interviews themselves thus should be seen not only as collection of data, but also as vital first steps in building support for a potential initiative. Each person interviewed should be provided with background material and each interview should begin with a brief refresher on what the Evergreen model is and how it might be adapted to fit the needs of the local context.

The assessment overall should evaluate the obvious issues of need, interest, and capacity, while also focusing in particular on the following *Evergreen Adaptation Factors*. It is essential to interview representatives from a diverse array of organizations, especially those that directly fit into the types of partnerships necessary to make adapting the Evergreen mode a success.

The purpose of the pre-feasibility assessment is to begin a longer-term dialogue with local leaders, to gain a better understanding of what community wealth building activities have already taken place, and what possibilities and barriers exist as well.

## Key Evergreen Adaptation Factors:

- **Project Champion:** Is there a likelihood that a project champion could emerge? An ideal project champion is a foundation or another institution that has the capital and political will to invest that capital in business ventures and to hire expertise.  
Interview: Foundations, Charitable Organizations, etc.
- **Anchor Institution Backing:** Would leading hospitals, universities, and other ‘anchor institutions’ be willing to sign on to an effort that relies on their purchasing goods and services from local worker cooperatives?  
Interview: Hospitals, nursing homes, universities, museums, cultural centers, and others
- **Catalyzing a Greener Economy:** Are there opportunities to create green cooperatives or other community wealth building mechanisms focused on catalyzing a greener economy?  
Interview: Leading green companies and non-profits focused on building a greener economy.
- **Business Expertise:** Is there a likelihood of identifying a group that can help recruit appropriate management and develop appropriate business plans? This would preferably be a business development center that knows how to market-test business ideas and hire and recruit talented management (and also run employee-owned businesses if possible).  
Interview: Business Development Centers, CDCs or other non-profit organizations with a business development focus, local Chamber of Commerce and ethnic business associations, etc.
- **Community Loan Fund Incubator:** Is there a community development financial institution (CDFI) or another institutions that could fulfill the role of hosting a cooperative development fund?  
Interview: Community Development Banks, Credit Unions, Loan Funds, etc.
- **Workforce Development Capacity:** Is there a nonprofit intermediary that can screen, recruit, & train workers for the businesses? (to become worker-owners in cooperative enterprises if possible)

Interview: Non-profit organizations specializing in workforce development, local workforce investment board.

- **Political Support:** Is a comprehensive community wealth strategy likely to have political legs, i.e. is the city government likely to be supportive and willing/able to provide financial support and act as an advocate with other governments?

Interview: City, County, and State Governments.  
Potential Departments: Mayor's Office, Economic Development, Housing and Community Development, Sustainability Office,

- **Labor Support:** Is a comprehensive community wealth strategy likely to get support from local labor organizations and labor-community partnerships?

Interview: Local labor union chapters, labor-community partnership non-profits, especially ones in industries similar to potential future business start-ups.

- **Support from Banks and the Business Community:** Are leading local companies on board with a community wealth building strategy? Will any invest in it or purchase goods and services?

Addressing the specific factors detailed above is key to outlining critical elements of adapting the Evergreen-Model. A fixed questionnaire is not particularly advisable, given that conversations with different stakeholders will necessarily focus on different topics, but the overall questions that need to be addressed via the entire interview project and *Phase One* in general.

The specific questions to ask during interviews will fluctuate depending on the type of organization or entity and the factors outlined above provide a general guide for understanding what type of information is needed from those different entities. However, there are some basic questions to ask during the interviews that most people can answer.

Those questions include:

- What community economic development work have you or your organizations been involved with in the past?
- Are you familiar with any other community economic development work in your city, local area, etc? If so, what?
- Do you think community wealth building and the Evergreen-Model are viable options for your city, local area, etc?
- Do you see any potential barriers for adapting the Evergreen-Model in your city, local area, etc?

- Would your organization be willing to get involved in the overall project, i.e. attend a community wealth building roundtable and/or provide a specific service based upon the different partnership areas like workforce training, business expertise, etc?
- What community wealth building mechanisms do you think would make the most sense for your city, local area, etc?
- What business opportunities do you think exist for potential start-up cooperative businesses or social enterprises?
- Are there any other individuals, organizations, businesses, etc. you can think of that should be interviewed?

## Drafting the Pre-Feasibility Assessment Report

Local leaders need an outline that covers the factors and questions addressed above as well as one that frames how adapting the Evergreen-Model could complement work already taking place, fill a gap in current efforts, which organizations could fill important partnership roles, etc. This next section outlines how to structure the Pre-Feasibility Assessment Report and what content to include in it.

It is important to include *background information on past and current economic and community development activities* in the assessment because it provides a history and context for looking at and thinking about community wealth building activities. Past *and/or current community wealth building activities* should be clearly outlined in a section as well. Next, it is important to outline potential *ways to leverage anchor institutions* for community wealth building activities. This section begins to frame for local leaders what opportunities exist for community wealth building in general.

The Evergreen-Model is based on the idea of catalyzing a 'greener' economy, but some communities might not be as familiar as others when it comes to this subject, so it is important to create a section outlining what efforts have already been undertaken in that community towards a green economy and varying interest and/or capacity levels of the different community stakeholders. This section should also address possible *ways to catalyze a greener economy* as well.

A critical part of the pre-feasibility assessment are *stakeholders' views and partnership opportunities* regarding adapting the Evergreen-Model in their area. The interviews are meant to help identify the views of local leaders about the potential as well as their degree of

willingness to step forward on important areas. It should include any opportunities that might exist for local organizations to fill important partnership roles i.e. workforce development, business expertise, or any of the other factors mentioned in the previous section. Local leaders' views of these different factors need to be conveyed to all local leaders in the report, so all the potential stakeholders can see who supports the idea as well as those willing to take a more direct and active role in the local adaptation effort.

That last crucial element of the pre-feasibility assessment report is to provide potential *next steps for local leaders*. This section can provide guidance as to what those next steps might look like. For more details on next steps, see the Phase Two: Building the Local Adaptation Effort document in the toolkit/website.

**Pre-Feasibility Assessment 1.0 Report Outline:**

It should provide *background on economic and community development efforts, any community wealth building efforts; opportunities identified to leverage anchor institutions, potential opportunities to catalyze a greener economy, views of potential stakeholders and partnership opportunities, and clearly articulated next steps.*

- Executive Summary
- Background on Past & Present Community Economic Development Efforts
- Background on Past & Present Community Wealth Building Efforts
- Leveraging Anchor Institutions
- Capitalizing on the Green Economy
- Stakeholders' Views & Partnership Opportunities
- Next Steps. Phase Two.