



U.S. Department of Health & Human Services

Administration for Children & Families

**Durango Leadership Summit on Family Financial Stability
Community Center, Durango Mountain Resort
September 14th and 15th 2010**

Day One Agenda

8:30 am Continental breakfast provided

**9:00 am Regional Welcome
Sandy Naatz, Program Specialist, ACF Region VIII**

**9:15 am Why is connecting families to financial asset building tools important?
Richard Gonzales, ACF, Senior Advisor for Early Childhood Development and Education**

**9:30 Setting Meeting Expectations
Jean Cooper, Facilitator, Northeast Oklahoma Community Action Agency**

Who are we and why are we here?
What do we expect to accomplish while we are here?

Table Exercise

Question #1: What are the financial challenges facing low-income families in your community and how is your community responding?

Question #2: Are you aware of opportunities to do more?

Question #3: What are the barriers?

10:30 *Break (coffee provided)*

**10:45 Promising strategy from the region
Robin Brule, Albuquerque Foundation and Katherine Freeman, United Way of Santa Fe County**

- 11:30** **Lunch provided**
- 11:45** **Over lunch define financial asset building**
Vickie Oldman-John, OWEESTA
- 12:30** **Asset building strategies: interactive panel #1:**
- Financial Literacy Education (**Tina Farrenkopf, First Nations**)
 - Borrowing and Managing What You Borrow (**Shawn Spruce, consultant**)
 - Other Public Benefits (**Patrick Kelley, Boulder County Housing and Human Services; Gaye Weiss, La Plata Family Centers Coalition; Diana Buza, The Pinon Project Family Resource Center**)
- 2:30** ***Break (coffee provided)***
- 2:45** **Asset building strategies: interactive panel #2:**
- EITC and Other Tax Credits (**Geraldine Malmberg, IRS**)
 - Individual Development Accounts (**Ingrid Mitchell, Prosperity Works**)
 - Getting Banked (**Marvin Ginn, Native Community Finance**)
- 4:45** **Wrap-up**
- 5:00** **Adjourn**
- 6:00** **Group dinner at Durango Mountain Resort**



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Day 2 Agenda

8:00 Continental Breakfast & Networking

**8:40 Assets for Independence grant program
Stefanie Whorton, Assets for Independence Resource Coordinator
ACF**

**9:00 Strategies for engaging rural communities
Beckie Harrell, Senior Tax Analyst
IRS SPEC (Stakeholder, Partnerships, Education and Communication)**

**9:30 Research on Child Savings Accounts
Miriam Jorgensen, Research Director
Native Nations Institute, University of Arizona**

**10:00 “Bringing it Home” Exercise:
Participants break up into 3 facilitated groups to discuss which asset building
tools and strategies they will bring back to their organizations.**

(Facilitators are Jean Cooper, Kelly Richburg, and Mary Farrell)

Of the strategies you have heard at the Summit, which do you think will be most effective in your community?

How will you convey the information to your staff and the families you serve?

What barriers remain?

What support would be helpful in addressing the barriers?

11:00 **Large Group Reconvenes – Spokesperson(s) reports back to the larger group**

12:00 **Lunch provided**
Over Lunch Reflect on Presentations, Wrap-up

1:00 **Adjourn**

Shuttle to airport available (plan to leave at least 2 hours before your flight time)