



Family Financial Stability Summit | Region IV | Agenda | Day 1, Monday, February 7, 2011

Day 1 – Monday, February 7, 2011

8:00 – 9:00 am	Registration & Continental Breakfast
9:00 – 10:00 am Room # 303/305	Welcome & Opening Remarks <i>Healthy finances contribute greatly to healthy families. Speakers will provide an overview of the benefits of financial stability for families with young children. This opening session will also provide an overview of how the conference will build relationships between the early learning and asset building communities to provide more support for families with young children.</i> <u>Presenters:</u> Carlis Williams, Regional Administrator, ACF Region IV Anton J. Gunn, Regional Director, ACF Region IV Don Arnette, Regional Administrator, USDA-FNS Region IV Bobby Cagle, Commissioner, Bright from the Start: Georgia Department of Early Care and Learning Amy Shir, AFI Resource Center (Facilitator) Keynote Address on Financial Stability for Families with Young Children <u>Keynote Speaker:</u> Joan Lombardi, Deputy Assistant Secretary and Inter-Departmental Liaison for Early Childhood Development
10:00 – 10:20 am Room # 303/305	Building Assets, Strengthening Families <i>This session will provide an overview of how asset building programs and policies improve financial stability and economic opportunity for low-income families, and how asset-building activities relate to and can assist with ACF's existing programming to stabilize and strengthen families.</i> <u>Presenter:</u> Leigh Tivol, Corporation for Enterprise Development
10:20 – 10:30 am	Break
10:30 – 11:00 am Room # 303/305	Connecting Families and Programs with State Asset Building Coalitions <i>Region IV boasts several successful state coalitions that promote financial stability and asset building and build partnerships among nonprofits, state and local government, and other stakeholders. Some of these coalitions will discuss their work and its positive outcomes for families. Participants will discuss how the early learning community can connect with state coalitions to bring asset building to the families they serve.</i> <u>Presenters:</u> Tiki Windley, EITC Carolina State Coalition Kaye Schmitz, Florida Prosperity Partnership



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11 am - 12:00 pm Room # 303/305	Financial Empowerment for Families with Young Children <i>This review of financial empowerment will focus on using existing tools to promote sound money management, help families prepare for emergencies, and connect families that are unbanked or underbanked to mainstream financial institutions (and away from alternative, potentially predatory, financial services).</i> <u>Presenters:</u> <i>Financial Education Tools</i> – Michael Gutter, University of Florida <i>Money Smart</i> – Penny King, FDIC <i>Getting Banked</i> – Janet Hamer, Federal Reserve Bank
12:00 – 1:00 pm Room # 303/305	Working Lunch <i>A successful participant of an IDA program in Kentucky will share her experiences becoming financially stable and empowered. State Senator Willie Simmons will discuss the importance of financial stability for families, using his Mississippi constituency as an example</i> <u>Presenters:</u> <i>Client Success Story</i> – Kentucky Domestic Violence Association <i>The Importance of Financial Stability for Families</i> – Senator Willie Simmons, Mississippi State Senate
1:00 – 1:30 pm Room # 303/305	Tools for Family Financial Stability <i>Providing access to financial education for youth is critical for a lifetime of good financial decision-making. This session will discuss financial education programs for youth and how to connect youth to these programs.</i> <u>Presenters</u> William Cheeks, Jump Start Rob Sansome, Kids Wealth Organization
Concurrent Workshop Sessions 1:30 – 2:15 pm	
Room # 406/407	How Families Can Access Benefits and Other Resources <i>Many families are unaware of benefits and resources that they may be qualified to receive. Workshop participants will discuss this array of benefits and resources and how to connect them to low-income families.</i> <u>Presenters:</u> Ralph Gildehaus, MDC, The Work Supports Initiative Diane McCants, United Way of Metropolitan Atlanta Daphne Kennebrew, USDA-FNS Stefanie Whorton, Office of Community Services (Facilitator)



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Room # 408	<p>Financial Stability for People with Disabilities</p> <p><i>People with disabilities often lack access to good jobs, transportation, financial resources, and affordable housing. We will talk about how to remove barriers for people with disabilities so they may enter the economic mainstream.</i></p> <p><u>Presenters:</u> Michael Roush, National Disability Institute Amy Shir, AFI Resource Center (Facilitator)</p>
Room # 409	<p>How Families can Access Free Legal Assistance with Health and Tax Related Legal Issues</p> <p><i>Law students working in the HeLP Legal Services Clinic and in the Tax Clinic at Georgia State University's College of Law assist low-income families with legal problems affecting the health and well-being of their chronically ill and disabled children and the tax controversies of low-income individuals, generally. The presentation will demonstrate how interdisciplinary, holistic problem-solving addresses the multiple determinants of health and improves family financial stability.</i></p> <p><u>Presenters:</u> Bill Timm, Associate Director, Georgia State University Sylvia Caley, Health Law Clinic, Georgia State University Edwin Patout, Office of Community Services (Facilitator)</p>
<p>Concurrent Workshop Sessions 2:15 – 3:00 pm</p>	
Room # 408	<p>Making Connections with the Child Care Community</p> <p><i>Asset building principles can make a big difference for child care providers. This session will be a dialogue with State Child Care Administrators to discuss how state child care programs can intersect with state asset building initiatives to support providers and families. Discussions will focus on how the asset building community can address unmet needs in the child care community such as home daycare providers—small business development, childcare providers—funds for professional development, families receiving subsidies—asset building services.</i></p> <p><u>Presenters:</u> Desiree' Reddick-Head, National Child Care Information and Technical Assistance Center (NCCIC) Stefanie Whorton, Office of Community Services (Facilitator)</p>
Room # 406/407	<p>Families and Affordable Housing</p> <p><i>Affordable housing is often elusive for low-income families. We will discuss how your clients can access and maintain affordable housing as a tool for building long-term financial stability.</i></p> <p><u>Presenters:</u> Economy Jackson, Atlanta Habitat for Humanity Martha Metcalf, Upper East Tennessee Human Development Agency, Inc. Dorothy Mabry, ACF Region IV (Facilitator)</p>



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Room # 303/305	Institutions and Foundations
	<p><i>Family Financial Stability is certainly a worthwhile goal. But how do organizations pay for financial education, IDA programs, credit counseling, and other asset building tools? This session will explore how to build a business case for funding asset building projects. We will talk to funders and discover ways to build relationships with the funding community.</i></p>
	<p><u>Presenters:</u> Laura Keenan, Bank of America Cassandra Brown, Credit Union of Atlanta Gail Hayes, Casey Foundation Amy Shir, AFI Resource Center (Facilitator)</p>
Room # 409	Consumer Protection and Predatory Financial Practices
	<p><i>Families not only need to know how to build their financial resources, but also how to protect them. Ms. Riley will discuss ways to inform families about protecting their identities and credit scores and how to avoid predatory financial services.</i></p>
	<p><u>Presenters:</u> Deatra Riley, CredAbility Edwin Patout, Office of Community Services (Facilitator)</p>
3:00 – 3:30 pm Room # 303/305	Wrap Up / Adjournment
6:00 pm	Optional Group Dinner
	<p><i>Meet in hotel lobby at 6:00 pm for dinner with your fellow summit participants.</i></p>



Family Financial Stability Summit | Region IV | Agenda | Day 2, Tuesday, February 8, 2011

Day 2 – Tuesday, February 8, 2011

All sessions on Day 2 will be held in Room # 303/305.

9:00 – 10:00 am	Tour Mobile Tax Assistance Unit Peer-to-Peer Education Continental Breakfast <i>Attendees will be offered a tour of a mobile tax assistance unit and information for connecting families to this service. Attendees from head start and child care programs not engaged in the tours will educate their asset building peers about their work and provide information about the families and children they serve.</i>
9:30 – 10:00 am	Reflections and Q&As
10:00 – 10:30 am	How Asset Building and IDAs Empower Families <i>Stefanie Whorton, an Assets for Independence (AFI) Resource Coordinator, will highlight the AFI program's successes in contributing to family financial stability and asset building. In addition to discussing the six fundamental asset building strategies, Ms. Whorton will also discuss how to connect families to existing AFI IDA projects and how to become an AFI grantee.</i> <u>Presenter:</u> Stefanie Whorton, Office of Community Services
10:30 – 11:30 am	Asset Building Projects for Your Clients <i>Three successful AFI projects will share their strategies for enrolling families into their IDA projects and providing financial education, incentives for saving, and asset purchases including first time homeownership, small business capitalization (including child care), and post secondary education.</i> <u>Presenters:</u> David Jackson, Centers for Working Families Charles Sterne, United Way of Atlanta Mary O'Doherty, Kentucky Asset Success Initiative, Kentucky Domestic Violence Association
11:30 – 12 pm	Free Tax Preparation and Tax Credits for Families with Young Children <i>The Earned Income Tax Credit (EITC) is one of the most effective anti-poverty tools available and tax time provides an opportunity to engage families on other financial issues. This panel will describe the EITC and other tax credits available to low income families with young children. The panel will also discuss ways to promote EITC and free tax preparation (VITA sites) for families.</i> <u>Presenters:</u> Overview of EITC and Other Tax Credits – Yolanda Davis, Internal Revenue Services Vita Site Development – Carter Elliott, Atlanta Prosperity Campaign



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12:00 – 1:00 pm	Working Lunch: Making Connections Statewide for Family Financial Stability
	<i>Ms. Dawson will discuss how to make the most of state and regional partnerships, networks, and other resources to promote financial stability for families with young children. Her remarks will set the stage for an effective set of state planning roundtable discussions.</i>
	<u>Presenter:</u> Diann Dawson, Director Regional Operations
1:00 – 2:30 pm	State Planning Roundtable Discussions
	<i>Attendees from the early childhood community will partner with their asset building colleagues to develop concrete and specific plans for linking low-income families and children with programs promoting financial stability in their respective states.</i>
2:30 – 3:30 pm	Report Outs / Closing Remarks
	<i>States will report out one or two action items for promoting family financial stability. Attendees will complete evaluation forms for the conference and provide feedback for future convenings.</i>