



Asset Funders *Network*



GRANTMAKER Conference 2015

INTEGRATING ACROSS SECTORS



April 7-9, 2015 | Dallas, Texas
Federal Reserve Bank of Dallas

Presenting
Sponsor

Citi Foundation



Asset Funders Network

Welcome to Dallas for AFN's fifth biennial national grantmaker conference!

Envisioning the future of philanthropy in a multifaceted area such as asset building is a complex task. More than ever, grantmakers are making, planning for, meeting—and even exceeding—long-term goals to achieve real results in effectively increasing the financial security of low- and moderate-income individuals and families. Identifying, understanding and elevating those innovative or system-changing investments and research is a large part of why funders created AFN.

We are in a moment of public discourse, recognizing that if the substantial wealth gaps are left unaddressed and the American dream of economic mobility continues to suffer, then the risk and economic threat to all of us is the negative impact on the well-being of children, workers, families and retirees.

Ours is indeed a time where philanthropy has helped drive notable change and significant progress for our communities. AFN celebrates the fundamental role philanthropy is playing to reinvigorate opportunity across communities nationwide. But the bar continues to rise. This is our time to respond in kind, reach higher and push forward to better meet the challenges facing our communities.

Through our conference, "Integrating Across Sectors," our members have chosen to explore and discuss funding approaches that bring greater economic security by changing existing systems through holistic, cross-sectional approaches. We will be highlighting various entry points to integrated strategies. Find the ones that resonate with you and consider how this can help you achieve your investment goals and those of your peers.

This is a critical time. With growing numbers of state and city public officials understanding the steep challenges facing their constituents, many are rhetorically calling for policies to reinforce the middle class, but too often, they lack workable plans. The asset-building strategies highlighted this week and AFN's other activities will increasingly help philanthropy establish guideposts for the policy and practices needed to make a difference for many years to come.

I am confident you will walk away from AFN's 2015 Grantmaker Conference more prepared, connected and hopefully inspired to imagine what you and your institution can contribute to make economic security a greater reality.

Enjoy.

Joseph A. Antolín
AFN Director

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Pre-Conference: Tuesday, April 7

Investing in Community Capacity for Asset Building: North Texas Case Study

This pre-conference takes a case study approach to showcase collaborative efforts in North Texas to help attendees understand the process for effectively executing an asset-building framework, from both the funder and nonprofit points of view. We will examine how local funders came together to invest in nonprofits across the human services continuum and change their business models by incorporating asset-building strategies and integrated services. Through discussions with both funders and community-based nonprofits, attendees will gain insights to inform their own funding strategies. This interactive experience provides participants with:

- An understanding of how funders collaborate around complementary strategies that invest in the capacity of the sector.
- The opportunity to hear from nonprofit leaders across a variety of sectors about the barriers to integrating asset-building services and the investments that make moving forward possible.
- Candid feedback about what's working, where challenges remain and how philanthropy can help.
- A site visit to a Dallas-based nonprofit that provides and integrates economic security services across programs.

The issues facing North Texas are similar in communities across this country—a growing number of families struggle to get ahead financially and the local nonprofit sector has limited capacity, tools and resources to respond. The process and the strategies successfully being deployed by North Texas funders can be replicated.

12:30 p.m. Check-In

Hotel ZaZa, 2332 Leonard St., Dallas, TX 75201
Board motor coach for travel to pre-conference site.

1:20 p.m. Arrival at City Square Opportunity Center

1610 S. Malcolm X Boulevard, Dallas, TX 75226

1:30 p.m. Welcome and Introductions

Annika Little, Asset Funders Network
John Siburt, CitySquare

1:45 p.m. Investing in Community Capacity for Asset Building and Economic Security

Sue Matkin, United Way of Tarrant County
Dena L. Jackson, Dallas Women's Foundation
Wende Burton, Communities Foundation of Texas
Michelle Thomas, JPMorgan Chase & Co.
Moderated by **Alfreda B. Norman**, Federal Reserve Bank of Dallas

3:00 p.m. Networking Break and Optional Site Tour

3:30 p.m. Evolving Service Delivery Models to Integrate an Asset-Building Framework

John Siburt, CitySquare
Carol Klocek, YWCA Fort Worth and Tarrant County
Sharon King, CCCS of Greater Dallas
Moderated by **Susan Hoff**, United Way of Metropolitan Dallas

4:45 p.m. Wrap-Up and Board Motor Coach

5:30 p.m. Arrival at Hotel ZaZa

General Session Day One: Wednesday, April 8

8:00 a.m. Registration, Breakfast and Networking

Auditorium

9:10 a.m. Conference Welcome and Opening Program

Auditorium

Joseph A. Antolin, AFN Director
Carla Thompson, W.K. Kellogg Foundation and AFN Conference Cochair

9:30 a.m. The Changing Context of Financial Security: Where Does Philanthropy Fit In?

Auditorium

Single-sector approaches to alleviate poverty have dominated philanthropy, in part because integration and collaboration are complex and often messy. As the world around us changes and becomes increasingly complex, the levers we are required to pull are getting both closer and further away. America's widening income gap and concerns around intergenerational mobility demand a different approach. Where and when should philanthropy engage to best help families improve their lives?

Sector-based thought leaders will share their perspectives on the opportunity for philanthropic organizations to break down their traditionally siloed approaches and begin integrating asset building across sectors for greater impact.

Ray Suarez, Journalist, Al Jazeera America
John Bouman, Sargent Shriver National Center on Poverty Law
Alfreda B. Norman, Federal Reserve Bank of Dallas
Moderated by **Joseph A. Antolin**, Asset Funders Network

10:45 a.m. Break

11:00 a.m. New Insights into the Financial Health of Americans

Auditorium

Over the last two decades, the assets field has developed and explored a better understanding of the interconnectedness of day-to-day financial access and management, the ability to weather financial shocks and the ability to save and invest for the future. Going forward, there is tremendous opportunity to link these insights to investments that improve the financial health and well-being in America.

This session will share results from the 2015 landmark consumer study by the Center for Financial Services Innovation (CFSI) that quantifies financial health in America. It will also provide new insights from the Federal Reserve Bank of St. Louis on rebuilding household balance sheets and ideas for strengthening families, communities and the economy, which were released at the Federal Reserve System's recent research conference.

Presentations and discussion will help funders better understand the marketplace, the opportunity size, current status of households and insights on providing economic growth for those they fund. Panelists will discuss their perspectives on how philanthropy can leverage this leading-edge research to spur industry innovation and cross-cutting community-based strategies that promote improved well-being.

Jeanne Hogarth, Center for Financial Services Innovation
Ray Boshara, Federal Reserve Bank of St. Louis
Moderated by **Beadsie Woo**, The Annie E. Casey Foundation

12:15 p.m. Lunch and Networking

Centennial Room

1:30 p.m. **Keynote: Insights into Behavioral Economics**

Auditorium

Dan Ariely, a professor of psychology and behavioral economics at Duke University, has long been fascinated with how emotional states, moral code and peer pressure affect our ability to make rational and often extremely important decisions in our daily lives—across a spectrum of our interests, from economic choices (how should I invest?) to personal (who should I marry?). His hope is that studying and understanding the decision-making process can help people lead better, more sensible daily lives.

For funders concerned about helping low-income families succeed, Ariely's comments will provide insights into why people sometimes make irrational financial decisions, and why and how their behavior does not follow the predictions of economic models. Ariely will share his perspectives about how behavioral economics can inform strategies across a variety of sectors to build financial security and encourage savings for low- and moderate-income families.

Dan Ariely, Duke University

Introduced by **Evelyn Stark**, MetLife Foundation

2:30 p.m. **Move to Small Group Discussion Locations**

2:45 p.m. **Small Group Discussion Sessions**

The Value of Microenterprise in a Changing Economy

Madeline Vaughan Room (first floor)

Owning a microenterprise is a way key populations—women, people of color, immigrants and low-income individuals—generate income and build assets. While our country is experiencing economic and technological transformation that is creating new opportunities for some to engage in self-employment and microenterprise, others are facing new barriers and challenges. What are these trends? How are they shaping the entrepreneurial landscape and for whom? How should funders think about their microenterprise, financial capability and inclusion portfolios in the context of these trends?

Joyce Klein, FIELD at the Aspen Institute

Janie Barrera, LiftFund

Susan Koehler, Walmart Foundation/Sam's Club Giving Program

Moderated by **Nikki Foster**, Northwest Area Foundation

Two-Generation Strategies: Moving Women and Children Beyond Poverty

Centennial Room

A promising new approach to moving women and their children out of poverty is dual-generation strategies. This approach works with children and their parents simultaneously to put the whole family on a path of permanent economic security. What are early adopters learning about this approach and where do questions remain? Panelists will share the latest research on the state of women and children in America and provide insights on policy, practice and strategies for funders interested in replication.

Mariko Chang, Author

Christine Robinson, The Kresge Foundation

Anne Mosle, Ascend at the Aspen Institute

Elisabeth Babcock, Crittenton Women's Union

Moderated by **Paula Sammons**, W.K. Kellogg Foundation

Investing in Credit Unions and CDFIs to Expand Financial Access

Training Room D

Increasing access to safe and affordable asset-building products is essential for helping low-income and underserved families build and protect assets. Philanthropy, nonprofit and government sectors have helped spur a wave of innovative approaches to financially serve low-income communities in a way that has true impact on consumers' needs, while also affecting profitability for financial institutions. This session will provide insights on investing in credit unions and CDFIs, ways they differ from other financial institutions and strategies for grantmakers to collaborate with these institutions to increase financial access.

Amy Brown, Ford Foundation

George Hofheimer, Filene Research Institute

Pablo DeFilippi, National Federation of Community Development Credit Unions

Moderated by **Rafael Morales**, Silicon Valley Community Foundation

Children's Savings Accounts: Building Pathways to Success

George Dealey Theater (first floor)

This session highlights the promise and limitations of Children's Savings Accounts (CSAs) and the role grantmakers can play to improve the effectiveness of CSAs and help close the gap between promise and college completion. A panel will review the range of CSA vehicles, highlight programs that enhance parents' ability to effectively use accounts and discuss funder strategies to build on promising initiatives.

William Elliott, University of Kansas Assets and Education Initiative

Andrea Levere, Corporation for Enterprise Development (CFED)

Ray Boshara, Federal Reserve Bank of St. Louis

Moderated by **Benita Melton**, Charles Stewart Mott Foundation

4:00 p.m. **Break and Transition to Closing Session**

4:15 p.m. **Leveraging the Dialog to Advance Economic Security: Lessons for Philanthropy**

Auditorium

The issues of wealth and income inequality have been a decade-long focus for numerous funders in the asset-building field. Until recently, however, these issues have not been part of the national discourse. From political leaders on both sides of the aisle to popular culture icons, people are talking about the challenges future generations will face if the issue of growing income and wealth inequality is left unaddressed. How can philanthropy harness this dialog to advance meaningful action that addresses these issues?

Alan Jenkins, The Opportunity Agenda

Introduced by **K. Sujata**, Chicago Foundation for Women

5:30 p.m. **Networking Reception Hosted by the Federal Reserve Bank of Dallas**

Dinner on your own; list of local restaurants provided in folder.

General Session Day Two: Thursday, April 9

7:45 a.m. Breakfast Buffet

Auditorium

Grantmaker Breakfast and Issue-Based Discussions

Centennial Room

Join topic-specific table discussions hosted by AFN members to network with colleagues, delve into challenges and opportunities and explore the potential for collaboration. Table topics are:

Rural and Southern Grantmaking Strategies

Hosted by **Abby Hughes Holsclaw** of Winthrop Rockefeller Foundation

Developing Common Outcome Measures for Financial Coaching

Hosted by **Regina Salliey** of The Annie E. Casey Foundation in partnership with **Michael Collins** of the University of Wisconsin–Madison

Asset Building 101

Hosted by **Daria Sheehan** of Citi Foundation, in partnership with **Janet Boguslaw** of IASP, Brandeis University

Promoting Economic Security through Tax Policy Reform

Hosted by **Bob Friedman** of the Friedman Family Foundation and **Luis Arteaga** of the Levi Strauss Foundation

9:00 a.m. Welcome and Tax Policy Initiative Update

Auditorium

The primary source of federal support for asset building is the U.S. tax code. In 2013, more than half a trillion dollars in tax benefits supported families to save and invest in homes, higher education and retirement; but the top 1 percent of households received more benefits than the bottom 80 percent combined. In 2013, AFN created a forum for asset-building and other equity advocates to learn about the challenge and come together around shared policy solutions. After identifying a set of shared priorities, late last year AFN transitioned the leadership of this important effort to a new team that includes CFED and PolicyLink. Bob Friedman, trustee of the Friedman Family Foundation and founder of CFED, will describe new work underway to advance policy solutions.

Megan McTiernan, Thomson Family Foundation and AFN Conference Cochair
Bob Friedman, Friedman Family Foundation

9:15 a.m. The Health/Wealth Connection

Auditorium

Medicine and other health care innovations may be developing in leaps and bounds, but those advances will not improve a community's overall health unless the underlying issues of poverty are met head on.

The strongest predictor of our health is our position on the class pyramid. Whether measured by income, schooling or occupation, those at the top have the most power and resources and, on average, live longer and healthier lives. Those at the bottom are most disempowered, get sicker and die younger. Funders concerned about economic security need to begin identifying ways to bridge this health-wealth gap. This session provides a frame for talking about the social determinants of health and how asset building is working to support families and communities holistically. Learn how health and asset-building funders can work together to create healthier households and neighborhoods and build economic and health equity.

Jason Purnell, Washington University in St. Louis
Charise Fong, East Bay Asian Local Development Corporation
Padmini Parthasarathy, The California Wellness Foundation
Moderated by **Aimee Durfee**, Y&H Soda Foundation

10:30 a.m. Break and Transition to Small Group Discussion Locations

10:45 a.m. Small Group Discussion Sessions

Philanthropic Partnerships with Local Governments

Madeline Vaughan Room (first floor)

Philanthropic investors are increasingly achieving large-scale financial empowerment impact through innovative and successful partnerships with local government leaders. Whether at the city, county or regional level, these partnerships are achieving measurable and impressive outcomes for residents in the areas of workforce development, summer jobs, banking access, youth and adult savings and homeowner protections.

These partnerships are also influencing important systems changes that are helping make the case for public investment, as well as new or augmented public programming that brings financial empowerment programs and services to the public at large. In addition, these philanthropic investments are seeding policy and advocacy outcomes, supporting new regulations, consumer protections and asset-oriented advocacy from the government itself.

William Porro, City of Miami

Megan Kursik, Community Economic Development Association of Michigan

Daniel Delehanty, Capital One

Moderated by **Jonathan Mintz**, Cities for Financial Empowerment Fund

Scaling the Integration of Financial Capability and Asset Building into the Delivery of Social Services

Training Room D

Integrating financial capability and asset-building strategies into social and other service programs holds tremendous promise for reaching greater numbers of low-income families in more comprehensive and effective ways. Yet replicating and scaling approaches across communities or sectors can be extremely challenging. This panel explores the hurdles of scaling financial capability into social service program delivery. Through a candid discussion with innovators leading on-the-ground integration efforts, this session provides funders with insights to inform their own replication and scale efforts.

Mae Watson Grote, The Financial Clinic

Kate Griffin, Corporation for Enterprise Development (CFED)

Daniel Dodd-Ramirez, Consumer Financial Protection Bureau

Colleen Briggs, JPMorgan Chase & Co.

Moderated by **Christine Robinson**, The Kresge Foundation

Millennials: On-Ramping into Financial Security

George Dealey Theater (first floor)

Millennials, those between the ages of 18 and 34, are differentiating themselves as a distinct market segment. They are both digital natives, having grown up on screens in the classrooms and in their pockets, and are America's most racially diverse generation. They also have higher levels of student loan debt, poverty and unemployment, and lower levels of wealth and personal income than the two previous generations.

What is the asset-building field doing to respond to the unique characteristics of this generation in a shifting economic landscape? What strategies are being developed to launch millennials toward long-term financial stability as well as support our next generation of leaders? This session provides insight into the millennial generation and highlights effective strategies and policy recommendations for on-ramping this unique generation into financial security.

Sarah Audelo, Generation Progress

Margaret Libby, MyPath

Carla Thompson, W.K. Kellogg Foundation

Moderated by **Daria Sheehan**, Citi Foundation

Building Wealth and Credit in Immigrant and Refugee Communities

Auditorium

Many first- and second-generation immigrants struggle to achieve economic stability and have little access to asset-building services even though they are tapping into entrepreneurship, microbusiness and small business opportunities. How can funders develop and support programs and products that build on the promise of newly arrived populations and provide real opportunities? This session discusses the use of loan products to support status adjustments and incubator and microbusiness programs to create long-term asset-building opportunities for immigrant populations.

Jane Duong, National Coalition for Asian Pacific American Community Development
Anna Crosslin, International Institute of St. Louis
Viola Gonzales, AnewAmerica Community Corporation
Moderated by **Irene Lee**, The Annie E. Casey Foundation

12:00 p.m. Lunch

12:30 p.m. Closing Lunch Plenary

Moving from Zero to Sixty in Just Two Years: Accelerating Collaboration for Community Change

Centennial Room

Dallas is the site for AFN's 2015 conference in part because of the strong and growing number of regional and statewide funders across Dallas and Fort Worth who have gathered and created the North Texas Asset Funders Network, a regional chapter of AFN.

Representatives from AFN's North Texas Network will share how in just two years, they identified many of the challenges of the wealth gap in the region; increased funder, nonprofit and community understanding of the issues; and are now implementing and aligning funding to more effectively improve the financial lives of low-income families. Panelists will explain how they came together and how they are now working differently—collaborating in new ways and working across sectors to invest in and build greater community support for economic security for the region's working families.

Alfreda B. Norman, Federal Reserve Bank of Dallas
Debbie Taylor, Citi Community Development
Megan McTiernan, Thomson Family Foundation
Mary Anne Alhadeff, North Texas Public Broadcasting
Moderated by **Sarah Cotton Nelson**, Communities Foundation of Texas

1:45 p.m. Wrap-Up and Close

Joseph A. Antolín, Asset Funders Network

Mary Anne Alhadeff

North Texas Public Broadcasting

Alhadeff is the president and CEO of North Texas Public Broadcasting, a nonprofit media organization based in Dallas/Fort Worth serving urban and rural communities across North Texas. The organization is the sole provider of public television, public radio news and contemporary music via KERA-TV, KERA-FM and KKXT-FM, respectively. Since joining KERA nine years ago, Alhadeff has led a major expansion of local programming, which has significantly increased philanthropy to the station.

A public broadcasting veteran of more than 25 years, she previously served as president/CEO of Prairie Public Broadcasting in North Dakota and Maine Public Broadcasting. As a former producer, her productions have earned awards from the Corporation for Public Broadcasting, NATAS (Emmy Awards) and the New York Film Festival, among others. Alhadeff has served on the PBS board and its executive and strategic planning advisory committees, and her community involvement has included the North Dakota Governor's Technology Council, the Maine Humanities Commission, the SMU Tate Lecture Series and the International Women's Forum.

Joseph A. Antolín

Director

Asset Funders Network Steering Committee

Antolín is the director of Asset Funders Network, the membership organization of funders seeking to increase the capacity and investment of grantmakers to effectively promote economic security by supporting efforts that help low- and moderate-income households build and protect assets in order to effectively promote economic security.

Antolín is also the principal at Antolín & Associates Consulting, providing not-for-profits and government agencies in several states support in strategic planning for growth; analysis to convert program process measures to outcomes and impact measures; and executive and leadership coaching in a nonprofit context.

Antolín actively serves as a volunteer commissioner on the Adult Redeploy Illinois Oversight Board and the Illinois Latino Family Commission. He is a board member of IFF (a Midwestern CFDI), the Greater Chicago Food Depository and the Illinois Public Health Institute. He is an experienced witness or speaker on issues related to poverty reduction, public benefit reform, civil rights and racial-ethnic disparity elimination.

Previously, Antolín served both as Heartland Alliance's senior vice president and Heartland Human Care Services' executive director, as director of the Division of Early Childhood and Self-Sufficiency for Catholic Charities, deputy director for the Illinois Department of Public Aid, and as a civil rights litigator with the Legal Aid Society of Cleveland and the Legal Assistance Foundation of Chicago.

Antolín holds a BA from Wesleyan University and a JD from Columbus School of Law at Catholic University of America.

Dan Ariely

Duke University

Ariely is the James B. Duke Professor of Psychology and Behavioral Economics at Duke University. He is dedicated to answering questions about the forces that influence behavior in order to help people live more sensible—if not rational—lives. His sometimes unusual experiments demonstrate profound ideas that fly in the face of common wisdom.

In addition to appointments at the Fuqua School of Business, the Center for Cognitive Neuroscience, the Department of Economics and the School of Medicine at Duke University, Ariely is also a founding member of the Center for Advanced Hindsight. His research is presented in print and video in multiple venues. He is the author of the *New York Times* bestsellers *Predictably Irrational*, *The Upside of Irrationality* and *The Honest Truth About Dishonesty*.

Luis Arteaga

Levi Strauss Foundation

Arteaga is the senior program manager for the United States at the Levi Strauss Foundation (LSF). He is responsible for domestic grantmaking addressing HIV/AIDS stigma and discrimination, as well as helping low-income individuals save and invest in long-term assets. He also manages LSF's hometown initiative, Pioneers in Justice, which supports social justice organizations in San Francisco looking to have greater impact using social media and networked action.

Prior to joining LSF, Arteaga was director of emerging markets at the California Emerging Technology Fund, a \$60 million fund established to close the digital divide and help low-income households get online. He served as the executive director of Latino Issues Forum, a nonprofit public policy and advocacy institute, directing a number of initiatives at the local, regional and state level.

Arteaga completed his undergraduate studies at Princeton University with a major in politics and received a master's degree in public policy from the Kennedy School of Government at Harvard University.

Sarah Audelo

Generation Progress

Audelo is the policy director for Generation Progress. Her work focuses on directing the organization's youth-led and youth-focused policy solutions related to economic justice, civil and human rights, and democracy. Prior to joining Generation Progress, Audelo was director of domestic policy at Advocates for Youth, a national nonprofit that focuses on young people's sexual health and rights. Previously, she was a 9th- and 10th-grade special education teacher in South Texas as part of Teach for America.

Elisabeth D. Babcock

Crittenton Women's Union

Babcock is the president and CEO of the Crittenton Women's Union, a Boston-based charitable organization dedicated to creating innovative new pathways to economic independence for low-income women and their families.

With an annual operating budget of \$11 million, CWU uses its unique action-tank business model to provide cutting-edge economic mobility, housing, education and job-readiness programs to more than 1,400 women and children annually, combined with anti-poverty research and public advocacy. Babcock's role as CEO is to lead CWU in its strategy to be a research and innovations powerhouse consistently delivering new programmatic and public policy approaches that expedite pathways out of poverty.

Babcock has taught nonprofit strategy and implementation at the graduate level for more than two decades at Harvard University, Brandeis University and the New England Conservatory of Music. She has received numerous awards, including the 2013 World of Difference Award by the International Alliance for Women for her work promoting women's economic empowerment. She was named a 2013 Woman of Influence by the *Boston Business Journal* and was profiled as a "breakthrough manager" in *The Breakthrough Imperative: How the Best Managers Get Outstanding Results*.

Babcock received her master's degree in city and regional planning from Harvard's Kennedy School of Government and her PhD in nonprofit strategy from Harvard's Graduate School of Arts and Sciences.

Janie Barrera

LiftFund Inc.

Barrera is founding president and CEO of LiftFund, formerly Accion Texas Inc. in San Antonio. Established in 1994, the organization has grown to become the largest micro- and small business lender in the United States, providing loans and management training to enterprises of all kinds in Alabama, Arkansas, Kentucky, Louisiana, Mississippi, Missouri, Tennessee and Texas. Since its inception, it has disbursed more than 15,000 loans totaling more than \$180 million—with a 94 percent repayment rate.

Barrera is responsible for the organization's financial management, oversight of its annual budget and the development of methodology and loan delivery procedures. In particular, she has worked hard to level the financial playing field for entrepreneurs, who historically have faced considerable obstacles when seeking the financing they need to start and grow their businesses.

Barrera has received nationwide recognition for her work in the field of microfinance and for aiding small businesses, including the Small Business Administration Financial Services Advocate of the Year and the Minority Enterprise Development Consortium's Corporate Advocate of the Year. The *San Antonio Business Journal* listed Barrera as one of the top influencers in the city and named her a Legacy Leader in 2013. Barrera has served on many national, state and local boards, including the

Federal Reserve Board's National Consumer Advisory Council. President Barack Obama appointed Barrera to the President's Advisory Council on Financial Capability, and she was named to the board of directors for the Federal Reserve Bank of Dallas' San Antonio Branch. In 2014 she was named to the San Antonio Business Hall of Fame.

Barrera began her career as director of telecommunications for the Diocese of Corpus Christi in 1977 and was marketing director for the U.S. Air Force Morale, Welfare and Recreation Division at Randolph Air Force Base in 1989.

Janet Boguslaw

Institute on Assets and Social Policy, Brandeis University

Boguslaw is senior scientist and associate director at the Institute on Assets and Social Policy. She is a senior lecturer and associate director of the master's degree program in public policy at the Heller School for Social Policy and Management at Brandeis University.

Through direct practice, evaluation and research, her work focuses on creating multisector innovations and partnerships to advance economic opportunity and stability through voluntary and policy-driven initiatives. Boguslaw has worked with corporate managers to research, direct and advance their community development initiatives; with state agencies in the areas of workforce training and employment stabilization; and on funded research exploring policy strategies for regional development and stabilization.

She is the author of numerous publications and holds a PhD from Boston College.

Ray Boshara

Federal Reserve Bank of St. Louis

Boshara is senior adviser and director of the Center for Household Financial Stability at the Federal Reserve Bank of St. Louis. The center conducts research on family balance sheets and how they matter for strengthening families and the economy.

Before joining the Federal Reserve in April 2011, Boshara was vice president of the New America Foundation, a Washington, D.C.-based think tank, where he launched and directed programs promoting asset development, college savings, financial inclusion and a new social contract. He has also worked for the Corporation for Enterprise Development (CFED), the United Nations in Rome and the U.S. Congress.

Over the past 20 years, he has advised presidential candidates; the George W. Bush, Bill Clinton and Barack Obama administrations; and leading policymakers worldwide. He has testified before the U.S. Congress and has written for *The Washington Post*, *The New York Times*, *The Atlantic Monthly*, *St. Louis Post-Dispatch*, *Democracy* and many other national publications. His media appearances include National Public Radio, Marketplace, CNBC, C-SPAN and Bloomberg News. He coauthored the book *The Next Progressive Era*, published in 2009.

Boshara is a graduate of Ohio State University, Yale Divinity School and the Kennedy School of Government at Harvard.

John Bouman

Sargent Shriver National Center on Poverty Law

Bouman has been president of the Shriver Center since 2007, having been the leader of its advocacy program since 1996. He spearheaded the statewide efforts in Illinois to create both the FamilyCare program, which provides health care insurance for up to 400,000 working poor parents of minor children, and All Kids, the first state plan to extend health coverage to every child. He has consulted and co-counseled with advocates in many states; helped draft numerous pieces of legislation; given hundreds of presentations; published extensively; and served as counsel in numerous federal and state cases, including *Memisovski v. Maram*, which established substantial reforms in children's health care in Illinois. He has led efforts on state-based implementation of federal health care reform, the Illinois Secure Choice retirement savings program for workers and state revenue and budget reform in Illinois.

Before joining the Shriver Center in 1996, he worked for two decades as a civil rights litigator and advocate at the Legal Assistance Foundation of Chicago. Among his honors, he has received the Kutak-Dodds Prize from the National Legal Aid and Defender Association, John Minor Wisdom Public Service and Professionalism Award from the American Bar Association's Litigation Section, Child Health Advocate Award from the American Academy of Pediatrics, and Excellence in Pro Bono and Public Interest Service Award from the United States District Court and Federal Bar Association.

Bouman serves on the boards of Illinois Partners for Human Service and the Center for Law and Social Policy, is a member of the National Advisory Committee to the United States Census Bureau on Race, Ethnic and Other Populations, and cochaired Chicago Mayor Rahm Emanuel's summer 2014 Working Group on the Minimum Wage. He is a graduate of Valparaiso University School of Law.

Colleen Briggs

Global Philanthropy, JPMorgan Chase & Co. Asset Funders Network Steering Committee

Briggs is vice president of financial capability and consumer initiatives within Global Philanthropy at JPMorgan Chase & Co. She is responsible for helping establish and execute the firm's philanthropic and corporate responsibility strategy in financial capability, including the Financial Solutions Lab. The Lab is a \$30 million, five-year initiative that convenes leading experts in technology, behavioral economics and design to improve consumer financial health. Briggs also manages the portfolio of national grants, impact framework and grant guidelines for the overall financial capability strategy.

Previously, Briggs was the economic policy adviser to Michigan Sen. Debbie Stabenow. In this role, Briggs managed the senator's economic portfolio, including policy related to financial services, tax, derivatives oversight, manufacturing, small business, job creation, housing and pensions. She managed the Dodd-Frank derivatives market reforms for the

Senate Agriculture Committee, authored the "Cash for Clunkers" legislation, and helped draft the Recovery Act, TARP, the Dodd-Frank Act and health care reform.

Briggs earned a BA from the University of North Carolina at Chapel Hill and an MBA from the Yale School of Management.

Amy Brown

Ford Foundation Asset Funders Network Steering Committee

Brown is a program officer at the Ford Foundation, where she manages grantmaking in financial justice and asset building. Her work focuses on two main goals: improving the financial marketplace through research, product innovation and improved regulation and consumer protection; and promoting federal and state-level policies that support financial security over a lifetime, including policies that address the racial wealth gap.

Before joining the Ford Foundation, Brown worked with the Aspen Institute's Economic Opportunities Program, launched New York City's EITC campaign, worked for the U.S. Senate Agriculture Committee and ran community-based social services programs.

Wende Burton

Communities Foundation of Texas

Burton is the community philanthropy director for Communities Foundation of Texas, providing direction for the foundation's focus on economic stability and asset building for working families. Burton oversees multiple cohorts, including the Data Driven Decision-Making Institute, a yearlong learning opportunity for organizations that serve low-income working families, as well as other cohorts focused on implementing greater financial capacity and the Working Families Success model within North Texas. Burton has over 17 years of experience with organizational development, business process improvement, curriculum development and project management.

Before joining Communities Foundation of Texas, Burton worked in the for-profit, public and nonprofit sectors, including government, consulting and customer service. She sits on the Community Economic Advisory Committee for the United Way of Metropolitan Dallas, the Housing and Human Services Board for the city of Irving, Texas, and the steering committee for the North Texas Asset Funders Network.

Mariko Chang

Author

Chang is author of the book *Shortchanged: Why Women Have Less Wealth and What Can Be Done About It*, which was recommended by *Washington Post* columnist Michelle Singletary in her nationally syndicated personal finance column "The Color of Money." Chang was an associate professor of sociology at Harvard University from 1998 to 2007, where she published work on occupational sex segregation across countries and the use of social networks for gathering financial information and

began her work on the women's wealth gap. She is a featured expert at the National Council for Research on Women, a member of the Insight Center for Community Economic Development's Experts of Color Clearinghouse and an affiliate scholar at the Women of Color Policy Network at NYU Wagner. To help raise awareness of the wealth gap, she maintains a website that provides data and other information on wealth, assets and debt for public policy makers, the media, researchers and organizations that address economic security.

Chang also works as a consultant and external program evaluator to help universities diversify their faculty, particularly with respect to women in sciences and engineering. She has a PhD in sociology from Stanford University.

J. Michael Collins

Center for Financial Security, University of Wisconsin–Madison

Collins is faculty director of the Center for Financial Security at the University of Wisconsin–Madison. He is an associate professor at the La Follette School of Public Affairs and at the School of Human Ecology. He is also a family economics specialist for UW-Extension, Cooperative Extension and an affiliate of the Institute for Research on Poverty and Center for Demography and Ecology.

Collins studies consumer decision-making in the financial marketplace, including the role of public policy in influencing credit, savings and investment choices. His work includes the study of financial capability with a focus on low-income families. He is involved in studies of household finance and well-being supported by leading foundations and federal agencies.

Collins founded PolicyLab Consulting Group, a research consulting firm working with national foundations and government agencies, and cofounded MortgageKeeper Referral Services, an online database for mortgage servicers and counselors. He also worked for NeighborWorks America (Neighborhood Reinvestment Corp.) and the Millennial Housing Commission.

Collins holds graduate degrees in public policy from Harvard and Cornell.

Anna Crosslin

International Institute of St. Louis

Crosslin has led the International Institute of St. Louis, considered the region's welcoming center for new Americans, for more than 35 years. In all, IISTL has helped start or expand more than 600 immigrant-owned businesses, with a positive economic impact of \$160 million. More than 7,500 immigrants from 75 countries receive services including English classes, refugee resettlement, job placement and career path services. Crosslin has been instrumental in the founding and operation of the St. Louis Mosaic Project, a nationally recognized multisector-led immigration attraction initiative.

Crosslin is the recipient of numerous recognitions and awards, including annual recognition for nearly two decades on the St. Louis Business Journal's Most Influential St. Louisans. She is a past recipient of leadership awards from the St. Louis

Economic Development Partnership, William T. Kemper Foundation, World Trade Center, YWCA and FOCUS St. Louis. She is a board member of the St. Louis Regional Chamber. Crosslin has two honorary doctoral degrees—one from Webster University and another from Washington University, her alma mater.

Pablo DeFilippi

National Federation of Community Development Credit Unions

DeFilippi is senior vice president of membership and business development for the National Federation of Community Development Credit Unions, a national nonprofit association that represents, supports and invests in credit unions serving predominantly low-income, financially underserved communities. He leads the federation's membership development and engagement strategies, and manages CU Breakthrough, a network of community development finance practitioners that provides consulting services to CDCUs. DeFilippi has more than 20 years of experience in community finance, working with regulated financial institutions both in the domestic and international arena.

Originally from Chile, DeFilippi came to the U.S. in the early 1990s and almost immediately became involved in credit unions. After working at MCU, a large credit union serving New York City employees, he joined the Lower East Side People's FCU, a credit union serving Hispanics and other underserved populations in the New York City area, and acted as its CEO until early 2004. DeFilippi has also managed the World Council of Credit Unions Inc. International Remittance Program, a worldwide initiative to provide alternative remittance services to consumers both in the U.S. and in recipient countries through the credit union system. He is also a Credit Union Development Educator and a U.K. Credit Union Development Educator.

DeFilippi holds a BA in social studies from Universidad de Chile, as well as Professional Accounting Certificates from Baruch College and New York University. He has a master's in business administration from Pace University and is a graduate of CUNA's Management School and NCUF's Social Impact Management Institute.

Daniel Delehanty

Capital One Asset Funders Network Steering Committee

Delehanty has 20 years of community development experience. He got his start in international development, running the Trickle Up Program's microenterprise efforts in Africa before serving as deputy executive director from 1998 to 2000. He then turned his attention to community development in the New York area, where he worked as a consultant before serving as deputy executive director with the Business Outreach Center Network in Brooklyn. There he helped launch innovative microenterprise programs for child-care providers, refugees and women entrepreneurs.

Delehanty then joined the public sector, serving as director of the Community Affairs Unit at the New York State Banking De-

partment, where he focused on facilitating partnerships between banks and community groups related to affordable housing, financial education, lending and investment opportunities. He also spearheaded the Banking Development District Program, a highly successful program to bring banking services to underserved areas. In September 2006, Delehanty returned to the private sector and joined the Community Development Banking team of Capital One. He is now senior vice president, responsible for community development activities in the field of economic and small business development nationally and locally in the New York/New Jersey area and the Mid-Atlantic.

Delehanty serves on the board of directors of the Intersect Fund, the Association for Enterprise Opportunity and the advisory boards of Grameen America and New York City's Office of Financial Empowerment. He is also a member of the Steering Committee of the Asset Funders Network.

Daniel Dodd-Ramirez

Consumer Financial Protection Bureau

Dodd-Ramirez serves as the assistant director for the Office of Financial Empowerment at the Consumer Financial Protection Bureau. The Office of Financial Empowerment focuses on the specific opportunities and challenges of low-income and economically vulnerable consumers as they engage in the financial marketplace. The bureau's mission is to help consumer financial markets work by making rules more effective, by consistently and fairly enforcing those rules, and by empowering consumers to take more control over their economic lives.

Dodd-Ramirez served as executive director of Step Up Savannah Inc. in Savannah, Ga., from 2005 to 2014. He previously served as education project director and community organizer for People Acting for Community Together in Miami. In 2010, he was selected as a fellow to the Annie E. Casey Foundation Fellowship Program.

Dodd-Ramirez holds a BA in Hispanic studies from the University of Southern Maine and an MA in international/intercultural training from the School for International Training in southern Vermont.

Jane Duong

National Coalition for Asian Pacific American Community Development

Duong is the director of programs and advocacy for the National Coalition for Asian Pacific American Community Development. Duong leads a team in the development and implementation of national CAPACD's economic vitality programs, including housing counseling, asset building, financial capability and small business strategies to advance social justice and improve the quality of life of low- and moderate-income Asian American, Native Hawaiian and Pacific Islander communities. In this role, Duong seeks to advance economic and social justice through programmatic innovation and policy change, in collaboration with local community leaders.

Previously, Duong served as the housing program manager for the Mission Economic Development Agency in San Francisco.

She earned a degree in sociology from the University of California, Berkeley and received her master's in public administration from New York University's Wagner School of Public Service.

Aimee Durfee

Y&H Soda Foundation Asset Funders Network Steering Committee

Durfee is a senior program officer at the Y&H Soda Foundation, managing Family Economic Success grantmaking for Alameda and Contra Costa counties in California. Through her career experience working in intermediary, philanthropic, legal, policy and direct-service nonprofits, Durfee has developed expertise in law, workforce/economic development, employment/labor, public benefits and women's economic self-sufficiency issues, as well as nonprofit capacity building, program design/evaluation, group facilitation and collaborative development.

In her previous position as vice president for community investment at the United Way of the Bay Area, Durfee worked with agencies in Napa, Solano and Marin counties to develop innovative collaborative solutions to address the challenges of poverty. She led United Way's public policy work, and provided technical assistance, fundraising support and facilitation to four of United Way's SparkPoint Centers, which are collaborative programs working to help families build income and assets, improve credit and reduce debt.

Durfee has also worked as an advice and counsel attorney at the Transgender Law Center, served as program manager at the Insight Center for Community Economic Development and was the Ruth Chance Law Fellow at Equal Rights Advocates.

William Elliott III

University of Kansas

Elliott is an associate professor at the University of Kansas (KU) and founder of the Center on Assets, Education and Inclusion (AEDI) in KU's School of Social Welfare. He also serves as a Senior Research Fellow for New America Foundation's Asset Building Program. He is a member of the advisory board for the initiative to develop a Human Needs Index at the Center on Philanthropy, Indiana University and a consultant for the Federal Reserve Bank of Boston.

Elliott is a leading researcher in the field of children's savings and college matriculation and success. He has written extensively on the relationship between assets and children's educational outcomes. His work has been featured by numerous news and media outlets, such as the *National Journal*, *PBS News Hour*, *NPR*, *U.S. News*, *Washington Monthly*, *The Washington Post* and others. His research has served as the impetus for Children's Savings Accounts (CSA) programs and policies across the U.S., such as Kindergarten to College (K2C) in San Francisco, College Savings Accounts in Cuyahoga County, Ohio, and the American Dream Accounts Act recently introduced into Congress.

Amanda Feinstein

Walter and Elise Haas Fund Asset Funders Network Steering Committee

Feinstein is a senior program officer at the Walter and Elise Haas Fund in San Francisco, where she manages a grantmaking program that promotes economic advancement for low-income families through workforce development, asset building and policy change.

Feinstein is a steering committee member of the Asset Funders Network and the Bay Area Asset Funders Network as well as chair of the Bay Area Workforce Funding Collaborative. In previous roles, she oversaw welfare-to-work training contracts and developed new workforce training initiatives at the San Francisco Human Services Agency; she founded a nonprofit advocacy organization addressing homelessness; and she worked as an aide to a member of the San Francisco Board of Supervisors.

Feinstein has a bachelor's degree in sociology from Antioch College and a master's degree in public administration from the Kennedy School of Government at Harvard University.

Charise Fong

East Bay Asian Local Development Corporation

Fong is the chief operating officer for the East Bay Asian Local Development Corp. (EBALDC). She works closely with all EBALDC programs to align and continuously improve impact evaluation, information systems and cross-departmental collaboration. In addition to her operations role, she oversees the corporation's San Pablo Ave. Corridor Healthy Neighborhoods Initiative. Fong has deep experience with people-based strategies and cross-sector collaborations. She was a founding member of SparkPoint Oakland and launched the corporation's East Oakland community hub and the Age-Friendly Community in the San Pablo Ave. Corridor. She also has expertise in outcomes measurement systems.

She joined the corporation in 2006 as the director of neighborhood and economic development. During this time, she launched the Resident Services program and significantly expanded Family Economic Success programs. She also facilitated organizational discussions on the corporation's Healthy Neighborhoods strategy and helped launch its pilot Healthy Neighborhoods program.

Fong started her career as a litigation attorney in Los Angeles. She transitioned into the nonprofit sector to work on policy advocacy at Chinese for Affirmative Action in San Francisco and then served as program director at Mission Hiring Hall/South of Market Employment Center. Fong has also worked in business development for a technology startup. As an independent consultant, she has assisted nonprofit clients with program development, research and fundraising.

Fong holds a BA in history from UCLA and a JD from the University of San Francisco School of Law.

Nikki Foster

Northwest Area Foundation Asset Funders Network Steering Committee

Foster has served as a program officer at the Northwest Area Foundation (NWAFF) since May 2013. For decades, NWAFF has cultivated strong relationships with the Native people of its eight-state region. NWAFF currently commits 40 percent of all new grant dollars to Native-led organizations aligned with the foundation's work to advance policies and programs to increase good jobs and strengthen financial capability in our communities. In her role, Foster uncovers unmet needs within the region and recommends ways to address those needs, facilitating partnerships between the foundation, nonprofit grant seekers, grant recipients and the community to help low-income individuals increase earnings, build assets, and increase financial capability and access to capital for new businesses.

Previously, Foster held positions at Sunrise Community Banks in which she established standards of quality for financial programs and banking products geared toward unbanked low-income individuals.

Foster was honored as a First Mover Fellow by the Aspen Institute Business and Society program in 2011. She also served as a community affairs analyst for the Federal Reserve Bank of Minneapolis and a policy advocate for the Minnesota Housing Partnership and the Neighborhood Reinvestment Corp. Foster has a master's degree in applied sociology with an emphasis on public policy from American University, Washington, D.C.

Robert Friedman

The Friedman Family Foundation

Friedman is the founder, chair of the board and general counsel for the Corporation for Enterprise Development (CFED). A recognized pioneer in the asset-building and economic development movement, he received the Presidential Award for Excellence in Microenterprise Development from President Bill Clinton in 1999. He helped create the U.S. microenterprise, savings and asset-building fields and the international economic development and child savings fields.

Currently, Friedman is focused on economic development strategies that ensure an inclusive economy where all children and adults have a reasonable opportunity to save, go to college, start a business, buy a home and otherwise build an economic future for themselves, their families and the country as a whole. Based in San Francisco, Friedman serves on a number of boards, including Ecotrust, Child and Youth Finance International, Rosenberg, San Francisco and Friedman Family Foundations. He is a past board member of Levi Strauss & Co., EARN and the Family Independence Initiative and author of *The Safety Net as Ladder: Transfer Payments and Economic Development*. He is a graduate of Harvard College and Yale Law School.

Viola Gonzales

AnewAmerica Community Corporation

Gonzales, CEO of AnewAmerica Community Corp., has a diverse work history that includes managing nonprofits in direct service and/or advocacy of low-income families, owning her own small business, working in a large corporation's accounting and regulatory divisions, and in city government working on local policies to support community development. At AnewAmerica, she sets strategic direction to a multicultural microenterprise development agency that, from its inception in 1999 through 2014, has served nearly 23,000 low-income individuals through its asset-building and other business development services.

Gonzales serves on the board of the Health Access Foundation and the Community Advisory Board to Union Bank. Past appointments include the Oakland Fund for Children and Youth, the Oakland Board of Education and the City of Oakland Planning Commission. She has an MBA from Harvard University.

Kate Griffin

Corporation for Enterprise Development (CFED)

Griffin is vice president for programs at the Corporation for Enterprise Development (CFED), providing strategic oversight for the organization's asset-building and financial capability programmatic agendas including savings, homeownership and entrepreneurship. In her tenure at CFED, she has designed and led programs to scale asset-building strategies within large systems such as TANF, Head Start, child welfare, child support, public health and other social services. She has consulted with community-based organizations and government agencies on developing financial capability and matched savings projects and has developed tools, case studies and resources for the field. She has spent her career focused on financial inclusion and helping low-income families build and manage wealth.

Prior to CFED, she worked internationally in the microfinance field, helping to expand savings practices among financial institutions serving low-income households in Asia, Africa and Eastern Europe.

Mae Watson Grote

The Financial Clinic

Grote is the founder and executive director of The Financial Clinic. She has been a member of New York City's public interest legal and social service communities for over a decade. Grote has led a number of diverse initiatives for organizations such as the Legal Aid Society and FoodChange. Grote created one of the nation's first nonprofit financial development organizations; its mission is to improve financial security for the working poor by addressing their immediate financial challenges and mapping trajectories for long-term goals. In less than 10 years, the clinic has accumulated over \$28 million in new savings, canceled debt and accessed tax credits.

Previously, Grote was a senior labor market policy analyst with Public/Private Ventures, a national nonprofit research and

policy organization. She has extensive experience in work supports and low-wage, low-skilled workers' self-sufficiency issues. Her publication *Unrealized Gains: How Workforce Development Organizations Can Put Money in the Pocket of Low-Wage Workers* examines how nonprofit organizations address their constituents' financial security within the fabric of their preexisting services.

Grote received a BA from Rutgers University and a JD from the City University of New York School of Law.

Susan Hoff

United Way of Metropolitan Dallas

Hoff is senior vice president of community impact at the United Way of Metropolitan Dallas. Prior to joining the United Way in 2009, she was president and CEO of ChildCareGroup, a Dallas-based nonprofit organization dedicated to promoting, delivering and expanding the best child care services available outside the home.

Hoff's professional experience includes the positions of teacher, child care center director and parent educator in domestic violence and drug abuse prevention programs. She is a trainer and public speaker, has developed curricula and educational publications for children and adults, and is an accomplished fund developer. Hoff is a well-known children's advocate at the local, state and national levels.

Hoff is past president of the Texas Association for the Education of Young Children and serves on an advisory committee for the National Association for the Education of Young Children. She is incoming board president of the Texas Early Childhood Education Coalition and an advisory board member of the Texas Early Care and Education Career Development System. She serves on the board of the National Society for Collegiate Scholars and is a member of the Dallas Social Venture Partners and the Junior League of Richardson. Hoff also serves on the steering committee for the North Texas Asset Funders Network.

Hoff earned a degree in bilingual/bicultural education from Fort Lewis College in Durango, Colo., and completed graduate work in early childhood education at the University of Texas at the Permian Basin and postgraduate work in public administration and policy analysis at the University of Texas at Dallas.

George Hofheimer

Filene Research Institute

As head of research and innovation, Hofheimer arms credit unions with the creative yet practical ideas they need to be competitive. He leads a portfolio of 30 consumer finance research projects annually, oversees an innovation think tank, guides a credit union young professionals community and is currently building a financial product incubator for low- and moderate-income consumers.

Prior to joining Filene, Hofheimer spent eight years leading the executive education function for the Credit Union Executives Society. Before his career in consumer finance, he lived for a number of years in Uzbekistan working for such disparate organizations as the U.S. Peace Corps, Price Waterhouse, the

American Council of International Education and Qora-Tepa Village School.

Hofheimer previously served as board president at Willy Street Co-op, a \$40 million, 30,000-member grocery cooperative. He earned an MBA from the University of Wisconsin–Madison.

Jeanne Hogarth

Center for Financial Services Innovation

As vice president for policy, Hogarth leads CFSI's policy initiatives to incorporate the latest research and innovative thinking into the policy process and serves as a liaison with federal agencies, NGOs, nonprofits and other key stakeholders. She strives to improve consumer financial decision-making within micro and macro environments.

Hogarth's experience in consumer behavior research at the Federal Reserve Board and in developing capacities in community-based organizations inspires her work. Previously, she was an economist in consumer and community affairs at the Federal Reserve Board, managing consumer research. She explored consumer financial behavior and decision-making, financial services access and inclusion and household economic stability. She was an associate professor at Cornell University, where she translated research into practice in community development and consumer finance.

Abby Hughes Holsclaw

Winthrop Rockefeller Foundation

Hughes Holsclaw is a consultant for the Winthrop Rockefeller Foundation and also the founder of Proper Southern Strategies. She is focused on helping organizations build capacity and strategically accomplish their mission. She most recently served as the national senior director of philanthropy at Goodwill Industries International Inc. in Washington, D.C., where she was responsible for leading development for the organization and the financial capability portfolio. During her time with Goodwill, she secured almost \$80 million in private and public investments and helped capture the organization's first-ever program-related investments.

Before joining Goodwill, Hughes Holsclaw was a vice president of community development for a small, private-sector technology firm helping connect low-income families to public benefits. Prior to that she served at the National League of Cities for more than six years, leading two portfolio areas—family economic success and early childhood—helping mayors and city council members strengthen their family, youth and children programs. She served as a lobbyist for Kentucky Youth Advocates in Frankfort and worked for the city of Arkadelphia as the director of research and assistant to the city manager.

Hughes Holsclaw is a graduate of Ouachita Baptist University and holds a Master's of Public Policy and Administration from Baylor University.

Dena L. Jackson

Dallas Women's Foundation

Jackson is vice president of grants and research at the Dallas Women's Foundation, which she joined in February 2012. She provides direction for research on topics focused on women and girls and leadership of \$3.5 million in annual grants on education, health, safety and economic security. She is growing the foundation's legislative advocacy initiative at the state level.

Jackson's experience includes health care administration focused on women's health and managed care process improvement; grants management at Susan G. Komen for the Cure; and opening of both the foundation relations and the research development offices as vice president of education at the University of Texas at Dallas.

A native Texan, Jackson earned her doctoral degree in health studies at Texas Woman's University.

Alan Jenkins

The Opportunity Agenda

Jenkins is executive director of The Opportunity Agenda, a communications, research and policy organization dedicated to building the national will to expand opportunity in America.

Previously, Jenkins was director of human rights at the Ford Foundation, managing grantmaking in the U.S. and 11 overseas regions. He has served as assistant to the solicitor general at the U.S. Department of Justice, where he represented the U.S. government in constitutional and other litigation before the U.S. Supreme Court, and as associate counsel to the NAACP Legal Defense and Educational Fund Inc., where he defended the rights of low-income communities suffering from exploitation and discrimination. His other positions have included assistant adjunct professor of law at Brooklyn Law School, law clerk to Supreme Court Justice Harry A. Blackmun, law clerk to U.S. District Court Judge Robert L. Carter and coordinator of the Access to Justice Project of the American Civil Liberties Union.

Jenkins serves on the board of trustees of New York Public Radio, on the board of governors of the New School for Public Engagement and as an advisor to the JBP Foundation. He is a founding cochair of the American Constitution Society's Project on the Constitution in the Twenty-First Century.

Jenkins is a frequent commentator in broadcast and print media, including MSNBC, CNN, *The New York Times* and *The Huffington Post*. He holds a BA in psychology and social relations from Harvard College, an MA in media studies from the New School University and a JD from Harvard Law School.

Sharon S. King

Consumer Credit Counseling Service of Greater Dallas Inc.

King joined Consumer Credit Counseling Service of Greater Dallas Inc. in 2009 as vice president of fund development. She served the agency as interim president and CEO in 2014 and is now vice president of strategic initiatives. Prior to joining CCCS,

King was vice president of recruiting for the North Dallas office of the Mass Mutual Co.

King is a longtime professional in nonprofit management in Dallas and has served as president and CEO of the YWCA of Metropolitan Dallas and Dallas Community Television. She is the recipient of service awards including the first Executive Director of the Year Award from the United Way of Metropolitan Dallas; the Distinguished Service Award from Girls Clubs of America; the Tom Shipp Award from Girls Inc. of Metropolitan Dallas; the Women's Council Outstanding Volunteer Award; the Presbyterian Children's and Community Services Foundation Award; the American Association of University Women Outstanding Member annual award; the Women Helping Women Award; and the Top 25 Women in Business Award from the *Dallas Business Journal*. She also was named a distinguished volunteer by Austin College in Sherman, Texas, where she was a 12-year board member and founding cochair of the Austin College Parent and Family Council.

King serves as chair of the advisory council for the Dallas Council on Alcohol; is a member of the advisory council for the Community Council of Greater Dallas; Executive Women's Roundtable of the Dallas Regional Chamber; president of LIFT; and vice chair of the Warren Center. She is a trustee of the First Presbyterian Church Foundation and is a graduate of Leadership Dallas, Leadership Texas and Leadership America.

Joyce Klein

FIELD at the Aspen Institute

Klein is director of the Aspen Institute Microenterprise Fund for Innovation, Effectiveness, Learning and Dissemination (FIELD). Its mission is to build the effectiveness, scale and impact of microenterprise as an economic opportunity strategy by engaging with practitioners and funders and providing them with tools that build knowledge and practice.

Klein has worked with FIELD for 15 years and has more than 20 years of experience studying and supporting microenterprise and entrepreneurial development programs in the U.S. Her recent work has included the Scale Academy for Microenterprise Development, the Asset-building through Credit pilot and FIELD's new leadership development program for the U.S. microenterprise field, ELM2.

Klein has worked as a consultant in the microenterprise field, providing assistance to clients including the Community Development Financial Institutions Fund of the U.S. Department of the Treasury, and the Corporation for Enterprise Development. Prior to her work with FIELD, Klein led the corporation's work in microenterprise development. She holds a bachelor's degree in economics from Boston College and a master's degree in public policy from the University of California, Berkeley.

Carol Klocek

YWCA Fort Worth and Tarrant County

Since 2009, Klocek has been the CEO for YWCA Fort Worth and Tarrant County. During these years, the agency has expanded to an operating budget of more than \$6.7 million and has

enhanced services for approximately 2,500 low-income women and children, helping hundreds more women and their families break the cycle of poverty. New services include emergency shelter expansion and the addition of rapid rehousing, permanent supportive housing and shared housing. Under her leadership, the YWCA began offering financial literacy education and one-on-one financial coaching so that low-income women and men are able to more effectively spend and save the money they earn.

Klocek has more than 20 years of results-oriented nonprofit management. In 2014, she received the Lockheed Martin Leadership Association Community Leader of the Year award. Her community involvement includes membership on the Fort Worth Commission on Ending Homelessness, and she has served as a member of the boards of the Tarrant County Homeless Coalition, Mental Health Connection and Infant Mortality Network.

Klocek holds a master's degree in social work from the University of Texas at Arlington and a master's in business from Texas Christian University.

Susan Koehler

Walmart Foundation/Sam's Club Giving Program

Koehler joined Sam's Club to lead public relations in 2006 and volunteered to help with charity and community projects. Four years later, she was asked to lead the Sam's Club Giving Program and Community Involvement function for more than 600 clubs nationwide.

Under Koehler's leadership and with the Walmart Foundation, Sam's Club and the Sam's Club Giving Program have contributed more than \$17 million to microenterprise development, training and access to capital programs.

Koehler graduated from Ferris State University with a Bachelor of Science in business. She received Public Relations Society of America Accreditation in 2010–11.

Megan Kursik

Community Economic Development Association of Michigan

Kursik has served as Community Economic Development Association of Michigan's (CEDAM) coordinator for the Michigan Communities for Financial Empowerment network since October 2011. She works with local governments across Michigan to support implementation of local financial empowerment initiatives for individuals and families to reach greater financial stability through financial education and counseling, access to safe and affordable banking products, opportunities to save and build assets and consumer protections.

Kursik is devoted half-time to direct support of the City of Lansing's Financial Empowerment Center initiative, part of a national replication project supported by Bloomberg Philanthropies and Living Cities' Cities for Financial Empowerment Fund. Kursik also coordinates the annual statewide Show Me the Money Day event, which kicks off tax season by promoting access to financial information and products through local events held across the state.

Previously, Kursik served as CEDAM's Asset Building Policy Project AmeriCorps member, research and policy associate policy

intern. She authored an updated version for the CEDAM report, “Helping Working Families Achieve Financial Security,” helped secure and develop CEDAM’s role as lead entity of the Michigan Earned Income Credit Coalition and launched Show Me the Money Day. Her previous professional experience includes an internship with the Flint-based nonprofit, Flint’s Future Now.

Kursik serves as a board member for Edgewood Village, a subsidiary of the Greater Lansing Housing Coalition, and is a volunteer income tax preparer for the Asset Independence Coalition’s VITA program. She holds a BA in social relations and policy from James Madison College at Michigan State University.

Irene Lee

The Annie E. Casey Foundation

Lee is director of Family Economic Success in the Center for Community and Economic Opportunity at The Annie E. Casey Foundation, a private foundation that works to build better futures for disadvantaged children and their families in the U.S. In addition to managing the Work and Wealth unit, she also oversees the foundation’s grant making on strengthening vulnerable refugee and immigrant families and career pathways anchored in Integrated Basic Education and Skills Training (I-BEST). She has been a member of the foundation’s Management Committee and Social Investments Committee since 2004. Lee has more than two decades of experience in philanthropy, including at the Eugene and Agnes E. Meyer Foundation and The Cleveland Foundation. She has developed expertise in housing and community development, community capacity-building, adult education and workforce, children of immigrants and immigrant economic integration.

Lee serves as chair of the Maryland Adult Learning Advisory Council and is on the Maryland Task Force for Performance-Based Funding in adult education. She is an appointee by Gov. Martin O’Malley on the Maryland Council for New Americans. She is a member of the executive committee of the Accelerating Connections to Employment evaluation project, which is a multistate effort measuring the impact of the I-BEST model through a third-party evaluation.

Lee has served on the Task Force on Remittances of the Inter-American Dialogue, the National Advisory Council for the We Are New York project of Mayor Michael Bloomberg’s Office of Adult Education, the advisory board of the Foundation Center in Washington, D.C., the National Advisory Committee for the Robert Wood Johnson Foundation’s New Routes to Community Health Program and the Investors Advisory Board of Market Creek Plaza in San Diego.

Lee is a founding member of Asian Americans and Pacific Islanders in Philanthropy and former board member of Grantmakers Concerned with Immigrants and Refugees and the Washington Regional Association of Grantmakers. She also served on the selection committee of the Fred Rogers Leadership Award in Philanthropy for Children, Youth and Families and on the advisory committee on Strategies for Portal Neighborhoods for CEOs for Cities.

Andrea Levere

Corporation for Enterprise Development (CFED)

Andrea Levere has led the CFED as its president since 2004. CFED is a private nonprofit organization with the mission of building assets and expanding economic opportunity for low-income people and disadvantaged communities through matched savings, entrepreneurship and affordable housing. CFED designs and operates major national initiatives that aim to expand matched savings for children and youth, bring self-employed entrepreneurs into the financial mainstream and turn manufactured housing into an appreciating asset. The organization produces the nationally recognized Assets and Opportunity Scorecard. In 2012, CFED launched the Assets & Opportunity Network, composed of 75 state and local organizations representing thousands of members who advocate for asset development and protection policies at the municipal and state levels.

Prior to joining CFED in 1992, Levere was a director with the National Development Council, where she was a lead trainer for the Economic Development Finance Certification Program and designed and conducted Taking Care of Business, a financial management program for entrepreneurs. She also worked with cities and states to structure financing for small businesses, affordable housing and urban development projects.

Levere has served as chair of the board of the Ms. Foundation for Women and currently serves as the chair of Resident Owned Communities USA, a national social venture that converts manufactured home parks into resident owned cooperatives. She is a member of the FDIC’s Committee on Economic Inclusion, Morgan Stanley’s Community Development Advisory Board and Capital One’s Community Advisory Council. In 2013, President Barack Obama appointed Levere to the National Cooperative Bank’s Board of Directors.

Levere holds a bachelor’s degree from Brown University and a master’s in business administration from Yale University.

Margaret Libby

MyPath

Libby joined MyPath, formerly Mission SF Community Financial Center, as its founding executive director in 2007, transforming it into a vibrant nationally recognized organization that creates, tests and scales models designed to promote economic mobility among low-income youth. Under her leadership, MyPath has launched innovative initiatives, including MyPath Savings™, a peer-based youth financial capability initiative delivered through youth workforce program partnerships; MyPath Credit, a financial coaching program that combines financial guidance with financial products to build credit, manage debt and build savings; and MyPath Advocates, a model that supports low-income youth to advocate for improved access to quality financial products and services.

Prior to MyPath, Libby led a statewide youth-led research and evaluation project while at the Youth Leadership Institute and engaged in advocacy related to inequities in the subprime mortgage market while at California Reinvestment Coalition. She has co-written numerous publications around youth finan-

cial capability, youth leadership development and evaluation, and predatory lending. She currently serves on the Financial Education Network of San Francisco and the Federation’s Youth Task Force.

Libby holds a BA from Brown University and a master’s in social work from the University of California, Berkeley.

Annika K. Little

Asset Funders Network

Little is a strong advocate for asset-building and financial security issues with broad experience in the philanthropic, corporate and nonprofit sectors. She is a strategic philanthropy consultant and also serves as a program manager for the Asset Funders Network, a community of foundations and grantmakers advancing programs, policies and strategies that promote poverty alleviation, economic opportunity and economic security.

Before joining the Asset Funders Network, Little spent more than 15 years working in the fields of philanthropy and corporate social responsibility. Most recently she served as a senior vice president and national program manager for Bank of America. In this role, Little supported the company’s lending, investing and giving activities to strengthen the economic health of communities. Prior to joining Bank of America, she held a number of positions with Fannie Mae and the Fannie Mae Foundation, with a special focus on housing and community development issues.

Little currently sits on the Community Economic Advisory Committee for the United Way of Metropolitan Dallas. She holds degrees from Northwestern University and the American University.

Sue Matkin

United Way of Tarrant County

Matkin is the vice president for information services and manager of the Income Council for the United Way of Tarrant County. She oversees the 211 Information and Referral System for health and human service agencies for the county and is responsible for United Way’s Earn Well initiative to improve the financial stability of low-income working families.

Matkin has experience in early childhood training and management. She has taught middle school and high school and has worked in banking and nonprofit management. In her first three years at United Way, Matkin established the Tarrant Literacy Coalition to address the literacy needs of adults in Tarrant County. She serves on the boards of the Women’s Policy Forum, the Tarrant County Emergency Food and Shelter Program, Literacy Texas and the North Texas Asset Funders Steering Committee and works with many other coalitions and groups.

Megan McTiernan

Thomson Family Foundation Asset Funders Network Steering Committee

McTiernan has spent over 15 years working in organizations focused on youth and the working poor. For the last six

years, she has been the executive director of the Thomson Family Foundation, establishing the foundation and identifying workforce development and asset-building projects in the San Francisco and Dallas areas. Through her work with the foundation, she supports projects that work to break the cycle of poverty.

McTiernan serves on the steering committees of the Bay Area Asset Funders Network, the North Texas Asset Funders Network and the Bay Area Workforce Funders Collaborative. She was a 2009 KIVA Fellow in Mexico, analyzing the impact of microfinance. She is a volunteer with the local CASA program serving youth in foster care and also serves on the California Council for IGNITE, bringing political and civic programs to young women.

Benita Melton

Charles Stewart Mott Foundation Asset Funders Network Steering Committee

Melton is a program officer with the Charles Stewart Mott Foundation. Headquartered in Flint, Mich., the Mott Foundation is a private philanthropy supporting nonprofit programs throughout the U.S. and on a limited basis internationally. Its major grantmaking programs are Civil Society, Environment, Flint (its home community) and Pathways out of Poverty.

Melton joined the Pathways Out of Poverty Program in 1995 and currently manages the foundation’s work on budget and tax policy and asset development issues. Within the broader philanthropic community, she serves on the steering committees of the Grantmakers Income Security Taskforce and the Asset Funders Network.

Prior to joining the Mott Foundation, Melton worked for The Pistons-Palace Foundation, the philanthropic arm of the Detroit Pistons basketball franchise. She graduated from Michigan State University and is pursuing a PhD in public policy from Wayne State University.

Jonathan Mintz

Cities for Financial Empowerment Fund

Mintz is founding president and CEO of the Cities for Financial Empowerment Fund, a national nonprofit that supports municipal efforts to help low-income families and individuals achieve long-term financial stability. He also founded and co-chaired the Cities for Financial Empowerment Coalition, which brings together pioneering municipal governments from across the country to advance innovative financial empowerment initiatives on the municipal, state and national level.

Mintz was previously the longest-serving commissioner of the New York City Department of Consumer Affairs, having been appointed to the role by former New York City Mayor Michael Bloomberg. During this time, he redefined the department’s regulatory enforcement powers toward a focus on consumer financial stability, re-envisioning consumer rights in fields such as debt collection, process serving, employment and finance. He launched the Office of Financial Empowerment to systematically advance programs in financial counseling and education, asset

building and safe banking.

Building on these experiences, Mintz has pioneered the “Supervitamin Effect,” a growing body of programs, policies and research that measures the positive impacts of integrating financial empowerment services into mainstream local government antipoverty programs, such as workforce development, public housing, domestic violence, prisoner reentry and more.

Mintz has graduate degrees from Cornell School of Law and Bank Street College of Education.

Rafael O. Morales

Silicon Valley Community Foundation

Morales leads the economic security portfolio at the Silicon Valley Community Foundation. He joined the foundation after working at The San Francisco Foundation, where he served as community development program fellow, overseeing grantmaking in support of affordable housing, asset building, job training and creation, foreclosure response and neighborhood preservation.

Prior to working in philanthropy, Morales spent nearly nine years at the National Federation of Community Development Credit Unions, a certified CDFI intermediary representing more than 250 community development credit unions nationwide.

In 2008, he opened the federation’s West Coast Regional Office in San Francisco and served on the Bank on San Francisco Credit Union Subcommittee, the San Francisco Smart Money Network, the Coordinating Council for the California Credit Union Network for Community Development, and on the boards of the U.S. Solidarity Economy Network and the California Center for Cooperative Development. He is board chairman of Homeownership SF and sits on the steering committee of the Bay Area Asset Funders Network.

Anne Mosle

Ascend at the Aspen Institute

Mosle is a vice president at the Aspen Institute and executive director of Ascend at the Aspen Institute. With more than 20 years of experience in policy and philanthropy, she has been recognized as Washingtonian of the Year, Ms. Magazine Woman to Watch and as Visionary Philanthropist. She is also an author of *The Shriver Report: A Woman’s Nation Pushes Back from the Brink*.

Under Mosle’s leadership at the Aspen Institute, Ascend has been a national leader in catalyzing a two-generation approach to breaking the cycle of poverty. It has launched a national values-based fellowship program and is investing \$1.5 million in promising programs and policy solutions.

Prior to the Aspen Institute, Mosle served as a vice president and officer of the W.K. Kellogg Foundation, where she oversaw \$140 million in investments. She led the creation of the foundation’s family economic security portfolio and managed its civic engagement portfolio and the launch of its mission-driven investing program. Previously, Mosle served as the president of the Washington Area Women’s Foundation and was the lead architect of its nationally recognized Stepping Stones initiative to build the financial independence of women and families. She

has also served as senior vice president at the Center for Policy Alternatives and has organized major summits at the White House and in the United Kingdom as well as numerous state and community forums. Mosle serves on the advisory committee of the Oxford University Said School of Business and on the National Trustees Council of America’s Promise.

Sarah Cotton Nelson

Communities Foundation of Texas Asset Funders Network Steering Committee

Nelson serves as chief philanthropy officer of Communities Foundation of Texas. Prior to joining the foundation, she spent 12 years as a survey research methodologist with the RAND Corp. Other prior professional roles include managing a youth intervention program in inner-city Los Angeles, directing grants and research for a regional women’s foundation and uncovering policy changes needed within El Salvador’s legalization process for nonprofit organizations following the end of that country’s civil war.

Nelson is deeply committed to creating bridges between best practices identified in the research and nonprofit staff facing a scarcity of time and resources to identify what is most effective in their fields of practice. She was a 2003 American Marshall Memorial Fellow and a 1997 graduate fellow at Pontificia Universidad Católica in Chile, with an undergraduate degree from the University of California, Berkeley.

Alfreda B. Norman

Federal Reserve Bank of Dallas

In her role as senior vice president, Norman oversees the Dallas Fed’s communications and public outreach programs to promote economic growth and an increased understanding of the economy and the role of the Federal Reserve. She has responsibilities for corporate communications, publication services, community development, economic education and financial institution relationship management. Before becoming a senior vice president, Norman served as vice president of community development, promoting financial stability for low- and moderate-income communities and individuals.

Prior to joining the Dallas Fed in 2004, Norman was one of the first neighborhood development officers hired by Bank of America in Texas. She also has extensive experience working with the public and private sectors and held management positions at the City of Dallas Office of Cultural Affairs and the Container Store corporate headquarters in Dallas.

Norman is also affiliated with many cultural and civic organizations, including Big Thought, Communities Foundation of Texas, the North Texas Asset Funders Network, Consumer Credit Counseling Service of Greater Dallas and the Dallas Mayor’s Task Force on Poverty. She earned a bachelor’s degree from Southern Methodist University and is a graduate of the University of Virginia’s Graduate School of Retail Banking.

Padmini Parthasarathy

The California Wellness Foundation

Parthasarathy is a program director at The California Wellness Foundation (TCWF). Her responsibilities include working under the direction of the interim vice president of programs in managing current grant portfolios and developing the foundation’s grantmaking strategies.

Before joining TCWF in January 2014, she was a program manager for Kaiser Permanente’s National Community Benefit Department, where she directed grants that addressed community health through policy, systems and environmental change strategies; managed Kaiser Permanente’s nationwide Community Health Needs Assessment process; and supported the execution of the national Obesity Prevention and Treatment initiative, focused on strategies for pregnant women and children ages 0 to 5. Prior to Kaiser Permanente, Parthasarathy worked for Contra Costa Health Services’ Family, Maternal and Child Health Programs.

Parthasarathy serves on the board of the Greater San Francisco Bay Area chapter of the American Foundation for Suicide Prevention, and on the advocacy and government affairs committee of the March of Dimes California Chapter. She earned a bachelor’s degree in psychology and social behavior, with a minor in sociology, from the University of California, Irvine and a master’s degree in public health, with an emphasis on maternal and child health, from the University of California, Berkeley.

William Porro

City of Miami

Porro is the special projects administrator for the city of Miami and since 2004 has coordinated the strategy and resources within City Administration—Economic Initiatives and the Office of the Mayor’s poverty reduction strategy. He launched ACCESS Miami, a multifaceted platform that links, facilitates access to and increases the utilization of prosperity-building programs (in the areas of free tax preparation, Earned Income Tax Credit campaigns, Individual Development Accounts, microlending, small business assistance, banking, financial literacy, financial empowerment coaching and homeownership). ACCESS Miami has been recognized as a replicable model by many national organizations, such as the U.S. Conference of Mayors and, most recently, Harvard University in winning the Innovation in American Government Bright Idea Award.

Porro has also been a leader on the development of other poverty reduction initiatives at the city of Miami, such as establishing a comprehensive workforce development center; a Department of Commerce funded MBDA Business Center to assist small businesses; the placement of Americorps VISTA volunteers with an economic development focus at sites, building the capacity of nonprofits across the city; and the launching of key economic development websites and representing Miami on national taskforces addressing financial empowerment.

Porro’s career in the financial services industry spans more than 25 years, including positions in both international and

domestic financial services and marketing for such Fortune 500 Companies as American Express, American Express Financial Advisors, Citibank and Cigna. He led financial services innovations such as PC Banking, financial service phone cards, and bilingual direct response marketing into Puerto Rico, the Caribbean and Central and South America.

Porro was appointed to the Department of Children and Families Advisory Council and to the Committee on Financial Stability and Sufficiency. His community service background includes starting a nonprofit organization called the World Mission of Jesus Christ in Miami, which serves the Haitian American Community. Porro was also recognized by the mayor of Miami—Dade County, Florida, for operating a Joint Commission Accredited behavioral health care center in one of Miami’s poorest Hispanic neighborhoods. He is a graduate of the University of Texas with a degree in finance.

Jason Q. Purnell

Washington University in St. Louis

Purnell is an assistant professor and faculty director for community engagement in the Center for Social Development at the Brown School and a faculty scholar in the Institute for Public Health at Washington University in St. Louis. His research explores the social, economic and educational factors that influence health behaviors and health disparities.

Purnell is a licensed psychologist and leads the Working Group on Asset-Building/Financial Capability and Health, an academic-community collaboration that explores financial interventions for health behavior change. He is the author of over 30 academic journal articles and has been recognized by national and local organizations for his research and contributions to the community. He leads a Missouri Foundation for Health-funded project called For the Sake of All to improve the health and well-being of African Americans in St. Louis and the health and economic viability of the region. The project, now in its second phase, is focused on community engagement and implementation of recommendations in the areas of economic opportunity for low- to moderate-income households, high-quality early childhood development, coordinated school health, mental health, healthy neighborhoods, and chronic and infectious disease prevention and management.

Purnell is a licensed psychologist, having completed doctoral training in counseling psychology at Ohio State University. He also holds an undergraduate degree in government and philosophy from Harvard University and a master’s in public health from the University of Rochester School of Medicine and Dentistry.

Christine Robinson

The Kresge Foundation Asset Funders Network Steering Committee

Robinson is senior program officer at The Kresge Foundation. She brings more than 25 years of experience in strategic planning, program development, design and evaluation to the Human Services Program team. She has worked on local, state and national initiatives to improve outcomes for low-income

children, youth, families and communities.

Robinson previously led poverty and human development programs for a number of foundations, including the Fannie Mae Foundation, The Moriah Fund and Pew Charitable Trusts. As community problem-solving officer for the United Way of Massachusetts Bay, she developed initiatives to build capacity of early care and education, the Latino community, elders, perinatal care and networks to address HIV/AIDS. As director of the Division of School Age and Adolescent Health for the Commonwealth of Massachusetts, she helped establish a statewide system of school-based health centers and the first violence prevention coalition in the United States.

Robinson has served on the boards of Grantmakers for Children, Youth and Families and the Woodstock Institute and served on the steering committee of the Grantmakers Income Security Task Force and the Early Childhood Funders Group. She founded and chaired the Capital Area Asset Building Corp., one of the first funders of individual development accounts in the U.S.

Robinson has published articles and presented papers on topics including equity and diversity, maternal and child health and development, asset development strategies, strategic philanthropy and individual development accounts. She was educated at Vassar College, Cornell University and Brandeis University and is trained as a developmental psychologist.

Regina Salliey

The Annie E. Casey Foundation

Salliey is program associate in the Center for Community and Economic Opportunity at the Annie E. Casey Foundation. Her work includes a focus on financial coaching as a strategy for increasing the financial efficacy of low-income individuals. Additionally, she co-manages the Youth Family Economic Success portfolio focused on improving pathways to opportunity (specifically postsecondary success) for youth, ages 16–24, who are disconnected from school and work.

Prior to joining the foundation, Salliey oversaw food and nutrition, victim services, fatherhood and homeless and transitional services programs at the Maryland Department of Human Resources. She holds a master of social work degree from the University of Maryland School of Social Work.

Paula Sammons

W.K. Kellogg Foundation

Sammons is a program officer on the Family Economic Security team at the W.K. Kellogg Foundation in Battle Creek, Mich. She provides leadership and oversight for the on-the-ground execution of foundation efforts that build economic security for vulnerable families and children. She recommends proposals for funding, manages a national portfolio of grants, and designs and implements initiatives and projects that advance economic stability and workforce mobility. In addition to her national work, she serves on the place-based team of New Mexico. Prior to this team, she served as program associate on the Education and Learning team and helped manage a general portfolio of grants, in addition to work focused on school readiness and college and

career readiness.

Outside of philanthropy, Sammons has served as a clinical social worker, therapist and counselor in various settings, such as community mental health, secondary education and domestic violence. She also has experience working across various sectors, including the banking industry, business, retail and higher education. Sammons serves on the Earned Income Tax Credit Funders Network and the Grantmakers Income Security Taskforce.

Sammons holds a BA in family life education and a master's degree in social work.

Daria Sheehan

Citi Foundation

Asset Funders Network Steering Committee

Sheehan is a senior program officer at Citi Foundation, which is committed to economic empowerment and financial inclusion for individuals and families. She directs the foundation's financial capability and asset-building portfolio in the U.S., managing over \$13 million in philanthropic investments annually. Sheehan collaborates with national financial capability and asset-building organizations to create innovative programs that help individuals establish positive financial behaviors, access safe and appropriate financial products, and build and preserve assets so that they can improve their financial situation and achieve their financial goals. Previously, she directed the Citi Foundation's global education portfolio and led the development of the U.S. college success portfolio, as well as its youth education and livelihoods portfolio outside the U.S.

Prior to joining Citi, Sheehan held various positions in corporate communications, community relations and consumer affairs at Pepsi-Cola Co., Unilever and Chesebrough-Pond's. She is currently a member of the Asset Funders Network Steering Committee and the Working Families Success Network Leadership Group.

John Siburt

CitySquare

Siburt is the president and chief operations officer of CitySquare, a Dallas-based nonprofit that has been dedicated to fighting the causes and effects of poverty for more than 25 years. Siburt joined CitySquare in August 2012 as assistant vice president of programs to manage a partnership between CitySquare and Abilene Christian University.

Prior to CitySquare, Siburt served for nearly 10 years as the preaching minister at the Richardson East Church of Christ.

Siburt has served on the board of Christian Works for Children, the advisory board for New Friends/New Life and on the leadership team of the Dallas Justice Revival. He completed the certificate in nonprofit leadership offered jointly by the Center for Nonprofit Management and Southern Methodist University in 2012 and is an alumnus of Abilene Christian University, where he earned three degrees.

Evelyn Stark

MetLife Foundation

Stark is the assistant vice president for financial inclusion at MetLife Foundation. She was previously a senior program officer on the Financial Services for the Poor team in the Global Development Program at the Bill and Melinda Gates Foundation. Her work is focused on product design and innovations that increase the relevance of financial services for poor people and lead to greater financial inclusion.

After working for many years at U.S. banks and nonbank financial institutions managing special asset portfolios (failed commercial real estate loans), Stark spent six years in the microfinance field in Uganda. In 2003, she returned to the U.S., where she worked with USAID in the office of Microenterprise Development, concentrating on products and services to extend outreach to underserved populations in Sub-Saharan Africa, the Middle East and North Africa. She then worked at CGAP on its Expanding Access project before joining the Gates Foundation in late 2008.

Stark holds a BA in international relations and economics from Bucknell University.

Ray Suarez

Journalist, Al Jazeera America

Suarez is the permanent host of Al Jazeera America's daily program *Inside Story*. Prior to joining Al Jazeera America, Suarez worked at PBS' *NewsHour* as its chief national correspondent. He also served as the lead correspondent for the program's global health coverage, reporting on some of the world's most threatening health crises from Africa, Latin America and Asia. Before joining PBS, he hosted National Public Radio's *Talk of the Nation* for six years.

Suarez also has hosted the monthly foreign-affairs radio program *America Abroad* for Public Radio International, cohosted the nationally broadcast weekly political program *Need to Know* for PBS and anchored the weekly Latino politics show *Destination Casa Blanca* for HITN-TV. Prior to his public-broadcasting career, Suarez spent seven years reporting for Chicago's NBC-owned station, WMAQ-TV. He began his career as a Los Angeles correspondent for CNN, a producer for the ABC Radio Network in New York and a reporter for CBS Radio in Rome.

Suarez is the author of the critically acclaimed *Latino Americans*, *The Holy Vote: The Politics of Faith in America* and *The Old Neighborhood: What We Lost in the Great Suburban Migration*, and has contributed to several other books.

In 2010, Suarez was inducted into the National Association of Hispanic Journalists Hall of Fame. His other honors include co-recipient of two Alfred I. duPont–Columbia Awards, the Ruben Salazar Award from the National Council of La Raza, the Distinguished Policy Leadership Award from UCLA's School of Public Policy and the Studs Terkel Award from the Community Media Workshop. He earned a BA in African history from New York University and an MA in the social sciences from the University of Chicago and has been awarded more than a dozen honorary degrees.

K. Sujata

Chicago Foundation for Women Asset Funders Network Steering Committee

Sujata has broad experience in Chicago's philanthropic, business and nonprofit communities. She has served as president and CEO of Chicago Foundation for Women since 2011, a grantmaking organization focused on basic rights and equal opportunities for women and girls in the greater Chicago area. She led the foundation through double-digit growth, managing a strategic alliance with the former Eleanor Foundation in 2012.

Sujata has worked at several notable nonprofit agencies in Chicago: director of programs for the Eleanor Foundation, executive director of Apna Ghar, director of Chicago Continuum of Care (now Chicago Alliance to End Homelessness) and director of planning and development at Interfaith Housing Development Corp. Before joining the nonprofit sector, Sujata trained as a scientist at Northwestern University, received an MBA from IIT and studied engineering in her native India.

Sujata serves on the Board of the Donors Forum, Women's Funding Network and the Steering Committee of the Asset Funders Network. She is the founding director of South Asian American Policy and Research Institute.

Debbie Taylor

Citi Community Foundation

Taylor is director of U.S. markets for Citi Community Development. She leads the team of market managers in California, Nevada, Illinois, Texas, South Dakota, Massachusetts, Florida and the Washington, D.C., metro. In these markets, she oversees community development and economic empowerment initiatives that strengthen low-income communities and manages the delivery of Community Reinvestment Act obligations in those areas. Taylor is also responsible for the City Community Development Innovation and Impact Initiative, a fund that helps develop innovative solutions to key issues in these communities.

A 30-year veteran of leadership positions in nonprofit and civic initiatives, she is past board chair of the United Way of Metropolitan Dallas, having also served as the 2007 campaign chair. She is vice chair of the board of LiftFund and is vice chair for the Dallas County Community College District Foundation board. She serves on the boards of the Dallas Women's Foundation and the Women's Leadership Council of United Way Worldwide.

Taylor's honors include the 2011 J. Erik Jonsson Award by the United Way of Metropolitan Dallas, the Dallas Business Journal's Outstanding Directors recognition in 2013 and Most Influential Women in Business award, the first Corporate Social Responsibility Executive of the Year in 2010 by the Center for Nonprofit Management, the Ebby Halliday Rose of Distinction award and the Junior League of Dallas Sustainer of the Year.

Taylor holds a Bachelor of Arts from the University of Texas at Austin and a Master of Public Administration from Texas State University.

Michelle Thomas

JPMorgan Chase & Co.

Thomas joined JPMorgan Chase in 2000. She is vice president of corporate responsibility and community relations and is responsible for managing a multimillion-dollar corporate giving budget for Dallas and Austin. She is also responsible for implementing the firm's strategic approach to philanthropy, which is multifaceted and aims to address community needs in the local market. She serves on the Dallas Market Leadership Team and represents the firm at community events.

Thomas has been in the financial industry for more than 25 years as a banker and human resource and community development professional.

Thomas is personally committed to the community through her many volunteer roles, including the advisory board of the Center for Nonprofit Management, Junior League of Dallas and the Kipp DFW Council. She is on the board of directors for the African American Museum, Dallas Summit, Methodist Health Foundation and UT Southwestern Medical Foundation. She is an alumna of Leadership Dallas and a member of the Dallas Assembly and Dallas Summit. She was recently recognized as a 2014 Minority Business Leader in the Dallas Business Journal and is the recipient of the 2015 Business and Civic Leader award by the Dallas Black Dance Theater.

A Dallas native, Thomas earned her BS in business education from the University of Oklahoma and an MBA from Dallas Baptist University. In addition, she received her teaching certification from the states of Texas and Oklahoma.

Carla Thompson

W.K. Kellogg Foundation Asset Funders Network Steering Committee

Thompson is vice president for program strategy at the W.K. Kellogg Foundation in Battle Creek, Mich. In this role, she leads the Education and Learning; Family Economic Security; Food, Health and Well-Being teams, providing leadership and management to the creative and strategic direction of programming from design through implementation, evaluation and dissemination. As a member of the executive team, she is also responsible for the overall direction and leadership of the foundation.

Prior to joining the foundation in 2012, Thompson was deputy director of the Office of Child Care at the Administration for Children and Families in the U.S. Department of Health and Human Services in Washington, D.C. There, she was responsible for developing national early childhood education policy, managing the \$5 billion annual budget of the Child Care Development Fund and providing oversight to 10 regional offices serving states, tribes and territories. Previously, she was assistant superintendent for early childhood education for the District of Columbia, where she initiated the first publicly funded prekindergarten program. In other professional experience, she has held positions with the Department of Education and Department of Public Welfare for the state of Pennsylvania; United Way of Southeastern Pennsylvania in Philadelphia; and the U.S. Department of Education.

Thompson has been honored for her leadership in early childhood education by the Administration for Children and Families, the Children's Defense Fund and the Temple University Institute on Disabilities. She also has served on boards and committees for nonprofit associations and professional organizations. In addition, she is the author of three publications related to school readiness and advocacy. She also is featured in *The Huffington Post* as a regular blogger and has been cited in numerous news media for her expertise.

Thompson holds a bachelor's degree from Syracuse University in Syracuse, N.Y., and a master's degree in social work from the University of Pennsylvania in Philadelphia.

Beadsie Woo

The Annie E. Casey Foundation Asset Funders Network Steering Committee

Woo is a senior associate in the Center for Community and Economic Opportunity at The Annie E. Casey Foundation. Her work to increase financial stability for families and children focuses on strategies that facilitate asset development and protect asset holdings. She is a coauthor of *Weathering the Recession: The Financial Crisis and Family Wealth Changes in Low-Income Neighborhoods*, which examines what happened to assets, debts and home equity for families living in low-income neighborhoods during the Great Recession, using data from the longitudinal Making Connections survey.

Woo holds an AB in economics from Davidson College, an MPP from Harvard's Kennedy School of Government and a PhD in economics from the University of North Carolina.

Angel Zapata

Wells Fargo Foundation Asset Funders Network Steering Committee

Zapata is senior vice president at the Wells Fargo Foundation and national manager for the Wells Fargo Foundation's Hands On Banking. He previously served in various key positions in the corporate, nonprofit and philanthropic sectors. Positions include vice president and senior community development officer at Wachovia, vice president and community development manager for the Northern Trust in Illinois, a senior consultant for business development to the Puerto Rican Legal Defense and Education Fund, and the national program marketing officer for KCET (southern and central California's community public television station). He was also a program officer at the Joyce Foundation for nearly five years.

Zapata serves on the national board of directors of the Jump\$tart Coalition. Previously, he served as the school site council chair for Edison Language Academy, a Title 1 school in Santa Monica. Through 2009, he served as the vice chairman of the board of directors for the Southern California Grantmakers.

Zapata received his bachelor's degree in political science from the University of California, Los Angeles and a master's in business administration from the University of Southern California. He is also a graduate of the Pacific Coast Banking School at the University of Washington.

THANK YOU

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Wende Burton

Federal Reserve Bank of Dallas

About AFN

The Asset Funders Network (AFN) is a membership organization of national, regional and community-based foundations and grantmakers strategic about using philanthropy to promote economic opportunity and financial security for low- and moderate-income (LMI) Americans.

AFN works to increase the capacity of its members to effectively promote economic security by supporting efforts that help LMI individuals and families build and protect assets.

Through knowledge sharing, AFN empowers foundations and grantmakers to leverage their resources to make more effective and strategic funding decisions, allowing each dollar invested to have greater impact.

Steering Committee

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