



WELFARE PEER TECHNICAL ASSISTANCE NETWORK



STRENGTHENING ECONOMIC SELF-SUFFICIENCY FOR FLORIDA'S FAMILIES

**MAY 23-24, 2006
JACKSONVILLE, FLORIDA**

AGENDA

May 23, 2006

7:30 - 8:30 AM **Registration**

8:30 - 9:15 AM **Welcome, Introductions and Vision Statement**

Honorable John Peyton, Mayor, Jacksonville, Florida
*Carlis Williams, Regional Administrator, Administration of Children and Families,
Health and Human Services, Atlanta Regional Office*
Connie Hodges, President, United Way of Northeast Florida

*Moderator: Carlis Williams, Regional Administrator, Administration of Children and
Families, Health and Human Services, Atlanta Regional Office*

9:15 - 10:15 AM **Achieving Financial Self-Sufficiency for Low Wage Earners and TANF Clients**

*Moderator: Carlis Williams, Regional Administrator, Administration of Children and
Families, Health and Human Services, Atlanta Regional Office*

*David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives for the Office of
Family Assistance (OFA), Health and Human Services (HHS) (contractor)*

Expanding opportunities for financial self-sufficiency for low income earners through the Earned Income Tax Credit (EITC) and Child Tax Credits (CTC). Incentives and opportunities to help families under TANF reauthorization. Review of successful TANF client outreach initiatives.

Don Winstead, Deputy Secretary, Florida Department of Children and Families

ACCESS (Automated Community Connection to Economic Self-Sufficiency) Florida, the DCF web-based public assistance application system will be highlighted during remarks by Deputy Secretary Winstead. Access Florida enables individuals to apply for benefits online from their home, DCF Customer Service Centers and through a network of community partners including faith-based organizations, Workforce One-Stop Centers, senior centers and community organizations.

10:15 - 10:30 AM **Break**

10:30 - 11:30 AM

Report from the Front: Working Coalitions in Florida

Moderator: Ted Granger, President, United Way of Florida

Kaye Schmitz, Director, RealSense Prosperity Campaign, an initiative of United Way of Northeast Florida,

Desiree Marrero, Human Services Coalition of Miami-Dade County, Miami-Dade Prosperity Campaign

Sandra E. Bernard-Bastien, Director of Public Affairs & Organizational Development, Children's Services Council of Broward County

Kristen Gopman, Hillsborough County Coordinator, Hillsborough County Department of Health & Social Services

Each of the programs will showcase their innovative or best practices for EITC and asset building initiatives.

(15 Minutes Reserved for Table Team Group Discussion / Action Planning)

11:30 - 12:00 PM

Planning for the 2007 Tax Season: IRS Resources and Tools

Ron Albert, Territory Manager for Plantation & Tampa, Florida, IRS

Barbara Travis, Territory Manager for Jacksonville & Northern Florida, IRS

This presentation will highlight VITA program updates, special projects, federal policy and regulatory changes and initiatives to expand the availability of community outreach programs

Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS

Successful strategies for organizing VITA and EITC outreach in rural communities.

12:00 - 1:30 PM
(Working Session)

Working in Partnership with the Business Community

Moderator: John O'Connor, Co-Ancor, CBS Evening News, WTEV 47

Pathways to Economic Success: Building on EITC and Employer Engagement.

Chuck Shannon, Senior Fellow United Way of America and Vice President, Mile High United Way

United Way Agencies across America are engaged in promoting and supporting EITC outreach community coalitions. Chuck Shannon will share strategies for working with business leaders and employers on EITC outreach. He will also share insights on developing innovations concerning community coalitions.

(Working session continued on next page)

Business Leader Initiatives on Asset Building

Introductions: Deborah Thompson, President, First Coast African American Chamber of Commerce, Jacksonville, FL

Santo Villafana, Community Development Manager, Everbank

Conny Good, Senior Benefit Specialist, Baptist Medical Center

Business leaders recognize the importance of supporting the EITC and other asset building resources. As both employers and financial leaders they are important partners in promoting the development of community based regional and statewide outreach initiatives on the EITC, CTC and IDA programs. This session will highlight two business organizations that have recognized the value of community asset development strategies and provide insight on building relations with business leaders in your community.

Testimonial: Impact of Community Asset Building Initiatives

Beverly Brown, Individual Development Accounts (IDA) Program Graduate, Fresh Ministries

1:30 - 2:00 PM

Achieving Self-Sufficiency for Florida's Families

Moderator: Bruce Ferguson, President, WorkSource, Inc.

Jennilee Robins, Program Director, WorkForce Florida

This session will highlight the strategic partnerships at the state level that emphasize work, self-sufficiency and personal responsibility to enable families to move from welfare to economic stability and self-sufficiency. Discussion will include the tenet that "Work Pays" and that one critical element of ensuring success is to partner with business to ensure opportunities for placements/job retention/career advancement/on-going job creation.

2:00 - 2:15 PM

Break

2:15 - 3:00 PM

Finding the Right Funding—Whether Just Beginning or Already Established (Panel)

Moderator: Edward King, Jr., Senior Program Manager, Jessie Ball duPont Fund

Scott Badesch, President, United Way of Palm Beach County, FL

John Zell, Vice President Donor Services, Community Foundation, Jacksonville FL.

Sandra E. Bernard-Bastien, Director of Public Affairs & Organizational Development, Children's Services Council of Broward County

Funding community based initiatives to provide EITC outreach, asset building resources, financial literacy education, low-income home purchase assistance, economic empowerment and other quality of life improvements for working families can be challenging. This session is designed to provide insight, strategies, and resources for crafting persuasive and commitment-generating funding requests.

3:00 - 3:45 PM

Urban and Rural Community Outreach Planning Sessions

Moderator: David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (HHS) (contractor)

Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS

Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS;

Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS

Both Urban and Rural communities face unique challenges in developing EITC outreach and VITA services. During this session Urban partners and Rural community partners will meet (separately) to identify strategies, challenges and opportunities to promote EITC and asset building outreach in their respective communities.

3:45 - 4:30 PM

The Road To Asset Building and Financial Self-Sufficiency: Programs and Resources

Moderator: John W. Edwards, Jr., President Northeast Florida Community Action Agency

Overview: Assets for Independence and the HHS IDA Program

Melissa Towery, Head Start Program Specialist, Office of Community Services, Health and Human Services, Atlanta Regional Office

The Office of Community Services (OCS) through the Assets for Independence Program provides grant funds for developing IDA programs. This presentation will provide a general introduction to the program. Additionally, there will be information provided on the current IDA Request For Proposals (RFPs). IDA RFPs are due July 18, 2006.

Strategies for Developing and Sustaining an Individual Development Account (IDA) program

Carter Elliott, Director, Prosperity Campaign, United Way of Palm Beach County

IDA programs can significantly help low wage earners save towards the purchase of a home or business. The Palm Beach County Prosperity Campaign will share insights on the development and management of their IDA Program.

Randy Evans, President, USA Ministries, Fresh Ministries, Jacksonville, FL

IDAs are a strong resource through which to promote asset development opportunities. Providing this service can also result in strong partnerships between community organizations. This session will include information on the organization of the Jacksonville IDA Partnership.

4:30 - 5:15 PM

Housing Assistance Strategies for Advanced Asset Building

Moderator: Joyce Couch, Vice President of Resident Opportunities, Jacksonville Housing Authority

Florida Programs To Assist Low and Moderate Income Home Buyers

*David Stelbrink, Loan Originating Officer, First Bank Mortgage.
(Housing Partnership of Northeast Florida, Inc.)*

This session will explore the programs and services available in Florida to assist low and moderate income home buyers.

The Banking Community Homeowner Assistance Programs

Michelle Braun, Market Manager, Community Development Bank, Bank of America

Financial institutions are active partners in supporting community outreach coalitions. Many offer Homeowner Assistance Programs to assist low and moderate income families become homeowners.

5:30 - 6:30 PM

Networking Reception

The Benefit Bank

Moderator: Janet R. Hamer, Community Development Manager, Federal Reserve Bank of Atlanta, Jacksonville Branch

*John Briscoe, Director of Development, National Council of Churches
Leslie Winder, Solutions for Progress, Inc.*

The Benefit Bank is a web-based software program that helps low and moderate income individuals apply for the benefits and tax credits to which they and their families are entitled. Applicants work with trained counselors in filling out forms which result in registration for various benefit programs.

May 24, 2006

8:00 - 8:30 AM

Implementing Effective Outreach Models and Demonstrating Community Impact

David Cunningham, Consultant for EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)

This session will include an overview on effective outreach strategies and resources for tracking and documenting the impact of local EITC outreach Initiatives.

Concurrent Workshops - Session I (Choose one)

Workshop A:
8:30 - 9:30 AM

Creating a Local Coalition and Developing A Stakeholder Network: How to organize and develop support for an EITC Outreach Campaign

Kaye Schmitz, Director, Real\$ense Prosperity Campaign, an initiative of United Way of Northeast Florida,

The Real\$ense Prosperity Campaign is a broad-based, community-wide partnership serving multiple counties. This session will highlight the organizational strategies that have secured the support of city officials, foundations, community organizations and business leaders. The project service area includes both an urban center and rural communities.

Sandra E. Bernard-Bastien, Director of Public Affairs & Organizational Development, Children's Services Council of Broward County
Evan J. Goldman, Esq. Senior Government Affairs Specialist, Children's Services Council of Broward County

The Children's Services Council of Broward County is an innovative leader in developing and promoting asset development initiatives and EITC participation. Through collaborative partnerships with social services providers and business leaders, the Children's Services Administration offers free tax filing assistance, Individual Development Accounts (IDA) and financial literacy services.

Workshop B:
8:30 - 9:30 AM

Empowerment Through Financial Literacy

*Moderator: Iris C. Jones, Vice President, Community Development Manager,
SunTrust Bank*

Overview of the FDIC Money Smart Program

*Tom Stokes, Community Affairs Officer, Division of Supervision and Consumer
Protection, Federal Deposit Insurance Corporation (FDIC)*

This session will introduce the FDIC Money Smart Program as a strategy for helping individuals and working families develop an understanding of their financial resources.

Get Checking

*Anita McKinney, Extension Educator, Duval County Extension Service, Jacksonville,
Florida*

Get Checking is a financial education program which provides an introduction to banking and practical money management skills to those without a primary banking relationship.

Credit When Credit Is Due

Sonya Fleshman, IDA Coordinator, Family Counseling Services, Jacksonville, FL

This session introduces personal money management to help participants gain a better understanding of how to manage their finances and avoid financial problems like bankruptcy and homelessness.

Workshop C:
Session I
8:30 - 9:30 AM

Assets and Opportunity Scorecard

*Janet R. Hamer, Community Development Manager, Federal Reserve Bank of
Atlanta, Jacksonville Branch*

The Assets and Opportunity Scorecard was developed by CFED to measure how easy or hard it is for families across the United States to achieve the American Dream of having the opportunity to build assets, while at the same time have a safety net in case of emergency. This session will provide an overview on the Assets and Opportunity Scorecard.

9:30 - 10:30 AM

Concurrent Workshops - Session II (Choose One)

Workshop D:
9:30 - 10:30 AM

Scale and Sustainability: Strategies for determining when to expand and how to sustain your local initiative

Moderator: Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS

Jean Hunt, Executive Director, Campaign for Working Families, GPUAC, Philadelphia, PA.

Growing a community outreach coalition can be challenging. This session will share strategies for determining when to expand your program and services. Additionally, information will be provided on ways to develop program sustainability through partnerships and strategies for effectively demonstrating the financial and human impact of the services offered through your community agency.

Workshop E:
9:30 - 10:30 AM

Operating a Mobile Multi-Community Outreach Program

Moderator: Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS

*Linda Guy, Housing Supervisor, First State Community Action Agency, Delaware
Sandra E. Bernard-Bastein, Director of Public Affairs & Organizational Development, Children's Services Council of Broward County
Arnold Jean-Baptiste (JB), Special Projects Specialist, Children's Services Council of Broward County*

This session will include information and strategies for developing and managing a Mobile Multi-Community Tax Filing Assistance and EITC outreach Program.

Workshop F:
9:30 - 10:30 AM

Building Successful Outreach Strategies In Minority Communities

Moderator: Mark Browne, Senior Tax Specialist, IRS

Developing an effective outreach strategy and marketing plan on the EITC and asset building in minority communities is not a challenge. It does require a dignified focus, citizen input, participation of recognized leaders and active acknowledgment of local institutions, programs and faith based organizations. In this session strategies and discussions will take place on effectively implementing an outreach strategy for diverse communities.

*Nelson D. Cuba, President, Fraternal Order of Police; Chair, Mayor's Hispanic-American Advisory Council, Jacksonville, FL
Deborah Thompson, President, First Coast African American Chamber of Commerce, Jacksonville, FL*

10:30 - 10:40 AM

Break

10:40 - 11:15 AM

Regional Planning Sessions: Building Local Partnership Networks

David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)

This will be an interactive planning session to take your coalition to the next level.

11:15 - 11:45 AM

Regional Planning Group Reports

11:45 - 12:00 Noon

Closing Remarks and Evaluation

Carlis Williams, Regional Administrator, Administration of Children and Families, Health and Human Services, Atlanta Regional Office