

**Georgia Earned-Income Tax Credit (EITC)/Asset-Building
Statewide Coalition Meeting**



**Savannah, Georgia
June 28–30, 2010**



Final Biosketches

Sharon Alley

Sharon Alley is a certified Grant Administrator with the Internal Revenue Service (IRS). She currently works in the Grant Program Office which awards the Volunteer Income Tax Assistance and Targeted Capacity Expansion Grants. As a member of the Grant Program Office she is responsible for reviewing and evaluating grant applications, as well as managing the grants once applicants are awarded. The Grant Program Office was nominated as Employee of the Year in the category for Outstanding Team in 2009 and 2010. Ms. Alley began her Federal Government career in 1984 with the Department of Defense as a co-op student at Kennesaw State University. While there, she worked in the Contract Administration Office where all defense contracts for the Southeast were managed. In 1988 she moved to the IRS and has held various positions within the agency. Ms. Alley graduated from Kennesaw State University with a Bachelor of Science degree in business administration.

Michael Beebe

Michael Beebe, the Director of the Stakeholder Partnerships, Education and Communication (SPEC) Program Headquarters Operations, is responsible for building and maintaining partnerships with key stakeholders and providing guidance on issues that cross stakeholder groups. He provides leadership in all phases of improving service to SPEC customers by creating and developing educational products and services. Prior to joining SPEC, Mr. Beebe was Field Director for Accounts Management in Atlanta. As the Field Director, he led an organization of 2,000 employees—located in Atlanta, Georgia; Jacksonville, Florida; and Puerto Rico—who provide assistance to taxpayers with tax and account-related inquiries via the telephone, correspondence, and e-mail. Mr. Beebe started his career with the Internal Revenue Service in 1987 as a Revenue Officer in Oregon. He was promoted through the revenue officer career path and held positions as Collection Group Manager, Department Manager in Accounts Management, and Operations Manager of the Seattle Accounts Management call site. In 2005, he moved to Atlanta to become the Chief of Planning and Analysis at the Joint Operations Center. He is a member of the 2006 Candidate Development

Program. Mike is a native of California. He holds a Bachelor of Arts degree in Political Science from California Polytechnic State University at San Luis Obispo.

Eric Blanchette

Eric Blanchette is the Regional Child Care Program Manager in the Administration for Children and Families within the Child Care Bureau of the U.S. Department of Health and Human Services where he has oversight responsibility for the Federal child care programs operated by the eight southeastern States. Prior to working in the Child Care Bureau, Mr. Blanchette was a TANF Regional Program Specialist in the Administration for Children and Families, Office of Family Assistance in the U.S. Department of Health and Human Services where he had oversight responsibility for the Temporary Assistance for Needy Families Programs. Mr. Blanchette began his Federal career in 2001 when he was selected to be a Special Nutrition Program Specialist with the U.S. Department of Agriculture–Food and Nutrition Service providing oversight of the Child and Adult Care Food Program and the Summer Food Service Program. Prior to assuming federal employment, he worked in State government providing oversight for the following programs: Child Support Enforcement, Community Services Block Grant, Refugee Resettlement Program, Low-Income Home Energy Assistance, Food Stamps, Medicaid and AFDC/TANF.

Cassandra Brown

Cassandra Brown is the Assistant Vice President of Marketing and Business Development with Credit Union of Atlanta (formerly Atlanta City Employees Credit Union). She began her career in the credit union movement over 15 years ago working in the areas of regulation, operations, consulting, and marketing. As a Credit Union Development Educator (CUDE), Ms. Brown shares that designation with only 900 credit union professionals across the globe. An Atlanta native, Ms. Brown believes that “you empower people by showing them the possibility of success.” With such determination, she is an active Marketing Committee member for the Atlanta Prosperity Campaign, an initiative of the Atlanta Community Food Bank that connects working families and individuals to existing programs geared toward a financially stable future. In 2010, she was honored to be included in Who’s Who of Black Atlanta, a distinction that has been shared by former mayors, business leaders and community activists throughout the City of Atlanta. Highlights of her career include: CUDE designation; memberships in African American Credit Union Coalition (AACUC), 2005 AACUC Hurricane Katrina Mentorship Committee for low-income designated credit unions in the New Orleans area, Credit Union National Association Marketing and Business Development Council, Atlanta Prosperity Campaign Marketing Committee; advisor to SEEDCO Earned Benefits—Atlanta Volunteer Income Tax Assistance; and affiliation with National Youth Involvement Board.

Kenneth Brown

Kenneth Brown is a Senior Stakeholder Relationship Tax Consultant with the Internal Revenue Service. As a 30-year employee, Mr. Brown has worked in many areas including corporate, individual, and partnership tax law. He has served as an IRS instructor for many years. He has been with the Stakeholder Partnership, Education and Communications program since March 2003. Mr. Brown communicates bilingually in Spanish. He is also currently the Relationship Manager of Chatham Savannah Asset Development Coalition, and he provides relationship management to additional coalitions and partners, including the military in Southeast Georgia. He is the Senior Tax Consultant to the only Acceptance Agent serving limited-English proficient customers in the state of Georgia.

Jo-Anne Butler

Jo-Anne Butler is a Senior Tax Consultant with the Internal Revenue Service (IRS). She is the Lead Relationship Manager for Zone 4 of the Atlanta Territory which consists of the Southwest Georgia Region. She began her career with the IRS in 1986 as a Taxpayer Service Representative. Ms. Butler is the subject matter expert for Taxwise and e-file.

David Camporeale

David Camporeale is a Program Specialist in the Division of State and Territory Temporary Assistance for Needy Families program, in the Office of Family Assistance, Administration for Children and Families. He is the Federal Project Officer for the Welfare Peer Technical Assistance Network and supports numerous other Federal initiatives. He has over 15 years of diverse experience as a civil servant, counselor, community organizer, statistician, and in IT support. Mr. Camporeale holds a double B.A. in Sociology and Political Science from the University of Maryland.

Jackie Lynn Coleman

Jackie Lynn Coleman is the Senior Director of the National Community Tax Coalition as well as Vice President of National Programs for the Center for Economic Progress. Jackie Lynn has been with the National Community Tax Coalition since 2003, has lead the community building work and orchestrates the national conference bringing together more than 550 practitioners together. She has 5 years of experience in community banking and 13 years of experience working in the areas of organizational, community, economic and workforce development, as well as public policy. In the past she has provided capacity building to a number of organizations across the country, including those in the fields of tax preparation and asset building, construction, child care and manufacturing; apprenticeship programs; the Chicago One-Stop Career Centers; U.S. Department of Labor and the Illinois Department of Human Services. Jackie Lynn holds an M.S. in Human Services

Administration from Spertus College, graduating Magna Cum Laude, as well as a B.S. with honors in Political Science from Chicago State University. Her home base is Chicago where she resides with her two children Christian and Shymel. In her spare time she enjoys drawing, swimming, and horseback riding.

Tammie Collins

Tammie Collins, Executive Vice President for Community Impact, joined United Way in 1985, beginning her career in Augusta Georgia. Tammie holds a Master of Social Work from the University of South Carolina and a B.A. from Warren Wilson College. She moved to Macon and joined the United Way of Central Georgia in 1994. Tammie currently serves on the board of Career Women's Network and is active in many civic endeavors in Macon. Additionally, she is the administrator for the United Ways of Georgia Association. Her work in Community Impact includes a wide variety of initiatives in the areas of education, income and health including the Macon Earned Income Tax Credit coalition.

Jean Cooper

Jean Cooper has served as the Executive Director of Northeast Oklahoma Community Action for the past 12 years. The agency assists low-income individuals and families to become more self-sufficient. The agency provides Head Start, housing, weatherization, emergency assistance, homeless services and financial empowerment services. The agency has provided tax preparation services since 2001. The agency initially served 308 clients helping return \$308,000 to those families. During the most current tax filing year the agency served over 1,100 families who received refunds in excess of \$1,951,000. The tax assistance program has become a central part of a larger financial empowerment strategy of the agency.

Richard Cramer

Richard Cramer is the Georgia State Coordinator for AARP's Tax Aide Program and the Sales Manager/Owner of RW Consulting/Sales Development, both in Roswell, Georgia. His prior work experience included numerous sales and marketing management positions with Eastman Kodak Co. In one position as Sales/Markets Development Manager, he focused on Athens, Greece, and Dubai, U.A.E. Mr. Cramer has a B.A. degree in English from the University of Rochester.

Yolanda Davis-Weaver

Yolanda Weaver serves as a Senior Tax Consultant for Wage & Investment, Stakeholder Partnerships, Education and Communication (SPEC) Organization. Ms. Weaver has been with the Internal Revenue Service for 24 years working in various organizations. She has been in the SPEC Organization for 10 years. She worked with the SPEC Headquarter Office

for 3 years on the administrative side and has been with the SPEC Atlanta Territory Office for 7 years working the technical/field side of the organization. She is the Lead Relationship Manager for the Atlanta Prosperity Campaign Coalition as well as the 40 Volunteer Income Tax Assistance Sites in 10 counties around the Atlanta Metropolitan area. She diligently seeks to assist underserved taxpayers with filing their income tax returns and showing them a better way to financial stability. She does this by partnering with nonprofit organizations, financial institutions, educational institutions, social service agencies and government agencies. She was recently selected as a finalist for Federal Employee of the Year— Outstanding Professional Award. In 2008 she was presented with a Special Congressional Recognition for outstanding and invaluable community service from Congressman Hank Johnson, in 2006 she was presented with a SPEC Partnership Award for maintaining outstanding Partnerships in Southeast Georgia and she was recently presented with a SPEC Achievement Award in 2009. Ms. Weaver loves working in the SPEC organization and she feels, if she can spread the word on how education and awareness, tax return preparation and asset building can lift struggling families out of financial instability into financial stability, then the work she does on a daily basis through the SPEC Organization is not in vain.

Michael Devault

Michael Devault is a business education teacher at Oakwood Open Campus High School in Cobb County, Georgia. He has been in this position for 11 years and has taught a variety of courses including Finance, Computer Applications, and Entrepreneurship. Oakwood is an alternative setting to the high school experience and caters to students who need a fresh start with their high school studies. Since many of Oakwood's students work part-time, Mr. Devault recognized a need to educate the students about the income tax process. Subsequently the school partnered with the Internal Revenue Service to host a Volunteer Income Tax Assistance (VITA) center and incorporated the center into the school's curriculum. As site coordinator of Oakwood's VITA center, Mr. Devault trains a class of students in tax law, return preparation, and office procedures. While the program was initially intended to address the needs of Oakwood students, it has developed into an exceptional community service project. The program has assisted over 1,400 taxpayers during the past 8 years. The Oakwood Volunteer Income Tax Assistance model has been presented at two national educator conferences and at State and regional conferences. Oakwood's tax program has also been highlighted in stories by local television affiliates and newspapers. Prior to teaching, Mr. Devault worked in commercial banking for First Tennessee Bank for 6 years. When he left First Tennessee, he was Vice President of the bank's equipment leasing division. He received a Bachelor of Science degree from the University of Tennessee, a Master of Business Administration degree from the University of Memphis, and an Education Specialist degree from Lincoln Memorial University.

Daniel Dodd

Daniel Dodd, the Executive Director of Step Up Savannah since 2005, brings with him more than 16 years of experience in nonprofit leadership, fundraising and community organizing. Under his leadership, Step Up has earned national recognition for bringing together business and government leaders, social service agencies, neighborhoods, and individuals to work to reduce poverty in Savannah and Chatham County. This year Mr. Dodd was chosen with 18 other leaders from around the country to the Annie E. Casey Foundation's 2010-2011 Children and Family Fellowship Class. Prior to Step Up, Mr. Dodd served as education project director and community organizer for People Acting for Community Together (PACT) in Miami, Florida. At PACT Mr. Dodd engaged hundreds of volunteer parents, teachers, administrators and community partners in an education reform and poverty reduction effort by partnering with local government, corporations, and churches. From 1998 to 2000, Mr. Dodd was the human resources director for Families First, a social services agency in southern Vermont. Mr. Dodd earned an M.A. degree in International/Intercultural Training from the School for International Training in Southern Vermont, and a B.A. in Hispanic Studies from the University of Southern Maine.

Carter Elliott

Carter Elliott joined the Atlanta Community Food Bank in July 200, as the Manager of the Atlanta Prosperity Campaign (APC). The APC is a broad-based collaborative of social service organizations, governmental agencies, businesses, and financial institutions dedicated to promoting financial stability for working families in metropolitan Atlanta. Prior to joining the Food Bank, Mr. Elliott worked at United Way of Palm Beach County, Florida, as Director of the Palm Beach County Prosperity Campaign. He was integral to the development and start-up of the Palm Beach County program. The program was designed to help working families build assets, by connecting family economic and educational supports with community investment strategies. The program empowered working residents of Palm Beach County to move toward financial independence through education, economic development, and homeownership. In early 2007, the program received the national Best Practices Award from United Way of America, as being a model program for other United Ways around the country to replicate. Mr. Elliott has over 15 years experience working in the nonprofit community. He has been the Chief Financial Officer at a community development corporation, managed grant operations, as well as provided IT and Human Resources support. Mr. Elliott graduated from Auburn University in 1979, with a B.S. in Business and received his M.B.A. from the University of Alabama.

Julie Farwell

Julie Farwell has been the Statewide Earned Income Tax Credit (EITC) Coordinator working through Community Action of Nebraska since 2008. Graduating Summa Cum Laude, Ms. Farwell obtained A.A.S. degrees in both Legal Administration and Human Services. Ms. Farwell is an active member of the National Community Tax Coalition (NCTC) and involved with the Asset Building Working Group and the Advocacy Working Group associated with the NCTC. Advocating for rights of the low income population, Ms. Farwell serves on several committees throughout Nebraska to change policy and create better living conditions for the less fortunate. As the Coordinator of the Statewide Coalition, she has brought together many different Federal, State, and local agencies to strengthen financial education and asset building strategies throughout Nebraska. She has worked to increase the volunteer base for the Volunteer Income Tax Assistance (VITA) sites in rural Nebraska, coordinated efforts to create a statewide yearly survey used to gather data from VITA site clients, and facilitated trainings for VITA volunteers. She also has her hand in maintaining the Community Action of Nebraska EITC website and in facilitating a multitude of meetings and webinars statewide concerning financial education, EITC, and asset building. Ms. Farwell serves on the Nebraska Statewide Individual Development Account (IDA) group and the Community Action of Nebraska IDA committee, which are working together to build strong, lifelong assets for deserving individuals and families. In her spare time, Ms. Farwell also serves as a Court Appointed Special Advocate volunteer and loves working with children. Believing strongly in the purpose of the EITC and its ability to bring individuals and families out of poverty, she continues her efforts daily to spread the word about tax credits for the low-income population and its usefulness in asset-building for their future.

Kari Finley

Kari Finley, Financial Services Manager for Goodwill Industries of the Southern Rivers, is a champion for community asset building. As the Financial Services Manager, Ms. Finley directs the organization's asset development programs that educate and encourage individuals to build financial wealth. This year, under the direction of Ms. Finley, Goodwill's first Volunteer Income Tax Assistance (VITA) site in the Chattahoochee Valley, which continues to operate full-time and year round, was recognized as Georgia's highest producing site. Year to date it has filed 1,242 tax returns, generating approximately \$1.9 million back to the community. In addition to promoting the Earned Income and Child Tax Credits through VITA, the financial services program focuses on five core areas:(1) budget/money management,(2) banking and credit card basics, (3) understanding/repairing credit, (4) paying for college, and (5) buying a home. Ms. Finley first joined Goodwill Industries of the Southern Rivers in 2006 as the Media and Events Manager where she was responsible for all public relations, internal and external communications as well as project

management of the organization's two fundraising events. Prior to joining Goodwill, Ms. Finley spent 3 years working as the city government reporter for WTVM-TV in Columbus, Georgia. She began her broadcasting career working as the bureau reporter for WKAG-TV in Clarksville, Tennessee. Ms. Finley graduated with honors from Cornell University in 2002 with a B.S. degree in Communications with a concentration in Applied Economics and Management. While at Cornell, she was a 4-year varsity swimmer and an employee of the university's Office of Planning, Design, and Construction. In addition to her role as Goodwill's Financial Services Manager, Ms. Finley is a licensed Georgia real estate agent with Rose Anne Erickson Realty, LLC; member of the Columbus Board of Realtors; and a member of the Chattahoochee Valley VITA Coalition.

Teinique Gadson

Teinique Gadson is the Executive Director of the Neighborhood Improvement Association (NIA), Inc. in Savannah, Georgia. NIA is a private, nonprofit community development cooperation designed to promote positive change in distressed communities by improving physical, economic, and social conditions. NIA services include development of affordable housing of single family homes, first-time homebuyer's education, financial education, and asset development. Through its asset development outreach, NIA is the lead agency for the Chatham Savannah Asset Development Coalition (CSADC). CSADC is a community based collaborative of social service organizations, governmental agencies, business and financial institutions dedicated to promoting financial education and stability for working individuals and families in Savannah, Chatham County, and surrounding areas. Ms. Gadson has 8 years of experience in participation in the Volunteer Income Tax Assistance (VITA) program and recently became the chair of the coalition under her leadership role as Executive Director. She is responsible for promoting and establishing VITA sites within Chatham, Bryan and Effingham counties. She also provides technical support for upcoming VITA sites within the Southeast region. She holds a Bachelor of Arts degree in Business Administration from St. Leo University and has received certifications from Georgia Department of Community Affairs for Housing Counseling and Education Techniques and for CCH Taxation and Specialized Knowledge and Application. She is a member of the National Community Tax Coalition. She is actively involved in consumer financial education, asset development, and wealth building. She loves and supports the Internal Revenue Service VITA program, working hard in making sure taxpayers understand and take full advantage of the Earned Income Tax Credit.

Cicely Garrett

Cicely Garrett, Atlanta Prosperity Coordinator-Volunteer Income Tax Assistance program, has been a member of the Atlanta Community Food Bank family since 2008. She had 6 years

prior experience with the Community Tax Aid program in Washington, D.C. A lifelong volunteer, she is involved with the local community as Board Member for the Atlanta Non-profit Professionals, Friends of Washington Park Event Co-Chair, and a Georgetown Alumni Admissions Ambassador Interviewer. She holds a B.S.B.A. degree with a concentration in Finance and New & Small Business Management from Georgetown University and a Master of Public Policy degree with a concentration in Non-profit Management from The George Washington University in Washington, D.C.

Gena Gunn

Gena Gunn serves as Project Director and Director of Asset Building in States and Coalitions at the Center for Social Development (CSD) at Washington University's Brown School. Ms. Gunn has extensive project management, program development, and policy advocacy experience in the areas of asset-building, asset policy coalition development, and workforce development assistance for low- to moderate-income households and marginalized populations. She leads efforts to identify systemic barriers experienced by vulnerable populations and to advance effective solutions through coalition building, advocacy, and legislative change. Her work with CSD primarily involves policy research analysis and consultation with community-based asset-building programs, State and Federal policymakers, and advocate groups. Ms. Gunn's program development and policy advocacy work focus on asset building, coalition development, and community economic development assistance for low- and moderate-income households and marginalized populations. Her research focuses on identifying and advancing asset-building policy strategies for State and regional coalitions. Prior to joining CSD, Ms. Gunn developed, managed, and directed the first State Individual Development Account (IDA) Program in Missouri while working for East-West Gateway Coordinating Council and Council of Mayors organization in St. Louis, Missouri. She continues to counsel individual States regarding IDA policy and programs and other asset-building policies to nonprofit organizations and the Federal government. Ms. Gunn earned a bachelor's degree from the Southern Illinois University in Carbondale, Illinois, and a business management master's degree from Fontbonne University in St. Louis.

Donna Gunter

Donna E. Gunter began working with the Division of Family and Children Services in 1987 as an AFDC Caseworker, Sr. in Fulton County. This is the largest county in Georgia. She advanced in her career by becoming a Caseworker Principal, then a Supervisor for the Child Care Unit and then a Supervisor for one of the Employment Services units. She then left Fulton County to become a Training Project Leader in the State's training unit. In this position she was responsible for maintaining, developing, and training various curriculum for staff statewide in the Economic Support Section of DFCS. Four years later she left this

position to become the TANF Unit Manager. In this position she is responsible for policy interpretation and dissemination, program administration, statewide contracts, program evaluation and monitoring, consultation and support to field staff, budgeting, Federal Reporting and State reporting. Donna has a heart for strengthening families so that parents, children and other caretakers can achieve their greatest potential. She has a BA in Psychology from Duke University and a Master of Divinity from the Interdenominational Theological Center.

Monica Hammond

Monica Hammond serves United Way of Metropolitan Atlanta as the 211 Outreach Marketing Manager. She began working with United Way as a Client Referral Agent. Previous experience includes work in county government as a Senior Group Advisor for the Fulton County Department of Family and Children Services. Ms. Hammond recently graduated from Mercer University with a major in organizational leadership.

Laura Hayes

Laura Hayes is Senior Associate at The Hatcher Group, a public policy and communications firm that works exclusively with nonprofit organizations and foundations. Ms. Hayes focuses on raising the profile of programs that help low-income populations, such as SNAP/Food Stamps, the Women, Infants and Children program and the Earned Income Tax Credit (EITC), through innovative and effective outreach strategies at the State and national level. In her work around the EITC, she has created publications for advocates and policymakers to increase program participation and build political support, including “The Earned Income Tax Credit and The Volunteer Income Tax Assistance Program: How Elected Officials Can Get Involved in Outreach.” Ms. Hayes spearheaded the Food Stamp Challenge in 2007, which challenged Members of Congress to live on an average food stamp budget of approximately \$3 per day for 1 week. Many members took on the challenge and blogged daily about the difficulty of buying nutritional food on the restricted budget. The project gained significant national media attention. Prior to joining The Hatcher Group in 2004, Ms. Hayes served as Communications Director for the U.S. Senate Finance Committee, where she developed media strategies on a wide variety of public policy issues ranging from health care and welfare to tax policy and international trade. Prior to the Finance Committee, she served as Deputy Communications Director for Senator Max Baucus (D-MT) and as Legislative Assistant for former Congressman Bill Luther (D-MN). Ms. Hayes has also worked on a number of campaigns, including Montana Governor Brian Schweitzer’s 2000 U.S. Senate race. Ms. Hayes holds a bachelor’s degree in English and political science from the University of Colorado.

Karen Heisler

Karen Heisler is the Director of Asset Development at Rural Dynamics, Inc., which serves Montana, Wyoming, North Dakota, and South Dakota with programs and partnerships to “help youth, individuals and families achieve economic independence.” The organization also works with the Northern Plains Initiative (NPI), a partnership between rural northern plains tribes and communities, through which money is re-granted to community organizations to promote asset building initiatives. In addition, NPI is working with local community organizations in the four States to create and support asset building coalitions. Housed within the Asset Development Department is Tax Help Montana, a collaborative effort of community organizations that provide Volunteer Income Tax Assistance and promote the Earned Income Tax Credit throughout the State. The Family Economic Security Program is a holistic program that assists low-income individuals and families reduce barriers to homeownership and education. This program includes the use of behavioral economics and a peer-based support meeting called Prosperity Club. Rural Dynamics also offers credit counseling services, financial education, and housing counseling.

Steve Holt

Steve Holt and his Washington, DC-based firm HoltSolutions provide evaluation, research, management, and public policy consulting services to government, foundations, and non-profit organizations, including the Aspen Institute and the Annie E. Casey Foundation. A graduate of Harvard Law School, Holt has served as Block Grant Director for the City of Milwaukee, led the Milwaukee Jobs Initiative, and been a lobbyist at the state and federal levels on welfare, employment, and tax policy. Holt is the author of the Brookings Institution’s *The Earned Income Tax Credit at Age 30: What We Know*. His most recent publications address expansion and consolidation of refundable tax credits, cumulative marginal tax rates facing lower-income workers, Earned Income Tax Credit compliance issues, and EITC advance payment.

Joy Hunt

Joy Garlin Hunt currently serves as the Program Associate for Asset Building at Neighborhood Partnerships in Oregon where she manages the program evaluation and data collection efforts of the largest network of Individual Development Account providers in the country. In this capacity she helps organizations use evaluation data to set performance goals and to measure and describe their success. She also coordinates trainings, provides direct technical assistance, and monitors compliance with State law. Ms. Hunt holds a B.A. degree in English Language and Literature from the University of Virginia and a master's degree in Urban and Regional Planning from Portland State University. After graduating from the University of Virginia, Ms. Hunt served as a Teach for America teacher and youth worker in

Washington, D.C., for 4 years prior to moving to Oregon.

Tom Jacobson

Tom Jacobson joined Rural Dynamics, Inc. (RDI) as Executive Director in September 2003. His responsibilities include providing strategic direction for the development and administration of RDI's initiatives, programs, policy agendas, and public relations efforts. He has led this 41-year-old nonprofit agency into expanding its financial counseling programs to assist consumers as they move along an economic continuum from dependence to independence. Along with financial counseling RDI provides asset development programs including free tax preparation, housing counseling, access to public benefits, Individual Development Account programs, and financial education. RDI uses a systemic approach in its work and acts as a catalyst for regional partner development, advocacy, and policy development. RDI is instrumental in helping individuals and communities across the Northern Plains region recognize a vision for personal and collective economic growth through systemic change. Mr. Jacobson earned a bachelor's degree in Business Administration from the University of Great Falls and a Master's Degree in Public Administration from the University of Wyoming. Most recently, he served as Treasurer on the Board of Directors for the National Foundation for Credit Counseling and as Chair of the Board of Directors for the Montana Nonprofit Association. He was a charter board member of Montana Financial Education Coalition and a board member for NeighborWorks Montana and for the United way of Cascade County. Mr. Jacobson is also an adjunct faculty member in the graduate studies program at the University of Great Falls.

Otis Johnson

Mayor Otis Johnson was elected in November 2003 and re-elected in November 2007 to become Savannah, Georgia's 64th mayor. Mayor Johnson is the second African-American to hold this position. Mayor Johnson is nationally known in the field of community building and youth development. He served as the 2009 Chair of the National League of Cities Council on Youth, Education, and Families and is a member of the boards of the Mary Reynolds Babcock Foundation, the Coastal Regional Commission of Georgia, Georgia Municipal Association, and MDC. Mayor Johnson was Executive Director of the Youth Futures Authority, an Annie E. Casey Foundation initiative, from 1988–1998. In 1999, he began a 4-year term on the Savannah Chatham Board of Education. Mayor Johnson retired as Dean of the College of Liberal Arts and Social Sciences at Savannah State University in 2002. He earned a Master of Social Work degree from Clark Atlanta University in 1969 and a Ph.D. degree in Social Welfare from the Heller School at Brandeis University in 1980.

Richard Keith

Richard Keith manages the Office of Financial Empowerment, located in the City of San Antonio's Department of Community Initiatives. He oversees the City's Volunteer Income Tax Assistance free tax preparation program, the Fair Housing and Foreclosure Prevention Counseling programs, and the City's Asset Building programs including financial literacy education, the Bank On San Antonio initiative, and Individual Development Account matched savings accounts for college tuition, home ownership and vehicle purchase. Richard has more than 12 years of experience coordinating community development, affordable housing and social service programs in the United States and Mexico. He earned his B.A. degree in Liberal Arts from the Evergreen State College and a Master in Public Health degree from the Lyndon B. Johnson School of Public Affairs, University of Texas at Austin.

Penny King

Penny King currently serves as a Community Affairs Specialist at the Federal Deposit Insurance Corporation (FDIC), Division of Supervision and Consumer Protection (DSC), Atlanta Regional Office. She began her career at the FDIC in Dallas, Texas on February 25, 1991, in the Division of Liquidations, liquidating assets and assisting with failed banks. In 1997, she joined DSC's Community Affairs Program, to promote the Community Reinvestment Act, economic and community development, and to motivate partnerships between financial institutions and community-based organizations to revitalize communities. Ms. King ensures equal access to credit, works with lenders and the public to revitalize communities and serves as an intermediary to further fair lending objectives. Ms. King was relocated to Washington, D.C., where she served as the Special Assistant to the Chief of the Community Affairs Branch, that lead to her involvement in a number of initiatives on Capitol Hill to stimulate and promote financial literacy. Ms. King earned a Bachelor of Arts and Sciences degree in Business Communications and Psychology and a Master of Arts and Sciences interdisciplinary degree in Business Communications and Counseling from Dallas Baptist University in Dallas, Texas.

Suzann Knight

Suzann Knight has provided financial management education for low- and moderate-income individuals and families for over 20 years. Initial involvement with the Earned Income Tax Credit (EITC) was providing outreach for the AARP free tax preparation sites to increase the number of eligible EITC recipients. By 2004 there were 2 Asset Building Coalitions sponsoring a Volunteer Income Tax Assistance (VITA) site and in the same year, Ms. Knight established (and currently chairs) the New Hampshire Statewide EITC Alliance with the Internal Revenue Service (IRS) Stakeholder Partnerships, Education, and Communication program (SPEC), AARP Tax Aide, VITA sites, asset building coalitions, and collaborating

agencies as members. The mission of the Alliance is to share best practices, training and research to increase the number of taxpayers claiming the EITC and to increase the financial security of low- and moderate-income individuals and families. Ms. Knight was instrumental in establishing an Alliance website, increasing the number of Asset Building Coalitions as well as encouraging AARP and VITA to work together and share volunteers. Within the Alliance, she pilots new approaches of reaching the EITC population and then provides the model for replication. Ms. Knight has a Master of Occupational Education degree, a Master of Science degree in family and Consumer Studies, and is a Certified Financial Planner. She has written numerous asset building/financial management curricula and publications and has trained educators to present the material.

Laura Lester

Laura Lester is the Advocacy and Education Director with the Atlanta Community Food Bank. After earning a J.D. degree from the University of California-Hastings and an M.P.H. degree from Emory University, Ms. Lester worked as an attorney with Atlanta Legal Aid Society on a public health initiative at The Carter Center and as Associate Vice-President for Programs at the CDC Foundation.

MarRonde Lotson

MarRonde Lumpkin-Lotson is the Director of the City of Savannah's Department of Economic Development where she heads up such initiatives as the city's Asset and Wealth Development Program, the city's Business Retention and Expansion Program, the Minority and Woman-Owned Business Enterprise Program and oversees the Savannah Entrepreneurial Center. Each of these programs offered by the department contributes to city's vision statement of "economically thriving for all its citizens." Ms. Lumpkin-Lotson began her career in municipal government in Thunderbolt, Georgia, where she held the post of Town Manager for 6 years. She had the distinction of being not only the first African American manager, but also the first woman manager and the youngest one. During her tenure in Thunderbolt, Ms. Lumpkin-Lotson lead the town in numerous successes in organizational improvements. She restructured Thunderbolt's finances and guided the town back to a fiscally healthy position, introduced technology in operations, improved the city's water and sewer system, and developed a robust capital improvement program that included the development and construction of the Thunderbolt's Public Works facility and Town Hall Complex—all while keeping the town's millage rate at historic lows. Ms. Lumpkin-Lotson earned her Bachelor of Business Administration degree in 1993 and a Master of Public Administration degree in 2000, both from Savannah State University. In 2006, Ms. Lumpkin-Lotson was named one of our Georgia's "Top 40 Under 40 Business and Governmental Professionals" by Georgia Trend magazine. She is also a graduate of Leadership Savannah's

2002 Class. She is active in her community and holds several professional, civic, and social positions in various organizations.

Kim Manuel

Kim Manuel is responsible for all customer and technical support, training, and premier accounts for Small Firm Services (SFS). She joined Universal Tax Systems (UTS) in 1992 and held a number of key positions before becoming Vice President of Premier Accounts in 2005. She also oversees the relationship with the Internal Revenue Service and the contract to supply tax software and training for 10,000+ volunteer tax assistance sites and walk-in offices. In her 19 years with UTS and later SFS, Ms. Manuel has been Director of National Relationships, Senior Project Manager, Customer Service Manager and also worked in the Accounting Department.

Mike Monahan

Mike Monahan is the Director of the Pro Bono Project of the State Bar of Georgia. In addition to providing pro bono support to programs and local bar associations, his work currently includes helping courts develop law information centers and implementing webcast, “live help,” and other technology to deliver legal information resources to low-income persons and to provide distance learning opportunities and support for volunteer lawyers and legal aid advocates in Georgia. Mr. Monahan is the staff liaison to the State Bar of Georgia Access to Justice Committee and the State Bar Military and Veterans Pro Bono Committee. He is a Fellow of the Lawyers Foundation of Georgia, a Supreme Court of Georgia Mentor for the State mandatory lawyer mentoring program and Advisor to the Supreme Court of Georgia Civil Justice Committee. In addition to his J.D. degree from the West Virginia University College of Law, he holds a B.A. in Spanish from Wheeling Jesuit University and an M.A. degree in Latin American Literature and Linguistics from West Virginia University.

Peter Ruark

Peter Ruark is a Planning/Research Associate for the Michigan League for Human Services, where he advocates for public policies benefiting low-income Michigan residents. He has written analyses and given presentations on such topics as workforce development, adult learning, public assistance, family self-sufficiency, wage mobility and the Earned Income Tax Credit. He currently facilitates the Michigan Statewide Earned Income Tax Credit Coalition and is on the Board of Directors of the National Association of Social Workers—Michigan Chapter, serving as Vice-President of Social Policy. He also is active in several national groups, including the Economic Analysis Research Network and the Working Poor Families Project. Before coming to the League in 2001, he directed an educational after-

school program for at-risk children in Grand Rapids, taught English at the university and primary school level in China, and worked in various capacities in the mental health field. Mr. Ruark has a Bachelor of Arts degree in philosophy from Calvin College and a Master in Social Work degree with a concentration in policy, planning and administration from Western Michigan University.

Nancy Russell

Ms. Russell is Chief Financial Officer for Landau Uniforms Incorporated (Landau), a leader in the medical and corporate apparel business. Prior to joining Landau Ms. Russell served as the Vice President of Finance for Bryce Corporation. Ms. Russell started her career with Ernst & Young providing audit and tax services to privately owned and emerging business. Ms. Russell holds a Bachelor of Science degree in Accounting from Purdue University and is a Certified Public Accountant. She is a member of the American Institute of Certified Public Accountants as well as the Tennessee Society of Certified Public Accountants.

Beverly Santicola

Beverly Santicola, President and CEO of U.S. Government Grants, is a national training consultant with expertise in grant writing, nonprofit leadership, project management, and community development. Since 2001 she has trained more than 2,500 nonprofit organizations throughout the United States, including city, county, State and Federal government agencies; schools, colleges and universities; hospitals and health care providers; churches, faith based organizations and other nonprofit organizations. Santicola remains active in the field of grant writing and works with a team of affiliates that have generated more than \$100 million in grants for their clients over the past 8 years. As Executive Director of a nonprofit organization between 1989 and 2001, Ms. Santicola led numerous projects that won State and national awards for excellence, including the AFL-CIO National Labor-Management Award, Work in America—Search for Excellence Award, Best Practices Award from U.S. Departments of Education and Labor, and the Governor’s Award for Team Excellence. Ms. Santicola is a Certified Federal Grants Administrator, as well as a Federal grants reviewer. She has over 25 years of experience in working with the U.S. Department of Education, Labor, and Health and Human Services, as well as experience with the National Centers for Disease Control and Office of Minority Health. Beverly serves as a volunteer Executive Director for the Center for Rural Outreach & Public Services. Most recently, she co-developed a model program for youth-led rural development called Growing Rural. Ms. Santicola is a member of the American Association of Grant Professionals and of the Greater Houston Grant Writers Network.

Kaye Schmitz

Kaye Schmitz began her career with the IBM Corporation. During her 15 years with IBM, Ms. Schmitz held several marketing positions, counting among her clients such giants as Blue Cross/Blue Shield, Vistakon, and Winn-Dixie Stores. While at IBM, Ms. Schmitz volunteered for United Way of Northeast Florida and was later hired as its Vice President of Marketing. She brought innovative techniques and creative processes to United Way. At the end of 5 years, she formed her own consulting company, KDS Communications, and was hired by United Way as the Executive Director of the RealSense Prosperity Campaign, a financial stability service provider for low-to-moderate income clients that includes free tax preparation, free financial education, and matched savings accounts. Since its inception in 2003, the Federal dollars in Earned Income Tax Credit brought back to Northeast Florida through the RealSense volunteers grew by more than 800%. In the fall of 2008, Ms. Schmitz, along with three other co-conveners, began the Florida Prosperity Partnership, a statewide version of coalitions like RealSense, and in March 2009 was hired as Executive Director. Since then, she has been on board, she has organized the infrastructure, grown the membership to more than 110 organizations, hosted two statewide meetings with national speakers, and formed a relationship with a Florida legislator to hold the first ever Florida Prosperity Caucus, at which an additional 20 legislators signed on. Ms. Schmitz is a nationally recognized speaker on prosperity practices, and was honored at the National Press Club in Washington, D.C., with a “Best Practice Award” by the National Disability Institute. She was appointed by Jacksonville Mayor John Peyton, to his “Mayor’s Commission on the Status of Women,” and was elected to the Steering Committee of the National Community Tax Coalition.

Lucy Smith

Lucy Smith has worked for the Department of Family and Children Services since 1985 in DeKalb and Gwinnett Counties in various positions, including caseworker, supervisor, administrator and Deputy Director. In 2007, she came to the State office to help oversee Georgia's initiative to improve its Food Stamp Accuracy Rate. In November 2008, Ms. Smith started in her current position as Unit Manager over Food and Nutrition programs administered by the State of Georgia which includes The Emergency Food Assistance Program, Commodity Supplemental Food Program, Nutrition Ed, SNAP Outreach, and Food Stamp policy.

Skye Thompson

Skye Thompson is currently the Benefits Outreach Coordinator for the Atlanta Prosperity Campaign, an initiative of the Atlanta Community Food Bank. Before coming to the Food

Bank, she completed her Master's degree in Social Work at Georgia State University in 2008. For her final project in graduate school, she worked with the Food Bank on the Benefits Outreach Program that she now manages. During her graduate studies, Ms. Thompson had several opportunities to work in different social service environments, leading her to her current work with public benefits.

Jeffrey Thompson

Jeffrey Thompson has coordinated a Volunteer Income Tax Assistance site for the past 4 years for Tyson Foods employees and has also assisted with recruiting and training employees to provide free tax assistance in multiple languages. Prior to this position, he served as a supervisor in production and material handling for Tyson Foods and was also a manufacturing supervisor at the Peterbilt Motor Company. Mr. Thompson served in the United States Army for 13 years. During his time in the Army he served as a Green Beret in the 5th Special Forces Group (Airborne) and served tours of duty in Germany, Saudi Arabia, Kuwait, Iraq, Jordan, and other areas throughout the Middle East. He also served in combat during Operation Desert Storm.

Leigh Tivol

Leigh Tivol is Director of Savings & Financial Security at CFED, the Corporation for Enterprise Development. She works to promote programs and public policies that help low-income children and adults save and build assets. She was a primary contributor to the 2009–2010 Assets & Opportunity Scorecard, and she presents the Scorecard frequently to advocates and policymakers around the country. Prior to joining CFED in 2006, Ms. Tivol was an advocate for community development and affordable housing policy in Indiana. She contributed to the development of statewide policy initiatives relating to Individual Development Accounts (IDAs), homeownership education and counseling, predatory lending, and Indiana's housing trust fund. From 1999 to 2002, Ms. Tivol directed one of the first IDA programs in the country. Ms. Tivol holds bachelor's degrees in Sociology and French from Brown University, and a Master of Public Administration degree from Indiana University's School of Public and Environmental Affairs.

Lisa Washington-Thomas

Lisa Washington-Thomas is the Technical Assistance Branch Chief of the Division of State and Territory Temporary Assistance for Needy Families (TANF) in the Office of Family Assistance (OFA), Administration for Children and Families. She possesses a breadth of experience in a wide array of social services programs, such as TANF, Aid to Families with Dependent Children, Job Opportunities and Basic Skills, and Emergency Assistance and Child Care programs. She is a project officer for a number of OFA Initiatives. Ms.

Washington-Thomas earned a B.A. degree from Georgetown University.

Stefanie Whorton

Stefanie Whorton currently works as an Assets for Independence Resource Coordinator. Among her assignments, Ms. Whorton is the liaison for the Child Care Bureau and the Office of Head Start for the Financial Stability for Families with Young Children Initiative focusing on early childhood. She also coordinates and promotes outreach surrounding refundable tax credits, Earned-Income Tax Credit, and free tax preparation. Ms. Whorton provides technical assistance to AFI grantees in New Jersey, Pennsylvania, West Virginia, Maryland, Washington, D.C., Delaware, and Virginia. Ms. Whorton received her bachelor's degree from Belmont Abbey College in North Carolina. During her year of service as a Jesuit Volunteer she worked at Philadelphia VIP as a paralegal recruiting and training pro bono attorneys and coordinated a Low Income Taxpayers Clinic and Volunteer Income Tax Assistance site for undocumented farm workers. Ms. Whorton received her Master of Public Policy degree from the Thomas Jefferson Program in Public Policy from The College of William and Mary. While pursuing her master's degree, she worked with the Office of Community Service on the Social Services Block Grant program.

Erika Wiggins

Erika Wiggins, a single mother of four children, is currently a senior at South University pursuing a degree in Health Care Management. As a full-time student, Ms. Wiggins embraces the work and her future aspiration, not only for her immediate family but also for others in her hometown. Since beginning the program in Healthcare Management in 2007, she has regularly been named to the Dean's List as she started her academic career with as much conviction and hard work as she has carried throughout her tumultuous life. Ms. Wiggins has taken advantage of all aspects of coalition services since 2008. Her taxes are prepared through the Volunteer Income Tax Assistance program, and she qualifies to receive Earned Income Tax Credit. She also benefits from the Alternative Rapid Anticipation Loan, has received second chance banking with financial education, and will be enrolling in the Individual Development Account for homeownership. "One thing I've learned at South, and I continue to learn, is you can't reshape your life by staying on the same level. In order to change circumstance, you have to change the behavior and that kind of positive change will take things to the next, and hopefully, higher level."

John Wilcox

John Wilcox is Deputy Director for Corporate Voices for Working Families. Mr. Wilcox manages Corporate Voices' family economic security work, which focuses on engaging the business sector on issues affecting lower-wage working families. Recent examples of this

work include original research on workplace flexibility for lower-wage workers; an annual Earned Income Tax Credit Employer Guide that encourages employers to act as intermediaries between their lower-wage workers and a range of State and Federal social support services; and a workplace lactation toolkit designed to help employers give their lower-wage employees positive choices about infant health and nutrition. He is also responsible for Corporate Voices' internal operations, including project management, financial oversight and reporting, staff development, IT, legal and fundraising. Mr. Wilcox has worked in the nonprofit sector for the majority of his career, most recently as General Counsel to the Center for Policy Alternatives, a nonpartisan, nonprofit 501(c)(3) focused on public policy and leadership in the fifty States. He holds a J.D. degree from Washington University in St. Louis and a B.A. degree from Dickinson College.

Jackie Wilks-Weathers

Jackie Wilks-Weathers is the Executive Director of the Center for Financial Independence & Innovation, Inc (CFII), a nonprofit organization dedicated to helping individuals with disabilities and their family members advance their financial independence and security. Ms. Wilks-Weathers' 15-year career has been dedicated to the nonprofit sector, where she has fought against child abuse and food insecurity, and now is working to help individuals with disabilities build assets. During her tenure, Ms. Wilks-Weathers secured significant public and private funding for CFII to sustain and grow its asset-building initiatives, including the Alternative Financing Program (Credit-Able), financial education, the Volunteer Income Tax Assistance program, an Individual Development Account program, and the Asset Alliance. In addition to her director-level responsibilities, she presents at local, State and national conferences on alternative financing strategies including loan loss reserve pool models, delinquency prevention and pre- and post-loan education. She also served as an Instructor at Georgia Perimeter College for the Nonprofit Certificate Program in the Continuing & Corporate Education Department. Ms. Wilks-Weathers holds a Master of Public Administration degree from New Mexico State University with a concentration in public policy, as well as bachelor degrees in Sociology and Religion from Wofford College in Spartanburg, SC.

Carlis Williams

Carlis Williams serves as the Southeast (Region IV) Regional Administrator for the U.S. Department of Health and Human Services, Administration for Children and Families (ACF) in Atlanta, Georgia. ACF provides comprehensive and supportive programs for vulnerable children and families, which include Temporary Assistance for Needy Families, Child Welfare, Child Care, Child Support Enforcement, and Head Start. The region consists of eight southeastern States: Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina,

South Carolina and Tennessee. As the Regional Administrator, she also provides executive leadership for emergency preparedness and response, and serves as the National Lead Regional Administrator for ACF Healthy Marriage Initiative and as Co-lead for the Office of Family Assistance. Ms. Williams is the recipient of the U.S. Department of Health and Human Services Secretary Award for Distinguished Service as well as the Clark Atlanta University Dean's Public Sector Award in recognition of her extraordinary achievements for the well-being of children and families in the southeast community.

Tiki Windley

Tiki Windley is currently a program manager in the Earned Income Tax Credit Carolinas program at MDC, Inc., in Chapel Hill, North Carolina. Ms. Windley spent several years working in the nonprofit sector where she witnessed the importance of nonprofit organizations on low-income communities. She has also assisted the North Carolina Indian Economic Development Initiative in addressing the economic and social disparities that plague their native communities. Ms. Windley graduated from the Elizabeth City State University with a major in business administration and a minor in economics and finance. She is currently a candidate to graduate the Executive Master's of Public Administration Program at North Carolina Central University.
