

Promoting Financial Capability in NC: Report from the Assets Learning Conference

Sponsored By



NC A&T Alumni Foundation Event Center
200 North Benbow Rd
Greensboro, NC 27411

October 22, 2014

AGENDA

9:30-9:50 am Registration

Choose concurrent sessions, have coffee or tea, network, browse information tables, and learn more about the Assets Learning Conference and conference organizers.

Opening Plenary

Ballroom 103

9:50-10:00 Welcome from Sponsor and Organizers: Why This Conference?

Frank McCain, Vice President, Community Investment & Impact, United Way of Greater Greensboro

Donna Gallagher, Executive Director, The Collaborative, on behalf of North Carolina Assets Alliance and Greensboro Asset Building Coalition

Craig May, Senior Vice President, Carolinas Market Manager, JPMorgan Chase

10:00-10:20 Summary, Highlights, Tools and Examples from the Assets Learning Conference

Raquel Lynch, Director of Strategic Initiatives, Crisis Assistance Ministry

Fran Rosebush, Programs Manager, Assets & Opportunity Network, CFED

Colleen Briggs, Vice President, Financial Capability & Consumer Initiatives, JPMorgan Chase

Lucy Gorham, Acting Executive Director, UNC Center for Community Capital

Sarah Glover, Community Impact Manager, United Way of Greater Greensboro

Concurrent Sessions 10:30-11:30

Access to Small-Dollar Credit (Board Room): In North Carolina we have eliminated some of the most predatory small-dollar lending practices, however, there is still a need to produce safe and affordable short-term, small-dollar loan options to meet consumer needs. Learn how the four local measures on the Assets & Opportunity Scorecard (<http://assetsandopportunity.org/localdata/>) relate to the demand for access to alternative credit. And hear lessons and insights from creative and responsible alternative payday lending products being piloted around the country. Presenter: Fran Rosebush, Program Manager, Assets & Opportunity Network, CFED (www.cfed.org)

Financial Capability: Design and Implementation (AFEC Room): Come learn about a new program design toolkit that will help you take concrete actions to expand asset-building services into new arenas. Presenter: Sofia Crisp, Executive Director, Housing Consultants Group (www.gchcnc.org)

Insights from Behavioral Economics (Library): Learn how financial capability services and tools benefit from the insights of the field of behavioral economics and the concept of "scarcity". Presenter: Sarah Glover, Community Impact Manager, United Way of Greater Greensboro (www.unitedwaygso.org) on behalf of The Center for Advanced Hindsight at Duke University (<http://advanced-hindsight.com/>).

Scaling Innovations in Financial Capability (Ballroom 103): Innovative financial tools and resources at the pilot and proof of concept stage continue to flourish throughout the country. However, there's an opportunity to replicate and expand these proven models to reach more financially underserved individuals. In this session, we will discuss paths to scale, obstacles and opportunities to increase the impact of financial capability programs. Presenter: Colleen Briggs, Vice President, Financial Capability & Consumer Initiatives, JPMorgan Chase (<http://www.jpmorganchase.com/corporate/Corporate-Responsibility/financial-solutions-lab>)

11:30-12:00 Break, Get Boxed Lunches (Ballroom 103)

Lunch Plenary 12:10 – 1:10 pm

Ballroom 103

The Circle of Disparity (Ballroom)

Learn about how disparities in education, health, employment, and access to credit interact to require us to think about assets differently when working for economic success of the whole community. **Speaker: Victor Galloway, President, Victor Galloway Influencer Group, LLC;** past board member North Carolina Assets Alliance.

Concurrent Sessions 1:20-2:20

Asset Building in the Workplace (Board Room): Learn about several organizations' recent innovations in establishing employer relationships to provide safer, more convenient financial products and additional wrap-around services to help workers set financial goals, build or repair credit, or access other benefits. Presenter: Lucy Gorham, Acting Executive Director, UNC Center for Community Capital (<http://ccc.unc.edu>)

Building Financial Capability for Youth Savers (Ballroom 103): Learn how nonprofits leverage technology solutions and important access points to build financial capability among young people. Presenter: Donna Gallagher, Executive Director, The Collaborative (www.cultureofsavings.org)

Entrepreneurship as an Asset in Communities of Color (AFEC Room): A growing number of individuals are turning to entrepreneurship to supplement their incomes and become self-sufficient. Hear about how other communities are promoting entrepreneurship as an asset building strategy and what this means for addressing the growing racial wealth gap. Presenter: Sadaf Knight, Policy & Research Director, The Support Center (www.thesupportcenter-nc.org)

Closing Plenary and Call to Action 2:30-3:00

Ballroom 103

Presenters: Fran Rosebush and Donna Gallagher
The Assets & Opportunity Network
CFED tools
Final thoughts
Next NCAA meeting in Charlotte in 2015