

Margins to Mainstream

Community Foundations Advancing Family Economic Success

A Peer-Exchange Workshop

October 24-25, 2003

Annie E. Casey Foundation / 503 Charles Street / Baltimore, Maryland 21202

Agenda

Friday, October 24	
12.00 p.m.	Buffet Lunch <i>Optional</i> For those participants who arrive early, and want to begin meeting and greeting each other, please avail yourself of a buffet lunch and get the networking going!
1:00 p.m. SHARP	Welcome and Participant Introductions Miriam Shark <i>Senior Associate, Annie E. Casey Foundation</i> Janet Topolsky <i>Aspen Institute Community Strategies Group</i> Cindy Ballard <i>Coalition of Community Foundations for Youth</i> Agenda Overview: How to Use this Workshop to Help Advance Family Economic Success Janet Topolsky
2:15 p.m.	Owning Up: Moving Poor Families from the Margins to the Mainstream Michael Sherraden <i>Director, Center for Social Development</i> <i>Washington University, St. Louis</i> Now more than a decade ago, Michael Sherraden charted a new direction for public and private anti-poverty policy when he wrote <i>Assets and the Poor: Toward a New American Welfare Policy</i> . In this groundbreaking work, Sherraden took America's blinders off, exposing perverse public policies that punish the poor who try to get ahead while subsidizing middle and upper-income classes as they acquire more wealth. He also proposed a new mechanism that could help <i>everyone</i> move toward building assets: Individual Development Accounts. In this session, Sherraden will help us understand why, as we walk with families who are trying to achieve economic success, we must head toward the destination of building their assets. As Michael has said, " While income feeds people's stomachs, assets change their heads. " Let's see what he can do to ours!

Friday October, 24 - *continued*

3:15 p.m.	Reflection Exercise/Break After a few questions for Michael, you'll sit with your Table Cluster, and begin to process what implications his insights might have for your work.
4:00 p.m.	The FES Journey to Date Bob Giloth: <i>FES Definition and urban evolution</i> <i>Senior Associate, Annie E. Casey Foundation</i> Miriam Shark: <i>FES rural roots and direction</i> <i>Senior Associate, Annie E. Casey Foundation</i> Bob and Miriam will take respective turns to help us understand the genesis and evolution of the Annie E. Casey Foundation's journey with its partners so far in plotting and advancing a Family Economic Success agenda across the nation. Earn it, Keep It, Grow It: <i>A Community Foundation Thinking and Action Framework for Advancing FES</i> Janet Topolsky In this session, we will walk through: <ul style="list-style-type: none">• <i>A Thinking and Action Framework for Advancing FES, including the FES Program Design Roadmap</i>• <i>How to use the Framework at home, kids!</i>• <i>How we will use it here in the Workshop</i>
5:30 p.m.	Reflection Exercise: Creating an FES Action Question for Your Foundation With the introduction in mind, you'll get to know more about your table's Peer-Advice Cluster as you examine the FES Indicators and develop an FES Action Question for your foundation.
6:00 p.m.	Wrap Up Friday and Set Up Saturday
6:30 p.m.	An FES (<i>Friendly Exchange and Schmooze</i>) Reception <i>At the Annie E. Casey Foundation Office Lobby / 701 St. Paul St. Baltimore, Maryland 21202</i> Ralph Smith: <i>Welcome and Remarks</i> <i>Senior Vice President, Annie E. Casey Foundation</i> We will saunter or ride the few blocks (roadmap provided!) to the Foundation's 701 Building for a day-ending informal exchange, nosh and refreshments.

Saturday, October, 24

7:15	<p>Assemble in Hotel Lobby for Rides to the Meeting</p> <p>Buses to shuttle you back to the session at the Casey Foundation offices will be located in the driveway outside the hotel lobby with “CCFY” on them. The first bus will depart at 7:15 a.m. and the last bus will leave at 8:15 a.m.</p>
7:30 a.m.	<p>Breakfast Buffet</p>
8:30 a.m.	<p>Set Up the Day</p>
8:45 a.m.	<p>Heading toward the <i>Earn It Outcome</i></p> <p>In this session, we will focus on the <i>Earn It</i> outcome: <i>Working families can earn a living that allows them to survive and thrive in the community</i>. This outcome means that a family’s working members can find a job that pays a family-sustaining wage, maintain it, and advance their careers and wages over time within their community or region.</p> <p><u>Story Time</u></p> <ul style="list-style-type: none">• A Marin Community Foundation Story Chantel Walker <i>Program Officer – Community Development</i> <i>Novato, California</i>• A West Central Initiative Story John Molinaro <i>Vice President – Program</i> <i>Fergus Falls, Minnesota</i> <p><u>Tool Time</u></p> <ul style="list-style-type: none">• Connectinc.: The <i>Earn It</i> Piece Jackie Savage <i>President, Connectinc</i> <i>Battleboro, North Carolina</i>• Fannie Clac Robert Chambers <i>President – Fannie Clac</i> <i>Lebanon, New Hampshire</i>• Lean Manufacturing & Workforce Development Tools John Molinaro
10:15 a.m.	<p>Reflection Exercise: What was in this for my foundation?</p> <p>Pondering the <i>Earn It</i> stories and tools, your Peer Advice Cluster will glean the best relevant nuggets of action wisdom to add to your FES Rules of the Road.</p>

Saturday, October, 24 – continued

10:45 a.m.	Break
11:00 a.m.	<p>Heading toward the <i>Keep It Outcome</i></p> <p>Now, we will focus on the <i>Keep It</i> outcome: <i>Working families can access a full range of financial services and programs that help them protect their income and lower their cost of living in the community and region.</i> This means that a family has a mainstream banking relationship, a good and improving credit record, and is taking advantage of all the tax benefits and public and private programs that will help them protect their income, save for the future and lower their cost of living in the community or region.</p> <p><u>Story Time</u></p> <ul style="list-style-type: none">• A Greater Milwaukee Community Foundation Story Doug Jansson <i>President & CEO</i> <i>Milwaukee, Wisconsin</i> <p><u>Tool Time</u></p> <ul style="list-style-type: none">• Connecting Low-Income Families with Financial Services: A Rapid Overview and Useful Tools Cathleen Mahon <i>Community Development Consultant</i> <i>Brooklyn, New York</i>• EITC Campaigns and VITA Siting Jean Hunt <i>Executive Director, Campaign for Working Families</i> <i>Philadelphia, Pennsylvania</i>• Connectinc: The <i>Keep It</i> Piece Jackie Savage <i>President, Connectinc</i> <i>Battleboro, North Carolina</i>
12:30 p.m.	<p>Reflection Exercise: What was in this for my foundation?</p> <p>With your Peer-Advice Cluster, you can determine what is best to keep from the <i>Keep It</i> discussion – in your mind and on your local action horizon.</p>
1:00 p.m.	Buffet Lunch

Saturday, October, 24 – continued

2:00 p.m.	<p>Heading toward the <i>Grow It</i> Outcome</p> <p>Next, we will focus on the <i>Grow It</i> outcome: <i>Working families and their communities are accumulating and maintaining assets that are gaining value over time</i>. This means that family members are saving, advancing their education, purchasing homes and any assets they need to keep their job or run their own business; they are maintaining them; that the value of those assets in the community is increasing over time; and that the community’s institutions and stakeholders are working together to support low-income families.</p> <p><u>Story Time</u></p> <ul style="list-style-type: none">• A Baltimore Community Foundation Story Tom Wilcox <i>President</i> <i>Baltimore, Maryland</i> <p><u>Tool Time</u></p> <ul style="list-style-type: none">• Beehive.org: The <i>Grow It</i> Piece Alec Ross <i>Vice President for Business Development, One Economy Corporation</i> <i>Washington, DC</i>• Increasing the Value of Manufactured Housing Paul Bradley <i>Vice President</i> <i>New Hampshire Community Loan Fund</i>• Self-Help Housing Dana Jones <i>President</i> <i>Southern Maryland Tri-County Community Action Committee, Inc.</i>• Individual Development Accounts IDA Round Robin by Participants (time permitting)
3:30 p.m.	<p>Reflection Exercise: What was in this for my foundation?</p> <p>Topic: How can you use ideas and inspiration from this <i>Grow It</i> session to grow your own FES back home? <i>Discuss amongst your Peer-Advice Cluster.</i></p>
4:00 p.m.	<p>Break</p>
4:15 p.m.	<p>Taking It All Back Home: FES Peer Advice and Action Plans</p> <p>In this session, your table Peer-Advice Cluster foundations will offer each other some final advice, and each foundation will develop a “Back Home” plan, using the ideas, reflection and advice you gleaned throughout the workshop to address your FES question.</p>

Saturday, October, 24 – *continued*

6:00 p.m.

Wrap Up and Adjourn

And don't forget your *Take the Learning Home* Grant Applications!

Note: For those returning to the hotel following the meeting, buses will leave starting at 6:00 p.m. The last bus will leave 503 N. Charles Street at 6:30 p.m.