



ISSUE NUMBER 1 ■ SUMMER 2006

THE RuFES Round-up!

Advance Your RuFES Objectives!

Participate in NEW RuFES Action-Learning Opportunities

As a member of the **RuFES Alumni Network** (see below, if you're asking "What is the RuFES Alumni Network?"), you are already on the RuFES track. And because of that, and the leadership and investment you've already shown in building family economic success, the Annie E. Casey Foundation (AECF) is inviting you to engage in some new action-learning opportunities that will further advance your community, regional, statewide or organizational RuFES goals.

Four RuFES-related events are scheduled for the summer and fall of 2006. To help you participate, AECF is offering support ranging from inclusion in peer-advice conference calls to coverage of registration fees and some travel, food and lodging costs for RuFES-related events.

These opportunities are available only to a limited number of applicants from among previous participants in RuFES Action-Learning events. So review the options, apply and start planning now! Questions or comments? Contact John Molinaro—jmol@aspeninst.org—202.736.5856.

What is the RuFES Alumni Network, you ask?

The RuFES Alumni Network consists of any community, agency or organizational leader who has participated in a *Strengthening Rural Families* or *Rural Family Economic Success* (RuFES) Action-Learning event since 2003. If you received this, you are in the RuFES Alumni Network, specifically

Action-Learning for the
Rural Family Economic Success
(RuFES) Alumni Network

Sponsored by the
Annie E. Casey Foundation

Coordinated by the
Aspen Institute
Community Strategies Group

What's inside:

Special invitations —
and incentives — to participate
in RuFES-related events:

CFED's 2006
Assets Learning Conference

National Community
Tax Coalition's Fifth Annual
EITC Conference

Site visit to
Southern Good Faith Fund,
a center of RuFES excellence

RuFES peer-advice
topical conference calls



because you were on a team that attended and developed a RuFES Action Plan at one of the following AECF-supported events:

STRENGTHENING RURAL FAMILIES ACTION LEARNING INSTITUTES

- RuFES Community Foundations Learning Institute—Wye, Maryland / June 2003
- Strengthening Rural Families: An Action-Learning Institute for NACo County Teams (co-sponsored by the National Association of Counties)—Clark County, Nevada / November 2004
- Strengthening Rural Families: An Action-Learning Institute for NRFC Collaborative Teams (co-sponsored by the National Rural Funders Collaborative)—Santa Fe, New Mexico / December 2004

- Strengthening Rural Families: An Action-Learning Institute for Iowa Area Teams (co-sponsored by the Institute for Social and Economic Development)—Des Moines, Iowa / September 2005
- Strengthening Rural Families: An Action-Learning Institute for New England Teams (co-sponsored by Casey Family Services)—Concord, New Hampshire / November 2005
- Strengthening Rural Families: An Action-Learning Institute for Oregon County Teams (co-sponsored by the National Association of Counties and the Association of Oregon Counties)—Pendleton, Oregon / January 2006

SITE VISITS TO “CENTERS OF RUFES EXCELLENCE”

- Connectinc.—Battleboro, North Carolina / March 2004
- West Central Initiative—Fergus Falls, Minnesota / April 2004

QUESTIONS OR COMMENTS?

CONTACT JOHN

MOLINARO —

JMOL@ASPENINST.ORG

— 202.736.5856

OPPORTUNITY

1 Assets Away!

Why: Learn much, much more about best-practice family asset-development strategies—that is, program approaches, tools and policies that help working families *Keep It* and *Grow It*.

What #1: This national Assets Learning Conference, sponsored by CFED, offers the leading exchange of peer expertise focused on asset building for low-income families and communities. See www.assetsconference.org

CFED’s 2006 Assets Learning Conference

A LIFETIME OF ASSETS: BUILDING FAMILIES, COMMUNITIES AND ECONOMIES

for complete conference details.

What #2: On Wednesday, September 20, we’ll gather over a working dinner for a *RuFES Alumni Network Reflection and Peer-Exchange Session*. This session will be

a chance to participate in a structured dialogue about how to apply what you’ve learned at the conference to your RuFES work. Plus, you’ll have the opportunity to network with RuFES friends and colleagues—and to discover new ones!

When and where:

September 19–21, 2006—Phoenix, Arizona

AECF's contribution:

AECF will cover the registration fees for a limited number of RuFES Alumni who attend the Assets Conference, selected in part on the

basis of the applicant's RuFES-related work. Get your application in early! Support is limited to two participants per RuFES Alumni Team.

Your participation:

You cover your travel and lodging expenses,

attend the *RuFES Alumni Network Reflection and Peer-Exchange Session* on Wednesday, September 20, and complete a brief Action/Progress/Ideas Report that the Aspen Community Strategies Group (Aspen CSG) will send you after the event.

To apply: Use the enclosed RuFES Action-Learning application #1 or use the form at www.aspenmsg.org/applications. Your RuFES Action-Learning application must be submitted before August 16, 2006, and approved before you register for the conference.

OPPORTUNITY

2 Tax & Save!

National Community Tax Coalition's Fifth Annual EITC Conference

BUILDING PROSPERITY FOR WORKING FAMILIES

Why: Strengthen your Earned Income Tax Credit (EITC) efforts and flex your *Earn It and Keep It* muscle by learning leading EITC practices and meeting EITC innovators from across the country.

What: NCTC's conference is the premiere national gathering for community volunteers, organizations and policymakers who develop and deliver EITC services and assistance. The conference's core sessions will address Advocacy and Tax Policy and Community-Based Tax Preparation, with a special focus on program innovation, leadership, scale, and sustainability—including how to link EITC to other

RuFES goals, such as building family savings and assets. For more information: www.tax-coalition.org/events/oct2006/index.htm.

When and where: October 11–13, 2006—Los Angeles, California

AECF's contribution:

AECF will cover registration, travel and lodging for selected local teams of at least two people (including at least one RuFES Alumni). Support is limited to two participants per team and will be based in part on applicants' RuFES- and EITC-related work. Apply now! Although your team's composition is a local decision, we recommend you include your EITC cam-

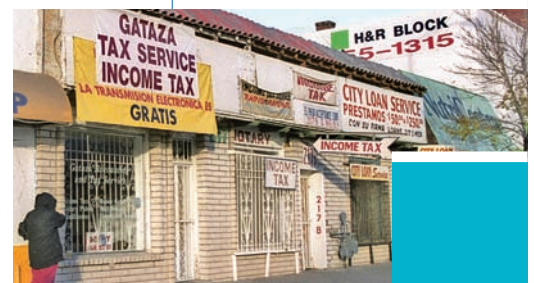
paign coordinator and an asset-building partner or a partner helping to shape your local effort.

Your participation:

Complete a brief Action/Progress/Ideas Report that Aspen CSG will send you after the event. If your team has more than two people, you must cover the additional costs—or determine on your own how to share costs among participants after the conference.

To apply: Use the enclosed RuFES Action-Learning

application #2 or use the form at www.aspenmsg.org/applications. Your RuFES Action-Learning application must be submitted before August 28 2006, and approved before you register for the conference.



MARK YOUR CALENDAR NOW! APPLICATION DETAILS FOR THIS EVENT WILL FOLLOW IN AUGUST. IN THE MEANTIME, FOR MORE INFORMATION ON SOUTHERN GOOD FAITH FUND: WWW.GOODFAITHFUND.ORG

OPPORTUNITY

3 Seeing is Believing!

Why: See how one dedicated, innovative and risk-taking rural-based organization has organized to integrate RuFES *Earn It, Keep It and Grow It* strategies to maximize outcomes for low-income rural families.

What: An intensive learning site visit to the Southern

Good Faith Fund (SGFF) in rural Arkansas. SGFF is a **nationally recognized Center of RuFES Excellence** that focuses on increasing the incomes and assets of low-income and low-skilled residents of the Delta in Arkansas and Mississippi.

Among SGFF's many RuFES-related activities:

- An acclaimed **Career Pathways** program focused on moving low-income workers onto career ladders in the health care, education, business, industrial maintenance, welding and manufacturing industries.
- One of the nation's foremost rural **Individual**

Site Visit to Southern Good Faith Fund

A CENTER OF RUFES EXCELLENCE

Development Account programs, helping low-income families save to buy their first home, make improvements to their home, pay for post-secondary education or job training, or start their own business.

- A finely tuned **business development center** that helps people launch new businesses, and helps existing business owners succeed by providing them with training, business counseling and technical assistance.
- A highly effective **public policy** program that conducts research and advocacy to have a broader and more systemic impact on improving the incomes and assets of working families by changing public policy.

For more information on Southern Good Faith Fund: www.goodfaithfund.org

When and where:

November 13-15, 2006—Arkansas (specific location to come).

AECF's contribution: AECF will cover the costs for the program, meals, materials and a partial travel/lodging stipend for up to 10 two-person teams from the RuFES Alumni Network.

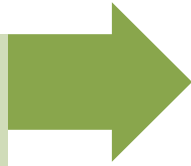
Your participation: Create a follow-up RuFES Action Plan on site, and complete a brief Progress Report that Aspen CSG will send you after the event. You must cover any team travel and lodging costs that exceed AECF's contribution.

To apply: Application details will follow in August. But mark your calendar now!



OPPORTUNITY

4 Hear Here!



RuFES Peer-Advice Topical Conference Calls

Why: Advance your RuFES efforts by tackling the strategies and steps that most challenge you today.

What: Starting this fall, Aspen CSG will conduct a series of **RuFES Peer-Advice Topical Conference Calls** for people and organizations in the RuFES Alumni Network. These teleconferences will give you the chance to learn about a RuFES-related idea, tool, policy or strategy from experts—and to get advice from your RuFES peers about how to address your challenges in advancing it.

When and where:

Beginning in Fall, 2006— from wherever you happen to be!

AECF's contribution: Free advice! Connections with RuFES peers! Plus, we will structure each call to maximize participation and get you the advice you seek.

Your participation: Help us plan now for these teleconferences by going to www.aspenconfig.org/surveys and completing a brief survey about topics that concern you the most. The topics with the most interest win!

Once we have a topic and time chosen, we will send the RuFES Alumni Network a notice, and you may sign up to participate in the call. *Stay tuned!*

After the call takes place, we will send you an online request to evaluate the call, and tell us what difference it made in your RuFES action progress.



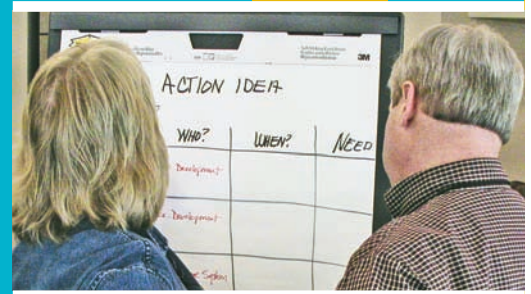
FILL OUT THE RuFES SURVEY AT WWW.ASPENCSG.ORG/SURVEYS — AND THEN STAY TUNED!

New RuFES Resource Online

The Annie E. Casey Foundation has launched a new RURAL FES website, highlighting rural strategies, reports, data and other resources. Check here for news of publications and events that can help you advance your RuFES efforts: www.aecf.org/initiatives/ruralfes

Reminders:

- For RuFES participation in **CFED's Assets Learning Conference** (see page 2), fill out the enclosed **Application Form #1** and submit it before August 16. AECF will cover the registration fees for up to 25 participants.
- For RuFES participation in the **NCTC Fifth Annual EITC Conference** (see page 3), fill out the enclosed **Application Form #2** and submit it before August 28. AECF will cover registration, travel and lodging for up to seven local teams of at least two or more people, one of whom must be a RuFES Alumni.
- For RuFES participation in the **site visit to Southern Good Faith Fund** (see page 4), just mark your calendar for November 13-15, 2006 and then wait for application details. AECF will cover the costs for the program, meals, materials, as well as a partial travel and lodging stipend for up to 10 two-person teams from the RuFES Alumni Network.
- For participation in **RuFES peer-advice topical conference calls** (see page 5), fill out the survey at www.aspenCSG.org/surveys and then stay tuned! The calls will begin in the fall, and we'll notify you once we've had a chance to review survey responses.
- **Questions?** Aspen CSG—or, more formally, the Aspen Institute Community Strategies Group—is working with the Annie E. Casey Foundation to coordinate and facilitate your opportunity to participate in RuFES-related events. Contact John Molinaro at Aspen CSG by emailing jmol@aspeninst.org or calling 202.736.5856.



ABOUT THE RUFES ROUND-UP!... NO, YOU HAVEN'T SEEN IT BEFORE. BUT YES, YOU'LL SEE IT AGAIN. WATCH YOUR EMAIL, BECAUSE THIS NEWSLETTER IS THE FIRST OF MORE TO COME...

INSTRUCTIONS

- The Aspen Institute Community Strategies Group (Aspen CSG) is coordinating participation in these RuFES Action-Learning events. If you have any questions, contact John Molinaro at jmol@aspeninst.org or 202.736.5856.
- **Please do not register for the conference until this application is approved!** If you are awarded AECF support, Aspen CSG will provide you with detailed instructions for registering, so that Aspen CSG can pay your registration fee directly to CFED.
- AECF's support will cover the full cost of conference registration at the early-bird rate.
- Support is limited to two participants per RuFES team or organization.
- Support recipients agree to attend the full conference and the RuFES Alumni Network Reflection and Peer Exchange working dinner on Wednesday, September 20th.
- **Applications are due by August 16, 2006**, and will be processed in the order they are received.
Submit one application per participant.

CONTACT INFORMATION

APPLICANT NAME PHONE E-MAIL DATE

TITLE ORGANIZATION

ADDRESS

CITY STATE ZIP

WHICH RUFES ACTION-LEARNING EVENT(S) DID YOU ATTEND?

- AECF RuFES Institute for Community Foundations, Wye River, MD—6/2003
- Connectinc. Site Visit, Battleboro, NC—3/2004
- West Central Initiative Site Visit, Fergus Falls, MN—4/2004
- AECF/NACO Institute for County Teams, Las Vegas, NV—11/2004
- AECF/NRFC Institute for Collaborative Teams, Santa Fe, NM—12/2004
- AECF/ISED Action-Learning Institute for Iowa Rural Teams, Des Moines, IA—9/2005
- AECF/Casey Family Services Institute for New England Teams, Concord, NH—11/2005
- NACO/AOC Institute for Oregon County Teams, Pendleton, OR—1/2006

**APPLICATION DUE
AUGUST 16**

YOU'RE CLOSE, BUT NOT QUITE DONE. CONTINUE FILLING OUT FORM ON NEXT PAGE...

REMEMBER: DO NOT REGISTER FOR THE CONFERENCE UNTIL THIS APPLICATION IS APPROVED.

WHO ELSE FROM YOUR RUFES ACTION TEAM IS APPLYING FOR AECF SUPPORT?

LIST ONE PERSON ONLY

IF ADDITIONAL TEAM MEMBERS OR LOCAL PARTNERS WILL ATTEND THE CONFERENCE — OTHER THAN YOU AND ANY PERSON JUST LISTED — THEY ARE WELCOME AT THE NETWORKING DINNER. PLEASE PROVIDE THEIR NAMES AND EMAIL ADDRESSES HERE:

AECF IS KEEN TO TRACK YOUR RUFES PROGRESS. PLEASE REPORT ACTIVITIES, PROGRAM INNOVATIONS, POLICY CHANGES, NEW PARTNERS OR FUNDING, AND ON-THE-GROUND RESULTS FOR FAMILIES STEMMING FROM YOUR LOCAL RUFES AGENDA AND ACTION PLAN. *(Focus on updates since your last report to Aspen CSG or AECF. Attach additional page if needed; if you already have a report, news article, or other relevant material, feel free to include it.)*

WHAT DO YOU HOPE TO ACCOMPLISH BY ATTENDING THE CFED ASSETS LEARNING CONFERENCE? *(150 words or less, please!)*

SUBMIT YOUR APPLICATION TO ASPEN CSG PROGRAM ASSOCIATE KELLY MALONE, USING ANY OF THESE METHODS:

Fax. 202.293.0525 (write ATTN: Kelly Malone on the cover page)

Post. Aspen Institute—CSG / One Dupont Circle NW, Suite 700 / Washington DC 20036

Online or PDF. www.aspenccsg.org/applications

Deadline: August 16, 2006

QUESTIONS OR COMMENTS? CONTACT JOHN MOLINARO — JMOL@ASPENINST.ORG — 202.736.5856

Application for AECF support to attend

NCTC Fifth Annual EITC Conference OCTOBER 11-13, 2006 ■ LOS ANGELES

INSTRUCTIONS

- The Aspen Institute Community Strategies Group (Aspen CSG) is coordinating participation in these RuFES Action-Learning events. If you have any questions, contact John Molinaro at jmol@aspennet.org or 202.736.5856.
- **Please do not register or book travel/lodging for the conference until this application is approved!**
If you are awarded AECF support, Aspen CSG will provide you with detailed instructions for registering and booking your travel/lodging.
- AECF's support will cover the full cost of conference registration, travel and lodging.
- Support is limited to two participants per RuFES team or organization. At least one team member must be in the RuFES Alumni Network. Preference will be given to teams of two or three persons.
- Support recipients agree to attend the full event.
- **Applications are due by August 28, 2006**, and will be processed in the order they are received.

**APPLICATION DUE
AUGUST 28**

APPLICANT #1

APPLICANT NAME _____ PHONE _____ E-MAIL _____ DATE _____

TITLE _____ ROLE WITH EITC EFFORT _____

ORGANIZATION _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

APPLICANT #2

APPLICANT NAME _____ PHONE _____ E-MAIL _____ DATE _____

TITLE _____ ROLE WITH EITC EFFORT _____

ORGANIZATION _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

THERE'S MORE! CONTINUE FILLING OUT FORM ON NEXT PAGE...

REMEMBER: DO NOT REGISTER FOR THE CONFERENCE UNTIL THIS APPLICATION IS APPROVED.

IF ADDITIONAL TEAM MEMBERS WILL ATTEND, LIST THEM HERE, AND INDICATE THEIR ROLES IN YOUR EITC EFFORT:

WHICH APPLICANT IS IN THE RUFES ALUMNI NETWORK—I.E., WHICH ATTENDED A RUFES ACTION-LEARNING EVENT?

WHICH RUFES ACTION-LEARNING EVENT(S) DID YOU ATTEND?

- | | | |
|---|--|--|
| <input type="checkbox"/> AECF RuFES Institute for Community Foundations, Wye River, MD—6/2003 | <input type="checkbox"/> AECF/NACO Institute for County Teams, Las Vegas, NV—11/2004 | <input type="checkbox"/> AECF/Casey Family Services Institute for New England Teams, Concord, NH—11/2005 |
| <input type="checkbox"/> Connectinc. Site Visit, Battleboro, NC—3/2004 | <input type="checkbox"/> AECF/NRFC Institute for Collaborative Teams, Santa Fe, NM—12/2004 | <input type="checkbox"/> NACO/AOC Institute for Oregon County Teams, Pendleton, OR—1/2006 |
| <input type="checkbox"/> West Central Initiative Site Visit, Fergus Falls, MN—4/2004 | <input type="checkbox"/> AECF/ISED Action-Learning Institute for Iowa Rural Teams, Des Moines, IA—9/2005 | |

AECF IS KEEN TO TRACK YOUR RURAL EITC AND RELATED RUFES PROGRESS. PLEASE REPORT THE RESULTS TO DATE OF YOUR RURAL EITC, TAX ASSISTANCE, ASSET-BUILDING OR OTHER RUFES-RELATED EFFORTS. FOCUS ON WHAT HAS HAPPENED SINCE YOU LAST REPORTED TO ASPEN CSG OR AECF.

Include program innovations, policy changes, new partners or funders, and any data directly related to family outcomes—such as how many sites you are running, numbers of EITC returns filed, dollars returned to EITC filers, or how many EITC customers have connected to other RuFES strategies such as IDAs, credit repair, or financial skill-building—as well as the change over time on any of these. Attach an additional page if needed; if you already have a report, news article, or other relevant material, feel free to include it.

WHAT DOES YOUR TEAM HOPE TO ACCOMPLISH BY ATTENDING THE EITC CONFERENCE? (150 words or less, please!)

SUBMIT YOUR APPLICATION TO ASPEN CSG PROGRAM ASSOCIATE KELLY MALONE, USING ANY OF THESE METHODS:

Fax. 202.293.0525 (write ATTN: Kelly Malone on the cover page)

Post. Aspen Institute—CSG / One Dupont Circle NW, Suite 700 / Washington DC 20036

Online or PDF. . . www.aspenccsg.org/applications

Deadline: August 28, 2006

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