



Paving the Road to Financial Security Draft #8

March 20th and 21st, 2012
Houston, Texas

Meeting Framework

This year's meeting of the Asset Funders Network will serve as a forum for a series of in-depth conversations on the grantmaking strategies needed to help protect, rebuild, and grow the assets low-income families lost during the great recession.

Meeting Goals

The goals of the meeting include:

- Reflecting on the 20 year anniversary of Michael Sherraden's Book "Assets and the Poor" – What have we learned, what is the state of the asset building field, and what does it mean for our grantmaking.
- Discussing a vision for building financial security in America during the next 20 years.
- Engaging in a robust discussion among foundation colleagues regarding policy, practice, innovation, impact, and how we can leverage our influence and resources.
- Discussing how to promote sustainable homeownership, supporting integrated service delivery approaches, taking initiatives to scale, working with the Consumer Financial Protection Bureau, and responding to the Occupy Movement.
- Networking and learning from colleagues to inform your grantmaking

Meeting Agenda

Day 1 – March 20th

8:00 - 9:00am	Breakfast
9:00 – 9:30am	Welcome and Introductions <ul style="list-style-type: none">➤ Co-Chair - Annika Little – Bank of America➤ Chair of Planning Committee – Benita Melton – C.S. Mott Foundation
9:30 – 10:45am	Michael Sherraden – 20 Year Anniversary of his book – “Assets and the Poor” – An overview of the creation of a field and what we have learned over the past 20 years.
10:45 – 11:00am	Break
11:00 – 12:15pm	Building Financial Security in America: A 2020 Vision – Lisa Mensah – IFS The Aspen Institute – The next 20 years – A vision for the next 5 to 8 years as a way to focus resources and chart a course forward for the next 20 years.
12:15 – 1:15pm	Lunch
1:15 – 2:45pm	Strategic Conversations Series 1 Working with the Consumer Financial Protection Bureau Gale Hillebrand - Invited Building a public/private collaboration focused on advancing a policy and education agenda to rebuild and protect financial assets in low-income communities.
2:45 – 3:00pm	Break
3:00 – 4:30pm	Strategic Conversations Series 2 A. Promoting Alternatives to bad financial options in low-income communities <ul style="list-style-type: none">• Manny Hidalgo – Executive Director of Latino Economic Development Corporation• Laura Sparks – Citi Foundation B. Sustainable Homeownership - What does it look like today

5:00 – 7:30pm AFN Sponsored Appetizers & Networking

Day 2 – March 21st

7:30 – 8:30am Breakfast

8:30 – 8:45am Day 2 Opening Remarks

8:45 – 9:45am **The Occupy Movement** – What does it mean for us, how can we leverage the movement, what can we learn about building a movement, and how do we respond and support the movement?

- **Alan Jenkins – Executive Director of Opportunity Agenda**

9:45 – 10:45 **Roundtable Discussion - An open discussion among all meeting participants**
Advancing asset-building strategies in a rapidly changing political environment – What are working, what are the challenges, what are we learning?

10:45 – 11:00am Break

11:00 – 12:30pm **Strategic Conversations Series 3**
Integrated Service Delivery – Pulling it all together
Measuring the Impact of our Work

- **Facilitated by Annika & Beadsie**

12:30 – 1:30pm **Lunch**
AFN – Building our Capacity to support our members
Grow → Educate → Elevate → Influence

1:30 – 3:00pm **Strategic Conversations Series 4**

A. Going to Scale – how do we move from thousands to millions?

- **Janie Barrera – CEO Accion**

B. Promoting Microenterprise in a tight credit market

- **Eric Weaver – CEO Opportunity Fund**
- **Den Letendre or Susan Hopper from B of A**

3:00 – 3:30pm **Close**
➤ **Merle Lawrence – Co-Chair - Levi Strauss Foundation**