

Thank You for your commitment to Financial Empowerment!

Louisville Metro Community Services is thrilled to join with the National Disability Institute to sponsor this important convening, and we welcome and thank everyone in attendance. Whether you are here as a representative from the public, private or community sector, each of you will play a role in today's success.

Today will be a day of learning as we hear from national experts from NDI, the Corporation for Enterprise Development and the Center for American Progress. Equally important, it will be a day to network and discover new ways to collaborate so that we can help everyone in our community become better informed about increasing financial stability and building assets.

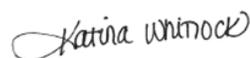
The Mission of the Department of Community Services is to improve the quality of life for all residents with an emphasis on poverty reduction and addressing the needs of vulnerable populations in the Louisville Metro Community. We need partners and allies like you to accomplish our mission. Together, we can continue to build a community-wide strategy that improves resources, accessibility and opportunities for all people.

Community Services champions the financial empowerment movement in our community in the following ways:

- We created the Financial Empowerment/economic Development team, as part of the Advocacy and Empowerment division, to focus asset-building initiatives on the low to moderate income population;
- We serve as the lead agency for Bank on Louisville whose partners have helped 16,000+ residents open new checking accounts and another 10,000+ access financial education;
- We represent Louisville on a national level as a member of the Cities For Financial Empowerment Coalition and as a Lead Local Organization in CFED's Assets and Opportunities Network; and
- We established a new Financial Empowerment Certification Program that provides training to service providers, equipping them with the tools and knowledge to move clients to a more stable future.

The Community Services team looks forward to continuing our work with other partners and agencies to help build a better economic future for all individuals and their families. I hope that today's work leads to the implementation of stronger resources and programs across our community and better services for residents of Louisville Metro. Thank you for your participation and commitment to making our community a better place to live.

Sincerely,



Katina Whitlock
Assistant Director, Louisville Metro Community Services



DEPARTMENT OF
**COMMUNITY
SERVICES**

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Welcome to Louisville's 2nd Annual Financial Empowerment Summit!

National Disability Institute began a movement almost ten years ago to increase the financial stability and capability of all people with disabilities and their families. Together, with partners like you, we work to challenge assumptions and build a new path to inclusive communities where all people with and without disabilities have the opportunity to be valued members of the economic mainstream. Through public education, pioneering projects and demonstrations, public policy development, and customized training and technical assistance activities, National Disability Institute has become a recognized leader across the country in supporting people across the spectrum of disabilities to find their paths to a better financial future. We believe in the power of collaboration and bringing together government, financial institutions, the business community, non-profit groups, educational institutions, and other stakeholders, to explore and commit to strategies of collective social impact. We applaud you for being a part of the conversation and a part of the solution to a set of issues that are both timely and long overdue – the advancement of financial capability and economic self-sufficiency for all people with disabilities and their families.

Working with the Department of Community Services and Bank On Louisville, National Disability Institute is enthusiastic about the efforts being made here, in Louisville, to bring people with disabilities into the economic mainstream. As the need grows for more Americans to learn about financial fundamentals, people with disabilities need to be part of developing strategies to enhance individual knowledge and skills to make informed financial decisions, manage money, credit, and debt, and plan for a better economic future. As part of the LEAD Center, the National Center on Leadership for the Employment and Economic Advancement of People with Disabilities, funded by the US DOL Office of Disability Employment Policy, NDI is proud to be working with the Mayor's Office and Louisville Metro Government to improve cross-system collaboration that integrates financial capability services into mainstream social and human service delivery systems to benefit economically vulnerable populations.

Our thanks to each of you for your commitment to innovation and social impact. We believe the work you are doing here will become a national model worthy of replication. We at NDI and the LEAD Center look forward to working with all of you to pioneer new pathways to a better economic future for Louisville citizens across the spectrum of disability.

Sincerely,



Michael Morris
Director, National Disability Institute



About The Front Cover:

The graphic on the front cover is comprised of the words and phrases most commonly used from last year's Summit participants, as found in the Vision Card comments.

Be sure to use the Vision Cards to share your thoughts, ideas, and opinions!

MORNING PLENARY

2ND FLOOR BALLROOM

Sign-in and Breakfast

8:00 - 8:30 am

Please take this opportunity to visit the resource tables located around the ballroom perimeter! (For list, see page 11)

Welcome and Introductions

8:30 - 9:45 am

Jere Downs, Event Emcee

Louisville Courier-Journal

Sadiqa Reynolds

Chief of Community Building

Louisville Metro Office of Mayor Greg Fischer

As Chief, Sadiqa Reynolds oversees the employees who operate the city’s Parks, Public Health and Wellness Programs, Animal Services, Human Relations Commission, Libraries, Zoom, Community Services, and the Safe and Health Neighborhoods Initiative.

The Honorable John Yarmuth

Representative, United States Congress

Congressman Yarmuth represents Kentucky’s 3rd Congressional District in the U.S. House of Representatives.

Keynote: Financial Capability for All: What’s Your Role?

Kate Griffin

Director of Savings & Financial Capability

Corporation For Enterprise Development

ABOUT

Corporation for Enterprise Development

The Corporation for Enterprise Development empowers low- and moderate-income households to build and preserve assets by advancing policies and programs that help them achieve the American Dream. As a leading source for data about household financial security and policy solutions, CFED understands what families need to succeed, promoting programs on the ground and investing in social enterprises that create pathways to financial security and opportunity.

ALL MORNING BREAKOUT SESSIONS ARE FROM 10 - 11:15 AM

MORNING SESSION A

2ND FLOOR CONFERENCE ROOM

Welcome and Introduction

Adam Hall
Fifth Third Bank

The New Workforce Innovation & Opportunities Act: The Impact on Economic Advancement

President Barack Obama signed the Workforce Innovation and Opportunity Act (WIOA) into law on July 22, 2014. WIOA builds on proven practices such as career pathways, work-based training, and regional economic approaches to improve employment outcomes for all job seekers, with and without disabilities. WIOA additionally offers new guidance to integrate financial education and financial capability strategies into youth programs and adult services to ensure workers have the financial skills to manage emergencies and retain employment. This workshop will focus in on aspects of the law that support employment and economic advancement for individuals with disabilities and how you can get involved in WIOA implementation at the federal, state and local level.

Michael Morris
National Disability Institute

VISION CARDS

We want to hear your feedback!

Look for a Vision Card throughout the day in every seat, and take a moment to reflect and share your insights.



Vision Card: Morning Plenary
Agency Name: _____
How does the information shared this morning inform the work you are doing?
[Empty box for response]

ALL MORNING BREAKOUT SESSIONS ARE
FROM 10 - 11:15 AM

MORNING SESSION B

**LOUISVILLE SUITE,
12TH FLOOR**

Welcome and Introduction

Melissa Johnson

National Association of Social Workers, Kentucky Chapter

Behavioral Economics: Our Feelings About Money

Discover the effect of emotional factors on people's financial decision making. Recognize that people often make decisions based on unreliable principles and not strict logic. People are so...well, HUMAN!

Dr. Kathy Cooter

Bellarmine Center for Economic Education

MORNING SESSION C

**ANDERSON CHAPEL,
1ST FLOOR**

Welcome and Introduction

Dave Matheis

Office of Vocational Rehabilitation

The Effects of Income on Benefits

Misinformation about the impact of earned income on Social Security disability benefits and resource limits continue to influence and control decisions regarding employment. This presentation will provide a BRIEF overview as well as resource information about work and benefits. Special needs trusts as a way for people to manage excess resources and not lose Medicaid eligibility will also be covered.

Carolyn Wheeler

Cabinet for Health & Family Services

Division of Developmental & Intellectual Disabilities

LUNCH PLENARY

2ND FLOOR BALLROOM

Resource Tables and Lunch

11:15 am - 12:00 pm

Please take this opportunity to visit the resource tables located around the ballroom perimeter!

Jere Downs

12 - 1:00 pm

Denise Belser

National League of Cities

Keynote: Disability and Poverty — Connecting the Dots

Rebecca Vallas

Center for American Progress



#LouFE

ABOUT

National League of Cities

The National League of Cities (NLC) is dedicated to helping city leaders build better communities. Working in partnership with the 49 state municipal leagues, NLC serves as a resource to and an advocate for the more than 19,000 cities, villages and towns it represents.

ABOUT

Center for American Progress

The Center for American Progress is an independent nonpartisan educational institute dedicated to improving the lives of Americans through progressive ideas and action.

ALL AFTERNOON BREAKOUT SESSIONS ARE
FROM 1:15- 2:30 PM

AFTERNOON SESSION D

**LOUISVILLE SUITE,
12TH FLOOR**

Welcome and Introduction

Merv Antonio

Center for Nonprofit Excellence

Developing Strategies for Integrating Financial Empowerment

Social services offer a number of “just in time” moments to provide financial capability strategies. Recognizing and capitalizing on these moments is key to integrating financial empowerment, financial education, and financial capability strategies into existing services. This workshop will take a closer look at the disability service system and benefits planning, home and community based services, and employment services to provide opportunities for financial empowerment.

Elizabeth Jennings

National Disability Institute

AFTERNOON SESSION E

**ANDERSON CHAPEL,
1ST FLOOR**

Welcome and Introduction

John Nevitt

Metro United Way

Providing Services That are Inclusive

Interactive role-plays and living with a disability simulations will raise awareness to disability and how we can remove barriers allowing participation for everyone. The presenters will share their personal stories and practical tips for interacting with people with disabilities.

David Allgood and Donna Fox

Center for Accessible Living

ALL AFTERNOON BREAKOUT SESSIONS ARE
FROM 1:15- 2:30 PM

AFTERNOON SESSION F

2ND FLOOR
CONFERENCE
ROOM

Welcome and Introduction

Tina Lentz

Louisville Metro Community Services and Bank On Louisville

Credit As An Asset

Credit As An Asset is a workshop for people who want to gain new information and tools to build or rebuild a good credit history. This workshop will help you think about your relationship with credit, why credit is so important, and plan how you will make financial products work for you to help increase your financial stability in the near term and your financial security in the long-term.

This workshop is being presented as a simulation so you can experience what your clients will hear and do by participating. Credit As An Asset will be presented around the community starting in January 2015, and will be open to everyone regardless of income or previous credit status. If you are interested in getting trained to facilitate the Credit As An Asset curriculum, please contact Caitlin Willenbrink.

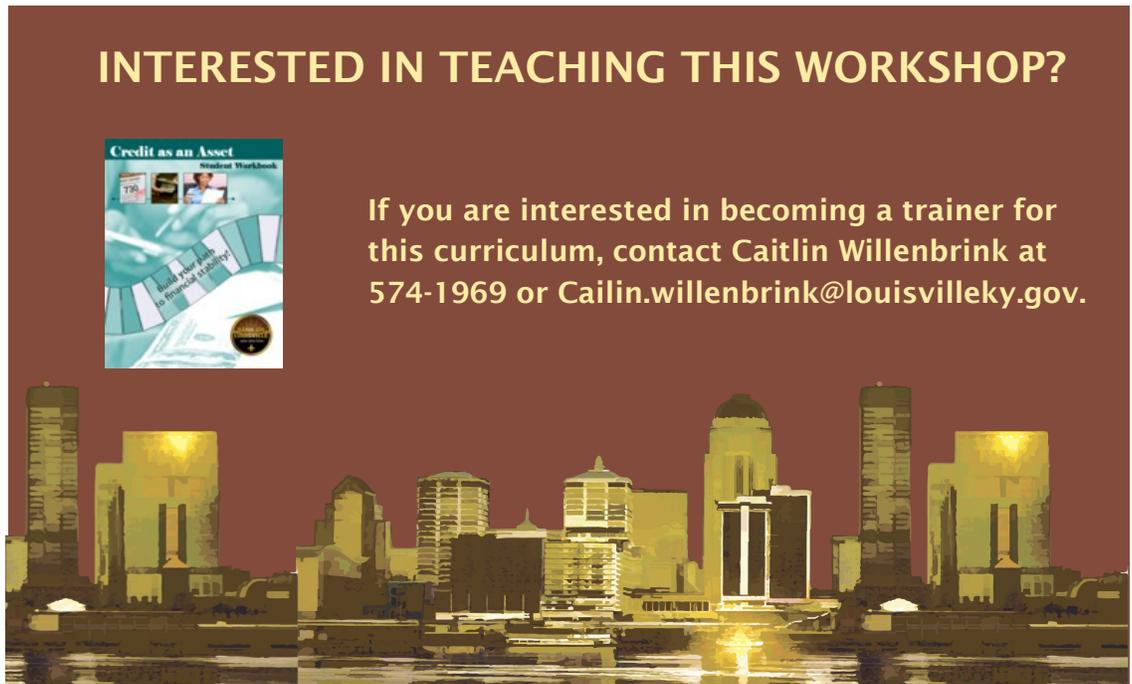
Caitlin Willenbrink

Bank On Louisville

INTERESTED IN TEACHING THIS WORKSHOP?



If you are interested in becoming a trainer for this curriculum, contact Caitlin Willenbrink at 574-1969 or Cailin.willenbrink@louisvilleky.gov.



AFTERNOON PLENARY

2ND FLOOR BALLROOM

Jere Downs

2:45 - 3:30 pm

Panel Discussion: Providing Integrated Services — Stories from The Field

Understanding the benefits of financial capability strategies and integration within community-based services is only the beginning. With implementation comes a new set of questions and challenges along with the potential for tremendous success. Join this closing plenary to hear from early implementers who are providing integrated services and the individuals who have successfully utilized these services to move forward on their path to a better financial future.

Moderated by **Elizabeth Jennings**

National Disability Institute

With **Marsha Berry** and **Natasha Krider**

Goodwill Industries and *Zoom Group*, respectively

Keynote: Pioneering Pathways to a Better Economic Future

3:30 pm

Closing remarks from **Michael Morris**, *NDI*

ABOUT

National Disability Institute

The mission of National Disability Institute is to build a better economic future for Americans with disabilities. We envision a world where people with disabilities have equal opportunity to achieve financial stability and independence as people without disabilities.



#LouFE

RESOURCE TABLES

This year's Summit is about economic inclusion and increasing the knowledge, understanding, and capacity of Louisville's service providers. Take advantage of the time allotted in the agenda to visit the various agencies, organizations, and representatives around the ballroom perimeter — meet the people already doing important work to improve financial capability in our disabled community, and share the important work you do! Conversations and knowledge of resources are always the beginning.

Bank On Louisville

Center for Accessible Living

Coalition for Workforce Diversity

Council of Developmental Disabilities

Goodwill Industries of Kentucky

GuardiaCare

Louisville Asset Building Coalition

National Associate of Social Workers, Kentucky Chapter

National Disability Institute

Office of Vocational Rehabilitation/Kentucky Assistive Technology

Planning Team Partner Table

MORNING PLENARY

JERE DOWNS

Louisville Courier-Journal

Jere Downs is a staff writer at the Louisville Courier-Journal, where she writes about food, the sustainable economy movement, personal finance, and the aftermath of the Great Recession. Downs, 49, is a graduate of the Columbia University Graduate School of Journalism and the University of Michigan.

Downs began her career at the International Herald Tribune in Paris, France before moving on to Pacific News Service in San Francisco and the Frontiersman, in Wasilla, Alaska. She was a member of the New York Times team awarded the Pulitzer Prize for breaking news coverage in the aftermath of the 1993 bombing of the World Trade Center.

In 1993, Downs began a 12-year career at the Philadelphia Inquirer, where she covered the impeachment of then-President Bill Clinton, unrest in the Middle East from a bureau in Jerusalem, the decline of inner ring suburb in the U.S., and transportation trends.

In 2005, Downs left journalism for two years to care full-time for her son while he recovered from Acute Lymphocytic Leukemia. In 2007, she joined the Courier-Journal to cover the labor movement and major employers like Ford Motor Company and General Electric. Her son George is now a healthy 8th grader at the Louisville Collegiate School. She is married to John Beasley.

KATE GRIFFIN

**Director of Savings & Financial Capability
CFED**

Kate Griffin is CFED's Director of Savings & Financial Capability. She has spent her entire career focused on financial inclusion and helping low-income families build and manage wealth. She worked internationally in the microfinance field, providing technical assistance to organizations in a dozen countries in Asia, Africa and Eastern Europe before joining CFED in 2012 to advance the goals of asset building and economic security in the United States.

Currently, Ms. Griffin oversees CFED's work in the area of savings and financial security, including matched savings accounts that enable low-income children, adults and families to build assets. She has been leading CFED's work to scale asset-building strategies within other large systems, such as TANF, Head Start, child welfare, child support, public health and other social services.

Prior to joining CFED, Ms. Griffin launched and managed the Solutions for the Poorest group at the Grameen Foundation. In that capacity, appropriate financial services were designed and made available to over 500,000 families in India, Ethiopia and the Philippines. She has also served as an adjunct faculty member at the Johns Hopkins School of Advanced International Studies (SAIS) and is widely published in the microfinance field.

Ms. Griffin holds a B.A. in international studies from Kenyon College and an M.A. from American University's School of International Service.

MORNING SESSION A

MICHAEL MORRIS

Director

National Disability Institute

Michael Morris, J.D. has over 35 years of experience in research, knowledge translation and system change activities advancing community participation and economic self-sufficiency for individuals across the full spectrum of disabilities. He has served as an advisor on advancing employment and economic freedom for people with significant disabilities to the US Department of Labor, Health and Human Services, and Education, as well as the Social Security Administration, the IRS, the FDIC, the Administration on Developmental Disabilities, and the Office of Community Services in the Administration on Children, Youth, and Families. He has developed over 20 demonstration projects at local, state, and national levels that have improved knowledge and service delivery for people with disabilities, their families, public agencies, and community nonprofit organizations.

He has an undergraduate degree from Case Western University, and a law degree is from Emory University School of Law. In 1981, Morris was named the first Joseph P. Kennedy Fellow in Public Policy and worked for Connecticut Senator Lowell Weicker as legal counsel to the U.S. Senate Subcommittee on Disability Policy. Other experiences include counsel to the U.S. Senate Small Business Committee and National Executive Director of United Cerebral Palsy Associations. During his 14-year tenure, his leadership put focus on assistive technology's role in employment, education, communications and daily living. Morris' proposal for policy development led to passage by Congress of the Assistive Technology Act.

In 2001, Morris established National Disability Institute to advance the social and economic independence of persons with disabilities through strategic investment and technical assistance activities nationwide. He is co-founder of the Real Economic Impact Tour (REI Tour), which over the past nine years resulted in new access to and use of EITC and other asset building

strategies for over two million individuals with disabilities, and receipt of over \$1.5 billion in tax refunds to low-income taxpayers with disabilities.

Morris co-authored two publications for the National Council on Disability, and in 2014, he coauthored the National Report on the Financial Capability of Adults with Disabilities based on data analyzed from the FINRA Financial Investment Education Foundation.

He currently is an advisor to the Department of Justice Community Employment Working Group (CEWG) on braiding public resources and development of integrated resource teams. He also facilitates for the US Department of Labor of a consortium of over 17 federally funded Research and Training Centers that share a common goal to advance competitive integrated employment outcomes for persons with disabilities across market sectors in diverse jobs.

MORNING SESSION B

KATHLEEN COOTER, PhD

Director

Bellarmino Center for Economic Education

Dr. Kathleen Spencer Cooter is Professor of Early Childhood/Special Education at Bellarmine University in Louisville Kentucky and directs the Bellarmine Center for Economic Education. Previous to Fall 2008, she was an Associate Professor of Special Education at the University of Memphis. In addition she served as outreach coordinator for the New Teacher Center, an exciting project working in conjunction with the Memphis City Schools to enhance teacher retention in urban schools. Dr. Cooter also served as principal investigator for the Tennessee Early Intervention System (TEIS) serving the needs of children of over 3000 families in West Tennessee.

Prior to joining the Special Education faculty at the University of Memphis, Dr. Cooter and a group of parents and committed community and university leaders raised some \$3 million and founded the Texas Christian University RISE School, a special school serving the needs of infants with Down Syndrome. In October of 2001, Dr. Cooter received the "Employer of the Year Award" from the Fort Worth business community for

MORNING SESSION B (continued)

her successes in employing adults with Down Syndrome as staff members at the TCU RISE School. Together with Starpoint School, a special school for students having learning disabilities, Dr. Cooter directed the teaching and research activities of both TCU's laboratory schools. Upon her leaving in December 2003, TCU announced that a new wing would be added to Starpoint School as a gift from a grateful benefactor and named in her honor.

Dr. Cooter has also held numerous administrative positions serving as an elementary principal, intermediate school principal, a central office special education director, and a middle school assistant principal. For the past eight years Dr. Cooter has served as the lead professor in a popular course developed for practicing school leaders in Texas and Tennessee known as the Principals' Fellowship. This program has been credited with turning around low performing schools' reading and writing scores. This work earned her with her colleagues The Urban Impact Award from the Council of the Great City Schools in 2008.

MORNING SESSION C

CAROLYN B. WHEELER

Provider Specialist
Cabinet for Health & Family Services
Division of Developmental & Intellectual
Disabilities

Carolyn B. Wheeler has a Master's in Special Education and over thirty years experience in program development,

training, and advocacy on behalf of people with disabilities and their families. While completing her Master's Degree at Syracuse University, she was instrumental in starting the Person to Person: Citizen Advocacy Program which recruits and matches local volunteers in a wide range of relationships with people with disabilities. She was recruited to work as a Program Specialist in the Developmental Services Division of Seven Counties Services from 1986 to 1990.

From 1990 to the present, she has been employed on a variety of projects with the Human Development Institute at the University of Kentucky. Carolyn was instrumental in the development of the Hart Supported Living Program, promotion of Person-Centered Planning practices for persons and agencies, and has also facilitated Business Development Planning teams to assist persons with disabilities to start their own small businesses. She is an expert in estate planning issues for people with disabilities and their families and has been instrumental in the development of Life Plan of Kentucky, which is a pooled special needs trust..

Carolyn is also a Provider Development Specialist with the Division of Developmental and Intellectual Disabilities and assists people interested in becoming certified to provide services through the Supports for Community Living or Michelle P Waivers. She attended the Work Incentives Planning Assistance training (WIPA) provided by the National Training and Technical Assistance Project and has attained certification as a Community Work Incentives Coordinator. Carolyn is providing training to supported employment specialists, student employment coordinators, Medicaid waiver case managers and employment providers, Office for the Blind and Office for Vocational Rehabilitation Counselors on Social Security Work Incentives.

LUNCH PLENARY

DENISE BELSER

Program Manager *National League of Cities*

Denise Belser is the Program Manager for Family Economic Success at the National League of Cities' Institute for Youth, Education and Families. In this role, Denise works directly with cities to promote family financial stability and other public benefits to residents. Denise joined NLC in 2009 to develop strategic alliances with private-sector partners to provide business solutions for cities, consumer solutions for city residents, and non-dues revenue for the association.

She began her professional career in the financial services industry over 20 years ago working in both the non-profit and private sectors, including serving as a founding manager of Seedco Financial Services, Inc., a subsidiary of Seedco in New York, focusing on access to credit and innovative small business lending programs in New York, Tennessee, Louisiana, Colorado and Alabama. Denise holds an M.B.A. from The Wharton School and a B.B.A. from Howard University.

Security Task Force. Prior to that, Vallas worked directly with poor and low-income individuals and communities as a legal aid attorney at Community Legal Services in Philadelphia for several years, where she was named a Skadden Fellow and a Borchard Fellow in Law & Aging.

Vallas has been featured on MSNBC's "Melissa Harris-Perry" and "All In with Chris Hayes," as well as on National Public Radio, C-SPAN, and CNN's "American Law Journal" among other television and radio programs. She is a frequent speaker at national conferences, is the author of several briefs and articles on income security and re-entry policy, and has testified before Congress. She is a member of the National Academy of Social Insurance and was the inaugural recipient of the National Legal Aid & Defender Association's New Leaders in Advocacy Award. She has twice been named as one of Forbes' "30 Under 30" for Law & Policy in 2011 and 2014.

Vallas received her law degree from the University of Virginia School of Law, where she was elected to the Order of the Coif. She graduated summa cum laude from Emory University, where she received a bachelor's degree in psychology, and was elected to the Phi Beta Kappa Society.

REBECCA VALLAS

Associate Director **Poverty to Prosperity Program** *Center for American Progress*

Rebecca Vallas is the Associate Director of the Poverty to Prosperity Program at American Progress. In this capacity, she plays a leading role in American Progress's anti-poverty policy development and analysis, with a particular focus on strengthening our nation's income security programs.

Before joining American Progress, Vallas served as the deputy director of government affairs at the National Organization of Social Security Claimants' Representatives, or NOSSCR, where she developed and managed legislative and communications strategies to preserve and strengthen Social Security Disability Insurance and Supplemental Security Income for workers with disabilities. She also served as a co-chair of the Consortium for Citizens with Disabilities Social

AFTERNOON SESSION D

ELIZABETH JENNINGS

Director of Training & Technical Assistance *National Disability Institute*

Elizabeth Jennings is the Director of Training and Technical Assistance for National Disability Institute and Assistant Project Director for NDI's LEAD Center. Ms. Jennings has technical expertise in Social Security work incentives, employment for individuals with disabilities, asset development, and the provision of training and technical assistance. Her extensive experience includes serving as the Assistant Director of a DOL-funded National Training and TA Center, Project Director of an SSA-funded Benefits Planning, Assistance, and Outreach project serving seven counties in South Florida, Program Associate for both the New York and Florida states Medicaid Infrastructure Grants, training and technical assistance provider for SSA's

AFTERNOON SESSION D (continued)

Ticket to Work Program and HHS' Assets for Independence Project, and Employment Consultant for clients of Vocational Rehabilitation.

Ms. Jennings has provided training to thousands of service providers focused on SSA work incentives, return to work practices, the link between employment and financial stability, and asset development strategies. She has jointly written content for the U.S. Health and Human Services' Assets for Independence website, and the U.S. Department of Labor's Office of Disability Employment Policy website. Ms. Jennings received a Bachelor's Degree in Sociology from Florida State University with minors in Women's Studies and Black Studies.

AFTERNOON SESSION E

DAVID ALLGOOD

**Director of Advocacy
*Center for Accessible Living***

David Allgood is the Director of Advocacy at the Center for Accessible Living. He is a graduate of the University of KY with a Master's degree in Vocational Rehabilitation Counseling. David has either led or participated in several major advocacy efforts in the state. David is President of a Spinal Cord Support Group, a member of the National Council for Independent Living, serves on the KY Spinal Cord and Head Injury Trust Board, was the former chair of the Hart-State Supported Living board, is the past chair of the Commonwealth Council on Developmental Disabilities, and also serves

on the Statewide Advisory Council for Vocational Rehabilitation.

As an advocate he has organized and built coalitions with other groups and developed long-term strategic advocacy plans. David is committed to developing strategies to further the advancement for people with disabilities.

DONNA FOX

**Independent Living Specialist
*Center for Accessible Living***

Donna Fox is currently employed at the Center for Accessible Living as an Independent Living Specialist with her primary emphasis focusing on peer support. Donna earned her Associate Degree in Human Services from the University of Kentucky and her Bachelor of Science in Sociology from the University of Louisville. Being physically disabled since childhood she understands the importance of and the need for the knowledge, experience, emotional, social, and practical help gained from peer support.

As a volunteer with the Arthritis Foundation she initiated support groups for children and young adults with juvenile arthritis and has served as Kentucky's third congressional district Arthritis Ambassador, advocating for the needs of arthritis patients by taking part in the democratic process and serving as a liaison between the Arthritis Foundation and her Congressional District's Representatives. She recently was invited to participate in the Advocates for Arthritis fly-in and traveled to Washington, DC with the American College of Rheumatology to speak with the Congress regarding the need for quality and affordable healthcare.

Disability awareness is a key issue for Donna and

recently she was given the “Educating Our Youth” leadership role at the Kids Center for Pediatric Therapies. In this volunteer role she will visit local schools and raise awareness to disability, how we can remove barriers allowing participation for everyone, share her personal story, and educate students through lecture and interactive role playing.

AFTERNOON SESSION F

CAITLIN WILLENBRINK

Coordinator, Bank On Louisville *Louisville Metro Community Services*

Caitlin Willenbrink serves as the Bank On Louisville coordinator in the Advocacy and Empowerment division of Louisville Metro Community Services. In this role, she manages Bank On Louisville’s financial education efforts and supports partnership development and expansion of this collaborative initiative.

Outside of her work in Louisville Metro Government, she volunteers with two reproductive justice organizations. Caitlin has a bachelor’s in Spanish language and English literature from Hanover College in Indiana, and hopes to study community-level social work in the future.

AFTERNOON PLENARY

MARSHA L. BERRY, PsyD

Vice President, Beargrass Division *Goodwill Industries of Kentucky*

Dr. Marsha Berry, Vice President of the Beargrass Division, brings 28 years of experience to the management team of Goodwill Industries of Kentucky. When she joined Goodwill Industries of Kentucky in 1986 there were two centers. Today, she oversees the operations of 12 retail and donation centers and is responsible for several programs including GTS Staffing (a subsidiary which is a temp-to-hire agency) and workforce development programs such as vocational evaluation, community worksite programs, community

employment, and the Alice H. James Adult Learning Center. In addition, Dr. Berry is responsible for programs partnering with SourceAmerica, the leading source of job opportunities for a dedicated and highly qualified workforce – people with significant disabilities. These programs include GoodShred (a document destruction program) and cleaning services for government buildings in Kentucky.

Dr. Berry’s efforts have been recognized by her colleagues both within Goodwill and the vocational rehabilitation community at large. She has twice served as president of the Kentucky Rehabilitation Administrators Association and has served as the president of the Kentucky Rehabilitation Association, the first president from the private sector. Also, in 1998, Berry received the Edgar J. Helms Award, one of the highest honors from Goodwill Industries International. The award, named for the organization’s founder, recognizes Goodwill staff for “exemplifying the founder’s principles in the service of people with disabilities and other barriers to productivity.”

A native of Louisville, Kentucky, Berry received her BA in Psychology and Spanish at Georgetown College in Kentucky. She received her MA in Clinical Psychology from the University of Illinois in Springfield, Illinois. She was awarded a Doctorate in Clinical Psychology from Spalding University in Louisville, Kentucky.

NATASHA KRIDER

Manager of Talent Transition *Zoom Group*

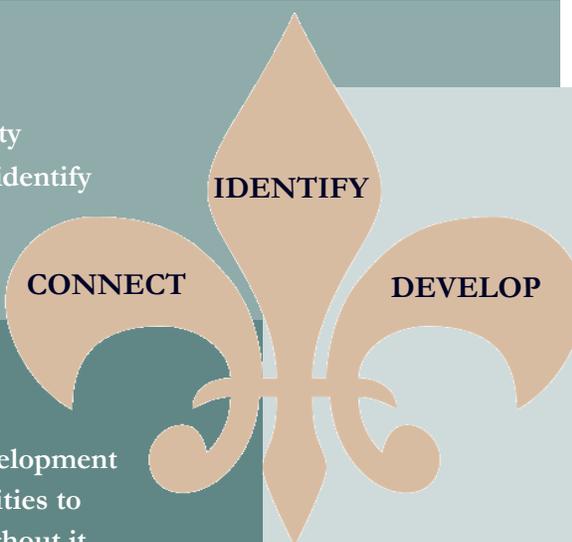
Natasha Krider is Manager of Talent Transition for Zoom Group. She received her BA degree in Social Anthropology and Studio Art from the University of Louisville, Louisville, KY. Natasha works each day to help Zoom’s members and their families understand their potential. “Working is so much more than a paycheck...it’s an experience everyone should have.” This is Natasha’s driving force as she works helping Zoom’s members find work in competitive employment. Currently, Natasha is completing her CWIC (Community Partner Work Incentives Counseling Assessment and Certification Process) through Virginia Commonwealth University, Richmond, VA.

COMMUNITY SERVICES AND
NATIONAL DISABILITY INSTITUTE
WORK TOGETHER TO ENACT CHANGE

Workforce Development/Financial Empowerment Integration Collaborative

These conversations highlighted emerging needs in the community and helped the group identify specific occasions for agency collaboration.

Delegates from 17 local agencies teamed up with NDI to examine Louisville's current workforce development landscape, and map out opportunities to expand financial capability throughout it.



From the issues and opportunities identified, the group will develop practical recommendations to promote a more accessible, financially empowered workforce development community for Louisville's disabled population.

Economic Advancement Assembly



Above: NDI's Dominic Maneke and Michael Morris, U.S. Representative John Yarmuth, and Community Services' Tina Lentz at May's *Economic Advancement Assembly*.

Right: NDI's Elizabeth Jennings leads a group discussion.

Representatives from over 20 local and national nonprofit and social services agencies gathered in May 2014 to begin the work to improve the financial capability of Louisville residents with disabilities.



IMPROVING CAPACITY IN THE SERVICE PROVIDER SYSTEM

Community Financial Empowerment Certification Program

In 2011, Louisville Metro Community Services received a grant from Living Cities to embed financial empowerment into Louisville’s homeless service provider system. This allowed Louisville to create a framework that is both broad and comprehensive enough to serve as a model for all future social service systems in the community. The opportunity with Living Cities also established the “Money Talks” project.

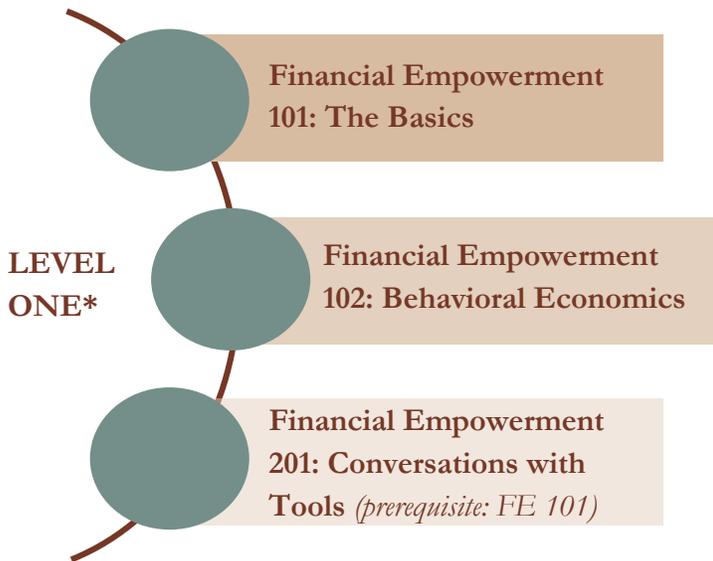
Community Services, with the support of PNC Bank, continues the powerful work of expanding this

framework and increasing the financial empowerment knowledge and capacity of Louisville’s service providers. This framework encourages service providers to examine their own economic decision-making, and encourages them to have honest and meaningful conversations about money with the people that they serve. Ultimately, this work is moving service providers and the people that they serve along the pathway to financial stability and independence.



Financial Empowerment Certification Program graduates receive their certification in May.

CERTIFICATION STRUCTURE



*A Level 2 Certification and further learning opportunities are in the works. Stay tuned!

CERTIFICATION PROGRAM GOALS

The Certification program is designed to:

- create a **common understanding** of the financial issues and challenges facing clients
- increase direct service staff’s confidence regarding financial issues
- **increase case managers’ confidence** regarding financial issues
- **provide guidance** on when and how to integrate financial empowerment into service delivery
- **raise awareness** about sound financial education standards and practices
- **create a support system** for case managers
- help **sustain and expand** financial empowerment efforts in our community

The Community Financial Empowerment Certification is brought to you by Community Services with the support of the PNC Foundation, the Center for Non-Profit Excellence and Metro United Way

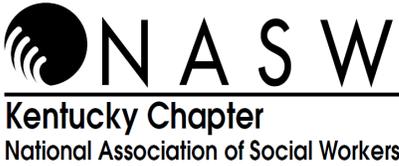
THANK YOU

FUNDERS & SUPPORTERS

OUR GRATITUDE GOES OUT TO THESE AGENCIES FOR THEIR SUPPORT



Building a better economic future for Americans with disabilities



DEPARTMENT OF COMMUNITY SERVICES

CENTRAL to AMERICA'S ECONOMY

STLOUISFED.ORG

DID YOU KNOW...

....That everyone registered for today's Summit will receive links with all of the PowerPoint presentations?

We will also update our website with pictures, feedback, and other materials from the day. Attendees will be sent an electronic evaluation as well to tell us what they thought!



#LouFE

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THANK YOU

PLANNING TEAM

THANK YOU FOR YOUR HARD
WORK TO MAKE THIS DAY
POSSIBLE!



Merv Antonio
Center for Nonprofit
Excellence



Dr. Kathy Cooter
Bellarmine University



Adam Hall
Fifth Third Bank



Melissa Johnson
National Association
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Lisa Locke
Federal Reserve
Bank of St. Louis



Dave Matheis
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Rehabilitation



John Nevitt
Metro United Way



Alison Stuhl
Louisville Metro
Community Services



Tina Lentz
Louisville Metro
Community Services



Erin Waddell
Louisville Metro
Community Services

And thank you to the Bellarmine
students who helped with registration
and note-taking!

Vision Board

Visit the Vision Board outside the main ballroom today and tell us what you think.

What would Louisville be like if...

All residents were financially empowered?

