



Please join us for the **Oregon Asset Building Convergence!** Happening April 11-12, 2006 in Portland, Oregon.

Come join local practitioners, national experts and policy makers focused on the Asset Building movement in Oregon and around the country. Together we will explore strategies that build human and financial capital ~ strategies that are critical to developing thriving and resilient individuals.

At the Asset Building Convergence, you will:

- Celebrate successes and share best practices.
- Identify policy barriers and strategize solutions.
- Network with others that share your passion for bringing an end to poverty.
- Meet national leaders in the Asset Building movement.

By strengthening our understanding and connections, this event promises to reshape how Oregon addresses the problem of poverty.

Cost of the two-day event is \$105.

See page two for the conference agenda.

**Registration deadline is March 15th.**

**To register, go to [www.regonline.com/89848](http://www.regonline.com/89848)**

Don't miss out on being a part of Oregon's Asset Building future!



## **Oregon Asset Building Convergence**

April 11-12, 2006  
Portland, Oregon  
Sheraton Portland Airport

### **AGENDA**

#### **Tuesday April 11, 2006**

##### **PRE-CONFERENCE MEETINGS**

- 9:00 AM – 12:00 PM    Family Self-Sufficiency Training - Jeff Lubell and CASA of Oregon**  
National expert, Jeff Lubell, will present on how HUD's Family Self-Sufficiency (FSS) Program can be paired with other asset building strategies like IDAs and micro-enterprise development to help low-income housing authority residents become more self-reliant. A definite "must attend" for all housing authority self-sufficiency program staff. For more information, contact Linda Woods at (503) 537-0319 ext. 19.
- 10:00 AM – 2:30 PM    Asset Building Research Workgroup - Andria Howell (OHCS)**  
OHCS research analyst Andi Howell will lead a work session to start developing a research agenda for asset building in Oregon. The group will seek to clarify desired program outcomes and identify tools for documenting efficiency and effectiveness of asset building strategies in Oregon, as well as tracking the evaluation and impact on poverty elimination. For more information, contact Andi Howell at (503) 986-2102
- 10:00 AM – 12:00 PM    Oregon IDA Fiduciary Organization Meeting (attendance by invitation only)**  
The Neighborhood Partnership Fund and OHCS host selected fiduciary organizations in the Oregon IDA initiative three to four times per year for training, problem solving and information sharing to improve the OR-IDA initiative. This meeting will feature Karen Edwards and Gina Gunn from the Center for Social Development, and Jim Gatz (invited) of the Assets for Independence Act (AFIA) program.
- 10:00 AM – 12:00 PM    Oregon Asset Builders Corps (VISTA) (attendance by invitation only)**  
OMEN will host a training for Oregon Asset Builders Corps members, the VISTA volunteers serving in community-based and tribal organizations across the state.
- 10:00 AM – 2:00 PM    OMEN Board Meeting (attendance by invitation only)**

##### **REGISTRATION**

- 1:00 PM – 8:00 PM    Registration desk open in the foyer**

## CONCURRENT WORKSHOPS

**2:30 PM – 4:00 PM**      **Select from the following workshops**

- **Using the EITC to Build Personal Human & Financial Capital – Jim Harper (CASH)**  
Learn how the non-profit organization, CASH Oregon, is working to maximize the utilization of the federal Earned Income Tax Credit in Oregon, and how the EITC can help low-income working families stabilize their lives and begin to build human and financial capital.
- **State of Asset Building Research – Andria Howell (OHCS)**  
Learn what the field has gleaned from years of experience. Andi Howell, OHCS Research Analyst will facilitate a panel presentation highlighting asset building research in Oregon and elsewhere.
- **Place of Assets in the Poverty Equation – David Foster (OHCS)**  
David Foster, OHCS Policy Strategist and long-time advocate for asset building strategies, will explain a new perspective on poverty, his equation for thriving and describe the critical role that assets serve in helping people to thrive and be resilient through life.
- **Federal Programs Update: A Review of Federal Asset Building Initiatives**  
This session will be of special interest to community action agencies and other community-based organization representatives. Invited presenters include Jenae Bjelland, National Association for State Community Services Programs; Jennifer Brooks, Corporation for Enterprise Development; James Gatz, U. S. Department of Health & Human Services/Assets for Independence Act (AFIA) Program.

## RECEPTION

**4:30 PM – 6:00 PM**      **“Meet the Experts” Reception: Networking with Guest Resource Persons and Other Attendees**  
Speakers, panelists, experts, decision-makers, and all the rest of us will gather for networking and casual learning at a reception just prior to the Asset Builders Dinner. A great opportunity to meet the many leaders in the field coming from out-of-state to the event.

## DINNER

**6:00 PM – 7:30 PM**      **Washington Mutual Asset Building Dinner  
Testimonials from Asset Building Participants and Dr. Michael Sherraden**  
Two graduates of Oregon asset building strategies will share how their experience with asset building influenced their lives. Then Michael Sherraden, Washington University professor and founder of the modern asset building movement will provide the “State of Asset Building” message.

**7:30 PM – 9:00 PM**      **Networking**  
After dinner, attendees will have the opportunity to gather and informally network onsite, accompanied by light piano music by John Fletcher.

Wednesday April 12, 2006

**REGISTRATION**

**7:00 AM – 4:00 PM**      **Registration desk open in the foyer**

**BREAKFAST**

**7:30 AM – 8:30 AM**      **Continental Breakfast, sponsored by Federal Reserve Bank of San Francisco**

**CONCURRENT WORKSHOPS**

**9:00 AM – 10:30 AM**      **Select from the following workshops**

- **Promoting Your Homeownership Program – Oregon Homeownership Alliance (Sandy Halonen)**  
Targeted to those working to expand homeownership, the session will focus on reaching potential first time homebuyers and promoting homeownership during National Homeownership Month, June 2006.
- **Energizing Entrepreneurs in Rural Oregon – Kathi Jaworski (RDI)**  
Oregon is one of six states to have received a grant from the W.K. Kellogg Foundation to strengthen services for rural entrepreneurs and implement Entrepreneur Development Systems. Kathi Jaworski and a leader from one of the five Oregon CORE Target Areas will present. Learn about the initiative, the impact it will have in five rural Oregon communities, and how you can use it in your work.
- **Capitalizing Ability: Serving Entrepreneurs with Disabilities – Shawn Winkler-Rios (LMB)**  
The provision of effective training and capital to business owners with a disability is relatively new territory for micro-enterprise development organizations. This workshop will feature the basics of working with persons with a disability and disability communities, including marketing and outreach strategies to clients and the rehabilitation organizations that serve them, and how to provide effective technical assistance. Best practices in helping persons with disabilities to achieve success with micro-enterprises. Presenters include Shawn Winkler-Rios from Lane Micro-Business, national expert Megan O'Neal from the World Institute on Disability, and Kedma Ough of AVITA Associates.
- **Financial Education in Oregon – Rosa Olivares (CASA of Oregon)**  
Rosa Olivares, CASA of Oregon, will share findings of their extensive recent research of financial education curriculums. She also plans to highlight a couple of financial education initiatives underway in Oregon.
- **529s, IDAs and other College Savings Strategies – Michael Parker (State Treasury)**  
Michael Parker, Director of the Oregon College Savings Plan, will share the strategies the State Treasurer's Office is championing to help Oregon families save for post-secondary education and develop financial competence.
- **Positioning for the Future: Economic Development and Micro-Enterprise – Jason Friedman**  
Where do micro-enterprise and entrepreneurship fit in the economic development continuum? Participants serving low-income entrepreneurs will learn how to position themselves strategically in the economic development conversation, and through case studies and exercises, will obtain keys to building a strong case for community based job creation through entrepreneurship and micro-enterprise. Presented by national expert Jason Friedman, of the Women Entrepreneurs of Baltimore and former Association for Enterprise Organizations trainer (invited).

## REFRESHMENTS

**10:30 AM – 10:45 AM Networking break with refreshments**

## CONCURRENT WORKSHOPS

**10:45 AM – 12:15 PM Select from the following workshops**

- **Financial Institutions Help Low-income Oregonians Build Assets – Craig Nolte & Brian Stewart (Washington Mutual)**  
Involvement in asset building strategies extends beyond the Community Reinvestment Act. Learn how financial institutions are participating in local initiatives that not only assist low-income Oregonians to build assets, but increase business opportunities as well.
- **Homeownership Initiatives Objectives – Oregon Homeownership Alliance (Sandy Halonen)**  
Homeownership is the path for building wealth for most Americans. So expanding homeownership is a critical aspect of asset building. Learn about the new initiatives of the Oregon Homeownership Alliance, network with other homeownership providers, share best practices, and help the Alliance learn what homeownership issues you're dealing with.
- **IDAs and MicroEnterprise: Growing Assets, Building Skills – Thomas Jensen (Mercy Corps Northwest)**  
Individual Development Accounts are an asset-building tool being used by low-income entrepreneurs to develop business equity and financial management skills. This workshop will feature best practices in delivering a high-performing IDA program, and how to link it with capital access resources in your community to benefit the clients you serve.
- **Positioning for the Future: Economic Development and Micro-Enterprise – Jason Friedman**  
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- **Oregon's Emerging Youth Asset Building Initiatives – David Foster (OHCS)**  
The record of asset building strategies for low-income adults is well established, but many in the field anticipate even better outcomes when asset building strategies start being applied to children and youth. This session will highlight several pioneering efforts to make sure youths develop the human and financial capital they need to succeed as they move into adulthood. Presenters will include Rosanne Marmor and Erin Singer of the REACH Community Development Corporation, which operates one of the longest practicing youth IDA programs in the country and Tom and Judie Drummond of the College Dreams Program in Josephine County.
- **Challenges of Assuring Positive Outcomes with IDAs – Cynthia Winter & Anna Aguilar (NPF)**  
We have all heard about the success stories from people able to complete the IDA program but we can also learn from people that do not graduate from the program. If the goal is to alleviate poverty, should the strategy be to create more stringent screening procedures or to be more adaptive to the realities of participants' lives? The need for further research and reflection on IDA programs in order to be more inclusive and effective is discussed.

## LUNCHEON

**12:30 PM – 1:45 PM Luncheon**  
**Perspectives on Asset Building from Congress**  
**Keynote Speakers Senator Gordon Smith & Senator Ron Wyden (Invited)**  
**Testimonials from Asset Building Participants**

## TOWN HALL

**2:00 PM – 3:45 PM Town Hall Conversation: Oregon's Asset Building Policy Agenda**  
**To be hosted by Senator Smith, Senator Wyden, Senator Westlund, Representative Merkley, and Treasurer Edwards**  
A brief overview of National and State Policy developments in the asset building arena. Panelists to include:

- Karen Edwards, Project Director, Center for Social Development on other state initiatives
- Jennifer Brooks, Policy Director, Corporation for Enterprise Development on federal policy developments
- Valerie Plummer, Oregon Micro-Enterprise Network on micro-enterprise activities
- Janet Byrd, The Neighborhood Partnership Fund for Oregon Housing Alliance on housing policy
- David Foster, Oregon Housing & Community Services for Oregon IDA initiative

A facilitated brainstorming session will follow to collect ideas and suggestions of asset building policy work that needs to be accomplished during the next two to five years to assist low-income Oregonians to build assets. Collected ideas and suggestions will be synthesized into a report for all conference participants, and will be used to shape 2007 legislative agenda and rule amendments related to asset building initiatives in Oregon.

## WRAP UP

**3:45 PM – 4:00 PM Next Steps, Conference Evaluation, Closing**

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*Thanks for the generous support from:*

