



Center for Social Development

GEORGE WARREN BROWN SCHOOL OF SOCIAL WORK



UNIVERSITY of MARYLAND  
SCHOOL OF SOCIAL WORK

FINANCIAL SOCIAL WORK INITIATIVE

# Convening Agenda

*Updated to reflect current paper titles*

## WEDNESDAY, APRIL 15

6:30-8:00 p.m. **WELCOME DINNER**

*Starlight Roof*

**Mike Rochelle**, Project Director, Financial Capability & Asset Building (FCAB),  
Center for Social Development, Washington University in St. Louis

**Michael Sherraden**, George Warren Brown Distinguished Professor and Founding Director,  
Center for Social Development, Washington University in St. Louis

## THURSDAY, APRIL 16

8:00-8:30 a.m. **BREAKFAST & OVERVIEW**

*Starlight Roof*

**Mike Rochelle**

8:30-9:00 a.m. **WELCOME & INTRODUCTION**

**Darla Spence Coffey** (via video), President and CEO, Council on Social Work Education

**Edward Lawlor**, Dean and William E. Gordon Distinguished Professor, George Warren Brown  
School of Social Work, Washington University in St. Louis

**Richard Barth**, Dean, School of Social Work, University of Maryland

9:00-10:30 a.m. **LEADERSHIP PANEL: FCAB and Social Work Research, Education, and Practice**

Moderator: **Edward Lawlor**

**Mimi Abramovitz**, Bertha Capen Reynolds Professor of Social Policy,  
Silberman School of Social Work, Hunter College, The City University of New York

**Richard Barth**

**Virginia Drywater-Whitekiller**, Professor, Department of Social Work,  
Northeastern State University

**Michael Wright**, Associate Professor and Interim Director, MTC-MSW, Social Work  
Program, Tennessee State University

10:30-10:45 a.m. **BREAK**

10:45 a.m.-12:00 p.m. **PANEL 1: Financial Capability & Asset Building Research**

Moderator: **Margaret Sherraden**, Founder's Professor, School of Social Work, University of Missouri-St. Louis, and Research Professor, Center for Social Development

**David Rothwell, Mohammad N. Khan and Katrina Cherney**, *Perceived Financial Capability and Savings Practices Across Low-Income Families in Canada*

**Stacia West and Terri Friedline**, *Coming of Age on a Shoestring Budget: Associations Between Financial Capability and Financial Behaviors of Lower-Income Millennials*

**Deborah Adams and Alegnta Shibikom**, *Financial Knowledge, Financial Inclusion, and Economic Strain Among Low-Income Parents of Young Children*

**Min Zhan and Xiaoling Xiang**, *Education Loans and Financial Balance Sheets Among Black and Hispanic Young Adults*

12:00-1:15 p.m. **LUNCH & PLENARY**

*Zodiac Room*

Moderator: **Michael Sherraden**

**Jing Jian Xiao**, Professor, University of Rhode Island and Editor-in-chief, *Journal of Financial Counseling and Planning*

1:15-1:30 p.m. **BREAK**

1:30-2:45 p.m. **PANEL 2: Applied Research in Financial Capability & Asset Building** *Starlight Roof*

Moderator: **Julie Birkenmaier**, Professor, School of Social Work, Saint Louis University

**Jin Huang, Yunju Nam, Michael Sherraden and Margaret Clancy**, *Financial Capability and Material Hardship Among Mothers with Young Children*

**Shiyu Wu, Mathieu Despard and Gina Chowa**, *The Influence of Parents on Youth's Access to Financial Services in Ghana*

**Clark Peters, Margaret Sherraden and Anne Marie Kuchinski**, *Child Welfare Caseworkers Administering Asset-Building Programs for Foster Youths: Three States, Four Sites, and Many Challenges*

**Larissa Padua and Joanna Doran**, *From Being Unbanked to Becoming Unbanked: Community Experts Describe Financial Practices of Latinos in East Los Angeles*

2:45-3:00 p.m. **TRANSITION TO CONCURRENT ROUNDTABLES**

3:00-4:15 p.m. **CONCURRENT ROUNDTABLE SESSIONS**

Moderator: **Lissa Johnson**, Director of Administration, Center for Social Development

**ROUNDTABLE 1: International Topics in Financial Capability & Asset Building**

Moderator: **Lissa Johnson**

**Zibei Chen and Catherine Lemieux**, *Financial Knowledge and Behaviors of Chinese Rural Migrant Workers: An International Perspective on a Financially Vulnerable Population*

**Mahasweta Banerjee**, *Exploring Financial Capability of Income-poor People in India*

## **ROUNDTABLE 2: Economic Strain**

Moderator: **Sally Hageman**, doctoral student, University of Maryland School of Social Work

**David Okech** and **Waylon J. Howard**, *The Effects of Sociodemographic factors of Financial Capability Among Poorer Households in the U.S. and Kenya: A Cross-Cultural Study*

**Mary Caplan**, *Credit Card Ownership and Debt Among Households Receiving Social Assistance*

**Peter Kindle** and **Mary Caplan**, *Understanding Fringe Economic Behavior: A Bourdieusian-informed Meta-ethnography*

## **ROUNDTABLE 3: Immigrants and Financial Capability & Asset Building**

Moderator: **Christine Callahan**, Research Assistant Professor, Financial Social Work Initiative, University of Maryland School of Social Work

**Yunju Nam, Jin Huang** and **Eun Jeong Lee**, *Financial Capability and Retirement Confidence Among Low-income Asian Immigrants*

**RaeHyuck Lee, Mashura Akilova** and **Tara Batista**, *Occupational Change and Asset Holdings Among United States Immigrants*

**Liza Barros Lane** and **Suzanne Pritzker**, *Toward Culturally-Competent Financial Education Interventions with Latinos*

4:15-4:45 p.m. **FCAB EDUCATIONAL TOOLS**

*Starlight Roof*

Introduction and Moderator: **Gena McClendon**, Director, State Assets Policy and Coalitions and Co-director Financial Capability & Asset Building, Center for Social Development

**Patricia Avery**, Financial Empowerment Program Specialist, Consumer Education and Engagement, Consumer Financial Protection Bureau

4:45-6:00 p.m. **BREAK**

6:00-8:30 p.m. **DINNER & KEYNOTE**

*Zodiac Room*

Introduction and Moderator: **Michael Sherraden**

**Camille Busette**, Lead Financial Sector Specialist, Consultative Group to Assist the Poor

## FRIDAY, APRIL 17

7:45-8:45 a.m. **BREAKFAST & PLENARY I**

*Starlight Roof*

Introduction and Moderator: **Margaret Sherraden**

**J. Michael Collins**, Associate Professor and Director, Center for Financial Security,  
University of Wisconsin, Madison

8:45-9:15 a.m. **PLENARY II**

Introduction and Moderator: **Michael Sherraden**

**Paul Stuart**, Professor, Florida International University  
*Financial Capability Practice in the Progressive Era: Lessons for Today*

9:15-10:45 a.m. **PANEL 3: Financial Capability & Asset Building Practice Research**

Moderator: **Jodi Jacobson Frey**, Associate Professor, Chair, Financial Social Work Initiative,  
University of Maryland School of Social Work

**Edward Scanlon** and **Cynthia Sanders**, *Applying Direct Practice Theories and Skills to  
Financial Capability and Asset Building*

**Rita Green** and **Kenya McKinley**, *Making the Right Financial Capability Connection for  
Your Clients: Classes, Counseling, and Coaching*

**Cynthia Sanders**, *Promoting Financial Capability of Incarcerated Women for Community  
Reentry: A Call to Social Workers*

**Judy Postmus**, **Andrea Hetling** and **Gretchen Hoge**, *Evaluating a Financial Education  
Curriculum as an Intervention to Improve Financial Behaviors and Financial Well-being of  
Survivors of Domestic Violence: Results from a Longitudinal Randomized Controlled Study*

10:45-11:00 a.m. **BREAK**

11:00 a.m.-12:30 p.m. **PANEL 4: Financial Capability & Asset Building Curriculum Research**

Moderator: **Erin Bascug**, Associate Director, Office of Social Work Education and Research,  
Council on Social Work Education

**Vernon Loke**, **Julie Birkenmaier** and **Sally Hageman**, *Financial Capability & Asset  
Building in the Curricula: Student Perceptions*

**Jodi Jacobson Frey**, **Karen Hopkins**, **Philip Osteen**, **Christine Callahan**,  
**Sally Hageman**, and **Jungyai Ko**, *Training Human-Service Providers to Address the  
Complex Financial Needs of Clients: Implications for Social Work Education*

**Margaret Sherraden**, **Julie Birkenmaier**, **Mike Rochelle** and **Gena McClendon**,  
*Financial Capability & Asset Building in Social Work Education: The Big Piece Missing?*

**Shelley Horwitz** and **Katherine Briar-Lawson**, *Financial Capacity Building: Promoting  
Economic and Social Justice*

**Pete Coser** and **Mike Rochelle**, *Financial Capability & Asset Building in Native American  
Communities*

12:30-2:00 p.m. **BUFFET LUNCH & STRATEGY WORKING SESSION**

Co-facilitators: **Margaret Sherraden**, **Julie Birkenmaier**, **Jodi Jacobson Frey**  
and **Christine Callahan**