Convening Agenda

Updated to reflect current paper titles

WEDNESDAY, APRIL 15

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

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

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*
- **Shiyou 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

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