



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**