



**Economic Self-Sufficiency Coalition of Western New York  
General Membership Meeting  
August 8<sup>th</sup> 2007**

**Present** (Signed In): Sharon Benz – Daemen College Center for Sustainable Communities and Civic Engagement; Diane Bessel – United Way of Buffalo and Erie County; Lauren Breen – University at Buffalo Law School; Mary K. Comtois – United Way of Buffalo and Erie County; Stephanie Connors – Consumer Credit Counseling Service of Buffalo; Val Cooley – Child Care Resource Network; Doris Corley – Catholic Charities of Buffalo; Marian Deutschman – Buffalo State College; Louisa Frazier-Merritt – Buffalo Urban League; Joan Dutchess Freidson – Homeless Alliance of WNY; Eric Gadley – Greater Buffalo Savings Bank; Karyn Hausknecht - Belmont Shelter Corporation; Nicole Juzdowski – United Way of Buffalo and Erie County; Janel Marcel – Financial Freedom Services; Christina Nelson – United Way of Buffalo and Erie County; Willie Olivencia - Hispanics United of Buffalo; Conway Porter - First Shiloh Baptist Church; Tricia Semmelhack – WNY Women’s Fund; Liz Siuy - Everywoman Opportunity Center, Laurie Schaller – Child and Family Services Ways to Work Program; Ann Sweeney – Lancaster-Depew Federal Credit Union; Karyn Ventrilla – Seedco; Deidra Whiteside – Taxpayers Advocacy Panel; and Michele Wilson, Child Care Resource Network.

Lauren Breen, Coalition Chair, welcomed members and began the meeting with introductions.

### **Committee Updates**

#### *Financial Education*

Stephanie Connors, Co-Chair of the Financial Education Committee, provided a report on the work of the committee to date. The Financial Education Committee has been very busy over the last couple of months. The groups’ accomplishments include:

- Completing an informal environmental scan to identify various financial education providers in Buffalo and Erie County;
- Completing a review of UB Professor Louis Mandel’s Money Skill program;
- Forming Curriculum Subcommittee to develop a ESSC Financial Education curriculum to be distributed via DVD and web-streaming video to local non-profit organizations and low-income individuals going to tax sites;
- Completing work on script/handout materials and recorded first digital access recording of an ESSC Financial Education offering, “Paying for What We Buy,” based in large part on the Money Skills curriculum as well as material from four other financial education curricula;
- Beginning a full committee review of national financial literacy standards to determine local standards; and

- Submitting a funding request to Community Foundation of Greater Buffalo to cover additional research costs, resource guides, and digital access recordings at University at Buffalo for ESSC Curriculum.

Moving forward, the Financial Education – Curriculum Subcommittee wants to complete two more digital access recordings of the ESSC Curriculum by December (including one on budgets and one on checks). The Full Committee will be working on finalizing the list of locally-determined financial education standards (based on their review of national standards). The Committee hopes to secure funds from the Community Foundation of Greater Buffalo to complete a research project on currently available financial education programming, including a review of what topics are covered, where the gaps are, what could be developed in this area. Finally, the Committee wants to develop a list of ESSC-Approved financial education providers that they can include in a resource guide and advertise on the ESSC website.

Diane mentioned that the goal is not to displace current financial education providers but to increase the number of low-income persons who receive financial education at tax sites and other locations. This is another way to reach people and hopefully it will allow financial education providers to focus on more advanced training.

Those who are interested in becoming part of the Financial Education Committee should complete the Pink – Member Information sheet.

Next meeting dates and locations for Financial Education are:

- Full Committee: August 22<sup>nd</sup> 2007 from 8:30-9:30 United Way of BEC
- Curriculum Subcommittee: August 31<sup>st</sup> from 9:00-10:00 United Way of BEC

#### *Free Tax Preparation Committee*

Diane provided an update on the Free Tax Preparation Network on behalf of Committee Chair Rose Mary Ginwright, who is on vacation this week

Over the last several months, the committee members have been busy wrapping up TY 2006, which was, by all accounts, another very successful season. ESSC-Sponsored sites completed returns for 6,167 families and individuals which totaled \$8,840,567 in refunds and saved nearly \$1 million in tax preparation fees for these people. ESSC-Sponsored sites actually completed more returns than all other local free tax preparation sites combined (40 sites or more!).

The Committee has also:

- Submitted a grant request to the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services for on-going support of the free tax preparation network coordinator position (Note: We're not sure if this grant will come through as it is a national competition);
- Submitted a grant request and was awarded a West Seneca Youth Bureau Americorps\*VISTA member to serve as a full-time "Community Engagement Coordinator;" this individual will be responsible for community outreach to neighborhood, community, business, and faith locations in order to secure tax preparation program participants and volunteers, assist in the development of consumer-friendly marketing materials and educational handouts; and help coordinate volunteer activities;

- Submitted a funding request and was very recently awarded funds from the Community Foundation of Greater Buffalo Hanna Peters Trust to fund the Americorps\*VISTA position and some limited marketing materials;
- Submitted a funding request to Points of Light Foundation to secure assistance with volunteer recruitment activities for free tax preparation network;
- Met with staff from Seedco, Canisius College Students for Free Enterprise (SIFE), University at Buffalo School of Management, and UB School of Social Work to secure volunteers and interns as well as in other relationship capacities;
- Secured volunteers to leaflet 14215 zip code area as part of United Way of Buffalo and Erie County's Day of Caring activities (August 15<sup>th</sup> 2007) – ESSC is hoping to expand these efforts with members as well;
- Established date and location for "Family Financial Wellness Day" – January 26<sup>th</sup> 2008 at the Buffalo Convention Center

Our next steps include holding a meeting (to be scheduled) for all interested free tax preparation network partners for TY 2007 to discuss the Memorandum of Understanding (MOU) and continued participation in ESSC-Sponsored Free Tax Preparation program. ESSC wants to make sure that the MOU is fair and that all sites have the support they need.

Along those lines, Rose Mary is already working on tax preparation training dates and she is hoping to take part in a "train the trainer" session in Rochester in early October. This will allow us to start training earlier this year.

Three subcommittees have also been formed to support the efforts:

- Laurie Schaller and Michelle Wilson have taken on responsibility for the Marketing Subcommittee and will work to include more grassroots marketing efforts including the distribution of leaflets in various neighborhoods. The Americorps Member will also work with this group.
- United Way will take on responsibility around volunteer recruitment – in order to more fully support free tax preparation sites. This will be a part of the Americorps Member's responsibilities as well.
- ESSC will have a subcommittee for Family Financial Wellness Day. Diane distributed a sheet for organizations who are interested in participating in the day (January 26<sup>th</sup> 2008). Organizations can be part of the planning process, can have a table for the event, or can provide information about their services. If you know any who might be interested in the day, please provide information to Diane using the form.

Diane also mentioned that she and Lauren attended a meeting with H&R Block to discuss the possibility of "collaborating" during the upcoming tax season. They are interested in attending Family Financial Wellness Day, helping with tax preparation for Home Child Care Providers; offering a discount to families who do not qualify for Free Tax Preparation, and providing an information sheet to inform consumers about benefit eligibility opportunities.

Conway Porter expressed his displeasure at the idea of "partnering" with H&R Block at any level. Lauren indicated that ESSC is interested in having a committee-level discussion around these issues. The following people expressed an interest in participating in a discussion around engaging with H&R Block this tax season:

Carol Dozier  
Liz Siuy

Michelle Wilson  
Karyn Hausknecht

Conway Porter  
Ann Sweeney

Dietra Grant  
Donna Mallon  
Mary K. Comtois  
Kayrn Ventrilla

Eric Gadley  
Doris Corley  
Deidra Whiteside  
Lauren Breen

Diane Bessel  
Louisa Frazier-Merritt

The meeting will be scheduled in October following the National Community Tax Coalition meeting in Denver, Colorado (October 1-2). Lauren and Diane will be attending the conference and will seek out information from national leaders as well as other communities regarding the pros and cons of entering into a relationship with H&R Block and whether any group has done so with positive results. ESSC will contact the individuals listed above about the meeting.

Finally, Diane distributed a sheet for Free Tax Preparation Network marketing materials. If you are interested in free tax, EITC, or Family Financial Wellness Day materials, please complete the form and submit to Diane. We hope to have this materials distributed at the December 12<sup>th</sup> ESSC meeting.

Free Tax Preparation:

- Full Committee: TO BE ANNOUNCED
- Marketing Committee: September 12<sup>th</sup> 2007 from 8:30-10:30 United Way of BEC
- Volunteer Committee: September 13<sup>th</sup> 2007 from 8:30-9:30 United Way of BEC
- Wellness Day Committee: September 13<sup>th</sup> 2007 from 3-4:30 United Way of BEC

### *Communications*

Doris Corley gave a brief report on the newly formed Communications Committee which she chairs. This group is interested in increasing awareness about poverty-related concerns in order to build public will to address the problem through local activism and policy interventions. The committee is acting in partnership with Catholic Charities of Buffalo Public Policy Committee, which is an already established group working on these issues.

A few meetings have taken place with Catholic Charities and ESSC to see if this relationship will work. During these meetings, individuals reviewed Catholic Charities USA's position paper on poverty as well as a "Study Circles" protocol titled, "Thriving Communities: Working Together to Move from Poverty to Prosperity for All," and funded by the Northwest Area Foundation (available on-line at: <http://www.studycircles.org/en/Resource.83.aspx>). Diane met a representative from the foundation that funded this work (Northwest Area Foundation) and they discussed how the program is working in several states.

The Communications Committee is interested in doing some pilot testing of the protocol with Catholic Charities staff and "friends" to see how it works in our community. The goal is to implement the program and involve elected officials, community and civic leaders, etc in the discussions. The aim is to increase awareness of local poverty through the study circle activities and then give energized/agitated people an opportunity to get involved after taking part. Committee members also want to make sure that ESSC is poised to take legislative action on key issues as needed.

The Communications Committee is looking for members. The next committee member is scheduled for: August 29<sup>th</sup> from 3:00-4:00 United Way of BEC.

### *Workforce Development*

The United Way of Buffalo and Erie County has identified four key areas of focus for its work including Early Childhood, Kids on Track, Tools for Living, and Aging with Honor. The Tools for Living Impact Council provides support for the Family Justice Center Initiative as well as the Economic Self-Sufficiency Coalition. This group has identified a desire to help low-income population (to be determined) gain and maintain employment.

While they are still in the process of defining their project, the Tools for Living Council is committed to using research to identify the needs and to work collaboratively with a number of community experts and partners. This team is also looking for members and will meet on August 23<sup>rd</sup> from 8:00-10:00 at Goodwill Industries.

### *Asset Building*

The Asset Building Committee has recently been re-energized and is working on putting together a two-day conference in September around Asset Building. The conference has been generously funded by the Western New York Women's Fund, Community Foundation of Greater Buffalo, and United Way of Buffalo and Erie County. The committee has secured national speakers to present at both sessions.

On the first day of the conference (September 18<sup>th</sup>), the committee has planned some special events for the foundation community as well as Executive Directors from local non-profit organizations in order to both increase understanding of asset building but also to ensure that funding will be available for these activities. These events are by invitation only.

The second day of the conference (September 19<sup>th</sup>) will be an open session to anyone interested in learning more about asset building especially non-profit practitioners, employers, and governmental representatives. This event will run from 8:30 (registration) to 4:00pm at the Buffalo Convention Center. Breakfast and lunch will be served and the event is free.

If you are interested in having materials from your organization available at the conference, please contact Diane by September 5<sup>th</sup>. She is also taking registrations for the session on September 19<sup>th</sup>. Please call 877-2717 to register. The next committee meeting is directly after today's session.

### **Upcoming:**

Diane briefly mentioned the dates for various activities:

Asset Building Conference	September 18 <sup>th</sup> and 19 <sup>th</sup>
Free Tax Preparation Training	Shortly After October 15 <sup>th</sup>
December Coalition Meeting	December 12 <sup>th</sup> 3-4:30 at United Way
Family Financial Wellness Day	January 26 <sup>th</sup> 2008

She also mentioned that she has been working with Sharon Benz from Daemen College's Center for Sustainable Communities and Civic Engagement around the Mobile Assistance Unit (yes, that's right, the Kerr Mobile!). We are almost ready to submit the proposal to M&T Charitable Foundation and hope to have the vehicle funded by September. Daemen College has taken lead on the project – with critical support from We Care Transportation and Mary Martino at United Way. Thank you Sharon and crew for all your hard work!

## **Discussion on Coalition Name Change**

Diane mentioned that she attended the “EITC and Beyond Conference” in San Francisco last month and had the opportunity to network with self-sufficiency groups across New York State. During the meeting, the NYS groups discussed the opportunity to do a media buy around free tax preparation and EITC efforts using the name “C.A.S.H.” which stands for Creating Assets, Savings, and Hope. They also talked about sharing information, materials, etc. The name CASH is also being used for coalitions that are out of state (in Virginia, Baltimore, Portland, Oregon, and Idaho) as well.

Since the meeting, Diane has been talking with ESSC members about changing the name of our coalition to C.A.S.H. – Buffalo and Erie County. Several NYS groups have already taken the name – including Rochester, Corning, Steuben/Yates, Schenectady, Rockland County. There is a fair amount of upside here – given the transience of the population, the “friendliness” and accessibility of the name, and its marketability. However, this is something that the Coalition had talked about in the past and some members were uncomfortable with the name because it was not distinctive and did not establish the Coalition as an individual entity. Val Cooley also mentioned that the current name has a history to it given the merger of the Asset Building Coalition and the Economic Self-Sufficiency Steering Committee – the name worked because it brought these groups together.

Diane indicated that time is of the essence - with the new website and mobile assistance unit logos (C.A.S.H. Van?). She asked members to consider changing the name to C.A.S.H. – Buffalo and Erie County.

Members decided unanimously to take the new name. Diane will make sure to make the necessary changes going forward on all marketing materials. The official name launch will coincide with the Asset Building Conference in September.

## **Member Updates**

Diane reminded members to complete the member information, Financial Wellness Day, and Free Tax Preparation Marketing forms and return them to her. On the member forms, individuals are asked to identify whether or not they would like their name and affiliation included on the C.A.S.H. website or if C.A.S.H. can link to their organizational website. Please submit these forms as soon as possible. Diane’s contact information is as follows: Diane Bessel, Director of Economic Self-Sufficiency, 742 Delaware Avenue, Buffalo, NY 14209; [diane.bessel@uwbec.org](mailto:diane.bessel@uwbec.org); (716)887-2717.

## **New Business**

There was no new business to discuss.

**The next CASH General Membership meeting will be held on December 12<sup>th</sup> from 3:00-4:30pm at United Way of Buffalo and Erie County (742 Delaware Avenue). We will be distributing marketing materials for the free tax network program during this meeting.**