



Quarterly Full Coalition Meeting

December 2008

Present: Cynthia Shore, Pat Hutton, Karyn Hausknecht-Yetman, Jim Folan, Karen Carmen, Kelly Dodd, Kristen Luppino, Jerry Turcotte, Michelle Wilson, Laurie Schaller, Stephanie Smith, Brad Dossinger, Doris Corley, Donna Mallon, Bonnie Oliver, Katie Lyons, Justin Moscati, Nicole Juzdowski and Diane Bessel.

The meeting began with introductions.

Organizational Updates

UWBEC Staffing Changes

Diane Bessel began the meeting by explaining the many changes that have taken place at the United Way of Buffalo & Erie County. Diane informed the Coalition that the United Way is now broken into three core platform areas; Education, Wellness, and Income. CASH is located under the Income platform and Diane now serves as the Senior Product Manager for Income. Diane's responsibilities for Income include United Way investments (in areas formerly known as Tools for Living and Aging with Honor), the Emergency Food and Shelter Board, and Director of CASH.

UWBEC Income Platform

Members were given a handout describing the Income Platform. Diane reviewed the handout explaining that Income's target population is individuals and families earning 200% of the federal poverty level and below. She also indicated United Way programs will focus on three population indicators including: Increasing the % EITC eligible households that secure the credit; increasing the % eligible of households that secure Food Stamps; and increasing the percentage of households above 200% of poverty. Diane also explained to the Coalition that there are a number of program indicators listed on the handout.

UWBEAC Request for Proposals

Finally, Diane mentioned that United Way is opening up its funding process to include its initiative partners. A handout on the funding opportunity announcement was provided to the Coalition. This document was dispersed to agencies on November 19th. The competition process will begin with a letter of intent that articulates an organization's mission, its program features, and performance as outlined in the document. The letter of intent is due on January 9, 2009. The letter will be reviewed by a panel of United Way staff and volunteers and following this stage, those who have been chosen will be invited to apply for funds on-line.

CASH Interns

The Coalition was introduced to our newest University of Buffalo School of Social Work Intern, Bonnie Oliver, who is be working closely with our Asset Building Committee and also a subcommittee of our Financial Education Committee working on Financial Education for disabled populations. Diane also informed the Coalition that we will be adding another Intern in January. His name is Ryan Daley.

Committee Updates

Free Tax Preparation Committee- Diane informed the membership of the Free Tax Preparation Committee's recent success in securing a federal grant of \$109,000 from the IRS. Diane reported that CASH has also secured multi-year funding from the Western New York Foundation as well as funding from Bank of America, the New York State Office of Temporary and Disability Assistance (OTDA) and HSBC.

CASH IN Saturday will be held on January 24, 2009 and will serve as both the launch of Tax Season and the CASH Hope Center. Activities will take place at the Tri Main Center at 2495 Main St in Buffalo. CASH IN Saturday will take place on both the basement and first floor levels of the Atrium at the Tri Main Center. The Coalition was urged to fill out their CASH IN Saturday form if they are interested in participating. For more information, CASH Intern, Katie Lyons can be contacted at 716-887-2671 or via email at Katherine.Lyons@uwbec.org.

Continuing her report on the Free Tax Preparation and the Hope Center, Diane stated that CASH has received donations of cubicles, IBM computers and also a federal grant to maintain the Hope Center including a full time staff position for the next 3 years.

Justin Moscati then provided the Coalition with marketing and volunteer opportunities for Free Tax Preparation. It was announced that CASH will be running a "Get SPoTted" promotion where people who are spotted (by a CASH employee or intern) in the community wearing their CASH Free Tax Preparation button; they will receive a SPoT coffee gift card.

Anyone asked about their button is encouraged to tell people to call 2-1-1 to find their nearest Free Tax Preparation site. In other Free Tax Preparation marketing news, all flyers and check stuffers are in; agencies are urged to contact Justin to arrange picking up marketing materials (716-887-2706, justin.moscati@uwbec.org).

Next, Justin explained our new Free Tax Preparation volunteer incentive raffle taking place following the completion of tax season. Based on the number of hours volunteers complete, volunteers will be registered for a number of prizes including the grand prize ipod.

Nicole Juzdowski provided the Coalition with an Income TAXi update. Nicole stated that the INCOME TAXi will be available during tax season Thursday nights from 5:00 pm – 8:00 pm and Saturday and Sundays from 10:00 am – 2:00 pm. To book the TAXi, please contact Nicole at 716-887-2606 or Nicole.juzdowski@uwbec.org. Additionally, CASH is beginning a pilot program with 2-1-1 to book appointments for clients visiting the Income TAXi appointments. If the program goes well, it may be expanded to additional tax sites next year.

The Free Tax Preparation program may be featured in a Buffalo News article in a coming Sunday edition of the Buffalo News, so keep an eye out!

Following the January close of training at the HOPE Center, Daemen College will be start providing training in late January and early February. If your organization is interested in having a tax site in future years, the Committee is urging organizations to take part in a mentoring program this year where future sites will work at current sites. The next Free Tax Preparation Network meeting is scheduled for February 10, 2009 1:00 pm at the United Way of Buffalo & Erie County.

Financial Education Committee- Cynthia Shore began Financial Education Committee updates for the Coalition by stating that the Committee has three projects currently in the works; the financial education survey, CASH Coaches, and its DVD program.

Justin then updated the Coalition on the survey and the results report. Justin noted that the survey has an excellent response rate (close to 70%) including 29 organizations which responded that they provide some form of financial education. The goal of this survey was to increase awareness, coordination, and consistency of financial education programs. There will be a soft release of the survey results in February to organizations that have expressed interest in learning about the results. A public release is planned for April, Financial Education month.

Nicole followed Justin by updating the Coalition on the progress of the CASH Coaches program. Nicole stated that there are now 8 clients and coaches matched together and 13 total Coaches trained. Trainings are ongoing and typically begin once there are 5-6 potential coaches ready

for training. Nicole explained that the goal of the program is to identify client needs and assist them in reaching their more immediate financial goals.

Cynthia Shore mentioned that the next Financial Education Committee meeting on December 17, 2008 9:00 am at the United Way of Buffalo & Erie County. The Committee will be discussing further steps to take with its DVD series as well as future direction and projects.

Karyn Hausknecht informed the Coalition that approximately 95 people per week are taking advantage of Safety Net Achievement Program (SNAP) and that Belmont has helped to complete 125 applications for Section 8 in 5 months.

Asset Building Committee- Karyn Hausknecht informed the Coalition that the December 17, 2008 meeting is cancelled, the Committee's next meeting will not be until January. Karyn then reported that the Asset Building Committee's IDA programs will both now have a 4-1 match. As such, if a client saves \$1,000; it will be matched with \$4,000 for \$5,000 total towards the purchase of a home. If someone qualifies for EITC or are under 200% of the poverty line, they qualify for this IDA program.

The Asset Building Committee is interested in expanding to Education IDA programs in the future and is seeking further Committee involvement from Coalition members to do so. Karyn also remarked about the possibility of an IDA program for children similar to the SEED program. In this program, children would be able to access their funds at 18 for educational or vocational training.

Jerry Turcotte also informed the Coalition that MicroBiz Buffalo will be running a new program called, "Nets to Net Worth." This is a combination tennis and financial literacy program for children (ages 10-16). In this program, kids will receive instruction in tennis as well as financial literacy. The kids who are taught this year, will help run the program next year. The Coalition was advised to contact Jerry for further information.

Communications Committee- Diane first informed the Coalition about the Poverty Simulation that CASH recently put on for Grantmakers. Katie Lyons then described the Simulation saying it provides people with the "experience of living a month in poverty" to raise awareness. The Coalition was informed that many schools including University of Buffalo and Niagara University as well as more organizations are interested in having a simulation run. Diane noted that Jane Corwin is also interested in having the Poverty Simulation done with the WNY Delegation.

Diane also informed the Coalition of the planning of legislative visits to elected officials. The visits will not be to seek funding but rather be an informal introduction of CASH and its programs to the officials. The Coalition was advised that the next Communications Committee meeting is January 15, 2009 3:00 pm at the United Way.

Upcoming Events and Other Updates

- *Free Tax Preparation Marketing Materials are in!*
Contact Justin Moscati 716-887-2706 or Justin.Moscati@uwbec.org.
- *CASH IN SATURDAY* January 24, 2009 10:00 am – 2:00 pm at the CASH Hope Center
Contact Katie Lyons 716-887-2671 or Katherine.lyons@uwbec.org.
- *The INCOME TAXi is available! To book it...*
Contact Nicole Juzdowski 716-887-2606 or Nicole.Juzdowski@uwbec.org.
- *AmeriCorps*
CASH is in the process of hiring 4 new AmeriCorps to help do Benefits Screening.
Contact Nicole Juzdowski 716-887-2606 or Nicole.Juzdowski@uwbec.org if you know anyone who might be interest.
- Diane will be out of the country from December 27th -January 11th in Bangladesh. She will be out of reach; however Nicole Juzdowski will be handling all your CASH needs.

The next Full CASH Coalition meeting is March 11, 2009 3:00 pm – 4:00 pm at the United Way of Buffalo & Erie County.