

¡VIVA!

Training Convening



ADELANTE:

Moving California Families Forward with Financial Capability

December 3rd, 2018 | 1055 Van Ness Avenue, Fresno, CA

AGENDA

Registration	9:00 AM - 10:00 AM (Lobby)
Welcome Plenary & Breakfast	10:00 AM - 10:45 AM (Millerton Lake)
Session: Dollars & Sense	11:00 AM - 11:45 AM (Bass Lake)
Networking Lunch	12:00 PM - 12:45 PM (Millerton Lake)
Session: All Hands on Deck	1:00 PM - 2:15 PM (Bass Lake)
Session: Championing the Story	2:30 PM - 3:45 PM (Bass Lake)
Closing Plenary & Grant Application	4:00 PM - 5:00 PM (Millerton Lake)

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LOGISTICS

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Wifi

Network: RadissonGuest
Password: Zest

Parking

A parking voucher to exit the parking lot can be purchased at the front desk for \$3 per exit.

Food

Breakfast and lunch will be provided. If you have not already advised of any dietary restrictions, please notify the registration desk.

Photos

Photos will be taken throughout the event. If you do not wish to have your photo taken, and/or do not consent to the future use of your photos - please see the registration desk for a sticker to place on your name tag.

Resources

Conference materials, ¡VIVA! resources, and grant application will be available following the event at:
medasf.org/about/viva-nonprofit-training/

SESSIONS

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Welcome Plenary & Breakfast

Vera Moore, Vice President, Office of Nonprofit Engagement of JPMorgan Chase & Co. will help kick off this event, discussing her philanthropic and strategic perspective on the importance of investing in financial capability, MEDA's unique value add in the field and the importance of coalition building across communities.

Dollars & Sense

What Everyone Needs to Know About Financial Capability

Beyond technical training on how to deliver Financial Capability services, the ¡VIVA! Financial Capability Model is a vehicle for expanding access to generational wealth and power building for low- and moderate-income individuals, immigrants and communities of color across the nation. All stakeholders play a role in scaling this access, from fund development to advocacy, to community engagement. This session presented by MEDA's Jaqueline Marcelos will cover technical fundamentals, as well as link these to a bigger, power building strategy.

All Hands on Deck

How to Make Financial Capability Work for All

No one will argue against the value of Financial Capability for individuals, families, and communities. But, there are so many interfering threats: daily personal pressures and priorities, systemic inequity in access and opportunity, competing workload requirements, lack of resources. How can we make this work for us all? This interactive session, led by MEDA's Ernesto Martinez, will cover human-centered design concepts for addressing client engagement, organizational integration and sustainability, and resource development & coalition building challenges.

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Championing the Story Impact, Strategic Partnerships, & Coalition

In this time of unprecedented attacks on low- and moderate-income individuals, immigrants and communities of color, we can't afford to keep working in silos. To build and reclaim our power, and build generational assets, we must work together to leverage our communities' strengths, and bridge the gaps. MEDA's Jillian Spindle will share how it is scaling its collective impact strategy, including Mission Promise Neighborhood, Community Real Estate, Fondo Adelante CDFI, and newly launched 501c4. Participants will engage in best practice exchange to take an honest look at what we're each doing well, and set action commitments for the work to come. Financial Capability is so much more than a program, it's a movement!

Closing Plenary

Love what you heard and shared today? Could your organization, networks, and community use one-on-one support to connect with this work on a deeper level? Apply to be one of two organizations selected to receive a customized, one-on-one Financial Capability integration plan, 12 months of training and technical assistance from expert MEDA staff, and \$25,000 in implementation funds. Must be a 501c3 organization to apply. Applications due Friday, January 11, 2019.

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PRESENTERS

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Vera A. Moore, JPMorgan Chase & Co.

Office of Nonprofit Engagement

Vice President, Community Relations Manager

Vera is responsible for fostering relationships with non-profit organizations involved in advocacy, thought leadership, and service to low- to moderate-income communities and communities of color. Vera works closely with community advocates and JPMorgan Chase senior leaders to build initiatives and relationships that advance access to opportunity and economic mobility.



Jaqueline Marcelos

Mission Economic Development Agency

Financial Assets Program Manager

Jackie leads MEDA's Financial Capability program which provides education and coaching focused on the areas of DISC+: debt, income, savings, credit, and banking. Jackie also leads MEDA's Tax program which serves over 4,000 clients annually, with an emphasis on ITIN application support as well as leveraging Tax time for connections to other Asset Building services. Jackie is the lead trainer at MEDA on Financial Capability integration.



Ernesto Martinez

Mission Economic Development Agency

Integrated Services Manager

Ernesto works to ensure that all of MEDA's Asset Building Programs are available at Mission District public schools and MEDA's affordable housing. Additionally he assists to create systems to improve, integrate and evaluate service delivery in the programs. As a coach at MEDA he has first hand experience in creating systems and processes that are designed with direct service staff in mind.



Jillian Spidle

Mission Economic Development Agency

Chief Operating Officer

Jillian is responsible for strategic leadership of internal operational functions at MEDA, overseeing finance, fundraising, communications, human resources, operations and asset building programs. Jillian has been at MEDA for eight years, and in her previous role as Director of Development, she led MEDA through unprecedented growth, from a budget of \$3 million in 2010 to \$12 million in 2017, with full-time staff going from 11 to 60 in the same time.



Lucy Arellano

Mission Economic Development Agency

Director of Asset Building Services

Lucy oversees MEDA's Asset Building Programs division which includes direct services in the areas of: Financial Capability & Taxes, Business Development, Workforce Development, Housing Opportunities. She shares MEDA's integrated Financial Capability capacity building ¡VIVA! Model nationally. Lucy Arellano has worked for over 10 years in public, private, and non-profit sectors with intentional emphasis on supporting disadvantaged communities.