

# State Coalition Leaders' Meeting

*Welcome Back to In-Person!*

August 31, 2022



## Agenda

Hyatt Regency Washington on Capitol Hill — Regency CD Room

Registration and Continental Breakfast at 8:30 a.m. ET

**A. Welcome and Introductions (9:00-9:30 a.m.)**

Variny Yim, Director of Partner and Affiliate Relations.

Laura Levine, President and CEO.

**B. The Business of State Coalitions (9:30-10:30 a.m.)**

Dan Hebert, New Hampshire Jump\$TART President and Jump\$TART Senior Director of Education, will discuss important operational topics and the *State Coalition Toolkit*.

**C. Break (10:30-10:45 a.m.)**

**D. Breakout Session 1: Operations, Partner and Board Recruitment, Retention, and Succession (10:45 a.m.-11:30 a.m.)**

What are states doing to rebuild, maintain, and grow their coalitions?

**E. Breakout Group Reports (11:30-11:45 a.m.)**

**F. Group Photo, followed by Networking Lunch (11:45 a.m.-12:45 p.m.)**

Jessica Cultra, Jump\$TART Director of Communications, will manage group photo.

**G. Jump\$TART Coalition National Leadership Listening Session (12:45-1:30 p.m.)**

Remarks from Corey Carlisle, Jump\$TART National Board Chairman. Discussion and Q&A to follow with state coalition leaders and Jump\$TART Board members:

- Rhonda Ashburn, Executive Director, American Financial Services Association Education Foundation, and National Board Secretary;
- Billy J. Hensley, Ph.D., President and CEO, National Endowment for Financial Education, and National Governance Committee Chair;
- Melanie Mortimer, President, SIFMA Foundation;
- Laura Levine will moderate.

**H. How to Manage Challenging Situations and Individuals (1:30-2:15 p.m.)**

Presentation by Annette Fowler, Senior Director, Operations, National Endowment for Financial Education (NEFE).

**I. Breakout Session 2: Meetings, Events, and Fundraising (2:15-2:45 p.m.)**

**J. Breakout Group Reports (2:45-3:00 p.m.)**

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**K. Break (3:00-3:10 p.m.)**

**L. Breakout Session 3: Effective Financial Education (3:10-3:45 p.m.)**

What are state coalitions doing to promote effective financial education (e.g., mandates, Standards, teacher trainings, resources, communication outreach, etc.)?

**M. Breakout Group Reports (3:45-4:00 p.m.)**

**N. A Conversation with Special Guest, William “Bill” Cheeks (2022 William E. Odom Visionary Leadership Award Recipient) (4:00-4:30 p.m.)**

Bill will talk about his years at the JumpStart Coalition and share his lessons on leadership in coalition building.

**O. Takeways and Goals (4:30-4:50 p.m.)**

State coalition leaders will share their meeting takeaways and goals for the upcoming year.

**P. Next Steps and Conclude Meeting (4:50-5:00 p.m.)**

*Please join us for a special reception with the national JumpStart Board at 5:30 p.m., in the Columbia B Room, following the State Coalition Leaders' meeting. Tomorrow (Sept. 1), join us for Continental Breakfast and browse the resource tables at 8:30 a.m., before the JumpStart General Partners' Meeting from 9:00 a.m. – 12:00 p.m. in the Regency CD Room. Then, cheer on **2022 State Coalition of the Year, Louisiana JumpStart**, at the Awards Luncheon from 12:30 – 2:30 p.m. in the Regency A Room.*

*And, take advantage of our JumpStart Photo-Op Wall for a fun group picture or selfie! Tag **@NatJumpStart** (Twitter and Facebook) using hashtags: **#FinancialLiteracy** and **#FinancialSmartsForStudents**.*

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