

April 17, 2024

Hyatt Regency Crystal City - Potomac Ballroom I & II

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

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## State Coalition Leaders Meeting Agenda

### **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 (9:30-10:45 a.m.)**

Dan Hebert, Jump\$tart Senior Director of Education and New Hampshire Jump\$tart President, will do a presentation on operational topics such as bylaws, 990s, state and local filings, insurance, and the State Coalition Toolkit; followed by a conversation with state coalition leaders.

### **C. Break (10:45-11:00 a.m.)**

### **D. 2024 National Educator Conference (NEC) (11:00-11:15 a.m.)**

Dan Hebert will give an update about this year's conference on Nov. 2-4 in Louisville, KY.

### **E. Take Advantage of Jump\$tart Resources (11:15 a.m.-12:00 p.m.)**

Jump\$tart national staff members will share updates on: Check Your School/Teen Teach-In, Clearinghouse, Financial Foundations for Educators (FFE), Financial Fridays, Jump\$tart Branding Guide, National Standards, Reality Check, and other communication resources.

**Panelists will include:** Joel Chrisler, Advisor on Effective Financial Education; John Doyle, Partner at Doyle McDonald; Susie Henson, Director of Communications; and Suzann Knight, Director of Curriculum Resources. Moderated by Variny.

### **F. Group Photo, followed by Networking Lunch (12:00-1:00 p.m.)**

### **G. Listening Session with New National Jump\$tart Board Officers (1:00-2:00 p.m.)**

Laura will moderate an interactive session with state coalition leaders and Board Officers including: Casey Cortese, Charles Schwab Foundation, Chairwoman; Rhonda Ashburn, AFSA Education Foundation, Vice Chair; J. Michael Collins, University of Wisconsin-Madison, Treasurer; and Rod Griffin, Experian, Secretary.

### **H. Breakout Session #1 (2:00-3:00 p.m.)**

**State coalition leaders will tackle different operational topics:**

- 1) Events, Activities, and Educators (Mary Dyer, ME Jump\$tart)
- 2) Rebuilding and Managing Sticky Situations (Tena Lozano, CA Jump\$tart)
- 3) Partners, Board Members, Succession, and Collaboration (Dave Mancl, WI Jump\$tart)
- 4) Operations, Finance, and Fundraising (Buffy Murphy, AL Jump\$tart)

### **I. Break (3:00-3:15 p.m.)**

### **J. How to Engage with Educators (3:15-3:30 p.m.)**

Variny will chat with Mary Dyer, President of Maine Jump\$tart and 2024 State Coalition of the Year, about how to attract, engage, and empower educators to become participants and leaders in your state coalitions.

### **K. Breakout Session #2 (3:30-4:30 p.m.)**

**State coalition leaders will tackle different operational topics:**

- 1) Events, Activities, and Educators (Mary Dyer, ME Jump\$tart)
- 2) Rebuilding and Managing Sticky Situations (Tena Lozano, CA Jump\$tart)
- 3) Partners, Board Members, Succession, and Collaboration (Dave Mancl, WI Jump\$tart)
- 4) Operations, Finance, and Fundraising (Buffy Murphy, AL Jump\$tart)

### **L. Takeaways and Goals (4:30-4:50 p.m.)**

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

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

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*Please join us for a special reception with the national Jump\$tart Board at 5:30 p.m., at the Chesapeake View on the Hotel Rooftop, following the State Coalition Leaders Meeting. Tomorrow (April 18), join us for Continental Breakfast and browse the resource tables at 8:30 a.m., before the Jump\$tart General Partners Meeting from 9:00 a.m. – 12:00 p.m. in the Potomac Ballroom. Then, cheer on 2024 State Coalition of the Year, Maine Jump\$tart Coalition, at the Awards Luncheon from 12:30 – 2:30 p.m. in the Regency Ballroom.*