

# 2017 Financial Coaching Symposium

Monday, April 24 -  
Tuesday, April 25, 2017



Consumer Financial  
Protection Bureau

The Fluno Center at the University  
of Wisconsin-Madison  
601 University Avenue  
Madison, WI 53715

# Monday, April 24

1:00 – 2:00

## Welcome/Framing

**Daniel Dodd-Ramirez**, Assistant Director, Office of Financial Empowerment, Consumer Financial Protection Bureau (CFPB)

**Jonathan Mintz**, President and CEO, Cities for Financial Empowerment Fund (CFE Fund)

**Michael Collins**, Faculty Director, Center for Financial Security, University of Wisconsin, Madison (CFS)

2:00 – 3:30

## Lessons Learned from Recent Financial Coaching Research

This session will provide participants with key takeaways from recent, relevant research. Brief presentations on findings and a moderated conversation will lay out the existing evidence-base for the effectiveness of financial coaching, elevate key topics that we will explore throughout the Symposium, and identify lessons-learned and areas for further research.

Moderator: **Irene Skricki**, Office of Financial Education, CFPB

Panelists:

- **Brett Theodos**, Senior Research Associate, Urban Institute
- **Chris Walker**, Director of Research and Assessment, Local Initiatives Support Corporation (LISC)
- **Nicky Grist**, Principal, CFE Fund

3:30 – 4:00

## Break

4:00 – 5:00

## Vision for Coaching Field

A small panel of funders and field leaders will discuss the vision for financial coaching provision and integration, and where the field could be in the near and longer term future.

Moderator: **Jonathan Mintz**, CFE Fund

Panelists:

- **Irene Lee**, Director, Family Economic Success, Annie E. Casey Foundation
- **Karen Murrell**, Financial Coaching Initiatives Manager, Asset Funders Network (AFN)
- **Wende Burton**, Community Philanthropy Director, Community Foundation of Texas
- **Sarah Sable**, Chief Program Officer, Neighborhood Trust Financial Partners

5:00

## Closing

**Katherine Gillespie**, Deputy Associate Director, Consumer Education and Engagement, CFPB

# Tuesday, April 25

8:00 – 9:00

## Welcome/Framing

9:00 – 10:15

## Effective Client Engagement

The session will explore how the program model can best ensure that clients are consistently provided with effective, tailored, client-centered services that most effectively help them reach their goals. Speakers will provide insights on best practices on common challenges that many programs experience, such as client recruitment and retention, identifying “coachable clients,” transitioning clients into a coaching relationship, and retaining client buy-in.

Moderator: **Sarah Bainton Kahn**, Office of Financial Empowerment, CFPB

Panelists:

- **Sandra Davis**, Executive Director, Sage Financial Solutions
- **Mae Watson Grote**, Founder and CEO, The Financial Clinic
- **Peter Rubenstein**, Chief Revenue Officer, Solutions for Progress (SfP) and My Budget Coach

10:15 – 11:30

## Ensuring the Quality of Coaching

This session will focus on how the preparation, training, credentialing, and support of coaches and counselors can help ensure they are able to meet their clients where they are and provide high quality, client-centered services. The moderator will lead a discussion on what key elements and competencies are most pertinent in coaching and counseling training and preparation.

Moderator: **Pam McClelland**, Office of Servicemember Affairs, CFPB

Panelists:

- **Lauren Gates**, Project Director, RAISE Texas
- **Brooke Linkow**, Manager, Financial Capability Training, Neighborworks America
- **Peggy Olive**, Financial Capability Specialist, University of Wisconsin-Extension
- **Rebecca Wiggins**, Executive Director, Association for Financial Counseling and Planning Education (AFCPE)

11:30 – 12:15

## Working Lunch

### Perspective from a Related Field: Health Coaching

Samuel P. Magill, MCC, MBA

12:15 – 1:15

## Learning How to be More Effective

This session will explore how we can use information and data to become more effective as both a program and as a field. At the program level, panelists will talk about how they use the data they collect to improve their program models. At the field level, the moderator will kick off a discussion about how we can continue to collect and analyze data to further build a financial coaching evidence base. Panelists will also identify what questions we still need to answer as a field and the information that can help us continue to make improvements to service delivery.

Moderator: **Michael Collins**, CFS

Panelists:

- **Cindy Guy**, Vice President, Research, Evaluation, Evidence and Data, Annie E. Casey Foundation
- **Carlos Colón**, Financial Education Program Manager, *mpowered*
- **Amber Paxton**, Director of the Office of Financial Empowerment, City of Lansing, MI

1:15 – 1:30

## Explanation of and Move to Breakouts

Participants will participate in two consecutive breakout sessions. Each participant will have the opportunity to attend two of the three topic areas.

Topic Areas:

1. **Service Delivery Principles:** This breakout will identify the keys to successful and authentic coach - client interactions.

Facilitators:

- **Melissa Grober-Morrow**, CFED
- **Hiba Haroon**, CFED
- **Lissan Anfune**, CFPB

2. **Coach Training and Preparation Competencies:** This breakout will delve into the key core competencies needed for coaches to be effectively trained and prepared to serve clients.

Facilitators:

- **Hallie Lienhardt**, CFS
- **Sarah Bainton Kahn**, CFPB
- **Matthew Spring**, CFE Fund

3. **Priorities for Building the Evidence Base:** This breakout will explore the data and research priorities that will help advance the field.

Facilitators:

- **Irene Skricki**, CFPB
- **Karen Murrell**, AFN
- **Sara Nowakowski**, CFS

1:30 - 2:45

## **Breakout Session 1**

2:45 - 3:00

## **Break (Move to Next Breakout Session)**

3:00 - 4:15

## **Breakout Session 2**

4:15 - 5:00

## **Reconciliation, Refinement and Report Outs**

Attendees will return to the auditorium. Facilitators will have 30 minutes to work to reconcile and further refine the ideas from each breakout.

Attendees can either choose to take a break, or to join one of the groups in this effort.

Each breakout group will then select one facilitator to report out to the broader group. Each breakout will have 5 minutes to report their list and the resources that would need to be garnered (in terms of funding, program capacity-building, and field coordination and a community of practice) to accomplish the goals set forth.

5:00 - 5:30

## **Next Steps and Closing**