

## **2009 Annual Meeting for Opportunity@Work**

In July 2009, the Opportunity@Work Coalition met for their second annual meeting. This document provides minutes from discussions relating to the strengths, challenges and priorities of the coalition as well as subcommittee discussions.

These minutes will also be provided to each subcommittee to be addressed and updates will be provided at the October 16, 2009 Opportunity@Work Coalition meeting.

# **GENERAL SUBCOMMITTEE**

## **Mission Statement**

- 1.) Add thorough, accurate research, policy advocacy, and community education.
- 2.) Need more active verb
- 3.) Add language to mission statement about growth, general stability

## **Challenges/Opportunities**

- 1.) Increasing presence in each community
- 2.) Northeast Nebraska (Use Reg Groups)
- 3.) Regional Opportunities
- 4.) Using more technology
- 5.) Replacing key people
  - Transfer of knowledge is important
- 6.) Have organized files on history for every subcommittee and all of O@W's efforts
- 7.) Build a stronger, more succinct relationship between the institution, it's mission, and the individuals found within the coalition
- 8.) When we broaden partnerships, we must be sure to avoid losing the focus of the coalition
  - Shared vision is the key
- 9.) Create "Standards of Membership" in order for all participants to know expectations and goals of the coalition
- 10.) Use public outreach to make others aware-- don't always need to expand membership
- 11.) Need for creating fund development for O@W
- 12.) Expand to a state-wide presence

13.) Create visual representation of O@W, it's big picture, and it's past accomplishments

**Role**

- 1.) Corporate financial wellness
- 2.) Connect family perspective to collaborating non-profits (Implementation)
- 3.) Use IDA software within 24 bank system  
Use TOOLS

**Strengths**

- 1.) Our comprehensive understanding of key issues and overall perspective/insight
- 2.) Many diverse resources available
- 3.) Advocacy opportunities
- 4.) Expansive knowledge of current efforts, systems, programs
- 5.) Strength in numbers
- 6.) Expertise in many areas

## **PUBLIC OUTREACH SUB-COMMITTEE**

- Need overarching goals and roles for each person within the group
  - Potential roles: press, education, recruitment
  - Need “whys” of engagement
- Now is the rare opportunity to point attentions to the problems and solutions
- Find a lot of value in informant interviews
  - Adjustments need to be made:
    - Move focus of the group idea/task to data subcommittee
- Educate: So what?
  - What is the change that is needed and what difference will it make in lives
- Strategically promote O@W offering membership, data, tools, perspectives, and resources to target audiences and create tools to promote activities and issues
- Focus on stimulating/facilitating
  - Be the “bridge” to us, our work, and what we have to offer as a coalition and individuals
- Need to do more face-to-face time
  - Strategic targets
- Sharing- go to them/come to us
- Promotion of the FBL Report
  - Do small part of promoting other groups
- Do training on how to use PPT
- More one pagers
  - Promote report and legislation
- AAU Women, churches, BPW, Admin Assist groups, Jr. League of Omaha, NAM, Child and Family Coalition Omaha----Target list and strategy to do outreach
- Priority: twin goals: promote O@W Coalition and materials
- Public Dialogue: Forum or discussion of opposing views
  - Talk about goals, vision, and solutions

- Recruitment info:
  - Develop info about what membership means
  - Teach moment for strange bedfellows
  
- Info to share/ Use of Toolkit
  - Develop Brochure on alternatives to payday loans
  
  - Best practices compilation from community groups
  
  - Create Brochure on NE financial products/services available
  
  - Connect to Mike McKnight (Mary)
  
- Project Economy Stories
  
- NETV Recession Toolkit
  
- Editorial Board Meetings
  - Papers
  - Connect to assign editors
  - Press Kit

# **Research and Data Subcommittee**

## 1. Follow-Up after the release of the FBL:

- Initial dialogue with policy makers and other community leaders to discuss current ideas of poverty, so as to better focus on certain areas that have been shown to have common misconceptions.

- Ask for delineation of ACS by County  
Contact Todd Welchen

- Should the FBL be a Roadmap for O@W?

## 2. Strengths

- A lot of recommendations are provided in the back of the report

- Much more comprehensive than many previous publications  
Breaks it down by 10 family compositions and geography

- Goes against stereotypes of east NE and the “rest of the state”

- Broken down into Metro, Non-Metro Urban, and Non-metro Rural

- Tangible - concise and effective in style  
Could always be simplified more for easy interpretation

## 3. Challenges

- Don't have enough data to delineate ACS data into what goes into the FBL

- Who can we work with to help fill in some of the traditional gaps in data

- We need better distribution and awareness of the report

- Get funding to analyze more data and write more report

- Describing data on a continuing timeline  
- Time relevant data

# Advocacy Subcommittee

## Group #1

- Testifying is the easy part – effective policy advocacy requires a lot of groundwork outside of testifying. Does O@W have the capacity to do all of this ground work?
  - Becky Gould – For issues that Appleseed is working on, it is easy to be an active leader of the coalition’s efforts
- O@W as a convener/coordinator bringing us all together
- Is the Working Group to be another voice or is it to amplify the voices that are already there?
  - If it becomes its own non-profit, it is its own voice
  - If not, it should be an amplifier of other voices
- Have we identified the districts of O@W members willing to participate in policy advocacy? (Terry Werner)
- Glennis – It is good to get the people that are working on these issues together and to see how those issues interact.
- Terry Werner – There may be issues that come up that no one else is taking the lead on.
- Becky Gould – We have to also leave room for O@W to say “no” to working on an issue.
- **Power analysis of group capacity** – This might be another retreat opportunity for O@W.
- Terry Werner – Not too early to begin to think about elections.
  - Tiffany – Felt Metro-Area Candidate Forum was a success.
  - Perhaps we are able to coordinate candidate forums statewide with other O@W partners.

## Group #2

- James - Social advocacy can translate into legislative advocacy. Taking a position on a bill can create a line, as to who is “in” and who is “out.” Through social advocacy you can offer education about an issue and offer your constituency an opportunity to provide input to legislators. By advocating information and concepts, you can educate.
- How are we building power for the issues we care about? Grassroots mobilization is very resource and time intensive. O@W has the ability to bring issues to the table from coalition members. How do we mobilize the hands at the table to create a voice for these issues? Grassroots strategy would be best.
- At some point, solutions are on the table and we have to take a stand. Social advocacy and education are very time/labor intensive, but if we have a solution that we support (a bill number), O@W members seem to want to take a stand.
- Becky – We (Appleseed) have gone down the social advocacy road – but not the most effective strategy for limited resources
- We need more collaboration and more “buy-in” from coalition members if they want to take an active policy role

### Full Group Discussion

- Mary Fraser Meints- suggested development of a legislative platform to help make these decisions.
- Erin – What about the Family Bottom Line recommendations?
- Survey suggested to send out to the whole group about what they wanted from an Advocacy subcommittee
  - Easy for those to suggest what they want when they will not be the “boots on the ground”
- Someone suggested that the Advocacy Subcommittee prepare a couple of possible scenarios for what they could offer and entire group would comment.

# **Priorities of Opportunity@Work**

## 1.) Asset-building and IDA accounts

- IDA program essential-need funding to meet the need for both youth and adults
- Small Loan Fund to help those who can't address obstacles to moving forward
  - Coaching and Education can only go so far
- Alternative to Payday lending/Payday Lending Reform
- Increase Data Collection capabilities
- Asset-specific goals and education
- Personal case management
- Reporting Requirements/Quality

## 2.) Affordable Housing

- Need more access to affordable safe housing
- Community jobs program to build/rehab housing
- Need legislation on requirements for landlords to accept vouchers-inspections mandatory

## 3.) Growing advocacy

- Predatory Lending
- Insurance risk-based pricing
- Benefits of independent living and self-sufficiency
- Statewide education tour of financial education efforts
- Crime reduction and neighborhood building
- Job creation and retention
  - Employee Education

## 4.) Building and Growth

- Train the trainer for asset and financial specialist
- Build O@W infrastructure and capacity
  - Inventory of members- database
  - Add 1 staff: communications and membership support
  - Strategic recruitment: university, bank, unlikely partners
    - Marketing, branding, press
- Training for membership/skill building
  - Lobbying, spokespeople, press
- Grow IDA and SFAI
- Expand think-tank potential
- Increase Trust and Intentionality

5.) - Evaluating individual families and organizations

- Use checklist (simple)
- Assess family strengths
- Use Village 1, Village 2 Model Circles of Support
- Provide reciprocal services and systematic solutions
- Toolkit for Churches to move people out of poverty
- Use scholarship model and Christo Rey Concept (Model)
- NE Family Support Network

6.) Seeing projects through to the end

- Positioning NE to take advantage of new industry being created with new Administration
- Sustainability of ARRA projects

7.) Expand Financial Education State-wide

- Financial Planning and Coaching
  - Need Action Component
- Look at current interim studies in the legislature/prepare testimony

#### 8.) Partnerships

- Expand scope of current relationships
- Look for new partnership opportunities
- Utilize current network that is in place
  - Experts share knowledge (people from outside coalition come brief us— includes opposition views)
  - Share data so we are always aware of the latest developments
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## **Strengths of Opportunity@Work**

- Legislative/Policy Committee
- Expertise at the table—partnerships O@W has created on transitional youth
- Have ability to bring in money for programs
- Business voices at the table
- Diverse breadth of people at the table
- Skill set within coalition is very strong
- Benefit from advocacy tradition
- Skills, knowledge, current actions
- ARRA Expertise
- Ability to prioritize and follow through on projects that have been started
- Website for O@W

## **Challenges for Opportunity@Work**

- More voices at the table
- Still need more business presence
- Increase awareness about O@W
- Develop asset inventory
- Putting more resources into attracting youth into the coalition and bringing them into long-term investment with members of the coalition
- Not enough connection with faith-based groups
- Find ways to engage policymakers in all aspects (formally and informally)
- Developing relationships with for-profit organizations and individuals in influential places
- Creating a state-wide reach for the coalition
- Determining what are achievable outcomes and how to best distribute workload
- Increase active collaboration and interaction and information sharing
- Need More Employers Involved  
Release of Tool Kit
- Find continued funding for O@W and its projects