



DETAC Announces a New Results in Systems Excellence (RISE) e-Learning Community: Financial Inclusion Matters in Achieving Economic Self-Sufficiency and Employment

Session Schedule

May 2022 – August 2022

- #1 FINANCIAL INCLUSION MATTERS LAUNCH MEETING**
- Welcome, Logistics, Introductions
 - Why is topic important? Who is presenting? State of the disability field and financial inclusion.
 - Discussion of grantees organization, interest in financial education, makeup of board, and access to community partners and goals for participation.
 - Review of Agenda for 10 weeks
 - Question and answer time
 - Co-Facilitator: Dr. Johnette Hartnett
 - Date: May 5, 2022, from 3:00-4:30PM/EST
- #2 HOW COMPLEX MULTIPLE SYSTEMS WORK TOGETHER TO BUILD FINANCIAL INCLUSION**
- Recap of previous session and questions raised.
 - Challenges and benefits of state systems working with each other and non-traditional financial and community-based partners.
 - Medicaid and SSA Ticket to Work.
 - Key findings from the field and best practices.
 - Discussion and Questions
 - Co-Facilitator: Dr. Johnette Hartnett
 - Date: May 12, 2022, from 3:00-4:30PM/EST
- #3 WHAT ARE THE LONG-TERM FINANCIAL NEEDS OF INDIVIDUALS WITH DISABILITIES – PANEL OF ADVOCATES**
- Recap of previous session and questions raised.
 - What happens to individuals with disabilities in financial crisis? Who is trained in their world to assist them?
 - How do individuals with disabilities learn about opening their first bank or credit union accounts? Or school loan?
 - What training is available to providers or employers to assist?
 - Developing a SSA PASS Plans for Employment
 - Discussion and Questions
 - Co-Facilitator: Dr. Johnette Hartnett



- Date: May 19, 2022, from 3:00-4:30PM/EST

#4 WHAT ARE POOLED TRUSTS AND WHY THEY MATTER

- Recap of previous session and questions raised
- Why Special Needs Pooled Trusts, Challenges and Benefits
- Beneficiaries share stories
- Discussion and Questions
- Co-Facilitator: Dr. Johnette Hartnett
 - o Guest Expert: Yolanda Mazyck, CEO Shared Horizons, Inc.
- Date: June 2, 2022, from 3:00-4:30PM/EST

#5 WHAT THE COMMUNITY REINVESTMENT ACT (CRA) MEANS FOR YOUR ORGANIZATION AND LOW MODERATE INCOME (LMI) POPULATION WITH DISABILITIES

- Recap of previous session and questions raised
- Recent Changes to the Community Reinvestment Act (CRAs)
- What it means for your organization and customers with Disabilities
- Tips and Review for upcoming session
- Discussion and Questions
- Co-Facilitators: Dr. Johnette Hartnett
 - o Guest Expert Dr. Janet Hamer/Hamer Consulting
- Date: June 16, 2022, from 3:00-4:30PM/EST

#6 MEDICAID BUY-IN AS A PATHWAY TO EMPLOYMENT

- Recap of previous session and questions raised
- History of MBI: national and state structures
- How to utilize the MBI program in your state
- MBI resources
- Discussion and Questions
- Co-Facilitator: Annette Shea
 - o Guest Expert: Annette Shea
 - o Date: June 23, 2022, from 3:00-4:30PM/EST

#7 WHAT ARE THE CURRENT TAX INCENTIVES FOR DISABILITY FILERS?

- Learn about 2021 tax incentives, deductions, and refunds and COVID related information
- Discussion and Questions
- Discussion and handout about Session 8 Assignment
- Co-Facilitator: Dr. Johnette Hartnett
 - o Guest Expert: Don Dill, IRS Stakeholder, Partnership Education and Community (SPEC) Senior Tax Analyst



- Date: July 14, 2022, from 3:00-4:30PM/EST

#8 WHY ABLE ACCOUNTS MATTER

- Recap of previous session and presentations and questions raised.
- Review ABLE Account History, Logistics and Nationwide Network
- Benefits and challenges
- Co-Facilitator: Dr. Johnette Hartnett
 - Guest Expert: Miranda Kennedy, Director Able National Network
 - Date: July 28, 2022, from 3:00-4:30PM/EST

#9 IMPORTANCE OF MAKING THE DISABILITY BUSINESS CASE

- Recap of previous session and questions raised.
- Practical Advice, Statistics for Inclusion of Disability Market Research in Financial Capability Local Work, Grants and Marketing
- Examples from RISE Network on how to begin!
- Discuss Centerpiece Assignment for session #10. August 11,2022.
- Discussion and Questions
- Co-Facilitator: Dr. Johnette Hartnett
 - Date: August 04, 2022, from 3:00-4:30PM/EST

#10 CENTERPIECE WRAP-UP – ONE PAGER EACH ON BUILDING AN INCLUSIVE FINANCIAL RELATIONSHIP CHANNEL IN YOUR COMMUNITY

- Recap of previous session and question raised
- Grantees present 5-minute each roadmap for next steps in building an inclusive financial capability conversation and/or project in one or more areas of RISE Money Matters work. (ABLE, Taxes, CRA's, Medicaid Buy-In, Financial Education, Pooled Trusts, etc.).
- Final Thoughts!
- Co-Facilitator: Dr. Johnette Hartnett
 - Date: August 11, 2022, from 3:00-4:30PM/EST

