
Strategic Brainstorming Breakout Sessions

Please refer to the Updated Strategy document from the April 2021 Board Meeting. Board Meeting participants will be divided into three groups to brainstorm ideas to support the five priority areas (see page 8). Participants have been pre-assigned to groups, to facilitate the transition into virtual breakout rooms and to help ensure a mix of organizational diversity in each group; however, if you feel you need to be reassigned, please contact Daniel.Hebert@jumpstart.org or Laura.Levine@jumpstart.org prior to the start of the meeting.

The goal of these sessions is to compile a list of thoughts and ideas for staff to integrate into an updated plan. Some similar ideas may come out of more than one group, which is fine – it will emphasize the importance. Group leaders will give a two-three minute report when the full Board reconvenes after the breakout sessions.

Group #1 – Project Groundswell/Check Your School and Financial Inclusion Efforts to Support CYS Goals

Brainstorm ideas for initiatives, messaging, outreach, and other activities that will support growth in classroom-based financial education, as well as financial inclusion strategies that will prioritize CYS growth in communities where it may be needed most.

Leaders: Mike Staten and Megan McDonald

Jump\$Start Team/Note Takers: Anne Bannister and Joel Chrisler

Participants:

- Chris Caltabiano, CEE
- J. Michael Collins, academic director
- Casey Cortese, Charles Schwab Foundation
- Christina Cuzzi, Fidelity
- Billy Hensley, NEFE – Education Committee Chair
- Sara Mee, TransUnion
- Lori Schock, SEC
- Colleen Tressler, FTC

Group #2 – Public Advocacy

Brainstorm ideas for initiatives, messaging, outreach, and other activities that will help us expand our reach in promoting the importance of financial literacy and the need for effective financial education. Consider ways for improving visibility for the successful programs that we currently administer.

Leaders: Corey Carlisle and John Doyle

Jump\$Start Team/Note Takers: Amina Carter and Jessica Cultra

Participants:

- Margaret Brooks, RIJ\$, State Coalition Representative
- Dennis Duquette, MassMutual
- Rod Griffin, Experian – Communications Committee Chair

- Hugh Norton, Visa
- Jinhee Kim, Cooperative Extension
- Wynne Lum, Bank of America
- John Ryan, CSBS
- Laura Shipley, FRB
- Olivia Valdes and/or Gerri Walsh, FINRA

Group #3 – Collaboration within the Field and Support for Jump\$Start’s Operation

Brainstorm ideas for initiatives, messaging, outreach, and other activities that Jump\$Start can use to orchestrate and augment collaboration within the financial literacy field. Consider how these efforts will help Jump\$Start grow the coalition—establishing new partnerships and potential avenues of support.

Leaders: Rhonda Ashburn and Vickie Bajtelsmit

Jump\$Start Team/Note Takers: Variny Yim and Rosella Bannister

Participants:

- Jared Davidove, Intuit
- Jeanne Hamrick and/or Karen Grajales, NASAA
- Ray Martinez, EverFi
- Melanie Mortimer, SIFMA Foundation
- Lori Myers, AAFCS
- Liz Ortiz, FDIC
- Demetrius Scott, Ally
- Bonnie Wallace, Wells Fargo
- Rebecca Wiggins, AFCPE – Partnership Committee Chair