

Minutes of the NCCC052 Annual Meeting
Omaha, NE
October 21-22, 2010

Thursday

Attendees: Kristy Archuleta, Liz Gorham, Clinton Gudmunson, Cathey Huddleston-Casas, Cynthia Jasper, Christine Ranney, Robert Scharff, Kathy Solheim, Tansel Yilmazer

Group:
Breakfast, Introductions and Station Reports

Cathey Huddleston-Casas:
Presentation of the reauthorization proposal approved by NIFA

Cynthia Jasper:
Update from NCCC052 Administrative Advisor. Update included information regarding the naming of Susan Shockey as National Program Leader to fill the vacancy left by Jane Schuchardt's retirement.

Shawn Macken:
Community Guest, Shawn Macken shared his experiences as the director of the Financial Wellness Program at Waddell & Reed Financial Advisors in Omaha, NE. NCCC052 members participated in an interactive presentation by Mr. Macken addressing behavioral finance and the interconnections between money and emotions as experienced in the field. The discussion sparked interest in assessing the degree to which fieldworkers (financial educators and advisors) make use of the products of academic inquiry as well as the opportunities that fieldworkers have to provide input into the process of academic inquiry.

Group:
Lunch—Shawn Macken joined the group for lunch and continued the discussion of the need for more communication between academicians and fieldworkers.

Mary Lynn Reiser:
Group traveled to South Campus to visit Mammel Hall, the newly constructed home to the College of Business Administration at the University of Nebraska-Omaha. We were met by Mary Lynn Reiser, the Associate Director of the UNO Center for Economic Education. Ms. Reiser showed us the resources available in the new facility and then hosted us for a presentation and discussion in the Center for Economic Education. NCCC052 members learned about the cross-referenced educational materials available on the Center's website and sparked a conversation about the need to develop comparable resources for financial education across the country.

Aubrey Mancuso & Ed Leahy:
Community Guests Aubrey Mancuso & Ed Leahy joined NCCC052 members for the latter half of the afternoon. Aubrey Macuso is the Coordinator of ***Opportunity@Work***, a coalition spanning non-profit, for-profit, education, and policy sectors. Ms. Mancuso presented the work currently being done by the coalition on IDAs. Ed Leahy is the director of EITC Coalition in Omaha and presented the VITA and VITA Plus programs that he directs in Omaha. Mr. Leahy's presentation also included his suggestions for areas needing the attention of researchers.

Kristy Archuleta:

NCCC052 team member Dr. Archuleta presented materials from the Fall 2010 Financial Therapy conference and led a discussion of the emergence of Financial Therapy programs and the development professionals specializing in Marriage and Family Therapy in combination with Financial Therapy.

Group:

Dinner at the Omaha Press Club

Friday

Group:

Breakfast and logistics to the airport coordination

Kristy Archuleta:

Research Update—shared her preliminary findings of current research project

Group:

Discussion on emerging issues and research priorities

Group:

Election

Election results: Kathy Solheim elected as Secretary/Chair-Elect

2010-2011 leadership: Michael Gutter, Chair & Kathy Solheim, Secretary/Chair Elect

Group:

2011 meeting location discussed and group agreed to meet in Minneapolis/St. Paul.

Meeting adjourned