

**Rural America
Earned Income Tax Credit and Family Economic Opportunity**

Thursday, December 6 & 7, 2007

Charlotte Hilton Center City -- Charlotte, North Carolina

Meeting Agenda

December 6, 2007

South Carolina Room

12:00 p.m. – 1:30 pm

Lunch -- Welcome: Alice Warner, W.K. Kellogg Foundation
Miriam Shark, Annie E. Casey Foundation

Opening Discussion: Working Poor Families and the Earned Income Tax Credit in Rural and Native American Communities

- * David Marzahl, Center for Economic Progress
- * Karen Edwards, KME Consulting, Inc.

1:30 pm – 3:00 pm

Innovations in EITC Outreach and Participation

- * Lisa McCulloch, New Mexico Community College (**OVERHEADS AVAILABLE**)
- * Mike McBride, Internal Revenue Service-SPEC (**OVERHEADS AVAILABLE**)
- * Jay Kerrigan, Iowans for Social and Economic Development
- * *Discussion Facilitator:* Deborah Schachter, New Hampshire Charitable Foundation

3:00 pm – 3:30 pm

Break

3:30 pm – 4:00 pm

Organizational Landscape of Rural States

- * Alice Warner, W.K. Kellogg Foundation

4:00 pm – 5:30 pm

Intermediaries—Building Capacity and Extending Reach in Rural and Native American Communities

- * Lucy Gorham, EITC of the Carolinas (**OVERHEADS AVAILABLE**)
- * Joanna Donohoe, Oweesta and Native Financial Education Coalition (**OVERHEADS AVAILABLE**)
- * Karen Heisler, Rural Dynamics/Consumer Credit Counseling Service-MT (**OVERHEADS AVAILABLE**)
- * *Discussion Facilitator:* Mary Hunt Lieving, Benedum Foundation

6:30 pm

Dinner Discussion -- EITC as a Piece of the Economic Opportunity Puzzle

- * Toni Freeman, Duke Endowment
- * John Molinaro, Aspen Institute (*interviewer*)

December 7, 2007

North and South Carolina Room

7:30 am – 8:30 am

Breakfast

8:30 am – 10:00 am

Linking EITC to Other Supports for Low-Wage Workers—Public Benefits, Financial Education, Banking, and Assets

* Ken Fredette, Lakes and Prairies (**OVERHEADS AVAILABLE**)

* Henry Thompson, Chief Dull Knife Community College

* Laura Scherler, United Way of America (**OVERHEADS AVAILABLE**)

* *Discussion Facilitator:* Ana Marie Argilagos, Annie E. Casey Foundation

10:00 am – 10:15 am

Break

10:15 am – 12:30 pm

Opportunities for Improvement—Where Do We Go From Here?

* Open Space Technology

12:30 pm

Adjourn

(Box Lunches Available)