

Kindergarten to College Symposium

December 11-12, 2012

Westin St. Francis, 335 Powell Street, San Francisco, CA

Meeting Objectives:

1. Generate insights, feedback and advice to support the Kindergarten to College program; provide K2C with practical recommendations to guide program refinement over the next 6-12 months.
2. Discuss interest and potential next steps for formalizing an advisory group to provide ongoing, periodic advice and counsel to support the program as it matures.
3. Capitalize on broad interest in the topic of children's accounts to discuss implications and potential actions for nurturing other local or national efforts; allow all participants to cross-pollinate ideas that they can take back to use in their own day-to day work.

Tuesday, December 11 – Tower Salon (Room A/B)

8:30am to 9am	Breakfast
9am to 9:30am	Introductions and review of goals for the day
9:30 am to 10am	K2C Program Overview
10am to 11am	K2C Program Results to Date and Review of Initial Research
11am to 11:15am	Break
11:15am to 12pm	Review of K2C Metrics and Group Discussion of Key Questions

Key questions include:

- *What does success look like for K2C? How do we define and measure this success?*
- *What are two or three priority success measures that we should use to define the success of K2C - both for sustainability in San Francisco and scalability beyond?*
- *Within a universal program, how do we make sure we move towards our goals, particularly if those goals focus on a target demographic?*

12pm to 1pm	Lunch and continue group discussion
1pm to 3pm	Small group discussions <ul style="list-style-type: none">• Account Design• Savings incentives• Encouraging savings/engaging families• Research and evaluation

Small group discussions will build on the morning dialog by dividing participants into 4 groups to discuss topic specific issues in depth. Objective is to develop recommendations for what the City should “start, stop, continue and investigate further” as it relates to each group’s assigned topic.

3pm to 3:15pm	Break
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Travel Report

What: Kindergarten to College Symposium (agenda attached)

When: December 11 – 12, 2012

Where: San Francisco, CA

Host: San Francisco Office of Financial Empowerment and Charles Stewart Mott Foundation

Expenses Covered: Travel, Hotel, and Food were paid for by the Charles Stewart Mott Foundation

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3:15 to 4:45pm Report back and capture questions for day two discussion

4:45pm to 5pm Wrap up and next steps

5pm Meeting Adjourns

6:30pm Dinner: Bar Postrio, 545 Post Street , San Francisco

DAY TWO

Wednesday, December 12 – Tower Salon (Room A/B)

8:00 to 8:30am Breakfast

8:30 to 10:00am Group discussion on themes and recommendations from small group topics

10:00 to 10:30am Lightning Round: Most important take-away from meeting

10:30 to 11:30am National Policy, Replication and Technical Assistance

- Overview of the current state of the field
- Discussion of key issues and questions

Key questions include:

- *How can we best use the K2C model to help make the case for a national savings program? Are there program elements to be added, highlighted, evaluated?*
- *How do we view replication of this model? Is creating more programs like K2C beneficial to a) San Francisco; b) the national movement?*
- *Short of a federal program, what other changes could happen at the national level to help programs like K2C?*

11:30am to 12:00pm Discuss the formation and role of an Advisory Group/Next steps

12pm Adjourn