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EMPOWERED CITIES: INNOVATIVE PRACTICES TO BUILD FINANCIAL INCLUSION FOR PERSONS WITH DISABILITIES

March 26, 2019



Building Financial Security for
People and Families with Disabilities



Welcome



Michael R. Roush, M.A., AFC®
Director, Real Economic Impact Network
National Disability Institute

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Please note: This webinar is being recorded and the materials will be placed on the National Disability Institute website at www.nationaldisabilityinstitute.org.

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Webinar Agenda

- Overview of Empowered Cities
- Panel Discussion
 - **Innovative Practices to Build Financial Inclusion for Persons with Disabilities**
 - City of Boston - Mayor's Office of Financial Empowerment and Boston Tax Help Coalition
 - City of Chicago - Mayor's Office for People with Disabilities
 - City of New York - Office of Financial Empowerment, NYC Department of Consumer Affairs
- New resources and tools

National Disability Institute (NDI)

- NDI is a national nonprofit organization dedicated to building a better economic future for people with disabilities.
- NDI is the first national organization committed exclusively to championing economic empowerment, financial education, asset development and financial stability for all persons with disabilities. NDI affects change through public education, policy development, training, technical assistance and innovative initiatives.

National Disability Institute

National Disability Institute envisions a society where people with disabilities have the same opportunities to achieve financial stability and independence as people without disabilities.

www.nationaldisabilityinstitute.org



What Is Empowered Cities?

A partnership between Citi Community Development and National Disability Institute that will engage municipalities and community partners across the U.S. to design, test and deliver innovative and scalable solutions for expanding financial empowerment and financial inclusion in the disability community.

Moderator



Jasmine Thomas

Senior Vice President of National Initiatives
Citi Community Development

Panelist



Mimi Turchinetz, Esq.
Mayor's Office of
Financial Empowerment
Assistant Deputy Director
Boston Tax Help Coalition Director

Office of Financial Empowerment Boston Tax Help Coalition Financial Inclusion Strategy and Outcomes

The Boston Tax Help Coalition is part of Boston Mayor Martin J. Walsh's Office of Financial Empowerment. The Coalition has provided free financial capability strategies and services for low and moderate-income people since 2001. The core service provided is free tax preparation with credit building integrated into the service. Financial inclusion for immigrants and people with disabilities is prioritized by the Coalition. The mission is as follows: *The mission of the Boston Tax Help Coalition is to broaden pathways from poverty to financial empowerment by maximizing the impact of the Earned Income Tax Credit and other tax credits through quality, free tax preparation, financial education and economic stability opportunities."*

Tax preparation results and demographics

- 13,000 taxpayers served in Boston annually
- Since 2001, over 165,000 LMI taxpayers served
- Close to 16% of taxpayers served self-define as having a disability
- Multicultural and multilingual taxpayers served
- Income eligible free tax preparation in Boston's neighborhoods
- Many qualify for refundable Earned Income and Child Tax Credits



**Office of Financial Empowerment
Boston Tax Help Coalition
Financial Inclusion Strategy and Outcomes (CONTINUED 2 of 3)**

Formation of the Disability Working Group in Partnership with NDI and Inclusion Strategy

The Boston Coalition Disability Working Group (DWG) was created in 2005, inspired by NDI and the IRS, in recognition of the need to provide fully inclusive VITA services to the communities with disability, leading to a strategy of braiding best practices from VITA and the disability movement.

DWG members included Coalition partners, including IRS/SPEC, Goodwill, Mass Rehabilitation Commission, Community Work Services and the Boston Housing Authority. All Coalition tax sites were evaluated to determine compliance with the ADA and that compliance was added to the tax flyer.

Increased research and self-education took place, resulting in the Coalition modifying the NDI Disability Etiquette Power Point training, and all Site Coordinators, tax staff and volunteers were trained in disability sensitivity and etiquette. Comprehensive outreach to communities with disabilities was provided through a “Disability Ambassador”, who joined 7 additional bi-lingual community Ambassadors who complimented the fully inclusive strategy of the Boston Coalition.



**Office of Financial Empowerment
Boston Tax Help Coalition
Financial Inclusion Strategy and Outcomes (CONTINUED 3 of 3)**

Expansion of Commitment and Creation of American Sign Language (ASL) Task Force

The Coalition's ASL Task Force was created in 2011 in partnership with NDI, the Mayor's Office of People with Disabilities, the IRS, Northeastern University and Deaf, Inc. The goal of the ASL Task Force was to create fully inclusive ASL tax days, allowing taxpayers who are Deaf and/or hard of hearing to fully participate in free tax preparation and asset building opportunities.

Funds were raised to expand this work, pay for ASL interpreters, and develop a strategy to increase ASL services for taxpayers.

In 2019, the ASL Task Force has as its goal to double service delivery from 3 to 6 ASL Tax Days at Deaf Inc. and to serve 100 taxpayers with fully inclusive ASL services.

In spring of 2019, an ASL Asset Summit is planned to provide asset building strategies to the Deaf community as a partnership between Deaf, Inc. and the Coalition. Planning is currently taking place, with the summit to occur in May of 2019.



Panelist



Joe Albritton
Deputy Commissioner
Mayor's Office for People with
Disabilities
City of Chicago



MOPD

Mayor's Office for
People with Disabilities

Chicago's efforts to improve financial wellness for our disability community

Financial Advisory Council for the Empowerment of People with Disabilities (FACED) Initiative

Partnership between Chicago MOPD & City Treasurer's Office

FACED collaboration with state and federal agencies, and local CBOs:

- FDIC
- Federal Reserve Bank
- Social Security Administration
- IDHS/Division of Rehabilitation Services
- Illinois ABLE Accounts
- City Clerk
- Council on Veterans Affairs
- Chicago Cook Workforce Partnership
- Woodstock Institute
- Economic Awareness Council
- Access Living
- Equip for Equality
- Heartland Alliance
- Center for Economic Progress
- Resources for Community Living
- Junior Achievement
- BankOn
- Cities for Financial Empowerment Fund
- Chicago Public Schools
- City Colleges of Chicago
- University of Illinois at Chicago: Chicagoland Entrepreneurship Education for people with Disabilities

FACED Year 1

- Understanding the barriers to financial empowerment and inclusion for Chicago's disability community:
 - collecting data
 - compiling resources
 - sharing information related to financial education and literacy
- Understanding the products and services offered to Chicago's disability community by financial institutions:
 - online research of banks
- Developed a strategic plan

Year 2 - Next Steps

FACED will invite targeted, high-level representatives from “local” financial institutions to a meeting hosted by MOPD & CTO

The invitation will include:

- An overview of Year 1 work by FACED.
- Local and National survey results showing the need for financial wellness by the disability community.
- A “wish list” to serve as a road map for financial institutions to provide services that are inclusive of the disability community, such as:
 - **Products (Offer and Market)**
 - **Accessibility Services**
 - **Other Steps**

Panelist



Nichole Davis
Director of Programs
Office of Financial Empowerment,
NYC Department of Consumer Affairs

NYC Department of Consumer Affairs (DCA) Office of Financial Empowerment (OFE)

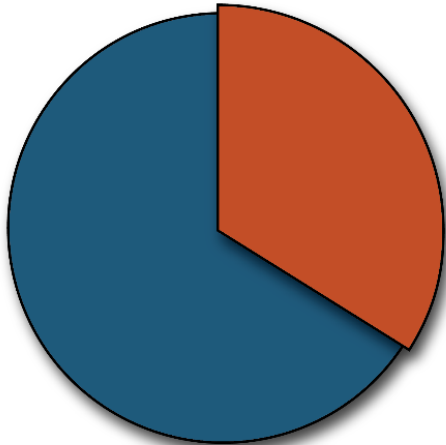
DCA protects and enhances the daily economic lives of New Yorkers to create thriving communities.

Within DCA, OFE focuses on initiatives that support New Yorkers and communities with low-incomes in building wealth and improving their financial health.

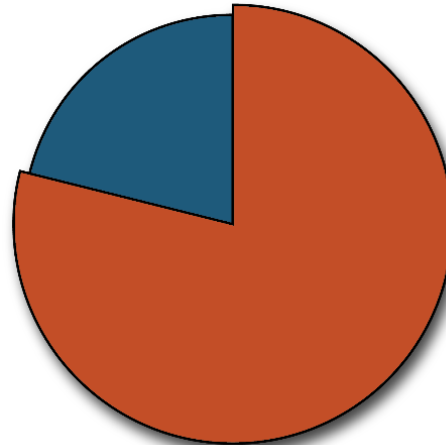
OFE uses data and research, policy, partnerships, and convenings to advance its mission. Using this model, OFE is able to develop, offer, and advocate for innovative programs and products for all New Yorkers.



The Need for EmpoweredNYC



36.2% of New Yorkers with disabilities live at or below the poverty level.



76.8% of New Yorkers with disabilities are jobless.

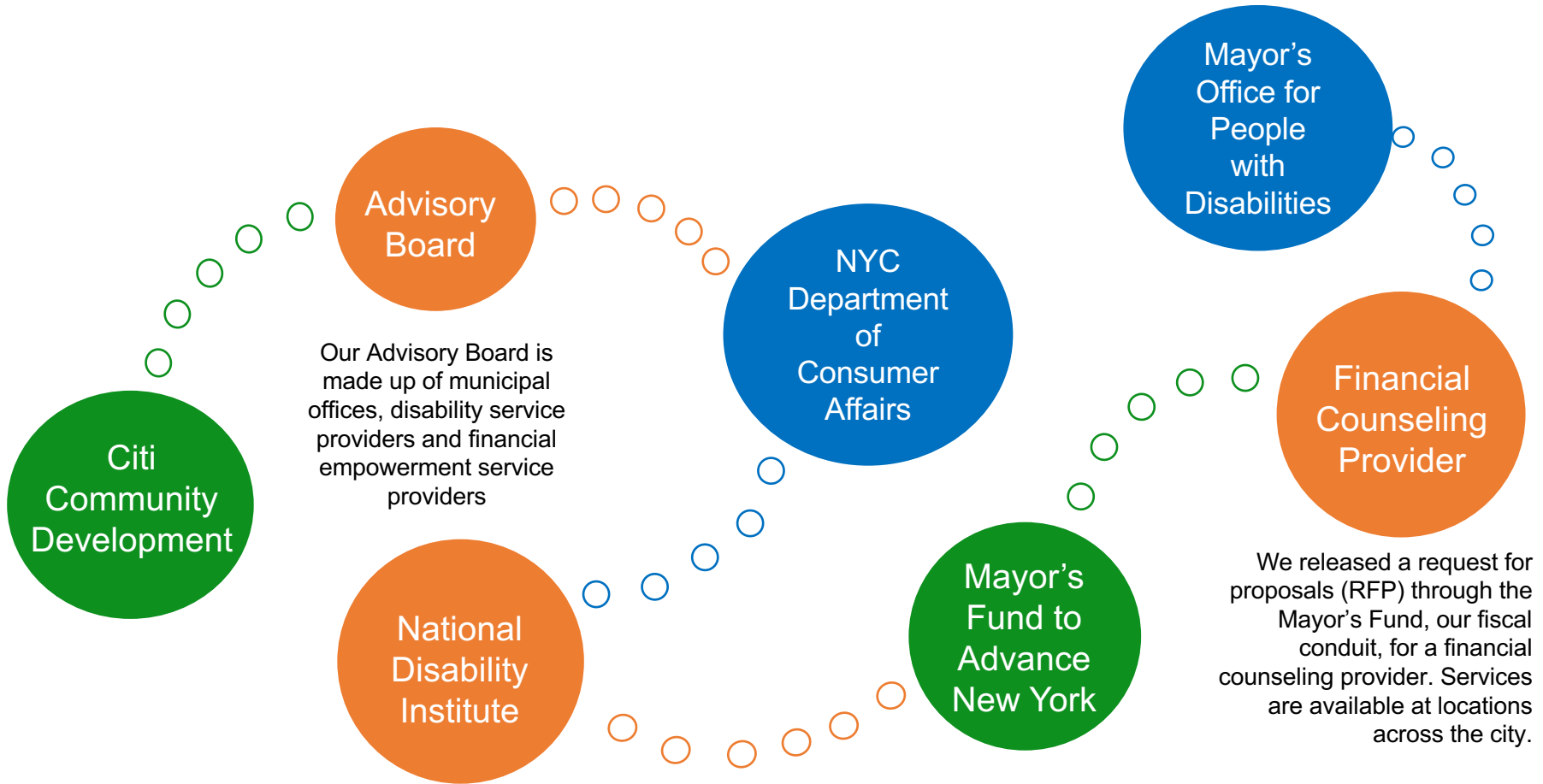
EmpoweredNYC



EmpoweredNYC is a new initiative to help New Yorkers with disabilities and their families take control of their finances and become more financially stable. To do this, EmpoweredNYC offers:

- Specialized and confidential one-on-one financial counseling
- Counselors with a deeper knowledge and understanding of disability benefits
- Services in the five boroughs of New York City, located at community-based organizations

EmpoweredNYC Strategic Partners



Panel Discussion



Mimi Turchinetz, Esq.
Mayor's Office of
Financial
Empowerment
Assistant Deputy
Director
Boston Tax Help
Coalition Director



Joe Albritton
Deputy Commissioner
Mayor's Office for
People with
Disabilities, City of
Chicago



Nichole Davis
Director of Programs
Office of Financial
Empowerment,
NYC Department of
Consumer Affairs

Tools and Resources

- Identifying the Needs of Persons with Disabilities Brief
- Quick Reference Guides
 - Data Collection
 - Identifying Disability Partners in My Community
- Empowered Cities Website
 - <https://www.nationaldisabilityinstitute.org/capacity-building/empowered-cities/>

National Disability Institute Contacts

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Questions?

Wrap-Up and Thank You

Join us for our next webinar:

Topic: Creating the Pathway to Financial Inclusion for Persons with Disabilities

Date: May 28, 2019

Time: 3:00 PM Eastern