Meeting Notes

Financial Inclusion Roundtable

April 28, 2016

Thank you to all who attended the Financial Inclusion Roundtable  last Thursday at United Way.  For those who were not able to make it, we hope to see you next time.

We had a very engaged group with a good mix of nonprofit service providers and financial institutions.  We heard three perspectives on financial inclusion challenges and opportunities in our community —from Eloy Villafranca with the FDIC, Councilman Rick Callahan from the City of Dallas, and Roy Lopez with the Federal Reserve Bank of Dallas.  In addition, Camilla Zimbal from Metrocrest Services shared how her organization is using an integrated service approach to help clients achieve financial stability through a combination of workforce development, financial capability and income supports programs.  Amanda Stephens with First Convenience Bank provided the financial institution perspective and talked about products and services their firm is using to serve everyone in the community.

We closed the meeting by asking everyone to vote on topics they would like for this group to cover in future meetings, both from a list of proposed topics and “write-in” suggestions.   Most popular common themes include exploring demographic trends, particularly resources for undocumented and Hispanic populations;  credit topics;  children/youth programs and accounts; and having a better understanding of the needs of low and moderate income individuals, from their perspective.  The complete list (in order of votes) is below, along with other handouts from the meeting that are attached.  Also, you can see photos from the meeting in our Facebook album:  : <https://m.facebook.com/unitedwaydallas/albums/10153573921183059/>

We are looking to have our Q3 meeting in late August, and plan to send the calendar invite before Summer gets here so that everyone can have it on their calendar.  Thank you again for your active engagement and participation.  Please let me know if you have any suggestions or input, and I look forward to building on this collaborative initiative.