

**Evaluation Compilation**  
**Pathways to Wealth Creation Programming: A Summit**  
**November 16, 2004**

Total Number of completed evaluations received: 37  
 Total Number of summit attendees: 70  
 Percentage of returned completed evaluations: 53%

**Please provide feedback to the panelists:**

	Excellent	Good	Fair	Poor	No Opinion
<b>Panelist: Jeanne Hogarth</b>	14	16	3	0	4
Comments: <ul style="list-style-type: none"> <li>• Too many acronyms with no explanation</li> <li>• Good overview</li> <li>• Good info, kept it real despite her position with Fed. Res.</li> <li>• Over my head</li> <li>• Enjoyable</li> <li>• Good stat info – would have liked to have her power point</li> <li>• Interesting but too high level</li> <li>• Very good info – needed to provide copies of presentation</li> <li>• Too many details (data)</li> <li>• Good info from research &amp; policy level perspective; but did speaker realize lots of audience is program providers</li> <li>• A handout of presentation would have been nice.</li> <li>• Triage concept very interesting/fits with Casey targeting concepts</li> <li>• The information was invaluable – I must use it!</li> </ul>					
<b>Panelist: Gena Gunn</b>	13	18	4	0	2
Comments: <ul style="list-style-type: none"> <li>• Research is passionless</li> <li>• IDA info and overview very helpful</li> <li>• Great info and resources, really appreciated her presentation. Got me very interested in advocacy around this issue.</li> <li>• Over my head</li> <li>• Excellent speaker, good information and data</li> <li>• Good information, thanks for resource information with power point</li> <li>• Not central to my work</li> <li>• Give examples</li> <li>• Good info &amp; very valued to have power point presentation handout but again, audience gets impatient waiting for tangible program info</li> <li>• Liked power point presentation handout and definition of asset building policy. Also handouts for future reference.</li> <li>• Interesting but wasn't sure where the inventory of IDAs fits</li> <li>• The information was invaluable – I must use it!</li> </ul>					

<b>Panelist: Dory Rand</b>	13	16	5	0	3
Comments: <ul style="list-style-type: none"> <li>• Very useful info</li> <li>• Real world – interested in education program</li> <li>• Wonderful overview of their program. Very interested in the combined curriculum they are using.</li> <li>• Over my head</li> <li>• Excellent information</li> <li>• Sort of disappointed, I had heard most of what she had to say earlier and in my work</li> <li>• Presented well, power point presentation informative – good speaker. Also contributed helpful info to small group. Also handouts for future reference.</li> <li>• The information was invaluable – I must use it!</li> </ul>					
<b>Panelist: Althea Saunders-Ranniar</b>	25	12	0	0	0
Comments: <ul style="list-style-type: none"> <li>• Real and informative</li> <li>• Real real world</li> <li>• I like that she stuck around and continued to contribute to the discussion. Very real and “hands-on” examples.</li> <li>• Keep it real!</li> <li>• Very good information</li> <li>• Very good speaker</li> <li>• Good information</li> <li>• Outstanding!</li> <li>• Great delivery – great info. Very interesting.</li> <li>• Excellent real life examples of products to serve our population</li> <li>• Power point presentation was excellent. Loaded with information and also gave concrete examples. Wonderful sense of humor.</li> <li>• What’s not to like?</li> <li>• The information was invaluable – I must use it!</li> <li>• Liked the way she spoke so down to earth.</li> </ul>					
<b>Facility and Food: Provided by Heartlove Place</b>	20	15	0	0	2
Comments: <ul style="list-style-type: none"> <li>• Fantastic facility. Great service.</li> <li>• Tasted good</li> <li>• Well prepared! Excellent!</li> <li>• Was bit cold in the room</li> <li>• Beautiful school! Beautiful facility! Should use it more.</li> <li>• Warm and friendly staff. Clean, well appointed environment – good lighting, seating, technology set up. Good food.</li> <li>• The food was great! The selection was limited.</li> </ul>					

<b>Format: Morning General Session</b>	14	14	1	0	3
<b>Format: MCM Area Discussion</b>	15	13	0	0	9
Comments: <ul style="list-style-type: none"> <li>• I like the model ▼ or is it ▲ 😊</li> <li>• Thank you for putting this together and making it free – wonderful! This should be done on a regular basis – nice work. Reach out to CBOs too.</li> <li>• Well put together!</li> <li>• Great information sharing, would like to have copy of comments that was done in small breakouts, would like to see list of everyone who participated.</li> <li>• Very well organized. Great job.</li> <li>• All great material! Thanks for bringing us all together!</li> <li>• Toni took too long to get to point. Not a strong call to action.</li> <li>• Appreciated Jeanne’s avoidance of using acronyms.</li> <li>• Second half of morning could have been more interactive – maybe small group before the panelists.</li> <li>• Small group discussion needs more time &amp; smaller groups. We need to reconvene after small group to gather all info, or else announce that the info will be compiled later or after the conference.</li> <li>• Strategy meeting at end was great!</li> <li>• I enjoyed listening to people expand on what they learned in the morning and apply to possible solutions in the afternoon session.</li> <li>• Should have brought County worker to the table.</li> <li>• More faith-based</li> <li>• Every single drop was very informative &amp; helpful. I would like to use the info to teach others.</li> </ul>					

**Please provide feedback to UEDA:**

YES	NO	N/A	No Answer	
24	0	7	6	Does your organization want to discuss ways to expand or enhance financial education to the MCM area?
31	1	3	2	Did the panel expose you to new ideas and ways for managing and deploying existing financial resources?
29	2	3	3	Is a financial education advocacy partnership of interest to you or your organization? <i>Please see tally below table of circled preferences.</i>
28	4	2	3	Did the breakout session provide a learning experience?
30	2	1	4	Did the facilitator create an open dialogue for exploring ways to enhance existing programming?

Tally of financial education advocacy partnership circled preferences:

Statewide	Regional	Local (city)	No Answer
5	2	12	23

Summit attendees who listed their name and organization when identifying their preferences in the tally of financial education advocacy partnership:

1. Betty Speed, Milwaukee Urban League (statewide, regional, local)
2. Ayoka Huff, Fitzsimonds Boys & Girls Club/Metcalf School (local)
3. Shirley Lowery, Career Youth Development (local)
4. Andrew DeFranza, WWBIC (statewide)
5. Waunda Eison, Northwest Side CDC (local)
6. Jacqueline Ward, Neighborhood Housing Services of Milwaukee (statewide, regional, local)
7. David Drews, ACORN Housing Corporation (local)
8. Teig Whaley-Smith, Community Development Advocates (local)
9. Nancy Fennell, Milwaukee Habitat for Humanity (local)
10. Jean Leslie, Milwaukee Habitat for Humanity (local)
11. Charles Richardson, Vincent Family Resource Center (statewide)
12. Saidah-Ayofemi Binns, MCM Resident/ABC Member/Jeremiah Potter's House Ministries (local)

Five respondents indicated an interest in a financial education advocacy but did not list their name or organization.

**Could UEDA follow-up with more information on anything discussed today? Please explain:**

- We'd like to talk. Share our plans and see how they fit with financial literacy. We meet every Monday at 4:30 p.m. at Metcalfe/Fitzsimonds, 3400 W. North Ave.
- What can advocates and organizers do to push the importance of IDAs and financial education for the state of Wisconsin? Who should we contact – what levels of office and what should we tell them? Are there bills or legislation out there?
- Statewide collaboration around asset building policy
- Though I appreciated all information, there should have been more networking and discussion with participants at summit
- A community services directory is a great idea!
- Program evaluation, collaboration planning, policy strategizing
- Have a follow-up meeting with MCM neighbors to have them tell us what they need in their neighborhood.
- Job well done. Thank you very, very much.
- Enjoyed meeting all the people and getting the information.
- Thanks for facilitating the summit – lots of good information.
- I would like to know how we can service the men that owe child support.
- As a student working on a case study at Alverno, the information furnished helped to clarify many things; especially frameworks within asset building theory
- I would like to collaborate with individuals & other entities to provide or get the word out on all of the information and resources available to the community.
- Very helpful & wealth of knowledge

**Organizations that want to discuss ways to expand or enhance financial education to the MCM area:**

<b>Name</b>	<b>Organization</b>
Betty Speed	Milwaukee Urban League
Sheryl Gotts	Making Connections Community Schools
Ayoka Huff	Fitzsimonds Boys & Girls Club/Metcalf School
Lemuel Eaton	Neighborhood Housing Services of Milw.
Shirley Lowery	Career Youth Development
La Vang	Neighborhood Housing Services of Milw.
Andrew DeFranza	WWBIC
Waunda Eison	Northwest Side CDC
Patrick Blum	Independence First
Jacqueline Ward	Neighborhood Housing Services of Milw.
David Drews	ACORN Housing Corporation
Emmett Gross	ACORN Housing Corporation
Dawn Davis	M & I Northern Bank
Supervisor Willie Johnson Jr.	Milw. Co. Board of Supervisors – 13 <sup>th</sup> District
Christal Benn	Milwaukee Urban League
Charles Richardson	Vincent Family Resource Center
Arteret Carson	MCM Resident/ABC Member
Saidah-Ayofemi Binns	MCM Resident/ABC Member & Jeremiah Potter's House Ministries
Betty Irving	MCM Resident/ABC Member
Sherry Johnson	MCM Resident/ABC Member
Patricia Adams	YWCA of Greater Milwaukee