

**FINANCIAL
SECURITY
PROGRAM**
aspen institute

2024 Benefits21 Leadership Forum

The Limelight Hotel
Denver, Colorado

October 8 - 10, 2024

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About the Aspen Institute Financial Security Program

The Aspen Institute Financial Security Program's (Aspen FSP) mission is to illuminate and solve the most critical financial challenges facing American households and to make financial security for all a top national priority. We aim for nothing less than a more inclusive economy with reduced wealth inequality and shared prosperity. We believe that transformational change requires innovation, trust, leadership, and entrepreneurial thinking. Aspen FSP galvanizes a diverse set of leaders across the public, private, and nonprofit sectors to solve the most critical financial challenges. We do this through deep, deliberate private and public dialogues and by elevating evidence-based research and solutions that will strengthen the financial health and security of financially vulnerable Americans. To learn more, visit AspenFSP.org, join our mailing list at <http://bit.ly/fspnewsletter>, and follow [@AspenFSP](https://twitter.com/AspenFSP) on X and [The Aspen Institute Financial Security Program](https://www.linkedin.com/company/the-aspen-institute-financial-security-program/) on LinkedIn.

The Aspen Institute Financial Security Program's Benefit21 Leadership Forum is supported by our generous Forum supporters:

AARP Foundation, Ballmer Group, JPMorganChase, Prudential Financial, and W.K. Kellogg Foundation. We are also grateful for the support and partnership of all of the investors in our Benefits21 work: Annie E. Casey Foundation, Ballmer Group, Citi Foundation, JPMorganChase, MetLife Foundation, Prudential Financial, Schmidt Futures, The Families & Workers Fund, and W.K. Kellogg Foundation.

Welcome from the Aspen Institute

Dear Participants,

Welcome to the second Benefits21 Leadership Forum. We are thrilled to bring together this inspiring group of leaders from across the country to celebrate the work you've done to improve the nation's benefits delivery systems and to strategize together about the path ahead.

We do this work because we know how important benefits are to the financial security of our country. For families, benefits can mean having the resources to put food on the table, accessing quality care for their children, and investing in their goals for the future. Delivering these benefits in a person-centered way is not only essential to supporting Americans' health and well-being, but is also a necessary foundation to building families' financial resilience and, ultimately, building wealth.

This Forum will focus on what weaving benefits together looks like to bridge the gap between policy and the outcomes we want for workers and families. Our discussions will center the *integration* and *interoperability* of benefits systems that support financial security. These words can seem vague, but the wicked problems that leaders are grappling with in benefits delivery are ultimately ones that require *coordination and collaboration* between institutions and across sectors. Antiquated technology built for different types of benefits presents consistent challenges for governments and their non-governmental partners trying to build seamless benefits application and delivery experiences. A patchwork of benefits eligibility criteria between benefits programs and state rules create significant hurdles to scaling solutions that help beneficiaries navigate their benefits. Inconsistent asset limits and income cliffs create real barriers for people wanting to take a new job or promotion, creating real friction for people trying to move from public to workplace benefits. Addressing each of these pieces in ways that make the whole system work for workers and families requires committing to a shared vision among institutions and across sectors.

You have been invited to this forum alongside all the other leaders here because you have the passion, ability, and curiosity to build and scale the solutions to these problems. We are grateful to all of you for joining us and your ongoing and future work to support the financial security of everyone in America. We would like to especially thank the financial supporters of the Forum, without whom this gathering would not have been possible. We hope that this Forum can launch partnerships between participants, illuminate and clarify ideas that you can use to solve problems at home, and help us collectively develop the scope of work we can pursue together. Most importantly, we hope that your experience at this year's Forum will expand your view of what is possible for the future of benefits across the U.S., as well as what your role in leading this change can be.

Thank you for joining us.

Sincerely,



Joanna Smith-Ramani

Co-Executive Director
**Aspen Institute Financial Security
Program**



Tim Shaw

Policy Director
**Aspen Institute Financial Security
Program**

Schedule at a Glance

Tuesday, October 8

4:00 PM	Registration Opens
5:00 PM	Opening Session: Centering People in Benefits Interoperability
6:00 PM	Dinner and Reception

Wednesday, October 9

7:30 AM	Breakfast Available
8:30 AM	Opening Remarks
9:00 AM	North Stars & Core Values
10:00 AM	Lightning Talk: New Evidence on Asset Limits and Income Cliffs
10:15 AM	Break
10:45 AM	Building Paid Leave Across Sectors
11:45 AM	Lunch
12:45 PM	Lightning Talk: Building a Benefits System that Addresses Long-Term Care
1:00 PM	Interoperability Spark Talks & Small Roundtables
2:35 PM	Lightning Talk: Building Benefits Infrastructure that Leads to Wealth
2:45 PM	Wrap Up
3:15 PM	Break
3:30 PM	Offsite Activity
5:30 PM	Break
6:15 PM	Depart for Offsite Dinner

Thursday, October 10

6:00 AM	Optional Red Rocks Hike
8:00 AM	Breakfast Available
9:15 AM	Emerging Technology Across Generations
10:45 AM	Break and Hotel Check Out
11:15 AM	Breakout Sessions
12:30 PM	Event Closing and Lunch Available
1:00 PM	Event Adjourns

2024 Benefits21 Forum Agenda

October 8-10, 2024 | Limelight Hotel, Denver, CO | All times in Mountain Time

Tuesday, October 8

4:00 PM

Registration Opens

Second Floor

5:00 PM

Opening Session: Centering People in Benefits Interoperability

The desire to live a good life—one marked by the ability to withstand a crisis, the opportunity to advance in the world, and the time to connect with your friends, family, and community—is broadly shared. Yet, in recent years the economic, social, and technological conditions that shape the ability of households to attain these aspirations have shifted dramatically. This discussion will provide a ground-level perspective from communities hardest hit by these changes. How well has the U.S. benefits system—both public and private—ensured that these broadly shared desires are also broadly experienced? What do these perspectives suggest are the costs of having these needs unmet—and the possibilities when getting it right?

Featured Discussants

- **Eboni Worsley**, Community Advisory Group Member, Aspen Institute Financial Security Program
- **Monica Potts**, Senior Politics Reporter, 538/ABC News
- **Joanna Smith-Ramani**, Co-Executive Director, Aspen Institute Financial Security Program (moderator)

Dinner to follow

Wednesday, October 9

7:30 AM

Breakfast Available

Copper Foyer

8:30 AM

Opening Remarks for the Day

Aspen Ballroom

9:00 AM

North Stars & Core Values

What does “good” look like when it comes to envisioning a transformed benefits system? Which values animate the system, and what are ambitious yet achievable goals that we could all work toward? This session will lay out the value of north stars to guide the collective commitment and leadership actions necessary to achieve this vision.

Featured Discussants

- **Kim Johnson**, Secretary, California Health and Human Services Agency
- **Michael Brennan**, CEO and Cofounder, Civilla
- **Meg Booth**, Director, Health Essentials, AARP Foundation
- **Tim Shaw**, Policy Director, Aspen Institute Financial Security Program (moderator)

Wednesday, October 9 (continued)

10:00 AM

Lightning Talk: New Evidence on Asset Limits and Income Cliffs

- **Stephen Roll**, Assistant Professor, Washington University in St. Louis, Social Policy Institute

10:15 AM

Break

10:45 AM

Full Group Session: Building Paid Leave Across the Public and Private Sectors

The principle of interoperability seeks to ensure seamless access to and effective integration of our public and workplace benefit systems. In recent years, both public and private sector actors have launched strategies to advance a shared goal: provide paid leave. Who came together to implement these effectively? What lessons were learned along the way? This session will explore paid leave as a use case in delivering critical benefits to workers from both the public and private sectors, and how those systems should work together moving forward.

Featured Discussants

- **Meghan Pistrutto**, Vice President, Product, Prudential Insurance
- **Elliot Schreur**, Assistant Secretary of Labor for Family and Medical Leave Insurance, Maryland Department of Labor
- **Ayushi Roy**, Deputy Director, New Practice Lab, New America
- **Joanna Smith-Ramani**, Co-Executive Director, Aspen Institute Financial Security Program (moderator)

11:45 AM

Lunch
Après Foyer

12:45 PM

Lightning Talk: Building a Benefits System that Addresses Long-Term Care

Aspen Ballroom

Featured Discussants

- **Benjamin Veghte**, Director, WA Cares Fund, Washington State Department of Social and Health Services

Wednesday, October 9 (continued)

1:00 PM

Interoperability Spark Talks & Small Roundtables

Integrating benefits for people in America is challenging in part because interoperable benefits delivery requires cross-program and often cross-sector infrastructure that the U.S. is often lacking. Innovators in benefits infrastructure will deliver spark talks on their work to build up new pieces of the U.S.'s benefits infrastructure to ignite breakout discussions with all participants on how leaders collectively can build the structures necessary for a truly interoperable benefits system.

1. Payment Infrastructure: G2P

- **Nisha Baliga**, Head of Strategy, MoCaFi

2. Operations Policy Infrastructure

- **Sarah Esty**, Senior Advisor for Technology and Delivery, United States Department of Health and Human Services

3. Workplace Infrastructure: Dependent Care

- **Rob McDaniel**, President and CEO, MetrixIQ

4. Benefits Navigation Infrastructure

- **Elise Henson**, Executive Director, MyFriendBen, Gary Community Ventures

2:35 PM

Lightning Talk: Building Benefits Infrastructure that Leads to Wealth

- **Kara Woolley Watkins**, Senior Program Manager, Inclusive Saving and Investing, Aspen Institute Financial Security Program

2:45 PM

Wrap Up

3:15 PM

Break

3:30 PM

Afternoon Offsite Activity

Attendees will have the option to enjoy a guided tour of the Denver Museum of Contemporary Art followed by free time to explore its exhibits, or discover downtown Denver's highlights on a guided bus tour of the city's vibrant landmarks and history.

5:30 PM

Break

6:15 PM

Depart for Dinner at Tamayo

Please meet in the lobby of the Limelight to walk (.6 miles) or ride to dinner at Tamayo, 1410 Larimer St, Denver, CO.

6:00 AM

Optional Red Rocks Hike

Start the day with an optional sunrise hike at Red Rocks Park for a guided 1.5-mile trail, followed by brown-bag breakfast at the iconic Red Rocks Amphitheater. Please meet in the lobby by 5:50 a.m. to board the 20-minute bus ride to Red Rocks. We will return around 9:00 a.m.

8:00 AM

Breakfast Available

Copper Foyer

9:15 AM

Opening Remarks for the Day

Aspen Ballroom

9:30 AM

Full Group Session: Emerging Tech Across Generations

As technological innovations are enhancing performance across benefits systems, this session discusses considerations for ensuring that these enhancements are experienced equitably by different generations and provide safeguards that strengthen these systems for both users and administrators.

Featured Discussants

- **Reggie Bicha**, President and CEO, American Public Human Services Association (APHSA), (moderator)
- **Tom Kamber**, Executive Director/SVP, Older Adults Technology Services (OATS)
- **Cass Madison**, Launch COO, Center for Public Sector AI
- **Andrew Fuligni**, Professor and Co-Director, Center for the Developing Adolescent, UCLA
- **Phil Chow**, CEO and Co-Founder, Humanitas AI

10:45 AM

Break and Hotel Check Out

11:15 AM

Breakout Sessions

1. Asset Limits & Benefits Cliffs

Copper Ballroom I

Asset limits and benefits cliffs undermine the innovations in private and employer offered benefits to increase the financial resilience of workers. This breakout will discuss ways in which the public benefits system shapes how workers choose to engage with those benefits or how much value they receive from them, and strategies for removing these constraints from workers and employers.

- **Rebecca Vallas**, CEO, National Academy of Social Insurance (facilitator)
- **Stephen Roll**, Assistant Professor, Social Policy Institute, Washington University in St. Louis

2. Person-Centricity

Copper Ballroom II

This session will explore strategies for bringing benefits systems into alignment with the needs of its participants by directly engaging them in the design and implementation process.

- **Alex Coccia**, Policy Manager, Aspen Institute Financial Security Program (facilitator)
- **Shelly Steward**, Chief Research Officer, The Workers Lab
- **Riani Carr**, Program Associate, Aspen Institute Financial Security Program

11:15 AM

Breakout Sessions (continued)

3. State Capacity

Aspen Ballroom

Governments need sufficient infrastructure and resources to deliver a range of benefits that support household financial stability but often lack the talent, technology, or other inputs to do this effectively. This session will feature innovative models of public and private sector partnerships for creating this capacity from the perspective of actors across the supply chain and provide insights for successful implementation.

- **Tim Shaw**, Policy Director, Aspen Institute Financial Security Program (facilitator)
- **Elliot Schreur**, Assistant Secretary of Labor for Family and Medical Leave Insurance, Maryland Department of Labor
- **Stacy Taylor**, VP, Policy, Propel

12:30 PM

Wrap Up for the Day, Event Closing, and Lunch

Lunch available in the Après Foyer

1:30 PM

Adjournment

Forum Participants

Charlie Arnowitz

Policy Advisor, Office of the Governor
State of Colorado

Nisha Baliga

Head of Strategy
MoCaFi

Shelley Banker

Director, Office of Economic Security
Colorado Department of Human Services

Joe Barela

Executive Director
Colorado Department of Labor and Employment

Reggie Bicha

President & CEO
American Public Human Services Association (APHSA)

Lelaine Bigelow

Executive Director
Georgetown Center on Poverty and Inequality

Meg Booth

Director, Health Essentials
AARP Foundation

Michael Brennan

CEO & Cofounder
Civilla

Justin Brown

CEO
Center for Public Sector AI

Melissa Bukuru

Associate Director
Ownership Works

Siran Cao

CEO/Cofounder
Mirza

Suzanne Chapman

Director of User Experience
IRS Direct File

Phil Chow

CEO
Humanitas AI

Brittany Christenson

CEO
AidKit

Erin Currier

Senior Program Officer
W.K. Kellogg Foundation

Andy Eichfeld

Founder
Corvus Oaks Foundation

Sarah Esty

Senior Advisor for Technology and Delivery
U.S. Department of Health and Human Services

Anjali Fernandes

Founder
The Safety Net Product Studio

Yasmin Fodil

Chief Operating Officer
Code for America

Andrew Fuligni

Co-Executive Director
UCLA Center for the Developing Adolescent

Kelly Kennedy Garcia

Director
Iowa Department of Health and Human Services

Genevieve Gaudet

Director of Design for R&D
Nava PBC

Lexi Gervis

VP, Impact
SteadyIQ

Benjamin Geyerhahn

Consultant

Max Ghenis

CEO
PolicyEngine

Brian Gilmore

Vice President
Commonwealth

Alana Gracey

Community Advisory Group Member
Aspen Institute Financial Security Program

Devon Gray

President
End Poverty in California (EPIC)

Heather Hahn

Associate Vice President
Urban Institute

Chelsey Hall

Director of Family and Community Engagement
Colorado Department of Human Services

David Helene

Founder & CEO
Beam

Elise Henson

Executive Director,
MyFriendBen
Gary Community Ventures

Rebecca Heywood

Governments Lead
U.S. Digital Response

Brian Hiatt

Vice President, Technology
Gary Community Ventures

Ginny Hunt

Former Senior Adviser for Technology and Delivery
White House (Former)

Jordan Hynes

Program Director - Children & Families
National Governors Association

Steph Itelman

Chief Impact Officer
Executives Partnering to Invest in Children (EPIC)

Emily Johnson

Chief Product Officer
Overalls

Kim Johnson

Secretary
California Health and Human Services Agency

Jamie Kalamarides

Fellow
Bipartisan Policy Center

Tom Kamber

Executive Director
Older Adults Technology Services

Katie Kelly

Director, Communications and Community Initiatives
JB and MK Pritzker Family Foundation

Ariel Kennan

Senior Director, Digital Benefits Network
Beeck Center for Social Impact + Innovation, Georgetown University

Korey Klein

Senior Portfolio Manager, Technology & Data
Ballmer Group

Sohrab Kohli

Program Officer
Prudential

André Lima

Director for the U.S.
Open Contracting Partnership

Cassandra Madison

Launch COO
CPSAI

Shoshana Marder

Executive Director
Leap Fund

Tracy Marshall

Director, Colorado Paid Family and Medical Leave
Colorado Department of Labor and Employment

Rob McDaniel

President/CEO
MetrixIQ

Jilma Meneses

Secretary
Washington Department of Social & Health Services

Angela Morse

Director, Benefit Programs Division
Virginia Department of Social Services

Lynn Overmann

Executive Director
Beeck Center for Social Impact + Innovation

Meghan Pistrutto

Vice President, Product
Prudential Insurance

Jeff Poirer, Ph. D.

Director
The Annie E. Casey Foundation

Monica Potts

Senior Politics Reporter
538/ABC News

Ayushi Roy

Deputy Director, New Practice Lab
New America

Shreenath Regunathan

Co-Founder
Starlight

Terri Ricks

CEO
T P Ricks, LLC

Tyonka Perkins Rimawi

Program Director
The Families and Workers Fund

Stephen Roll

Assistant Professor, Social Policy Institute
Washington University in St. Louis

Brayan Rosa Rodríguez

Executive Director
Instituto del Desarrollo de la Juventud

Forum Participants (continued)

Andrew Schmidt

Advisor
Reten Child Care

Elliot Schreur

Assistant Secretary of Labor
for Family and Medical Leave
Insurance
Maryland Department of Labor

Deborah Smith

Deputy Director of Human
Services
Oklahoma Human Services

Shelly Steward

Chief Research Officer
The Workers Lab

Stacy Taylor

VP, Policy
Propel

Leo Tokar

President
Lockton

Rebecca Vallas

CEO
National Academy of Social
Insurance

Benjamin Veghte

Director, WA Cares Fund
Washington State Department of
Social and Health Services

Jennifer Wagner

Director of Medicaid Eligibility &
Enrollment
Center on Budget and Policy
Priorities

David Wiedinmyer

Chief Revenue Officer
Torch Technology Solutions

Eboni Worsley

Founder/CEO
Turn Key Solutions Foundation
LLC
Community Advisory Group
Member
Aspen Institute Financial
Security Program

Aspen Institute Financial Security Program Staff

Fran Rosebush Baylor

Founder and Principal at
Rosebush Impact Consulting

Laila Bera

Graduate Fellow

Rachel Black

Associate Director

Riani Carr

Program Associate

Alex Coccia

Policy Manager

Genevieve Melford

Managing Director

Tim Shaw

Policy Director

Joanna Smith-Ramani

Co-Executive Director

Emy Urban

Manager, Events and Operations

Mike Wilkening

Senior Fellow

Talia Zitner

Event Coordinator

Participant Biographies



Charlie Arnowitz

Policy Advisor, Office of the Governor, **State of Colorado**

Charlie Arnowitz serves as Policy Advisor to Colorado Governor Jared Polis. In this role, he advises the Governor and key members of the Administration on a range of policy issues including economic security, labor, economic development, consumer protection, broadband, and other issues. Charlie previously spent seven years as a legislative staffer for several members of the U.S. Senate and House of Representatives, including members of the House Ways and Means and Senate Finance Committees. He is a graduate of the Harvard Kennedy School of Government and Middlebury College, and a Chicago native. Charlie has a longstanding focus on enhancing the social safety net, including work at the federal and state levels and in academia. He enjoys running, exploring beautiful Colorado, reading the New York Times, and spending time with his one year old son.



Nisha Baliga

Head of Strategy, **MoCaFi**

Nisha Baliga is a lifelong city dweller passionate about making cities more equitable. She has two decades of experience leading and implementing complex, innovative, large-scale urban planning and change management projects that advance equity. Nisha is Head of Strategy at MoCaFi, a national fintech company whose mission is to lay the financial infrastructure to close America's wealth gap. Before that, she was Co-Executive Director of Hester Street. During her leadership at Hester Street, the organization was awarded the New York Housing Conference - Public Service Award, the NY American Planning Association's Paul Davidoff Award for leadership in housing and equal opportunity, and the Route 50 Navigator Award. Nisha was named to the NY City & State's Power 50 for Community Engagement in 2019 and has received LEAP Impact and Next City Vanguard fellowships. She serves on the Board of New Neighbors Partnership and the Prospect Park Alliance. Nisha holds a Master's in Urban Planning from Columbia University and a B.A. from Ohio Wesleyan University. Nisha spent her childhood in India and lives in Brooklyn with her husband and two kids.



Shelley Banker

Director, Office of Economic Security, **Colorado Department of Human Services**

Shelley Banker is a leader passionate about challenging inequities, disrupting social injustice, and empowering communities. As the Director of the Office of Economic Security, she leads a team working to improve policies and statewide support systems, eradicate poverty through child support, food and energy, and cash programs via a \$685 million dollar budget. She has over a decade in nonprofit, private, and public sectors promoting educational equity and access in Colorado's postsecondary systems, including through the implementation and expansion of the Colorado Opportunity Scholarship Initiative (COSI), and the establishment of the Colorado Department of Higher Education's Educational Equity Office and Equity Champions Coalition. Shelley received her MSW from the University of Denver's Graduate School of Social Work and a BS in Business Administration from the University of Colorado Denver. She serves on the Denver CASA Board of Directors, and enjoys showing her daughter everything nature offers.



Joe Barela

Executive Director, **Colorado Department of Labor and Employment**

In December 2018, Governor Polis appointed Joe Barela as the Executive Director of the Colorado Department of Labor and Employment, a 1900-person state agency housing the Divisions of Unemployment Insurance, Workers' Compensation, Labor Standards and Statistics, Vocational Rehabilitation, Employment and Training and Oil and Public Safety. Joe has more than 25 years of experience in workforce and human capital development and is seen as a local and national leader in the field. Joe is passionate about creating more opportunities for better career pathways for working all Americans. Under his leadership he has introduced the Office of the Future of Work, The Office of New Americans and the Office of Just Transitions as well as the Colorado Family and Medical Leave Insurance Division.



Reggie Bicha

President & CEO, **American Public Human Services Association (APHSA)**

Reggie Bicha, MSW, is a social worker, administrator, educator, and national leader. He has extensive experience working on child welfare, early childhood education, employment, and healthcare issues at the county, state, and national levels. He served as the Executive Director for the Colorado Department of Human Services for Governor John Hickenlooper, and as the Inaugural Secretary of the Wisconsin Department of Children and Families for Governor Jim Doyle. He is a former Ascend Fellow, sponsored by the Aspen Institute, focusing on 2 Generation approaches to move children and parents beyond poverty. Reggie served as President of Acelero, Inc., a pioneering provider of early childhood education and family engagement services for thousands of Head Start children and families across the country. Reggie was recognized in 2014 for his leadership and dedication with the Casey Family Programs "Excellence for Children Award." Reggie has three children and lives with his wife, Katie, in Denver, CO.



Lelaine Bigelow

Executive Director, **Georgetown Center on Poverty and Inequality**

Lelaine Bigelow is the Executive Director of the Georgetown Center for Poverty and Inequality. She leads work to expand economic security and opportunity and advance racial and gender equity for everyone through engagement, research, analysis, and ambitious policy ideas. A longstanding leader in the paid leave movement, Lelaine came to GCPI after serving as vice president for social impact and congressional relations at the National Partnership for Women & Families, where she was responsible for creating and executing strategies to turn policy work into social change. Her accomplishments include passing the Federal Employee Paid Leave Act (FEPLA) and the Pregnant Workers Fairness Act (PWFA). She ran a major national campaign for paid family and medical leave that included a broad coalition of workers and business and bipartisan leaders across the country. Lelaine has extensive experience working in government as Deputy Assistant Secretary at the Department of Housing and Urban Development during the Obama Administration and in Congress, including roles with Rep. Judy Chu (D-CA) and the Congressional Asian Pacific American Caucus, Rep. Corrine Brown (D-FL), and Rep. Jerrold Nadler (D-NY). Lelaine graduated from the University of Florida and the Graduate School of Political Management at George Washington University. In 2012, she was named a Champion for Children by First Focus and established a National Commission on Children and Disasters in 2008.



Meg Booth

Director, Health Essentials, **AARP Foundation**

Meg is the Director, Health Essentials on the Financial Well-Being Team at AARP Foundation. Her team is focused on improving the affordability and accessibility of food, medicine, and health care for and with older adults with low income. Prior to AARP Foundation, Meg has spent her career leading health organizations as the executive director of the Children's Dental Health Project; Managing Director at the Mental Health Strategic Impact Initiative (S2i); and as Principal of MB Strategies. She holds a bachelor's degree in Community Health Education with a minor in Women's Studies from the University of Northern Iowa and a Master's in Public Health at the University of North Carolina at Chapel Hill.



Michael Brennan

CEO & Cofounder, **Civilla**

Mike is married to Joan Brennan and the father of three children: Samuel, Patrick, and Meg. Professionally, Mike has dedicated his efforts to advancing purpose driven organizations over the past 40 years. Mike's work included advancing the mission of United Way locally, nationally and internationally. He concluded his 32 year with United Way as the CEO of the United Way for Southeastern Michigan in 2015 and subsequently co-founded Civilla. Civilla is a nonprofit design studio dedicated to changing the way public-serving institutions work. Civilla's deep practice is in human centered design and focuses on helping leaders of large scale institutions get friction out and humanity in. Mike is the CEO of Civilla and guides the mission, strategic direction, and a mission driven team.



Justin Brown

CEO, Center for Public Sector AI

Justin Brown served as Oklahoma's Cabinet Secretary of Human Services and Director of the Oklahoma Department of Human Services from 2019 to 2023. In July 2023, Brown stepped away from state service with confidence in the transition strategy and with a deep commitment to continue human services transformation across America. While serving as Secretary of Human Services, Brown focused on transforming the culture of the human services system through his 'True North' strategies and developed a target culture built on the framework of the Science of Hope and Human Centered Design. Further, his focus on transforming the delivery model for human services through developing a 'proximate' model for human services delivery resulted in improved outcomes stemming from deep community relationships and innovative real estate modernization. In 2022 & 2023, Secretary Brown served as Chairman of the American Public Human Services Association (APHSA) Leadership Council and as a member of the Governing Board of Directors, as well as a member of the National Governor's Association's (NGA) Core Advisory Board for Children and Families. Currently Brown serves as Chief Executive Officer of Global True North, a Public Benefit Corporation (globaltruenorth.org) in the health and human services consulting industry. Additionally, in 2023, Brown, alongside other HHS leaders, founded the Center for Public Sector AI (cpsai.org), a non-profit organization that supports government leaders in minimizing risk and maximizing impact of contemporary technologies in their agencies.



Melissa Bukuru

Associate Director, Ownership Works

Melissa joined Ownership Works in 2022 and leads the Financial Inclusion and Resilience practice. In this role, she partners with the private and nonprofit sectors to develop and implement programs that increase employees' personal financial capability and wellness. Previously, Melissa was a director at Lion's Head Global Partners, an investment bank operating across frontier and emerging markets globally. While there, she worked with clients from the public and private sectors on projects focused on financial inclusion and women's economic empowerment. Before joining Lion's Head, Melissa was an Analyst in Global Policy Development at Soros Fund Management. She managed policy-related projects for the principals of the Fund and designed and implemented impact investment strategies. Melissa has also worked at the Open Society Foundations in New York managing grants for African civil society organizations as well as the Council on Foreign Relations, where she did research on conflict, technology, and democracy in Africa. Melissa holds a master's degree in international affairs from the New School in New York. She sits on the board of the Fund for Global Human Rights, an organization that funds local human rights activists and groups in over 50 countries.



Siran Cao

CEO/Cofounder, **Mirza**

Siran is the Co-Founder & CEO of Mirza, a tech platform activating the fragmented, administratively burdened, and varied child care subsidy market across America. Mirza partners with Medicaid payers, employers, and community colleges to reach families, providing a single point of entry into the hundreds of options for subsidy—think Common App or TurboTax. Siran is a first generation immigrant, daughter of a single mom, and prior to founding Mirza, was part of Uber's initial deployment in New York City. She has a B.A. in Gender Studies from Harvard University and her Master's from The London School of Economics. She lives in NYC.



Suzanne Chapman

Director of User Experience, **IRS Direct File**

Suzanne is the Director of User Experience for IRS Direct File. She's worked on a variety of civic-related projects including Student Loan Debt relief, covid vaccine find-ability, Veteran benefits applications and processing, and helped multiple state DMVs implement automatic voter registration.



Phil Chow

CEO, **Humanitas AI**

Phil Chow leads Humanitas AI, a stealth Palo Alto-based AI startup backed by the leaders of OpenAI, Care.com, and more. The company offers personalized AI helper as an employer-sponsored wellness benefit to reduce turnover of hourly workers (ie. retailers, grocers, manufacturers, etc). Previously he was on the founding team of a GovTech (NYSE: NOTE). Phil is an investor and advisor of AI-first organizations like Coactive, aiEDU, and Karya.



Brittany Christenson

CEO, AidKit

Brittany Christenson is the CEO of AidKit, a social impact company dedicated to delivering aid with dignity and transforming benefit systems. She has forged partnerships with major County and State Governments to design and implement scalable systems for delivering complex benefits, including direct cash transfers, wage replacement programs, and guaranteed income. With a career rooted in addressing societal challenges at their source, Brittany champions technology's role in tackling poverty. Prior to AidKit, she scaled an organic farm and served in nonprofit leadership, where she consistently sought holistic approaches to social challenges. Outside of work, Brittany is a passionate community advocate, outdoor enthusiast, artist, and mother of two.



Erin Currier

Senior Program Officer, W.K. Kellogg Foundation

Erin Currier is a senior program officer for the W.K. Kellogg Foundation in Battle Creek, Michigan. In this role, she co-leads the foundation's national grantmaking team focused on early childhood, employment equity, health and food systems. She also oversees a portfolio of work that supports family economic security and promotes the centering children and their families in employment and government policies and programs.



Andy Eichfeld

Founder, Corvus Oaks Foundation

After advising CEOs and top teams with McKinsey from 1995-2017 and serving as CHRO/CAO at Discover from 2018-2023, I am shaping a portfolio of board leadership and philanthropy focused on social and economic inclusion and leadership development. Related to inclusion, I am exploring "top of the funnel" strategies to inform and inspire millions of households throughout the US to apply for more of their rightful public benefits. My thesis is that increasing demand broadly will complement and amplify the impact of the many ongoing efforts to improve access to the approximately 2000 public benefits programs for lower-income households. At McKinsey, I advised financial services clients on customer service strategies and service delivery, and built a global practice focused on helping clients install new management systems based on lean principles. At Discover, I worked with the CEO and top team to set strategy and align the talent agenda, management system, and culture across the company. I orchestrated multiple enterprise initiatives, including integrating advanced analytics and product management capabilities with the lean management system, strengthening compliance management, and opening new operating centers in overlooked communities on the South Side of Chicago and in Columbus.



Anjali Fernandes

Founder, **The Safety Net Product Studio**

Anjali Fernandes leads the Safety Net Product Studio, an incubator for technologies that improve economic mobility. She also supports strategic initiatives for multi-donor collaboratives as a Director at Renaissance Philanthropy. Previously, Anjali was a program lead at Schmidt Futures, where she led grantmaking in civic technology. Prior to philanthropy, Anjali was a product manager in the nonprofit sector. She was also a visiting AI research scientist at the University of Chicago, and helped create the C19 Coalition, a nonprofit focused on global pandemic preparedness. Anjali served as a founding product management fellow at Tech4Germany, a partnership with the German Chancellery. She worked under the U.S. Chief Technology Officer during the Obama Administration, and has held engineering, research, and design roles at Microsoft, Harvard Business School, and IDEO CoLab. Anjali received a bachelor's degree in computer science from Harvard.



Yasmin Fodil

Chief Operating Officer, **Code for America**

Yasmin is the Chief Operating Officer at Code for America where she oversees the programs, impact, and strategic operations required to unlock benefits that advance economic mobility, at scale. Yasmin came to Code for America with two decades of experience leading strategy, impact, operations, and program design across nonprofit, philanthropic, and government sectors. She taught Digital Innovation to public administration students at NYU, was the Chief Program Officer at a national nonprofit, and worked on a number of design and civic technology projects for government agencies like the Massachusetts Department of Veterans Services; the NYC Department of Housing Preservation, and Development; Chicago Public Libraries; and NASA.



Andrew Fuligni

Co-Executive Director, **UCLA Center for the Developing Adolescent**

Receiving his Ph.D. in Developmental Psychology at the University of Michigan, Dr. Fuligni is a professor of Psychology at UCLA. Dr. Fuligni was a recipient of the American Psychological Association's Boyd McCandless Award for Early Career Contribution to Developmental Psychology, a William T. Grant Faculty Scholars Award, a FIRST award from NICHD, and he is a Fellow in the American Psychological Association and the Association for Psychological Science.



Kelly Kennedy Garcia

Director, Iowa Department of Health and Human Services

Kelly Garcia serves as the inaugural Director of the Iowa Department of Health and Human Services. Governor Kim Reynolds appointed Garcia to oversee the state's social services agency in November 2019. She was unanimously confirmed by the Iowa Senate on February 26, 2020. In 2020, Garcia was asked to serve as interim public health Director. As a dual director, Garcia led the agency's pandemic response, while shepherding consolidation to a single health and human services structure. Kelly leads Iowa's largest agency, focused on life-span services and prevention, with a commitment to transparency and accountability. Before moving to Iowa, Garcia led improvements in organizational structure, program management, and policy development in Texas, including serving in executive positions at the Texas Health and Human Services Commission. Garcia has more than 20 years of experience in program evaluation and budget, planning and policy development. Garcia is a graduate of The University of Texas at Austin and received her MPA from The Bush School of Government and Public Service at Texas A&M University. She is Chair of the APHSA Leadership Council and is actively engaged in the Center for Public Sector AI. She is married to attorney Dan Garcia, and they have two children.



Genevieve Gaudet

Director of Design for R&D, Nava PBC

Genevieve Gaudet is a technologist building a more people-centered and equitable government at Nava Public Benefit Corporation. As Director of Design for Research and Development, she co-leads Nava Labs' work to identify critical wedges where philanthropy can add velocity to public interest technology projects and build more trustworthy public institutions. Prior to Nava, she co-founded the New York City Service Design Studio in the office of Mayor Bill de Blasio. As Deputy Director, she redesigned how the largest city in the nation supports people experiencing poverty. Genevieve holds a Master of Public Health degree from Tulane School of Public Health and Tropical Medicine.



Lexi Gervis

VP, Impact, SteadyIQ

Lexi Gervis, PhD is a sociologist who has conducted research on benefits for non-standard workers, low-wage work, and the social safety net. Since completing doctoral work on portable benefits, Lexi has worked with tech start-ups focused on improving financial outcomes for non-standard workers. Formerly the Head of Policy at Catch, she is currently the VP of Impact at SteadyIQ, a consent-based income verification solution designed to streamline application to public benefits. At SteadyIQ, Lexi coordinates efforts with federal and state leaders on benefits' access.



Benjamin Geyerhahn

Consultant

Ben has deep expertise across healthcare policy and is an expert in the future of work/gig economy. He is also a successful start-up founder in the health and benefits space.



Max Ghenis

CEO, **PolicyEngine**

Max Ghenis is the co-founder and CEO of PolicyEngine, a non-profit open-source software platform for policy analysis and benefit access. Previously, he founded the UBI Center, a think tank researching cash assistance policies. Before that, he led data science projects at Google that made the company's processes more equitable and its products more accessible to low-income people around the world. Max earned a bachelor's degree in Operations Research and Management Science from UC Berkeley and a master's degree in Data, Economics, and Development Policy from MIT.



Brian Gilmore

Vice President, **Commonwealth**

Brian Gilmore is a Vice President at Commonwealth, where he focuses on the broad adoption of financial innovations to address challenges faced by people living on low and moderate incomes. Brian works to scale these innovations through partnerships with the financial services industry, policymakers, employers, and nonprofits, with the goal of making wealth possible for everyone. He also engages in cross-organizational efforts around funding, project development, and finances in support of Commonwealth's mission. Prior to Commonwealth, Brian spent a decade at forward-thinking organizations tackling a variety of social challenges including access to public benefits, youth education, and financial security. He has Bachelor's degrees in Psychology and Philosophy from the University of Pittsburgh, and a Master's degree in Public Policy from Drexel University.



Alana Gracey

Community Advisory Group Member, **Aspen Institute Financial Security Program**

Alana (she, her) Gracey's career in social advocacy has been in service to women (mostly of color) who exist in vulnerable states of survival, namely intimate partner violence, teen homelessness, and sex trafficking. She is currently working as the Data Administrator for Alternatives For Girls (AFG) in Southwest Detroit. Alana is a poet and writer with a deep appreciation for the importance of writers of all ages having the opportunity to have their voices and stories heard—especially within marginalized communities. She believes storytelling is a key to our power as oppressed identities to create change. Alana is also a Youth Performance Troupe coach and a Teaching Artist with InsideOut Literary Arts City Wide Poets (a poetry after school program for teens), as well as freelance literature and creative writing workshop facilitator. As a CAG Member, Alana loves being able to come together with people from different parts of the country who have the same concerns about equity and justice, which is an important reminder that there are kindred spirits outside of the circles of safety created within our personal communities.



Devon Gray

President, **End Poverty in California (EPIC)**

Devon Gray is the president of End Poverty in California (EPIC), an advocacy organization founded by former Stockton Mayor Michael Tubbs. At EPIC, Devon aligns the organization's priorities, both advancing a statewide policy agenda focused on equal opportunity for all and changing narratives around poverty away from ones based in outdated stereotypes to ones that better reflect the lived experiences of individuals and communities. Devon joined EPIC in 2022 as Mayor Tubbs' chief of staff and was named the organization's first president the following year. He previously served in the administration of Governor Gavin Newsom as Special Advisor to the Governor's Chief of Staff, and was also a policy advisor for Beto O'Rourke's presidential campaign, where he led the campaign's gun safety and criminal justice reform strategies. Prior to joining EPIC, he was a director with Evergreen Strategy Group, where he advised gun violence prevention organizations on policy and communications. Devon is a graduate of Stanford Law School and the Stanford Graduate School of Education, and his writings have been featured in CalMatters, Newsweek, The Hill, and other publications.



Heather Hahn

Associate Vice President, **Urban Institute**

Heather Hahn is an Associate Vice President at the Urban Institute. She is a national expert on Temporary Assistance for Needy Families (TANF) with 25 years of experience researching TANF, the Supplemental Nutrition Assistance Program (SNAP), child care subsidies, child support, and other policies affecting the well-being of children and families. She coleads the Kids' Share project, examining federal program and tax expenditures on children. Hahn previously co-led both Urban's From Safety Net to Solid Ground initiative, providing timely and rigorous analyses of state and federal policy changes, and the Work Support Strategies evaluation of state efforts to modernize families' access to nutrition assistance, child care, and Medicaid. She has extensive experience leading, designing and conducting qualitative and mixed-methods studies, and listening to the people administering and participating in programs public benefit programs. She has testified before Congress and has been interviewed and quoted by major print and radio media. Before joining Urban, Hahn was an assistant director for education, workforce, and income security issues at the US Government Accountability Office. She received a PhD in political science from Stanford University, an MPP from Duke University, and a BA in philosophy and certificate in Women's Studies from Brandeis University.



Chelsey Hall

Director, Family and Community Engagement, **Colorado Department of Human Services**

Over her career, Chelsey Hall has championed ways to authentically include community voices into changing government systems for the better. Today, Chelsey can be found leading a team to enhance the department's human-centered culture while creating mutually beneficial relationships with community based organizations. As a result of what she does, communities feel more engaged and connected to the work of the department. Communities believe their voice matters and changes will be made to help Coloradans thrive. Earlier in her career, Chelsey spent a decade as a grant manager for Colorado behavioral health grants, and before that, emergency response back in Joplin, MO. She subsequently served as the State Emergency Response Grant coordinator after the Joplin tornado in 2011 leading community outreach and recovery efforts in her hometown. She holds an MPH from Missouri State and a BS from Missouri Southern. In her free time, she can be found renovating her home while practicing her DIY skills or swinging for her first hole in one.



David Helene

Founder & CEO, **Beam**

David Helene is the founder and CEO of Beam, a technology provider of equitable and effective benefits access and cash transfer administration for institutional and government partners. Under his leadership, Beam has worked with over 100 innovative partners in postsecondary education and government to process more than \$300 million in assistance to more than 300,000 individuals and their families. He has helped the organization attract support from some of the most innovative impact investors in the country, including Schmidt Futures, ECMC Foundation, the Kresge Foundation, the Michael & Susan Dell Foundation, the Lumina Foundation, Spring Point Partners, Potencia Ventures, Imaginable Futures, the Bill and Melinda Gates Foundation, and others. For his work at Beam, David was named to 2020 Forbes 30 Under 30 in Social Entrepreneurship. Prior to Beam, David founded UniFi Scholars, a non-profit college access organization where he worked with more than 400 students in the classroom and spent nearly three years at The Clearing House, a trade association and payments company processing over 85% of domestic payments, where he was named the youngest Vice President in the organization's history.



Elise Henson

Executive Director, MyFriendBen, **Gary Community Ventures**

Elise Henson is a social entrepreneur passionate about increasing opportunity for kids and families. As the Executive Director of MyFriendBen at Gary Community Ventures, she currently leads a team working to build and deploy technical innovations to increase access to the social safety net, through close partnerships with aligned organizations and continuous feedback from end users. Prior to her work at Gary, Elise spent six years focused on K-12 innovation and systems change through national grantmaking at Carnegie Corporation of New York. She previously supported schools and community organizations in fostering positive youth development at the nonprofit Points of Light, and started her career with four years as a middle school teacher at small international schools in Nicaragua, the Marshall Islands and Nigeria. Elise holds a Master's degree from Teachers College, Columbia University and a Bachelor's degree from Williams College. She lives in Lakewood, Colorado with her husband and two young children.



Rebecca Heywood

Governments Lead, U.S. Digital Response

Rebecca Heywood (she/her) is a former public servant and an advocate for improved government services and technology focused on the needs of people. She currently leads the Governments team at U.S. Digital Response, where she builds partnerships with governmental and ecosystem partners to strengthen service delivery and digital maturity in the public sector. She has led work in areas including Medicaid, Summer EBT, resources for asylum seekers and infrastructure funding. Prior to her work at USDR, she worked for the City of New York and the MBTA focused on changes to behind-the-scenes government operations to allow for improved policy and service delivery. Rebecca also serves on the board of directors of Technologists for the Public Good, and runs the #PublicSectorJobBoard, a newsletter highlighting tech and innovation jobs in government.



Brian Hiatt

Vice President, Technology, Gary Community Ventures

Brian Hiatt is a technology leader passionate about bridging tech, data, and policy to develop breakthrough solutions for Colorado kids and families. As Gary's Vice President, Technology, Brian leads a team of individuals who co-create tech products and data solutions with Colorado families, organizations, and businesses to produce new outcomes at scale. In his role he is focused on creating products to help families understand and apply for benefits, access high-quality after-school opportunities, and improve the universal preschool experience. Previously, Brian was the Chief Technology Officer at Gary's venture known as COVIDCheck Colorado, where he led product and data teams to deliver over 1.9 million COVID-19 tests and 300,000 doses of COVID-19 vaccine. His accomplishments include maintaining COVIDCheck Colorado's average NPS of 89, developing a COVID-19 attestation solution for Colorado's largest school district, and scaling administrative technology solutions for a rapidly growing team. Brian lives in the West Colfax neighborhood of Denver with his wife and 11-year-old-son. In his free time Brian enjoys mountain biking, rockhounding and backpacking across Colorado.



Ginny Hunt

Former Senior Adviser for Technology and Delivery, **White House (Former)**

Ginny Hunt served as a Senior Adviser for Technology and Delivery at the White House, where she co-founded the Financial Resilience Initiative to align federal, state and cross-sector leaders around initiatives to build financial security centered in lived experience. Previously, Ginny was the Vice President and Managing Director for the Justice and Opportunity Initiative at CZI and a Principal at Google, where she founded the public sector engineering team that launched products used by nearly a billion people. Ginny served as the US Digital Service founding Director for Product, Policy and Procurement. She co-founded the Tech Executive Leadership Initiative and served as a teaching Fellow at the Harvard Kennedy School of Government. She regularly advises leaders, entrepreneurs and mission-driven organizations on cross-sector strategies to advance inclusive economic growth and on how to make delicious biscuits.



Jordan Hynes

Program Director - Children & Families, **National Governors Association**

Jordan Hynes leads the Children & Families Program at the National Governors Association Center for Best Practices, overseeing the team charged with supporting State executive leadership through the provision of technical assistance and peer-learning opportunities on issues related to human services delivery and early childhood education and care, including safety net programs, child welfare, nutrition, housing, and wrap-around and economic supports. Prior to NGA, she spent a decade developing and negotiating federal policy in early childhood development, social issues, and human services, serving under the leadership of Chairman Lamar Alexander (R-TN) on the U.S. Senate Health, Education, Labor, and Pensions Committee working to secure bipartisan support on legislative packages including the Every Student Succeeds Act and the SUPPORT Act. Before joining the Committee, Jordan worked under the leadership of Senator Mark Kirk (R-IL) where she advised on education and labor policy.



Steph Itelman

Chief Impact Officer, **Executives Partnering to Invest in Children (EPIC)**

Steph is Chief Impact Officer at Executives Partnering to Invest in Children (EPIC) focused on helping employers to attract and retain working parents, by supporting their exploration of and planning for child care solutions. She brings a rich mix of organizational leadership, professional services expertise, and dedication to early learning and K-12 education. At EPIC, clients have included Denver International Airport (DEN), East West Partners, and Mile High United Way, among others. Steph's first engagement with employer-based care was partnering with Guild to launch its on-site center in downtown Denver. At this time, Steph was leading 5280 Impact Partners where she advised organizational leaders to advance their most important priorities. Prior to this work, she was a Denver public charter school executive director and spent 6 years at Bellwether, providing advisory support to education organizations around the country. Before joining Bellwether in 2013, Steph was the Chief of Staff and led the development of new schools and facilities at Aspire Public Schools. Steph has also worked as a consultant for Bain & Company and the Bridgespan Group. She earned her M.Ed. and MBA at Stanford University and holds a bachelor's degree from the University of Virginia.



Emily Johnson

Chief Product Officer, **Overalls**

Emily Johnson is co-founder and Chief Product Officer at Overalls, an employee benefit platform that offers assistance and support for life's hassles and events. Previously, she co-founded Tutorlist (acquired by Cross Country Healthcare), and led enterprise product at LearnVest and D2C products at insurtechs Haven Life and Fabric.



Kim Johnson

Secretary, **California Health and Human Services Agency**

Kim Johnson was appointed by Governor Gavin Newsom as the Director of the California Department of Social Services (CDSS) in July of 2019. In this role, she leads a team of over 5,000 employees serving over 7 million Californians in the largest Department in the California Health and Human Services Agency. Ms. Johnson started with CDSS in 2015 and had previously been appointed by Governor Jerry Brown to serve as the Deputy Director of the Family Engagement and Empowerment Division, CalWORKs and Child Care Branch Chief, and Child Care and Refugee Programs Branch Chief. Ms. Johnson has over 25 years of experience working in various family support and children's programs focused on social justice, equity, and poverty disruption in both community-based organizations and government.



Jamie Kalamarides

Fellow, **Bipartisan Policy Center**

As a fellow at the Bipartisan Policy Center, Jamie focuses on employee benefits, financial wellness, and retirement issues. Jamie has designed and secured public policy successes that expand access to wealth-building solutions, such as retirement savings, paid family medical leave and employers' roles in supporting workers' financial resilience. He served as key expert to the 2019 SECURE Act, testifying to the U.S. Senate Finance, HELP, and Aging Committees about the benefits and policy needs to enable pooled employer plans and lifetime income solutions. While working in industry, Kalamarides sponsored the pilot program for workplace emergency savings within a 401k plan that served as a model for the 2022 SECURE 2.0 Act. He has recently focused on creating a sustainable, universal solution for paid family medical leave through public-private partnerships. Previously Jamie led a top-three provider of life, disability and paid family medical leave benefits and a top-ten provider of retirement solutions. Jamie currently serves as the Chairman of The Hartford Bishops' Foundation – a community foundation serving the needs of three Connecticut counties. He also is the CEO of Bear North LLC, a management consulting firm. Jamie and his wife live outside Hartford, CT.



Tom Kamber

Executive Director, **Older Adults Technology Services**

Tom Kamber is the founder and executive director of Older Adults Technology Services (OATS) and Senior Planet. He is a leading expert on aging and technology and is regularly featured in national media. Under his leadership, OATS and Senior Planet have developed award-winning programs for older adults across America and are now charitable affiliates of AARP. Tom has taught courses on technology, urban studies, and philanthropy at Columbia University, is widely published in professional and academic journals, and has presented his work on five continents. He is also a co-founder of the Afro-Latin Jazz Alliance (which has won multiple Grammy awards) and serves on several nonprofit boards of directors and public commissions.



Katie Kelly

Director, Communications and Community Initiatives, **JB and MK Pritzker Family Foundation**

Katie Kelly is Director of Communications and Community Initiatives at the J.B. and M.K. Pritzker Family Foundation. She joined the foundation in 2016 after more than 25 years of experience in Illinois' nonprofit and government sectors with a record of success in raising funds and deepening awareness for key organizational priorities. Kelly manages the foundation's Illinois investments in early childhood, public benefit access, and housing insecurity and homelessness among families with young children. From 2007 until 2014, Kelly served as a member of the senior leadership of the National Association of Charter School Authorizers, a national education reform organization. Previously, Kelly led a consulting practice committed to improving the efficiency and effectiveness of local government. Earlier, Kelly served as Chief of Staff and Director of External Affairs for a reform administration at the Chicago Housing Authority where she helped lead efforts to enact groundbreaking changes in the nation's public housing program. Long active in politics, she served on the campaign staffs of three U.S. senators from Illinois: Dick Durbin, Paul Simon, and Adlai Stevenson III. Kelly lives in the Chicago area with her husband and is the mother of two adult daughters.



Ariel Kennan

Senior Director, Digital Benefits Network, **Beeck Center for Social Impact + Innovation, Georgetown University**

Ariel Kennan (she/her) is a Senior Director at the Beeck Center for Social Impact + Innovation at Georgetown University, where she researches and advises on advancing design, data, and technology for accessible and equitable delivery of public benefits. Ariel leads the Digital Benefits Network to support practitioners in current and near term challenges in public benefits delivery and envisioning future policies, services, and technologies. Ariel is a leader in service design, digital product development, and organizational strategy. She has worked in the private, nonprofit, and public sectors to drive change and deliver impactful solutions. Previously, she served in the New York City Mayor's Office for Economic Opportunity where she founded the nation's first municipal service design studio and managed a portfolio of best-in-class digital products to connect and deliver services. Most recently, she was the Director of Civic Innovation at Sidewalk Labs, where she led the strategy for inclusive participation in the social infrastructure of cities. She holds a Bachelor of Fine Arts in Integrated Design from Parsons School of Design. She is based in Brooklyn, New York.



Korey Klein

Senior Portfolio Manager, Technology & Data, **Ballmer Group**

Korey Klein is a Senior Portfolio Manager at Ballmer Group, developing and managing investment strategies that leverage technology and data to increase economic mobility and drive social impact. Within his role, Korey oversees Ballmer Group's national benefits access strategy. Korey brings on-the-ground experience in technology implementation and building partnerships with state and local government, having previously led data operations for United Way of Salt Lake's collective impact strategy. Korey holds a M.S. in Geography from the University of Utah and a B.S. in Geography from Ball State University.



Sohrab Kohli

Program Officer, **Prudential**

Sohrab Kohli is a Program Officer at Prudential Financial, where he helps drive the company's strategic philanthropy. In his role, Sohrab manages partnerships with nonprofit organizations that are enabling more people to build wealth. The ultimate goal of Sohrab's portfolio is to help families and communities achieve financial dignity and intergenerational prosperity. Before joining Prudential, Sohrab spent over a decade at national nonprofits promoting financial inclusion. Most recently, Sohrab was a Senior Manager at the Aspen Institute Financial Security Program, where he collaborated with public and private sector leaders to advance market and policy solutions. His work focused on building emergency and retirement savings, expanding access to banking, addressing consumer debt, and modernizing our public and workplace benefits systems. Sohrab previously worked at the Financial Health Network across their innovation, research, and consulting practices. He led projects on fintech, consumer credit, workplace wellness, and supporting community-based organizations. At the onset of his career, Sohrab was a strategy consultant with PwC, advising clients in the financial services industry. Sohrab has a Bachelor of Arts in Economics and Political Science from the University of Chicago. He currently resides in Chicago, IL.



André Lima

Director for the US, **Open Contracting Partnership**

André Lima is the Director for the US at the Open Contracting Partnership where he supports people in government, business, and civil society in harnessing the power of public procurement and open data as engines for innovation, sustainability, and economic inclusion. Before joining OCP, André served as the Director of Supplier Diversity for the City of Boston where he led an organization-wide reform effort to open up Boston's public contracts for local businesses owned by women and people of color. Previous to this role, André served as the Director of Policy and Research for the Mayor's Office of Health and Human Services, also at the City of Boston, where he focused primarily on the development of policy and programs to support access to legal representation and critical public benefits for local immigrant communities. André holds an MSc in Legal Anthropology/Sociology of Law from the London School of Economics and Political Science and a BA degree in Anthropology and Certificate of Letters from Wesleyan University.



Cassandra Madison

Launch COO, **CPSAI**

Cassandra Madison is a devoted public servant with twenty years of experience helping build the government's capacity to deliver technology effectively and serve its constituents with integrity and empathy. Throughout her career, Cass has played a key role in transforming ambitious ideas into practical solutions that improve service delivery, enhance the lives of those they serve, and strengthen the public sector's capacity for effective implementation. Currently, Cass serves as the Vice President of Partnerships at the Tech Talent Project, where she works to strengthen the government's ability to recruit, retain, and empower a modern technical workforce. She also serves as the Launch COO for the Center for Public Sector AI, where she leads initiatives to provide Human Services leaders with the knowledge, tools, and resources they need to explore AI and other emerging technologies responsibly. Cass previously served as Deputy Commissioner of the Department of Vermont Health Access (DVHA), leading the turnaround of the state's Health Insurance Exchange and its Integrated Eligibility Program. She earned her BA in Political Science and Women's Studies from Penn State University, with a minor in Information Sciences and Technology. She has also served as a Non-Resident Fellow at New America's New Practice Lab, and her transformative work in Vermont was highlighted in "Power to the Public."



Shoshana Marder

Executive Director, **Leap Fund**

Shoshana is the Executive Director of Leap Fund, leading the team in creating products that empower optimism, financial and career growth, future planning, and security for the working families that need it most. She has presented about benefit cliffs at the Circles USA National Conference (2023), Foundation for Financial Planning (2023), and the National FSS Conference by Compass Working Capital (2022), and about Product Feedback Loops at the Prosperity Now Summit (2022). She's also spoken about benefits cliffs to numerous groups, including JobsFirstNYC Policy Committee, NYATEP's Workforce Development Directors, multiple Chambers of Commerce, and participated in the HHS Marginal Tax Rate Advisory Panel. Shoshana received her BA from Stern College Honors Program, and previously worked at the International Rescue Committee. <https://myleapfund.com/shoshana>



Tracy Marshall

Director, Colorado Paid Family and Medical Leave, **Colorado Department of Labor and Employment**

Tracy Marshall joined the Colorado Department of Labor and Employment (CDLE) in September of 2021 to stand up the new paid Family and Medical Leave Insurance (FAMLI) Division. Tracy has been a Registered Nurse for over 30 years and holds her Bachelors in Nursing from the University of Wales. She is Board-Certified as a Case Manager, a Disability Management Specialist and is credentialed with the Society of Human Resources Management as a Senior Certified Professional. Prior to joining CDLE, Tracy was a Director of Clinical Operations for Guardian Life Insurances' Absence Management company.



Rob McDaniel

President/CEO, **MetrixIQ**

Rob founded MetrixIQ in 2009 with the vision to create a frictionless operating platform for families to enroll and access public childcare funding. MetrixIQ has grown into a national leader in its market and helped 350,000+ families access more than \$800 million in public childcare funding. Reten Childcare extends MetrixIQ's deep knowledge of federal, state and local public childcare funding to the employee benefits space. Reten helps employers attract and retain a diverse and productive workforce by helping workers find and pay for childcare. Prior to founding Metrix, Rob was Vice President of Corporate Growth at Policy Studies Incorporated, a leading provider of outsourced services to state and local governments. Rob's diverse background also includes financial leadership roles with Trimble Navigation and Hewlett-Packard. Early in his career Rob also worked as an economic developer for the state of Colorado. Rob is a graduate of Leadership Denver and has been actively involved in a variety of civic activities ranging from the Board of Directors of Pinnacol Assurance, to serving as a Board Trustee for the Clyfford Still Museum, where he currently chairs the Facilities Committee. Rob lives in Denver's Park Hill neighborhood with his wife and two sons.



Jilma Meneses

Secretary, **Washington Department of Social & Health Services**

Appointed by Governor Inslee and confirmed by the State Legislature, Jilma Meneses, the Secretary of Washington State Department of Social and Health Services, oversees the largest state agency with over 18,000 employees, \$22B+ biennial budget, serving approximately 3 million clients. DSHS services are inclusive of aging and long-term care, behavioral health, development disabilities, vocational rehabilitation, Medicaid pathways based on age and disability, and other public benefits in partnership with US Department of Agriculture, Food and Nutrition Services, such as cash and supplemental nutrition assistance for families. She also served in executive roles in operations, legal, risk management, equity and inclusion, compliance, and academia at respective institutions, such as at Concordia University Portland, Portland State University, and Oregon Health & Science University. At OHSU specifically she and her teammates were instrumental in leading innovative change in operations, patient safety, and quality assurance for the academic health system. Her humanitarian work extends from the United States across the world, including the Democratic Republic of Congo. She earned her undergraduate degree from UC Berkeley and her Juris Doctor from Lewis & Clark Law School. Her goal is to break the cycles of poverty, advocate for justice, and strengthen the health and vitality of communities throughout by providing access to critical healthcare, human services, and education.



Angela Morse

Director, Benefit Programs Division, **Virginia Department of Social Services**

Angie has had an extensive career in human services delivery in the Commonwealth of Virginia spanning 27 years. Beginning as a front-line eligibility worker and rising to her current position as Director of the Benefit Programs Division. Benefit Programs has oversight and administration responsibilities for SNAP, TANF/VIEW, Energy Assistance, Medical Assistance and the Child Care Subsidy Program. Along the way, she has held state level positions in Quality Control, Fraud, Management Evaluation, Policy and Regional Operations. Additionally, she has served as Co-Director of Organizational Development/Human Resources and Director of the Change Management Office. Angie played a significant role in Eligibility Systems Modernization and Organizational Change Management in support of Virginia Case Management System (VACMS) implementation and was recognized by the Department for her hard work, dedication and commitment to the success of the implementation. At the local government level, Angie served as a Department of Social Services (DSS) Director at two of Virginia's 120 locals DSS offices. Angie is a motivational and influential executive who thrives at helping teams, peers and partners to understand the "art of possible" even under challenging circumstances. She is a graduate of the Commonwealth Management Institute (CMI) and the Virginia Executive Institute (VEI).



Lynn Overmann

Executive Director, **Beeck Center for Social Impact + Innovation**

Lynn Overmann is the Executive Director at the Beeck Center for Social Impact + Innovation at Georgetown University. She previously served as a Senior Advisor for Delivery with the U.S. Digital Service, embedded in the Domestic Policy Council to advise Ambassador Susan Rice on priority policy implementation. In this role, Lynn oversaw teams of digital service experts across diverse projects, including targeted efforts to make the asylum system more effective and humane, increasing access to federal funding for low-capacity communities, and improving the delivery of safety net benefits. Lynn also recently served as a Senior Advisor for Delivery at the U.S. Department of Agriculture, where she led the department's work to leverage data and human centered design to advance equity, streamline critical funding programs, and improve insights into rural economies.



Meghan Pistrutto

Vice President, Product, **Prudential Insurance**

As VP, Product for Disability and State Paid Leaves, Meghan is responsible for leading strategic direction, financial performance and thought leadership as well as supporting advocacy efforts for short-term disability, long-term disability statutory and paid family and medical leave (PFML) products. She is an expert in PFML and understands the complexities of the regulatory environment and impacts to the industry surrounding state and federal paid leaves. She has a proven history of profitable product growth and leading complex product acquisitions and implementations. Meghan has over 15 years in the Group Disability and Absence industry.



Jeff Poirer, Ph. D.

Director, **The Annie E. Casey Foundation**

Jeffrey Poirer, Ph.D., leads a new portfolio at the Annie E. Casey Foundation that aims to ensure young people can pursue their education, employment, and financial goals. Specifically, the portfolio has two strategies that aim to address their basic needs. This includes a strategy focused on improving access to safety net programs, so that they can engage in school and work; and a second strategy focused on supporting effective navigation programs and practices so that young people can access the supports and services they need on their path to economic independence. As this portfolio launches, Jeff is overseeing exploratory and learning grants, and developing relationships with new partner organizations, to help shape the portfolio's design and priorities. A key interest is identifying scalable practice innovations that can improve economic well-being for young people ages 14 to 24, in particular those at risk of or experiencing disconnection from school and work. Jeff holds a bachelor's from the University of Pennsylvania, and a master's in education policy and a Ph.D. in public policy and administration from The George Washington University.



Monica Potts

Senior Politics Reporter, **538/ABC News**

Monica Potts is a senior politics reporter for the website FiveThirtyEight and the author of The New York Times bestseller *The Forgotten Girls: A Memoir of Friendship and Lost Promise* in Rural America. Her previous work has appeared in The New York Times, The Atlantic, and The New Republic, among other publications, and on NPR. She was a 2015–16 New America Fellow and is a former senior writer with The American Prospect. She lives in central New York.



Shreenath Regunathan

Co-Founder, **Starlight**

At Starlight, Shreenath oversees integration products, business development and partnerships as well as finance, ensuring that our strategic vision aligns with our mission to foster financial equality. Shreenath has a background in technology, having launched and led complex technical projects at Google as a Product leader and over a decade of experience there. His expertise in leveraging data, machine learning, and cloud technology has driven impactful solutions that improved financial inclusivity and accessibility.



Terri Ricks

CEO, **T P Ricks, LLC**

Terri Porche Ricks leads two enterprises: T P Ricks LLC, a human resource development and human services consulting firm, and The Law Office of Terri P Ricks LLC. She was appointed to executive leadership roles in the Louisiana Department of Children and Family Services (DCFS) by three governors, eventually serving as DCFS Secretary. During her tenure, Ricks stabilized and transformed the agency by promoting transparency and innovation, supporting staff, and improving outcomes. Her leadership covered enterprise wide goals, emergency preparedness, legal affairs, finance, HR, technology, and strategic management. Ricks played a vital role in modernizing child support services, enhancing workforce development, and creating a Diversity, Equity, Inclusion, and Belonging Unit. She also led Louisiana's disaster recovery efforts in health and social services, expanding public access to benefits through the "No Wrong Door" model and digital solutions. Her collaboration with Code for America earned DCFS the 2023 Governmental Changemaker Award. Ricks holds a juris doctor from Tulane University, a bachelor's in psychology, and a master's in leadership and human resource development (LHRD) from Louisiana State University. She is currently pursuing a Ph.D. in LHRD at LSU.



Tyonka Perkins Rimawi

Program Director, **The Families and Workers Fund**

Tyonka Perkins Rimawi is a Program Director with the Families and Workers Fund, a \$125+ million pooled fund supported by a coalition of more than 40 diverse philanthropies working to build a more equitable economy that uplifts everyone. Tyonka leads the Fund's 21st Century Benefits impact area, collaborating with leaders across the benefits access ecosystem to reimagine and repair the social safety net and other benefits that help to propel economic security and mobility. She also collaborates with the Fund's Essential Leaders Council of diverse frontline workers and leaders who help shape the Fund's priorities and weigh in on grant prospects. Tyonka has a track record leading innovative philanthropic initiatives focused on economic security, including a public-private partnership that launched the first fully funded Mayors for a Guaranteed Income pilot in the nation. She also led economic opportunity initiatives at Goodwill Industries International and the Center of Excellence in Leadership of Learning. Tyonka earned a BA in Journalism from Butler University and an MBA in Supply Chain Management from the University of Indianapolis.



Stephen Roll

Assistant Professor, Social Policy Institute, **Washington University in St. Louis**

Dr. Roll's is an assistant professor in the Brown School at Washington University in St. Louis, and the co-director of the Social Policy Institute. His work focuses on promoting asset building, debt management, and economic security in lower-income populations. Most recently, his work has examined the role of cash transfer programs in improving household balance sheets and economic mobility outcomes, including studies of the Expanded Child Tax Credit and several Guaranteed Income experiments. He is also leading the new Workforce Economic Inclusion and Mobility Project, which examines how low-wage workers navigate public and private benefits programs to achieve financial security. His work has been featured in numerous media outlets including The Atlantic, The Wall Street Journal, NPR, The Washington Post, and The New York Times, and he has briefed the White House Domestic Policy Council, the Senate Joint Economic Committee, and the United States Supreme Court on the results of his research. Dr. Roll received his PhD in Public Policy & Management from The Ohio State University.



Brayan Rosa-Rodríguez

Executive Director, **Instituto del Desarrollo de la Juventud**

Brayan L. Rosa-Rodríguez has a background in education and public policy. He has a particular focus on government programs and interventions that can facilitate economic mobility to lift people out of poverty. In addition to his current role, Brayan was a Senior Policy Analyst at the UNIDOS US Economic Policy Project. He was responsible for analyzing policies that would improve the quality of life for Latinos living in the United States, as well as advocating for their implementation. Throughout his career, Brayan has worked tirelessly to promote economic and educational policies that benefit those most in need, participating in poverty reduction projects, economic development policies, tax incentives and program evaluation. Brayan received a master's degree in education from Teachers College, Columbia University, with a concentration in Economics and Education. Additionally, he holds a master's degree in public administration and policy from the Robert F. Wagner School of Public Service at New York University. His bachelor's degree is in Criminal Justice with a concentration in Forensic Psychology from the University of Puerto Rico's Carolina campus.



Andrew Schmidt

Advisor, **Reten Child Care**

Andrew Schmidt is an entrepreneur and social impact consultant based in Denver, CO. Throughout his career, Andrew has been a thought leader and speaker, in both for-profit and nonprofit circles, on operationalizing belief and behavioral values into organizations. Andrew spent 15 years building businesses in the trades and fell in love with creating people centered processes that build healthy, purpose-driven cultures. Now he focuses his time on projects that align with his personal mission statement, which is to 'Align Resource and Relationship for Good'. Andrew is thrilled to advise the Reten team to help invest into innovative solutions to help solve our child care crisis. In 2016, Andrew spearheaded efforts to bring The Other Side Academy (TOSA) to Denver. TOSA is a peer-led, residential, self-sustaining social enterprise that helps people escape the cycle of drug addiction and criminality through the operation of several small businesses. Andrew led a successful capital campaign of more than \$5 million to launch TOSA. The organization is now operationally self-sufficient and serves 75 full-time residents in Denver. In 2019, Andrew was one of three finalists for 9News Leader of the Year and a winner of DBJ's 40 under 40. He currently serves on the board of the Colorado Women's Chamber of Commerce and is Chair of The Other Side Academy Denver's board. In his free time, Andrew loves to travel, spend time with friends, smoke meat and sit by fires. As one who really appreciates being from Cleveland, he's most appreciative of not living in Cleveland. His greatest joys, though, are his two little humans and his wife, Mackenzie.



Elliot Schreur

Assistant Secretary of Labor for Family and Medical Leave Insurance, **Maryland Department of Labor**

Elliot Schreur is the Assistant Secretary for Family and Medical Leave Insurance (FAMLI) at the Maryland Department of Labor. In this newly created role, Elliot leads the development of Maryland's paid family and medical leave insurance system, which will provide working Marylanders with the financial security they need to take time off work to care for themselves and their families. Elliot brings to this role expertise in social insurance, which he developed through more than a decade of research, policy analysis, and administration of state and federal programs. Previously, he served as the Chief of the Division of Policy and Research for the District of Columbia's Office of Paid Family Leave. There, he developed the policies and administrative procedures for one of the first state-wide paid leave programs in the country. The District of Columbia's Paid Family Leave program was launched in 2020 and has since served as an early example of a successful state paid leave program. Before this, he served as a Research Associate at the National Academy of Social Insurance and a Policy Analyst at New America where he provided expertise on Social Security, workers' compensation, unemployment insurance, and savings policies.



Deborah Smith

Deputy Director of Human Services, **Oklahoma Human Services**

Deborah Smith is an innovative leader and social worker with extensive child welfare and social services experience at the local, state, and federal level. She is passionate about strengthening families and engaging communities. She serves as the Deputy Director at Oklahoma Human Services (OKDHS) where she is responsible for safety net services, childcare services, and child support services. She started her professional career as a front-line child welfare worker in rural Oklahoma. After 12 years of child welfare practice and management experience, she was promoted to Director of Child Welfare Services (CWS). She was the principal developer and author of the Oklahoma Pinnacle Plan. She also served as the Director of Innovation Services for several years where she worked agency-wide to identify efficiencies innovative strategies. Between the role of CWS Director and Innovation Services Director at OKDHS, she served 5 years at the federal level as the Regional Program Manager for the Administration for Children and Families, Children's Bureau out of Kansas City, MO. In this role, she worked with child welfare programs in KS, MO, IA, and NE along with the nine Indian Tribes located in those states.



Shelly Steward

Chief Research Officer, **The Workers Lab**

Dr. Shelly Steward (she/her) is the Chief Research Officer at The Workers Lab, the nation's home for worker-centered innovation. In this role, she leads participatory action research and designs equitable evaluations to measure scale, impact, and equity. Her research interests include the gig economy, labor and social safety net policy, and the impact of technology on work. She is the former director of the Aspen Institute Future of Work Initiative, where she started the Gig Economy Data Hub and led work on portable benefits. She has also been a postdoctoral researcher with the Fairwork Project based at the Oxford Internet Institute. As someone who is queer and autistic, she strives to make research an accessible and empowering practice for everyone involved. Shelly has a PhD in sociology from the University of California, Berkeley and an AB from Harvard University.



Stacy Taylor

VP, Policy, **Propel**

Stacy McLoughlin Taylor is the VP of Policy at Propel where she leads policy, cross-sector partnerships and marketing. The team at Propel, a financial services technology company, are the makers of a smartphone app used by over 5 million SNAP participant households each month and a no fee no overdraft debit card. Prior to Propel, Stacy worked with policy and direct service nonprofit organizations working to improve access to social services. Stacy is a graduate of Princeton's School of Social Policy and International Affairs and Stanford's Graduate School of Business.



Leo Tokar

President, **Lockton**

Leo leads the Risk Solutions and People Solutions groups at Lockton for its Colorado market and sits on Lockton's national Executive Committee. Lockton provides consulting and brokerage across insurance, risk management, total rewards, employee benefits and retirement solutions, and in this space, is the largest private, independent firm in the world. Leo has developed and restructured insurance operations in regulatory, indemnity and managed care organizations in both for-profit and non-profit environments and with national and local organizations. His broad financial and market expertise in health care and insurance fields has allowed him drive significant financial improvement and expansion for organizations he has worked with, and the opportunity to influence public policy, craft legislation and present testimony, and speak nationwide on varying health insurance and regulatory topics.



Rebecca Vallas

CEO, National Academy of Social Insurance

Rebecca Vallas is the CEO of the National Academy of Social Insurance. She steps into leading the Academy after spending nearly 8 years as a member of its Board of Directors. Most recently, she was a senior fellow at The Century Foundation and founder of the Disability Economic Justice Collaborative, bringing together nearly 50 leading organizations across the policy/research and disability rights and justice communities to bring a disability lens to economic policymaking. Prior to that, she spent several years helping to build and lead the Center for American Progress's anti-poverty work and launching its disability justice and criminal justice programs. Vallas began her career as a public benefits lawyer in Community Legal Services in Philadelphia's Aging and Disabilities Unit, where she was a Skadden Fellow and later a Borchard Fellow in Law & Aging. Over the years, Vallas has authored a wide range of policy reports and proposals on income security, disability policy, and reentry policy. Her work has appeared in the New York Times, Washington Post, USA Today, Wall Street Journal, on MSNBC, CNN, CNBC, C-SPAN, Fox News, PBS, NPR, among other national and local media outlets, and she has testified before Congress on numerous occasions. She is a founding board member of the Disability Culture Lab, the National Disabled Legal Professionals Association, and Tzedek DC, and is an active member of the Project to Integrate Spirituality, Law, and Politics (PISLAP). She received her law degree Order of the Coif from the University of Virginia and her bachelor's degree Phi Beta Kappa from Emory University. In her spare time, she supports leaders and healers of all types as a practicing astrologer. She lives in Charlottesville, Virginia with her husband and rescue kitties.



Benjamin Veghte

Director, WA Cares Fund, Washington State Department of Social and Health Services

Benjamin W. Veghte is Director of the WA Cares Fund, the nation's first universal long-term care insurance program in Washington State. He is a Board member of the American Society on Aging, an MIT CoLab Mel King Community Fellow, and a member of the Care Guild, a group of 125 innovators redesigning care for the 21st century. He holds a Ph.D. from the University of Chicago and an MPA from the Harvard Kennedy School. Veghte is an expert on U.S. and OECD social policy with recent publications on the German and Dutch long-term care systems. His research and policy work focus on developing new policies that improve the economic security of families and support them in balancing work and care. He taught comparative social policy and comparative politics as an Assistant Professor of Political Science at the University of Bremen, Germany, until 2008. He worked as a Social Policy consultant for the European Union, working on projects which advised EU accession countries on how to harmonize their social policies with EU standards. Veghte was Vice President for Policy at the National Academy of Social Insurance from 2015-18. From 2018-2020, he led the research portfolio at Caring Across Generations.



Jennifer Wagner

Director of Medicaid Eligibility & Enrollment, **Center on Budget and Policy Priorities**

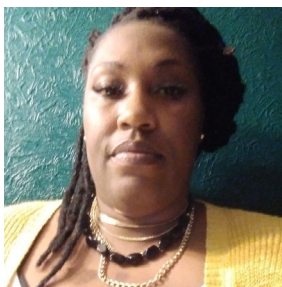
Jennifer Wagner is the Director of Medicaid Eligibility & Enrollment with the Center on Budget and Policy Priorities. She focuses on how policy, operations, and technology can improve the enrollment experience for clients and staff and ensure more eligible individuals access needed supports. She also advances policies to increase coordination among public benefit programs including SNAP, WIC, and TANF. Previously, she was an Associate Director with the Illinois Department of Human Services where she was responsible for SNAP and TANF policy and oversaw local office operations statewide. Jennifer played a major role in the modernization of policy, business processes, and technology in connection with Affordable Care Act implementation in Illinois. She was also a Skadden Fellow at the Sargent Shriver National Center on Poverty Law, is a 2008 graduate of Northwestern University School of Law, and holds a B.S. from the University of Wisconsin – Madison.



David Wiedinmyer

Chief Revenue Officer, **Torch Technology Solutions**

At Torch Technology Solutions, David spearheads business development and product innovation, creating technology platforms that help families identify and surpass the benefits cliffs threatening their transition out of poverty, while aggregating anonymized lived-experience data that inform meaningful program and policy change. With a deep passion for social impact, David draws on a career leading for-profit and non-profit enterprises in Government IT, Renewable Energy, Human Services, and Financial Markets. A native of Pennsylvania, David has lived in Colorado for 20 years and currently resides with his wife and son in northwest Denver.



Eboni Worsley

Founder/ CEO, **Turn Key Solutions Foundation LLC**; Community Advisory Group Member, **Aspen Institute Financial Security Program**

Eboni Worsley is a dedicated humanitarian, entrepreneur, and board member for Aspen Financial Security. As a successful business owner of four ventures, she balances her professional achievements with her roles as a loving wife and mother. Her commitment to social impact and financial security drives her work and philanthropy, reflecting her passion for creating positive change in her community and beyond.

Aspen Institute Financial Security Program Staff



Fran Rosebush Baylor

Founder and Principal at Rosebush Impact Consulting

As a partnership builder and convener, Fran's career has been dedicated to addressing economic challenges and creating pathways to economic mobility for and with people. As a consultant, she combines her business and social work disciplines to drive community-level outcomes for economic opportunity. She collaborates with executive leaders across local, state, and national levels, facilitating conferences and cross-sector partnerships among nonprofit, corporate, government, and financial institution stakeholders. Fran is also a Program Officer at Asset Funders Network where she convenes private, corporate, and community foundations to drive economic mobility initiatives in Central Texas. Previously, Fran was the Vice President for Field Engagement at Prosperity Now where she oversaw their national learning and advocacy community, as well as the program for their biannual Prosperity Summit. She earned her MBA and Master of Social Work from the University of Houston and BA from Purdue University.



Laila Bera

Graduate Fellow

Laila Tasneem Bera is a Graduate Fellow and Master's candidate in Public Policy and Management at Heinz College, Carnegie Mellon University. With a deep interest in the intersection of economic development and emerging technology, Laila graduated from Connecticut College, earning a dual Bachelor's degree in Quantitative Economics & Econometrics and International Relations. She is passionate about exploring how Public-Private Partnerships can be strategically leveraged to advance financial inclusion. Laila's professional experience includes roles as an impact analyst and in research and insights within international development.



Rachel Black

Associate Director

Rachel Black is an Associate Director at the Aspen Institute Financial Security Program (FSP), leading research for FSP's Benefits 21 initiative and directing the development and implementation of Person-Centered Policy and Program Design methods across the FSP team. Previously, Rachel was a Research Fellow with the Jain Family Institute, serving as Project Manager for the City of Newark's Guaranteed Income Task Force and lead author of the task force's final report, *Building Financial Security: Newark's Roadmap to a Guaranteed Income*. Prior to that, she spent nearly 10 years at the think tank New America providing policy research, analysis, and commentary on ways to reform public systems, especially the social safety-net and tax code, to improve the financial security of U.S. households, including as the Director of New America's Family-Centered Policy program, which advocated a strategy for designing more equitable and inclusive social policies by centering the communities who would be directly impacted. Previously, Rachel was a policy analyst in the Government Relations department of the national grassroots anti-hunger organization Bread for the World, where she helped shape the organization's domestic policy agenda and contributed to its legislative advocacy, including leading its 2008 campaign to enhance the anti-poverty impact of the Earned Income Tax Credit and Child Tax Credit. Rachel holds a BS from Georgia Tech. Her work has been featured in a diverse set of outlets, including The Washington Post, The New York Times, The Atlantic, Slate, Business Insider, CNN, and Essence.



Riani Carr

Program Associate

Riani Carr (she/her) is a Program Associate at the Aspen Institute Financial Security Program (Aspen FSP) and is a strong believer that policy change starts with community expertise. In her role, she engages with cross-sector leaders, helps design and execute events, contributes to research, and advances and implements the Person-Centered Insights approach and methodology across Aspen FSP's portfolio of work. What Riani considers the most meaningful part of her work is her leadership of Aspen FSP's Community Advisory Group and the relationships she's cultivated with the members, whose lived and professional expertise ground, strengthen, and challenge her work. Riani is an alum of the Bill Emerson National Hunger Fellowship and earned a B.A. in Politics and International Affairs, with minors in Sociology and Latin American Studies from Wake Forest University. Riani calls Silver Spring, Maryland home and loves to travel and find new hobbies.



Alex Coccia

Policy Manager

Alex Coccia is a Policy Manager for the Aspen Institute Financial Security Program, where he advances policy work on public benefits delivery and financial security. His work focuses on building an inclusive economy by making public systems robust, responsive, and accountable to people and communities who have long been excluded from them. Before joining Aspen FSP, Alex was a senior policy analyst at the Center for the Study of Social Policy. While there, he led efforts to call for an expanded, fully refundable and inclusive Child Tax Credit, and to improve the administration and delivery of public benefits across the tax and human services systems. His work centered parents and caregivers in policy development so that programs and institutions effectively meet the needs of children and families. Prior to that work, Alex was a policy consultant for Children's Defense Fund Ohio, and a special assistant and policy analyst at the U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation. Outside of policy and advocacy work, he was an adjunct assistant professor in Political Science at the University of Notre Dame. Alex holds a DPhil (PhD) in Politics and an MPhil in Comparative Social Policy from the University of Oxford, where he was a Rhodes Scholar. He received his BA in Africana Studies and Peace Studies from the University of Notre Dame.



Genevieve Melford

Managing Director

As Managing Director of the Aspen Institute Financial Security Program (Aspen FSP), Genevieve oversees the program's strategy, activities, and operations to illuminate and solve the most critical financial challenges facing American households and to make financial security for all a top national priority. Genevieve joined Aspen FSP as its inaugural Director of Insights and Evidence, a role in which she built and led a team of talented researchers synthesizing knowledge and data on topics including consumer debt, financial stability, housing security, caregiving, the financial lives of workers, inclusive financial systems, household wealth, and the financial well-being of youth and young adults. Before joining FSP, Genevieve worked at the U.S. Consumer Financial Protection Bureau (CFPB), where she led the Bureau's work to define, measure, and study the drivers of consumer financial well-being and effectiveness research on financial education and capability strategies. While at the CFPB, she co-chaired the interagency Financial Literacy and Education Commission (FLEC)'s Research and Evaluation Committee. Before that, she served as Director of Research at Prosperity Now, a national nonprofit dedicated to expanding economic opportunity for low-income families and communities. Genevieve holds an M.P.A. from Princeton University's School of Public and International Affairs and a B.A. in economics from Wesleyan University.



Tim Shaw

Policy Director

As the Policy Director for the Financial Security Program, Tim works to advance promising policies that address the most pressing financial security challenges facing people in America. Working with leaders across levels of government, Tim and Aspen FSP's policy team seek to provide policymakers the innovative ideas, research, and network of leaders they need to design and enact policies that make a concrete difference in people's financial security. Before joining the Aspen Institute, he was an Associate Director for Economic Policy at the Bipartisan Policy Center. While there, he was the policy lead for BPC's Paid Family Leave Task Force and led projects on economic opportunity, retirement security, and fiscal policy. Prior to that work, he was a tax and budget staffer at the Government Accountability Office. His work has been featured in numerous publications, including the Washington Post, Politico, and the Wall Street Journal. Tim holds a B.A. in Political Science and Spanish from Washington University in St. Louis and a master's degree in Public Policy and Management from Carnegie Mellon University.



Joanna Smith-Ramani

Co-Executive Director

Joanna Smith-Ramani is Co-Executive Director of the Aspen Institute Financial Security Program, a leading national voice on Americans' financial health. Working with the team, she is building a diverse cross-sector community of leaders (Joanna calls her "quirky Thanksgiving table") who, together, are using their shared collective wisdom and humanity to deeply investigate and solve for the most critical financial challenges facing U.S. households. Joanna has more than 20 years of experience across community, personal finance, and asset development. Joanna holds a Master of Public Policy degree from the Harvard Kennedy School and a B.A. in Urban Studies from Barnard College, Columbia University. She serves on the Boards of the CASH Campaign of Maryland and A Wider Circle, and was selected to the 2017-2018 class of Leadership Montgomery.



Emy Urban

Manager, Events and Operations

Emy Urban is the Events and Operations Manager for the Aspen Institute Financial Security Program (FSP). They manage and support FSP's public and private events. Before coming to Aspen, they worked at Ecosystem Investment Partners and AidData. Emy has a B.A. in sociology and economics from Wellesley College.



Mike Wilkening

Senior Fellow

Michael Wilkening is a Senior Fellow in the Financial Security Program at the Aspen Institute. Wilkening served as a Senior Advisor for Technology and Delivery at the US Health & Human Services Agency and in the Executive Office of the President prior to joining the Aspen Institute. Wilkening held various leadership roles during his 25+ years in California State government. Wilkening was California's first Special Advisor on Innovation and Digital Services. Working directly with the highest ranking officials in government, Wilkening chaired the Innovation & Technology Task Force, to connect the public and private sectors, designing and utilizing innovative approaches to shape California's response to the COVID-19 pandemic. Before his appointment in the Governor's Office, he was Secretary of the California Health and Human Services Agency (Cal HHS) and Chair of Covered California. Before serving as Secretary, Wilkening was Undersecretary of Cal HHS for nearly a decade. Wilkening was executive sponsor of the Cal HHS Open Data Initiative and Agency Technology Governance Council. He earned a Master of Arts degree in political science from the University of California, Davis.



Talia Zitner

Event Coordinator

Talia Zitner (she/her) is the Event Coordinator for the Aspen Institute Financial Security Program (FSP). She supports the production of FSP's variety of public and private events. Before joining the Aspen team, Talia worked in the music festival industry in operations and advocacy positions. She holds a B.A. in English and Environmental Studies from Wesleyan University.



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