

CSPN Children's Savings Account (CSA) Forum - March 11-12, 2025

Agenda

Forum Objective: Foster peer-to-peer sharing among state 529 plans that administer a CSA, or are considering it, in order to tackle common challenges, develop best practices, and share information relevant to understanding and furthering the connection between CSAs and 529s.

Location: Atrium/Conference Center at 1201 Pennsylvania Ave NW, Washington, DC 20004

This Forum is intended to be interactive and discussion oriented.

Tuesday, March 11		
12:00-1:00pm	Lunch	Atrium level at 1201 Pennsylvania Ave
1:00pm	Welcome and Kick-off	Benita Melton, Director, Mott Foundation Education Program Julie Peachey, Co-Chair, CSPN CSA Working Group
1:15-2:15pm	Introductions / Program Updates Each state with CSA activity will briefly review their program status and highlight a recent or upcoming milestone or project.	Facilitator: Julie Peachey
2:15-3:00pm	Marketing to both older and younger audiences Learn from research and campaigns conducted in California to drive engagement	Speaker: Doug Harrison, TIAA Mitch Baum, MAB Strategies
3:00-3:15pm	Break	
3:15-5:15pm	Driving Awareness and Action through Partnerships Examples will be shared from My Alford Grant (ME), BabySteps (MA), NYC KidsRise, and CalKIDS + Covered California	Facilitator: Karen McDermott, PA Treasury Speakers: Colleen Quint, Alford Grant Foundation Jessica Keegan, Office of Economic Empowerment- MA Treasury Debra-Ellen Glickstein, NYC KidsRise Noah Lightman, ScholarShare Investment Board
5:30-7:00pm	Networking Reception	12th Floor at 1201 Pennsylvania Ave

Wednesday, March 12		
7:30-8:30am	Breakfast	Atrium level at 1201 Pennsylvania Ave
8:30-9:15am	Keynote: Why are we here?	Speaker: Michael Sherraden, Founding Director, Center for Social Development, Washington University in St. Louis
9:15-10:15am	Table Topics Opportunity to break into smaller groups to discuss different topics of interest: -Solving Data Access -Success Metrics -Partnering with local CSAs	
10:15-10:30 am	Break	
10:30-11:30am	Making CSA Distributions Some states are making CSA distributions and others are years away. Learn what some states are doing to prepare for the distribution phase of their program and what needs to be considered when developing the CSA distribution process.	Facilitator: Linda English Speakers: Eva Giles, Finance Authority of Maine Noah Lightman, ScholarShare Investment Board
11:30am-12:00pm	Wrap Up	
12:00-1:00pm	Lunch	

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