



2023 RAISE Texas Summit Speakers

Keynote Speakers



DR. TIFFANY MANUEL

President and CEO
TheCaseMade

OPENING KEYNOTE

DrT (as she prefers to be called) (she/her) is a dynamic speaker, bestselling author and the President and CEO of TheCaseMade, an organization dedicated to helping leaders powerfully and intentionally make the case for systems change.

In her role at TheCaseMade, DrT works with hundreds of passionate social changemakers, innovators and adaptive leaders around the United States who are building better, stronger communities that are diverse, equitable and inclusive.

By aligning their community stakeholders around the kind of deep systems changes that can improve population outcomes, these leaders are able to grow their impact, scale their programs, and harness the investments they need to improve their communities.



TIM SHAW

Policy Director, Financial Security Program
The Aspen Institute

CLOSING KEYNOTE

Tim is the Policy Director for the Aspen Institute Financial Security Program, where he works to advance policies that address the most pressing financial security challenges facing Americans.

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 the Paid Family Leave Task Force and led projects on economic opportunity, retirement security, and fiscal policy.

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.

Special Performances



JOAQUIN ZIHUATANEJO

*Poet & Spoken Word Artist
Poet Laureate for City of Dallas*

Born and raised in the barrio of East Dallas, in his work Joaquin strives to capture the duality of the Chicano culture. Sometimes brutal, but always honest his work depicts the essence of barrio life, writing about a youth that existed somewhere between the streets of the barrio and the dream wanderings of a boy who found refuge in a world of stories and poems.

Joaquin is a poet who is a uniquely inspiring and articulate teacher that energizes students and adults to discover their voice and share their story.



SHANDALLA CALDER

Multi-genre violinist

Shandalla Calder is a multi-genre violinist who brings a musical experience that is high energy and interactive. Ms. Calder is a classically trained artist who has performed extensively in both North America and across Europe.

Dalla is a technical precision talent who brings a unique musical style that resonates with her audience. She is also a composer with three original songs that have been released and is working on her first album.

She is in her 24th year of playing and 11th year of performance work.



ZIHAIR DOUGLAS

*5th grade winner MLK Jr.
Oratory Competition*

Zihair Douglas is a 10-year-old student from Thomas L. Marsalis STEAM Academy within the Dallas ISD. Zihair was this year's winner of the 30th Annual City-wide MLK Jr. Oratory Competition. The competition serves as a celebration of cultural diversity and opportunity to spotlight talented DISD students as they learn about Dr. King.

Zihair's hero is his mother because she teaches him to love and respect everyone. His long term goal is to be an architect as he loves construction and design.

Zihair lives in Desoto, Texas with his Mom (Gloria), Dad (Nakia) and younger sister. He also loves his two dogs and their two guinea pigs.



Breakout Sessions

Financial Coaching, Counseling and Crisis Assistance

Breakout Session - March 2nd
Track 1-A

A workshop that builds on the expertise of presenters in coaching, counseling, and crisis assistance to answer:

- How do you identify when a client needs coaching, counseling, or crisis assistance?
- What are tools and resources that staff can use in each scenario?
- How do you deliver services that meet clients where they are?

Data for Storytelling

Breakout Session - March 2nd
Track 2-A

This workshop will equip you with ways to leverage client data to build a stronger case for your organization's mission and cause. Learn how to use your organizational data to inspire, excite, and influence others to take up your cause.



MARINA GARCIA
Project Manager
RAISE Texas

Marina works as a Project Manager with RAISE Texas where she facilitates projects that support financial coaching, volunteer income tax assistance, and savings programs. Marina has over ten years of experience in the financial capability field as a financial coach, services manager, and Financial Capability Director at Cornerstone Foundation

Marina received her B.S. in Economics from the University of North Texas.



DUSTI YOUNG
Program Manager
GreenPath Financial Wellness

Dusti works for GreenPath, a nonprofit financial wellness organization, where she teaches on financial wellness topics. Dusti has also designed a financial coaching program to build financial confidence and prepare people for home ownership.

Dusti is passionate about creating a space for people to learn about their finances, understand how to navigate decisions, feel confident with their spending, and have the courage to bridge the gap between intention and action.



CATHY BARKER
President & CEO
Jewish Family Service of Greater Dallas

Cathy is an experienced Non-Profit Executive with 25 years of progressive growth in leadership of both local and national social service and mental health non-profits. She has built a distinguished 12 year record of progressive, successful leadership at Jewish Family Service of Greater Dallas first in her roles as Chief Operating Officer and Chief Development Officer and now as the Chief Executive Officer.



ERIKA LEOS
Assistant Director of Prosper Programs
Foundation Communities

Erika has been a part of the financial coaching program at Foundation Communities since 2008. In her present role she manages Foundation Communities' financial coaching, emergency assistance, loan, saving, and credit-building programs, which were designed to help community members achieve financial wellness and reach their goals.

Erika earned her Bachelors of Business Administration from The University of Texas at Austin.



DR. TIFFANY MANUEL
President and CEO
TheCaseMade

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Breakout Sessions

Innovations in Fines, Fees, and Financial Burdens

Breakout Session - March 2nd
Track 3-A

These Texas leaders are providing alternatives to fines and fees to help vulnerable populations move forward financially.

Learn about an Affordability Program for low-income water users and programs that resolve citation-related fees while increasing client financial capability.

Creating Effective Feedback Loops

Breakout Session - March 2nd
Track 1-B

Listen4Good is a national leader in the field of client feedback.

Learn how to listen more deeply to clients and use feedback to build authentic client partnerships.



MARY MERGLER
(MODERATOR)

*Sr Campaigns Strategist
Fines & Fees Justice Center*

Mary leads FFJC's Free to Drive Campaign to end debt-based license suspensions in states across the country as well as the Cities and Counties for Fine and Fee Justice project. Prior to joining FFJC, Mary spent nearly a decade at Texas Appleseed advocating for criminal legal system reform in Texas and three years at The Constitution Project in Washington DC

Mary received her J.D. from the University of Virginia School of Law and her B.S. in Business cum laude from Wake Forest Univ. She is a member of the State Bar of Texas. She lives in Austin, TX. with her husband and three daughters.

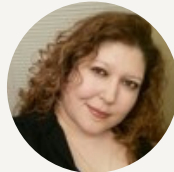


FRANCES GONZALEZ

*Senior Director
Asset Funders Network*

Frances is a results-oriented public servant focused on developing and advancing policy that creates and supports areas of opportunity for families and children. She is serving as the Sr. Director of the Texas network of AFN chapters and New Mexico with specific oversight for the San Antonio Area Asset Funders Network.

Before joining AFN, Frances served as Deputy and Interim Chief of Staff for the Honorable Julián Castro, Secretary of the U.S. Dept. of Housing and Urban Development in Washington, D.C. Prior to HUD she was Mayor Julián Castro's Assistant to the Mayor for Policy where she led key projects such as the Mayor's Fitness Council and was lead staff for water and transportation issues.



YVONNE YANEZ, MSW

*Human Service Specialist
City of Fort Worth Municipal Court*

Yvonne has worked at the City of Fort Worth's Municipal Court for over six years. She currently facilitates their Community Court Program that seeks to eliminate barriers to obtaining a drivers license for homeless and low-income individuals. Yvonne previously worked with Fort Worth's Community Action Partners, Tarrant County's Community Action Agency that provides comprehensive services to economically disadvantaged individuals, families and the elderly.

Yvonne received both her Bachelor's in Social Work and her Masters in Social Work from the University of Texas at Arlington.



LOURDES ZUNIGA

*Executive Director & Founder
Financial Health Pathways*

Lourdes is an award winning social impact leader and a Presidential Leadership Scholar. A journalist from Lima Peru, Lourdes works on addressing social & systemic issue. She is passionate about philanthropy, education, and advocating for the Hispanic community. She has been recognized by the Austin Business Journal as one of the most influential women in Central Texas

Lourdes is a proud alumna of the American Express Leadership Academy, and the LBJ Women Campaign School's inaugural class, where she was selected because of her work as an influential leader and strategist.



VALERIE THRELFALL

*Managing Director
Listen4Good*

In her role as Managing Director at Listen4Good, Valerie manages a team that works to support hundreds of nonprofits nationwide to build sustainable feedback practices focused on those they serve. Valerie has worked with Listen4Good for over eight years and brings more than fifteen years of experience in the feedback space. Valerie led the conception and development of a youth-focused feedback program, YouthTruth, which has since become a national leader in the student feedback space

Valerie has a B.A. in Economics from Swarthmore College; an MBA in Management and Strategy from Northwestern University; and a Masters in Public Policy from Harvard's Kennedy School of Government.



Strength-Based Communications

Workshop - March 2nd
Track 2-B

"Helping you communicate clearly in a complicated world" is the mantra for D. Gandhi Communications.

Dulari's workshop will help nonprofits create communications that support brand awareness and fundraising.



DULARI GANDHI
CEO
D. Gandhi Communications

Dulari is the founder of D. Gandhi Communications, a strategic communications firm that helps corporations, foundations, nonprofit organizations, and social impact entrepreneurs communicate clearly in a complicated world.

Dulari's prior work experience includes the Michael & Susan Dell Foundation, the Global Hunger Project, and the New York City Department of Health & Mental Hygiene.

Dulari received a B.S. from the State University of New York. She resides in Austin, Texas.

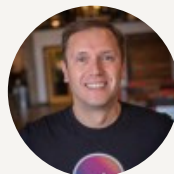
Innovations in Financial Services

Breakout Session - March 2nd
Track 3-B

Gain insight into innovative financial products that are creating on-ramps to the financial ecosystem for low- to-moderate-income individuals.

- Fee-free banking
- Auto insurance geared towards immigrant and low-income consumers
- Home ownership program for LMI communities.

Attendance is a must for leaders wanting to help expand the financial ecosystem for all Texans.



FRANK SANTONI
(MODERATOR)
Co-Founder
Credit Mountain

Frank is the co-founder of Credit Mountain, a fintech startup focusing on enabling access to quality credit for financial strivers. Frank's brings together a diverse mix of philanthropic, social service and product development experience to lead innovation efforts at Credit Mountain.

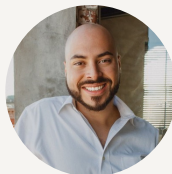
Prior to founding Credit Mountain, as Senior Director of Research + Innovation at Catholic Charities Fort Worth, Frank launched the Padua Pilot, a \$6M randomized-control trial testing an experimental, integrated case management model.



STACY ARMIJO
Chief Experience Officer
Amplify Credit Union

Stacy is Chief Experience Officer for Amplify Credit Union, which stewards more than \$3B in assets under management through fee-free banking, award-winning lending and excellence in loan servicing. Stacy spearheaded the credit union's initiative last year to become the only traditional financial institution in the country to eliminate ALL banking fees, keeping \$2M in the pockets of members and supporting financial inclusion in Texas.

Stacy was named a "Woman of Influence" by the Austin Business Journal and "Volunteer of the Year" by the American Marketing Association. She is a proud mom to two boys, ages 12 and 8. Stacy loves exploring her home city of Austin and entertaining friends.



NESTOR SOLARI
CEO and Co-Founder
Sigo Seguros Auto Insurance

Nestor is co-founder and CEO of Sigo Seguros, an innovative insurance technology company providing affordable access to car insurance for immigrant and working class communities. Nestor was named one of the Most Notable Hispanic Leaders in New York by Crain's Business. A former Howard E. Mitchell Fellow, he is the son of Uruguayan immigrants and was the first in his family to attend college.

Nestor received a B.S. in Finance from Penn State University, a Master of Arts in International Studies from the University of Pennsylvania, and an MBA from the University of Pennsylvania's Wharton School of Business.



JOE VELAZQUEZ
Sr VP-Neighborhood & Community Lending
Bank of America

Joe has been in banking for 30 years and has collective experience in Multicultural Markets, Mortgage Banking, Community Affairs, Community Development, Real Estate Marketing, and Trust Banking. In previous roles he managed partnerships with Realtor board associations, real estate multicultural trade organizations, industry leaders, and community housing agencies promoting homeownership in low to moderate income and multicultural communities



Plenary Sessions

March 3rd

Connecting with Stories to Change Policy

Understand the power of narratives to shape the conversation, build power, and change policy.

Hear how narrative change successfully reshaped tax policy to adopt a state Earned Income Tax Credit in Arkansas.

Connecting Texans with Digital Equity

Where are we making progress in digital equity?

What can local groups do to further digital equity in their community?

Learn about efforts to promote digital inclusion and literacy in Texas.



KSENIYA BENDERSKAYA
(MODERATOR)

Assistant VP & Community Affairs Officer
Federal Reserve Bank of Dallas

Kseniya has been with the Federal Reserve Bank of Dallas for over three years. In addition to her current role, she serves as the Advance Together Initiative Director. She previously worked for the Federal Reserve Bank of Boston as Initiative Director for the Working Cities Challenge.

Kseniya attended Duke and Harvard universities and currently serves on the RAISE Texas Board.



REGAN GRUBER-MOFFITT

VP of Community Investments
St. David's Foundation

Regan leads the Community Investments team at St. David's Foundation, overseeing their strategic grantmaking, community collaborations, and strategic partnerships. Regan's career includes serving as a legislative aide in the Texas Legislature, an insurance regulatory attorney with Mitchell Williams Law, and Chief Strategy Officer at the Winthrop Rockefeller Foundation—a private foundation supporting systemic change to achieve equity throughout Arkansas.

Regan currently serves on the boards of the Carl B. and Florence E. King Foundation and Asset Funders Network. She co-founded and serves on the steering committee of the Central Texas Asset Funders.

Regan received her B.A. in Psychology, Math from Wellesley College, her Masters in Education from UT-Austin, and her J.D. from UA-Little Rock's William H. Bowen School of Law.



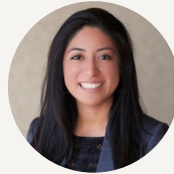
JERRY HAWKINS

Executive Director
Dallas TRHT

Jerry serves as the Executive Director at Dallas Truth, Racial Healing & Transformation: part of a national 14-place initiative by The W.K. Kellogg Foundation. Dallas TRHT's mission is to create a radically inclusive city by addressing race and racism through narrative change, relationship building, and equitable policies and practices.

Jerry served on Dallas ISD's Trustee-appointed Racial Equity Advisory Council and The Education Trust/ERS Resource Equity Working Group, and the United Way of Metropolitan Dallas/PolicyLink/National Fund for Workforce Solutions 'Pathways to Work' Workforce Equity Advisory Council

Jerry received his B.S. in Early Childhood Education from Southern Illinois University and his Masters in Education from Northeastern Illinois University.



MARYCRUZ DE LEON
(MODERATOR)

Community Development Senior Advisor
Federal Reserve Bank of Dallas

Marycruz has held several roles in her eight plus years with the Federal Reserve Bank, including Senior Economic Analyst and Assistant Economist while in El Paso, TX., and her current role as Community Development Senior Advisor.

Marycruz is President of the Rio Grande Economics Association, a chapter of the National Association for Business Economics

Marycruz received her B.S. in Economics from Baylor University and her M.S. in Economics from the University of Texas at El Paso.



ARMANDO CANTU

Chief Executive Officer
CARDBOARD Project

Armando is the founder and executive director of CARDBOARD Project, a non-profit in Dallas, TX, whose mission is to bridge the digital gap and educate underserved communities in South Dallas. CARDBOARD Project empowers its clients by providing access to connectivity and devices, and by improving their digital fluency. CARDBOARD Project equips clients with community-based resources and the necessary tools for sustainable success and self-sufficiency.

In 2020, CARDBOARD Project was the Workforce Solutions Greater Dallas recipient of the "Workforce Solution Partner Award" and in 2022, Armando was recognized in SUCCESS 125 Awards list of Most Influential Leaders.



FRANCELLA OCHILLO

Executive Director
Next Century Cities

Francella is an attorney and tech policy expert. Her work underscores how widespread connectivity can improve educational outcomes, economic resilience, and the ability to age in place. Her work at Next Century Cities equips local government officials working to deliver on principal broadband goals.

As a Technology and Public Purpose Fellow at Harvard University, Francella published research on the effects of digital inequities to reinforce disadvantage and contribute to the separation of wealth.

Francella has also served on federal agency working groups, provided congressional testimony, and participated in local, state, and federal level proceedings on closing the digital divide.



Plenary Sessions

March 3rd

Understanding the Current Economy in Texas

Gain a better understanding of this inflationary environment and how will it affect low- to moderate-income communities in Texas.

Spotlight on Funding

Modernization of CRA & Impact on Nonprofit Funding

New Federal Dollars for Asset Building

Panel 1: Discussion of CRA changes and new federal funding to support small businesses, address energy poverty, and help homeowners and renters.

Panel 2: Discussion of what nonprofits and clients can do to prepare for this new funding.



PIA ORRENIUS
Federal Reserve Bank of Dallas

Pia has been with the Federal Reserve Bank of Dallas for over 23 years. She presently leads the regional and microeconomics groups in the Research Department. She has been a research fellow at the SMU Tower Center for Political Studies and adjunct professor at Baylor University for over fifteen years. In addition since 2017 she has been a research fellow for the the SMU Mission Foods Texas-Mexico Center. Pia has also served as a senior economist for the President's Council of Economic Advisors.

Pia holds a BA in Economics and Spanish and earned a PhD in Economics from the University of California at Los Angeles.



JUDITH CANALES - MODERATOR
Executive Director, Eagles Pass Maverick County Economic Development Alliance

Judith has over thirty years of experience working at the national, state, and local levels in federal and local government administration and nonprofit management. Her expertise includes community and economic development, rural and urban development, housing, small business, and agriculture policy and financing. Judith received presidential appointments in the administrations of President Barack Obama and President Bill Clinton. She was the Texas State Executive Director (SED) for the USDA Farm Service Agency investing \$7.6 billion in federal farm payments and loans to Texas farmers and ranchers. Judith received a Master of Public Administration from Harvard University, a Masters in Urban Studies from Trinity University.



HERBERT AUSTIN
District Director
Small Business Administration

Herbert is the District Director for the U. S. Small Business Administration (SBA), Dallas/Ft Worth office. His office covers 72 counties in north, central, and east Texas. Herbert is responsible for the management and delivery of SBA programs and services including oversight of SBA resources, Small Business Development Centers and SCORE Chapters. He works with about 200 participating lenders to provide access to capital for the small business community.



LINDA DAVIS-DEMAS
Vice President of Housing
BALANCE

As VP of Housing for BALANCE, Linda is responsible for all housing counseling programs, the management of housing grants, and the oversight of BALANCE's National Affiliate Housing Counseling Network. Linda has more than a decade of experience in grants, regulatory compliance, training, quality control, financial coaching and counseling.

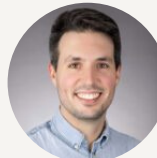
Prior to joining BALANCE, Linda served as Director of Client Experience, Training and Federal Grants for the national HUD intermediary of the Homeownership Preservation Foundation (HPF), Director of Quality Control and Compliance at HPF and Director of Housing at CCCS of Greater Dallas. Linda has a BS in Psychology from Florida State University.



DANIEL ELKIN
Director of Policy, Impact, & Innovation
come dream. come build.

Daniel is responsible for initiating cdcb's research initiatives and advocates on behalf of policies that expand home ownership at the local, state, and federal level. In addition, he coordinates cdcb's resource development and data collection efforts.

Daniel has a PhD in History from the University of Arkansas where he researched urban development along the U.S. Mexico border.



ANDREW ROBISON
Research Analyst
Texas Energy Poverty Research Institute

At TEPRI, Andrew helps execute their mission-driven research agenda to meet their strategic goals. Prior to joining the TEPRI team, Andrew worked for the Texas Senate Research Center during the 87th Texas Legislative Session. During his undergraduate studies, Andrew had the opportunity to work for both a Berlin-based international consultancy and at the United States Embassy in Berlin.

Andrew received his master's in global policy studies from the LBJ School of Public Affairs at the University of Texas at Austin.



SAWYER WILLIAMS
Consumer Affairs Examiner
Federal Reserve Bank of Dallas

Sawyer is a Senior Examiner with the Federal Reserve Bank of Dallas, specializing in Community Reinvestment Act evaluations of large and complex institutions. He served as in-house counsel for an international money remitter prior to joining the Federal Reserve System in 2014.

Sawyer holds a Bachelor's degree from Abilene Christian University and a Juris Doctorate from St. Mary's University in San Antonio