

Curriculum Vitae
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Personal

Born: Manhattan, Kansas, USA, May 28, 1948.

Married: Margaret Sherrard Sherraden, July 29, 1978.

Children: Catherine Elizabeth Sherraden, October 23, 1979; Samuel Chapman Sherraden, August 16, 1983.

Education

High School Degree, Junction City High School, Junction City, Kansas, 1966.

AB (Social Relations), *cum laude*, Harvard University, 1970.

MSW (Social Administration), University of Michigan, 1976.

PhD in Social Work (Social Policy and Administration) and Psychology (Organizational Behavior), University of Michigan, 1979.

Professional Positions

Faculty of Washington University in St. Louis, 1979-present.

Zellerbach Visiting Professor, University of California, Berkeley, 2003-04.

Fulbright Research Fellow, National University of Singapore, 1992-93.

Visiting Professor, National Autonomous University of Mexico, 1987-88.

Books, Research Monographs, Journal Issues

Sherraden, M.S., & McKernan, S.M. (Eds.) (forthcoming 2008). *Poor finances: Asset accumulation in low-income households* (working title). Washington: Urban Institute Press.

McBride, A.M., & Sherraden, M. (Eds.) (2007). *Civic service worldwide: Impacts and inquiry*. Armonk, NY: M.E. Sharpe.

Schreiner, M., & Sherraden, M. (2007). *Can the poor save? Savings and asset building in Individual Development Accounts*. New Brunswick, NJ: Transaction.

Sherraden, M., & McBride, A.M. (Eds.) (2004 through 2007). *Social Development Issues* (Editor of academic journal with three issues per year over four years).

Sherraden, M. (Ed.). (2005). *Inclusion in the American Dream: Assets, poverty, and public policy*. New York: Oxford University Press.

McBride, A.M., & Sherraden, M. (Eds.). (2004). *Civic service: Toward a global research agenda* [Special issue]. *Nonprofit and Voluntary Sector Quarterly*, 33(4).

Sherraden, M.S., Sanders C., & Sherraden M. (2004). *Kitchen capitalism: Microenterprise in low-income households*. Albany, NY: State University of New York Press.

Perold, H., Stroud, S., & Sherraden, M. (Eds.). (2003). *Service enquiry: Civic service and voluntarism in the 21st century*, first edition. Johannesburg: Volunteer and Service Enquiry Southern Africa. (Also published in Spanish [2003]. Johannesburg: Volunteer and Service Enquiry Southern Africa.)

Sherraden, M. (Ed.). (2003) *Asset building and social development & Social development: Engaged scholarship* [Special double issue]. *Social Development Issues*, 25(1&2).

Morrow-Howell, N., Hinterlong, J., & Sherraden, M. (Eds.). (2001). *Productive aging: Concepts and controversies*. Baltimore: Johns Hopkins University Press.

Midgley, J., & Sherraden, M. (Eds.). (1997). *Alternatives to social security: An international inquiry*. Westport, CT: Auburn House.

Sherraden, M., Page-Adams, D., Emerson, S., Beverly, S., Scanlon, E., Cheng, L., Sherraden, M.S., & Edwards, K. (1995). *IDA evaluation handbook*. St. Louis: Washington University, Center for Social Development.

- Sherraden, M. (1992). *Community-based youth services in international perspective*. Washington, DC: Carnegie Council on Adolescent Development and W.T. Grant Foundation Commission on Youth and America's Future.
- Sherraden, M. (1991). *Assets and the poor: A new American welfare policy*. Armonk, NY: M.E. Sharpe. (Published in Chinese [2005], Beijing: Commercial Press. Published in Bahasa Indonesian [2006], Jakarta: Rajawali Press. Forthcoming in Spanish [2007], San Juan, Puerto Rico: Center for a New Economy).
- Sherraden, M., & Sherraden, M.S. (Eds.). (1991). *Social services and adolescents* [Special issue]. *Children and Youth Services Review*, 13(3).
- Eberly, D., & Sherraden, M. (Eds.). (1990). *The moral equivalent of war? A study of non-military service in nine nations*. New York: Greenwood Press.
- Sherraden, M., & Eberly, D. (Eds.). (1982). *National service: Social, economic, and military impacts*. New York: Pergamon Press.
- Sherraden, M. (1979). *The Civilian Conservation Corps: Effectiveness of the camps*, PhD dissertation, University of Michigan, Ann Arbor.

Selected Journal Articles, Book Chapters, Proceedings, Reviews

- Lombe, M., & Sherraden, M. (forthcoming). Effects of participating in an asset-building intervention on social inclusion. *Journal of Poverty*.
- Guo, B., Huang, J., Zou, L. & Sherraden, M. (forthcoming). Asset-based policy in rural China: An innovation in the Retirement Social Insurance Program. *China Journal of Social Work*, inaugural issue.
- Sherraden, M. (forthcoming). Individual development accounts and savings by the poor. In R. Blank and M.S. Barr (Eds.), *Access, assets, and poverty*. New York: Russell Sage Foundation.
- Sherraden, M., & Williams Shanks, T.R. (forthcoming). The influence of research on policy and practice: Lessons from studies of asset building and low-income families. In A. Stiffman (Ed.), *The nitty-gritty of managing field research*. New York: Oxford University Press.
- Sherraden, M., & Boshara, R. (forthcoming). Learning from individual development accounts. In A. Lusardi (Ed.), *Improving effectiveness of financial education and savings programs*. Chicago: University of Chicago Press.
- Guo, B., Huang, J., Sherraden, M., & Zou, L. (forthcoming). Dual incentives and dual asset building: Policy implications of the Hutubi rural social security loan program in China. *Journal of Social Policy*, 37(3).
- Sherraden, M. (forthcoming). Asset building. In *Encyclopedia of social work*.
- Putnam, M., Sherraden, M., Zhang, L., & Morrow-Howell, N. (2008). Age differences in IDA savings outcomes: Findings from the American Dream Demonstration. *Journal of Aging and Social Policy*, 20(1), 45-64.
- Sherraden, M., & Han, C.K. (2007) Social investment state and asset-based policy: Implications for Korean social policy, *Proceeding of international symposium*, 29-50. Seoul: Seoul Welfare Foundation.
- Sherraden, M. (2007). Assets for all: Toward universal, progressive, lifelong accounts (pp. 151-164). In J.R. Edwards, M. Crain, & A.L. Kallenberg (Eds.), *Ending poverty in America: How to restore the American Dream*. New York: New Press.
- Boshara, R., Cramer, R., & Sherraden, M. (2007). The politics of aspirations: Creating inclusive asset-based policies in the US (pp. 1-18). In J. Robson & P. Nares (Eds.), *Wealth and well-being: New directions for social policy in Canada*. North York, Ontario: SEDI.
- Sherraden, M., & Sherraden, M.S. (2007). [Review of the book *Credit markets and the poor*]. *Social Service Review*, 81(1), 191-194.
- White, J., Edwards, J.R., Sherraden, M., Morse, S., Stauber, K., Brown-Graham, A.R., & Leloudis, J.L., (2006). Community economic development and poverty alleviation, *Employee Rights and Employment Policy Journal*, 10(1), 121-150.
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- Grinstein-Weiss, M., Zhan, M., & Sherraden, M. (2006). Saving performance in Individual Development Accounts: Does marital status matter? *Journal of Marriage and Family*, 68, 192-204.
- Schreiner, M., Ng, G.T., & Sherraden M. (2006). Cost effectiveness in social work practice: A framework with application to Individual Development Accounts, *Research on Social Work Practice* 16(1), 28-37.

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- Schreiner, M., & Sherraden, M. (2005). IDAs and drop-out: Prediction and prevention. *Financial Services Review, 14*(1), 37-54.
- Morrow-Howell, N., Tang, F., Kim, J., Lee, M., & Sherraden, M. (2005). Maximizing the productive engagement of older adults. In M. Wykle (Ed.), *Successful aging*. Springer Publications.
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- Sherraden, M. (2005). *Assets, poverty, and public policy*. Sydney, Australia: The Sydney Institute.
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- Duran, C.R., & Sherraden, M. (1997). Introduction: Social security in the 21st century. In C.R. Duran (Ed.), *Systems of Social Security in the 21st Century* [In Spanish]. Mexico City: Foundation of Luis Donaldo Colosio.

- Sherraden, M. (1997). Social security based on capital accounts: The Central Provident Fund of Singapore. In C. R. Duran (Ed.), *Systems of Social Security in the 21st Century* [In Spanish]. Mexico City: Foundation of Luis Donaldo Colosio.
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National and International Conferences Organized

- “Saving, Assets, and Access to Financial Services,” global symposium sponsored by Citigroup Foundation, organized by Center for Social Development, New America Foundation, and National University of Singapore, Singapore, June 2007 (organized with Leslie Meek, Ray Boshara, and Sudha Nair).
- “Taking the Measure of the American Dream Demonstration,” research conference organized by the Center for Social Development, St. Louis, April 2005 (organized with Lissa Johnson).
- “Research Conferences on Civic Service,” a series of five international conferences supported by the Ford Foundation and others, organized by the Global Service Institute (GSI) at the Center for Social Development: Buenos Aires, September 2002; St. Louis, September, 2003; Accra, Ghana, August 2004; London, May 2005; St. Louis, February 2007 (organized by Amanda Moore McBride and GSI staff).
- “State Assets Policy and Research,” a series of six conferences with state policy leaders and researchers), organized by the Center for Social Development, St. Louis, November 2001, November 2002, November 2003, April 2005, June 2006, November 2007 (organized by Karen Edwards and Gena Gunn).
- “Asset Building and Social Development,” organized by Shandong University, the Center for Social Development, and the Chinese Academy of Social Sciences, Jinan, Shandong Province, China, September 2004 (organized with Gao Jianguo).

- “Individual Development Account and Asset Building Learning Conferences,” a series of eight national and international conferences, organized by the Corporation for Enterprise Development (now known as CFED) and the Center for Social Development (research components of conferences): Chicago, April 1995; Chicago, March 1998; Oakland, March 1999; Austin, March 2000; Washington, April 2001; Windsor, Ontario, Canada, April 2002; New Orleans, September 2004; Phoenix, September 2006.
- “Asset-Based Social Policy: From Welfare State to Investment State,” organized by the World Economic Forum (Geneva), New America Foundation (Washington), and Center for Social Development, Geneva, Switzerland, November 2003 (organized with Ray Boshara).
- “Asset-Based Welfare – An International Debate,” organized by the Institute for Public Policy Research (London) and the Center for Social Development, London, January 2001.
- “Social Work and Family Economics: First National Meeting across the Two Professions,” academic and professional meeting, organized by the Center for Social Development and the National Endowment for Financial Education, Denver, October 2000.
- “Children’s Savings Accounts,” policy symposium, sponsored by the Corporation for Enterprise Development and the Center for Social Development, Washington, DC, October 2000.
- “Inclusion in Asset Building: Research and Policy Symposium,” organized by the Center for Social Development, funded by the Ford Foundation, September 2000 (organized with Lisa Morris).
- “Worldwide Workshop on Youth Involvement as a Strategy for Social, Economic, and Democratic Development,” policy and academic conference, sponsored by the Ford Foundation, San Jose, Costa Rica, January 2000 (organized with Susan Stroud).
- “Universal Savings Accounts,” policy symposium, sponsored by the Corporation for Enterprise Development and the Center for Social Development, Washington, DC, January 1999.
- “Perspectives on Productive Aging: Toward a Knowledge-Building Agenda,” academic conference, sponsored by the Center for Social Development and the National Institute on Aging, St. Louis, December 1998 (organized with Nancy Morrow-Howell and James Hinterlong).

Selected Academic Papers, Policy Presentations, Keynote Speeches

- “The Social Investment State and Asset-Based Policy: Implications for Korean Social Policy”, keynote speech, 2007 International Symposium of the Seoul Welfare Foundation, November 2007.
- “Detecting Effects on Net Worth is Nettlework: Evidence from a Randomized Experiment with Individual Development Accounts in Tulsa,” paper at annual meeting of Association for Public Policy and Management, Washington, November 2007 (with Mark Schreiner).
- “Asset Building: Progress and Directions,” opening plenary, annual meeting of programs of the federal Assets for Independence Act, St. Louis, November 2007.
- “Applied Social Science, Why It Matters, Lessons, and Directions,” panel presentation, 50th Anniversary Conference of the Doctoral Program in Social Work and Social Science, University of Michigan, Ann Arbor, October 2007.
- “IDAs and Asset-Building Strategies,” invited paper at a conference on Access, Assets, and Poverty, sponsored by University of Michigan and Brookings Institution, Washington, October 2007.
- “Child Development Accounts around the World: Initiatives and Potential,” invited speech and discussion, Institute for Public Policy Research, London, October 2007.
- “Asset Building and Community Development,” plenary speech at conference of Indiana Housing and Community Development Authority, Indianapolis, September 2007.
- “Savings, Assets, and Financial Inclusion: Promises and Challenges,” opening plenary speech, Global Symposium on Saving, Assets, and Access to Financial Services, sponsored by Citi Foundation and others, Singapore, June 2007.
- “Saving and the Role of Financial Education: Lessons from Individual Development Accounts and Implications for Policy,” invited paper at a conference on Increasing Effectiveness of Financial Education and Saving Programs, Dartmouth and National Bureau of Economic Research, Cambridge, May 2007 (with Ray Boshara).
- “Overcoming Barriers to Saving and Asset-Building for Poor People in Developing Countries,” keynote speech, Consultative Group to Assist the World’s Poorest, World Bank, January 2007.

“Savings and Asset Accumulation by the Poor,” Grand Rounds Lecture, School of Medicine, Washington University in St. Louis, December 2006.

“Can the Poor Save? Evidence and Implications for Theory and Policy,” invited seminar, School of Social Service Administration, University of Chicago, December 2006.

“Assets and the Poor: Research to Inform Public Policy,” Arthur Holly Compton Lecture, Washington University in St. Louis, December 2006.

“Asset-based Social Policy: The Potential of Child Development Accounts,” presentation to Korean Institute of Labor and Ministry of Health and Social Welfare, Seoul, November 2006.

“Building Assets: The Potential of Child Development Accounts,” invited seminar, Chinese University of Hong Kong, November 2006.

“Building Assets: The Potential of Child Development Accounts,” plenary at Conference on Child Poverty, Government of Hong Kong, November 2006.

“Matched Savings: Evidence and Implications for Theory and Policy,” invited presentation, Symposium on Consumer Finance, Harvard School of Business Administration and FDIC, Cambridge, October 2006.

“Assets for All: Global Perspective,” plenary address, State Assets Policy Conference, St. Louis, June 2006.

“Summary and Directions,” conclusion of a meeting on Asset-based Approaches to Sustained Poverty Reduction in a Globalized Context, Brookings Institution and Ford Foundation, Washington, June 2006.

“Lessons from Schemes to Boost Small Savings” invited paper at Global Conference on Access to Finance, World Bank, Washington, May 2006.

“Creating Wealth in a Rural Context: Challenges and Opportunities,” keynote address, Assets and Opportunities: Growing Wealth, Reducing Poverty, and Achieving Equity in Rural America,” National Rural Funders Collaborative, Washington, May 2006.

“Rural Poor, Asset Rich: ‘Our Town’ Revisited,” panel presentation, annual meeting of the Council on Foundations, Pittsburgh, May 2006.

“Universal Children’s Savings Accounts,” keynote address at a conference on Children’s Savings Accounts, Federal Reserve Bank of Chicago, May 2006.

“Assets in the Delta,” keynote at policy conference, Social and Economic Challenges in the Delta, hosted by Mike Espy, Indianola, Mississippi, April 2006.

“State of Asset Building,” keynote address, Asset Building “Convergence”, Portland, Oregon, April 2006.

“Asset Building, Social Policy, and Development,” invited seminar, National University of Singapore, March 2006.

“Assets for the Poor: New Perspective for Poverty Alleviation in Indonesia” keynote speech, National Islamic University of Indonesia, Jakarta, March 2006.

“Children’s Savings Accounts: International Momentum and Lessons for the US,” panel speech, New America Foundation, Washington, January 2006.

“Expanding the American Dream: Making Asset Development Accessible to Everyone,” keynote address, launching of SEED State Policy Innovation in Oklahoma, Oklahoma City, October 2005.

“Asset Building: Social Policy for a Harmonious Society,” invited presentation, 21st Century Forum, Beijing, September 2005.

“Assets, Poverty, and Public Policy,” invited presentation, Sydney Institute, Australia, September 2005.

“Asset Building and Social Development,” keynote address, International Year of Microcredit Conference, United Nations Association, Melbourne, Australia, August 2005.

“Asset Building: Past, Present, and Future,” keynote address, Asset-Building Forum, KAPAC (Kansas Community Action Program), Junction City (my hometown!), Kansas, August 2005.

“Inclusion in the Policy Process,” invited paper, Expert Group Meeting on Towards an Inclusive Society: Shaping the Policy Process, United Nations, New York, July 2005 (with Margaret Lombe).

“Inclusion in Asset Building,” invited testimony, Subcommittee on Social Security and Family Policy, Finance Committee, US Senate, April 2005.

“Asset-Based Social Policy: The American Experience,” workshop at a conference, Mainstreaming Social Development in the Indonesian Welfare System, State Islamic University, Jakarta, March 2005 (with Li Zou).

“Inclusion in Asset-Based Policy: Scientific Development,” keynote speech at A New Trend in Social Development: Reconstruction of Asset-Based Social Policy, a conference at the Chinese Academy of Social Science, Beijing, January 2005 (with Li Zou).

- “Inclusion in Asset-Based Policy: Scientific Development,” lead presentation at Individual Accounts and Social Security Policy, a conference at Tsinghua University, Beijing, January 2005 (with Li Zou).
- “Household Credit and Saving Performance in Individual Development Accounts,” invited paper, Consequences of the Consumer Lending Revolution, St. Louis University, December 2004 (with Margaret S. Sherraden).
- “Assets and American Families: Shortfall and Solutions,” Initiative on Financial Security, Aspen Institute, New York, December 2004.
- “Asset Building: Progress in the United States and Potential in Developing Countries,” worldwide meeting of the Ford Foundation, Chennai, India, November 2004.
- “Saving Policy for the Poor: Can the Poor Become Part of the Ownership Society?” New America Foundation, Washington, November 2004 (with William Gale and Greg Mills).
- “Asset Building,” presentation at a conference on Bootstrap Capitalism: Financial Services in Low-income Communities, organized by PolicyAmerica, Washington, September 2004.
- “Asset Building in the United States and the Rest of the World,” paper at a conference on Asset Building and Social Development, Shandong University, Jinan, China, September 2004.
- “Asset Building Welfare Theory: From Research to Policy,” paper at International Forum on Asset Building and Future Investment: Theory and Policy, National University of Taiwan, Taipei, September 2004.
- “Civic Service: Policy, Pitfalls, and Potential,” panel organized and chaired at Communitarian Policy Summit, Washington, DC, July 2004 (with Bill Galston, Leslie Lenkowsky, Marc Magee, Jim Perry, Ann Marie Thompson).
- “Civic Service Worldwide” speech at international roundtable, conference sponsored by the Corporation for Community and National Service, Kansas City, June 2004.
- “Extending Policies for Saving and Asset Accumulation to Low-Income Households,” invited presentation at meeting of National Academy of Social Insurance, Washington, May 2004.
- “Voluntarism and Civic Service in Latin America and Caribbean: Just Good Intentions or Potential for Development?” luncheon speech, Inter-American Development Bank, Washington, DC, March 2004
- “The Impact of Voluntarism on the Economy and Society,” panel presentation at conference on Latin American and Caribbean Social Capital in Action: Youth Entrepreneurship and Voluntarism, sponsored by Inter-American Development Bank, Lima, Peru, March 2004
- “Assets and Social Mobility,” invited presentation at a conference on Life Chances and Social Mobility: Where Do We Spend the Marginal Pound?” chaired by Chancellor of the Exchequer Gordon Brown, London, March 2004.
- “Racial Differences in Outcomes in a Matched Savings Program,” paper at meetings of Eastern Economic Association, Washington, February 2004 (with Michal Grinstein-Weiss).
- “US Asset-based Development Approaches,” invited speech at a conference, Asset Building and Sustainable Livelihoods, US Agency for International Development, Washington, DC, January 2004.
- “Asset Building and Social Development,” invited lectures at Jamia Millia Islamia University and Delhi University, Delhi, India, January 2004.
- “Centers for Social Development,” panel organized for biennial meeting of Inter-University Consortium for International Social Development, Mumbai, India, January 2004 (with Saltanat Kustebaeva).
- “Asset-based Approaches in the Context of Poverty and Social Exclusion: Concepts and Theory, plenary speech at a conference, Assessing the Promise of Asset-Based Approaches for 21st Century Social Policy, Ottawa, Ontario, Canada, December 2003.
- “Building Wealth in Rural America,” plenary speech at a conference, Wealth Creation and Rural America: Extending the Dream of Economic Success, sponsored by National Rural Funders Collaborative, US Department of Agriculture, and US Department of Health and Human Services, Washington, November 2003.
- “Institutions and Inclusion in Saving Policy,” invited paper at Building Assets, Building Credit: Symposium on Improving Financial Services in Low Income Communities, Joint Center for Housing Studies, Harvard University, November 2003 (with Michael Barr).
- “From Welfare State to Investment State”, opening presentation, meeting on Asset-Based Social Policy, World Economic Forum, Geneva, Switzerland, November 2003.
- “Asset Building for All of America’s Children,” Capitol Hill Briefing, Washington, October 2003.

- “Building Wealth for Family Economic Success,” Community Foundations Advancing Family Economic Success, Baltimore, October 2003.
- “Building Wealth,” plenary presentation, National Rural Funders Collaborative, Nebraska City, Nebraska, September 2003.
- “Why Asset Building and Introduction to Individual Development Accounts,” plenary presentation, Conference of Results, Inc, Washington, June 2003.
- “Social Development and the Assets Approach,” invited presentation, Conference on Social Development, Cape Town, South Africa, June 2003.
- “Asset Building for Families and Communities,” keynote speech, annual conference on Community Solutions, organized by Utah Issues, Salt Lake City, May 2003.
- “Assets in Social Research and Public Policy,” invited presentation, University of Michigan, April 2003.
- “Individual Development Accounts, Policy Practice, and Research,” invited speech, University of Georgia, Athens, February 2003.
- “Asset Building, Poverty, and Public Policy,” invited speech, University of Pittsburgh, February 2003.
- “Narrowing the Gap in Savings and Asset Accumulation between Blacks and Whites: What is the Potential of IDAs?” paper at annual meeting of the Society for Social Work and Research, San Diego, January 2003 (with Michal Grinstein-Weiss).
- “IDAs and Asset Building: Idea, Research, Practice, and Policy,” invited speech, Wayne State University, Detroit, November 2002.
- “Civic Service: An International Overview,” plenary speech at 25th Anniversary Conference of Katimavik (Canadian service program), Ottawa, November 2002.
- “Assets-Based Policy,” speech at the New America Foundation, Washington, September 2002.
- “Opportunity and Assets: The Role of the Child Trust Fund,” seminar organized by Prime Minister Tony Blair, 10 Downing, London, September 2002 (with Home Secretary David Blunkett and others).
- “Opportunities, Assets, and the Child Trust Fund,” speech at dinner hosted by Chancellor of the Exchequer Gordon Brown, 11 Downing, London, September 2002.
- “Can and Should the Poor Save?” speech at a conference, Ending Poverty – An Asset-based Approach? sponsored by the End Child Poverty Association, London, September 2002.
- “The Saving Gateway: Lessons from Individual Development Accounts,” speech at Toynbee Hall, sponsored by the Institute for Public Policy Research, London, September 2002.
- “Introduction,” Toward a Global Research Agenda on Civic Service: An International Conference, organized by the Center for Social Development, Washington University in St. Louis, Buenos Aires, September 2002.
- “Forging Partnerships in Social Development,” Experts Group Meeting on Social Responsibility of the Private Sector and Forging Partnerships for Social Development, Department of Economic and Social Affairs, United Nations, Copenhagen, June 2002.
- “A Vision for Asset Building,” opening plenary, IDA and Asset Building Annual Conference, Windsor, Ontario, April 2002.
- “Asset Building: Ideas, Research, and Directions for the Future,” invited presentation to the Board of Trustees of the Ford Foundation, New York, January 2002.
- “Individual Accounts in Social Security: Can They Be Progressive?” invited paper at the 10th Anniversary Symposium of the International Journal of Social Welfare, “The Uncertain Future of Social Security,” University of California, Berkeley, December 2001.
- “Macroeconomic Policy and Social Development: Notes toward Integration,” Experts Group Meeting on the Social Impact of Macroeconomic Policy, Commission on Social Development, United Nations, New York, November 2001 (with Gautam Yadama).
- “Matched Saving: Interaction of Research and Policy,” organizer of roundtable (selected as “mini plenary”), annual meeting of the Association of Public Policy and Management, Washington, November 2001.
- “Civic Service: Issues, Outlook, Institution Building,” paper at the Biennial Conference of the Inter-University Seminar on Armed Forces and Society, Baltimore, October 2001.
- “Assets and the Poor: Implications for Individual Accounts and Social Security,” invited testimony before the President’s Commission to Strengthen Social Security, Washington, October 2001.
- “Wealth and Welfare,” speech at annual conference of the Labour Party, Brighton, United Kingdom, October 2001 (with Alistair Darling, Secretary of State for Work and Pensions).

- “Asset Building and Social Development,” plenary address, Twelfth Biennial Symposium, Inter-University Consortium for International Social Development, Istanbul, Turkey, June 2001.
- “Civic Service as an Option in National Service,” distinguished lecture series, Ben Gurion University of the Negev, Beer Sheva, Israel, June 2001.
- “Policy Innovation from the University: The Role of the Applied Scholar,” distinguished lecture series, Ben Gurion University of the Negev, Beer Sheva, Israel, June 2001.
- “Asset-Based Policy: Evidence and Implications,” distinguished lecture series, Ben Gurion University of the Negev, Beer Sheva, Israel, June 2001.
- “Asset Building and Community Development: Evidence and Implications,” keynote address, Neighborhood Reinvestment Training Institute, Chicago, April 2001.
- “Asset Accumulation in Low-Resource Households: Evidence from Individual Development Accounts,” Second Community Affairs Research Conference, Federal Reserve Board of Governors, Washington DC, April 2001 (with Mark Schreiner and others).
- “Setting the Context,” opening presentation at a conference, “Asset-Based Welfare – An International Debate,” sponsored by the Institute for Public Policy Research (London) and the Center for Social Development at Washington University, London, January 2001.
- “Savings Patterns in IDA Programs,” paper at annual meeting of Association of Public Policy Analysis and Management, Seattle, November 2000 (with Mark Schreiner and others).
- “Asset Building and the New Welfare State,” invited speech with David Blunkett, Secretary of State for Education and Employment, at a symposium on the New Welfare State, Institute for Public Policy Research, London, June 2000.
- “Youth Service as Strong Policy,” invited speech at a symposium on Youth in Service to the Community: A Global Perspective, Community Service Volunteers, London, June 2000.
- “Asset Building: New Welfare Policy for the Poor,” invited lecture, Hong Kong Polytechnic University, May 2000.
- “Asset Building Policy,” keynote address at a conference, Economic Security for Low-Income Families, Taipei, May 2000.
- “Asking Questions Well: The Role of Theory in Applied Social Research,” keynote address at the Twelfth National Symposium on Doctoral Research in Social Work, Ohio State University, Columbus, April 2000.
- “Research on Individual Development Accounts,” symposium organizer, Annual Meeting of the Society for Social Work and Research, Charleston, SC, January 2000.
- “Youth Service as Strong Policy,” presentation at a Worldwide Workshop on Youth Serving the Community, sponsored by the Ford Foundation, San Jose, Costa Rica, January 2000.
- “Lessons from the U.S. Civilian Conservation Corps,” invited presentation at a meeting on youth policy, Moscow, September 1999.
- “Policy Innovation in the Applied Social Sciences,” plenary address at an Institute on Politics, Policy, and Social Change, University of South Carolina, June 1999.
- “Evaluating Outputs and Outcomes,” plenary presentation, Conference on Family Service Centres, Ministry of Community Development, Singapore, May 1999.
- “Asset Building in Social Policy: Issues and Challenges,” invited lecture, National University of Singapore, May 1999.
- “The Challenges of Large-Scale Applied Research: Evaluation of a National Policy Demonstration,” workshop at Third Annual Conference of the Society for Social Work Research, Austin Texas, January 1999 (with Deborah-Page Adams and others).
- “Asset Building Policy and Programs for the Poor,” symposium presentation, Assets for the Poor, New York University, December 1998.
- “The Assets for Independence Act,” invited briefing to staff of the Department of Health and Human Services, Washington, October 1998.
- “Assets and the Poor,” keynote address at a conference, Assets and the Poor, University of Minnesota, September 1998.
- “Poverty and Public Policy,” Talk of the Nation, National Public Radio (Ray Suarez, Host), August 1998.
- “Taking National Service to Scale: The Challenges of Major Policy Innovation,” plenary speech at Fourth Global Conference on National Youth Service, Windsor Castle, London, June 1998.

“Individual Development Accounts,” invited presentation, Community Affairs Research Conference, Federal Reserve Board of Governors, Washington, DC, May 1998.

“Building Assets in Low Income Communities,” invited presentation at the Symposium on the Delivery of Financial Services in a Post-Welfare Reform Society, Federal Reserve Bank of Richmond, April 1998.

“Community Development and Domestic Policy in the Twenty-First Century,” plenary speech, IDA National Conference, Chicago, March 1998.

“The Research Agenda for a National IDA Demonstration,” invited colloquium, School of Social Welfare, University of California, Berkeley, December 1997.

“Asset Building, Community Development, and Public Policy,” keynote presentation to regional directors and development finance officers of the Ford Foundation, Marrakech, Morocco, October 1997.

“Evaluation of ‘The American Dream Demonstration,’” Congressional briefing, Washington, September 1997.

“Individual Development Accounts and Asset-Based Development,” keynote speech to the 11th annual meeting of the Indiana Association for Community Economic Development, Indianapolis, June 1997.

“Assets and Community Development,” keynote presentation to the Maine Community Foundations, Orono, December 1996.

“The Future of the Welfare State,” forum at the Jerome Levy Economics Institute, Bard College (with Howard Karger, Lawrence Mead, Howard Rosen, and David Stoesz), July 1996.

“Asset Development for the Poor: A New Policy Paradigm,” lecture at the Kennedy School of Government, Harvard University, April 1996.

“Policy Innovation and Impact: How Academics Can Move Ideas into Public Policy,” invitational speech, Annual Program Meeting, Council on Social Work Education, Washington, February 1996.

“National and Community Service,” keynote speech at Colorado Campus of AmeriCorps's National Civilian Community Corps, Denver, January 1996.

“Asset-Based Concepts in Rural and Community Development,” plenary speech, 53rd Annual Professional Agricultural Workers' Conference, Tuskegee University, Alabama, December 1995.

“Individual Development Accounts and the Future of Domestic Policy in America,” plenary speech, First National Conference on Individual Development Accounts, Chicago, November 1995.

“Social Policy Based on Assets: Singapore's Central Provident Fund,” paper presented at Annual Meeting of the Association for Asian Studies, Washington, April 1995.

“Social and Psychological Effects of Asset Accumulation: Toward a Knowledge Foundation for Asset-Based Domestic Policy,” organizer and chair of dual session and co-author of five papers, Annual Symposium of the Society for the Advancement of Socio-Economics, Washington, April 1995.

“Assets and Community Reinvestment,” luncheon keynote at a conference on community reinvestment, sponsored by the Federal Reserve Bank of San Francisco and the Office of Hawaiian Affairs, Honolulu, November 1994.

“Connecting Economic and Social Development through Asset-Based Strategies,” plenary keynote at annual meeting of the Council of State Community Development Agencies, Albuquerque, September 1994.

“Assets and Community,” presentation at a Roundtable on “Asset-Based Welfare Reform Strategies” sponsored by the Congressional Hunger Caucus (Rep. Tony Hall, Chair) Washington, May 1994 (with Reps. Cardiss Collins, Bill Emerson, Dave McCurdy, and others).

“Asset-Based Welfare Reform,” panel presentation (Senator Bill Bradley, Chair) to Members of Congress and staff, sponsored by the Congressional Empowerment Caucus, Washington, February 1993.

“Asset Development,” luncheon speech to Members of Congress and staff, sponsored by the House Select Committee on Hunger and the Corporation for Enterprise Development, Washington, February 1993.

“Social Policy,” series of guest lectures, National University of Singapore, November 1992 through February 1993.

“Asset-Based Policy,” speech at the State Capitol, Helena, Montana, May 1992.

“Perspectives on Welfare Reform: Rhetoric, Reality, and Opportunities,” testimony before the Domestic Task Force (Rep. Mike Espy, Chair), Select Committee on Hunger, U.S. House of Representatives, Washington, April 1992 (with Mark Greenberg, Robert Rector, and Isabel Sawhill).

“Federal Policy and Assets for the Poor” roundtable at Center on Budget and Policy Priorities, Washington, January 1992 (with Robert Greenstein, Wendell Primus, Isabel Sawhill, and others).

“Community-Based Youth Services in International Perspective,” presentation to the Task Force on Youth Development and Community Programs, Carnegie Corporation, New York, December 1991.

- "Home Ownership and the Poor," luncheon speech at a state conference, "Indiana: The State of Housing," Indianapolis, December 1991 (Lt. Governor Frank O'Bannon, Chair).
- "Assets-Based Domestic Policy in America: Old Idea, New Direction," breakfast speech and discussion, Domestic Policy Council, The White House, Washington, October 1991.
- "Asset-Based Welfare Policy," testimony before the Select Committee on Hunger (Rep. Tony Hall, Chair), U.S. House of Representatives, Hearings on "New Strategies for Alleviating Poverty: Building Hope through Assets," Washington, October 1991.
- "Community Investment and Asset Development," keynote speech at the 1991 Community Investment Conference, sponsored by the Federal Home Loan Bank, Indianapolis, October, 1991.
- "New Strategies for Asset Development in the African-American Community: Individual Development Accounts," panel presentation at the 21st Annual Legislative Forum, Congressional Black Caucus, Washington, September 1991 (with Rep. Mike Espy, Chair; Robert Friedman; Steve Glaude; and Catherine McClelland).
- "Welfare and Public Policy," Talk of the Nation, National Public Radio (John Hockenberry, Host), September 1991.
- "Youth Participation in America: A Historical View of Changing Institutions," plenary presentation at a conference, "Youth Service and Democracy in the 21st Century," Wingspread, Racine, Wisconsin, July 1991.
- "Assets and the Poor: A New American Welfare Policy," speech and discussion with senior officials of the Department of Housing and Urban Development, White House domestic policy staff, and others, Washington, June 1991 (with Secretary Jack Kemp).
- "Economic Development in the Mississippi Delta Region," panel presentation to the Mississippi Delta Caucus, U.S. House of Representatives, Washington, June 1991 (with Rep. Mike Espy, Chair; Rep. Bill Emerson; and Rep. Richard Gephardt).
- "Asset-Based Social Policy," speech and discussion at a staff retreat of the Office of Treasurer, State of Illinois, Springfield, June 1991 (with Treasurer Patrick Quinn).
- "An Asset-Based Welfare Policy for Oregon," speech and discussion at the Oregon Human Investment Partnership Forum, sponsored by the Oregon Progress Board (Governor Barbara Roberts, Chair), Salem, April 1991.
- "Current Thinking in Social Security and Social Welfare in the United States," speech and discussion with officials of the Central Provident Fund, Republic of Singapore, February 1991.
- "The Present Situation of Volunteer Activities and Charity in the United States," keynote address at the Symposium on Volunteer Activities in Japan and the United States, sponsored by the Japan National Council on Social Welfare and the Japan College of Social Work, Tokyo, February 1991.
- "Trends in Financing of Social Services in the United States," speech and discussion at the Japan College of Social Work, Tokyo, February 1991.
- "Social Service by Youth," invited paper at a conference, Europe Plus Moscow: Experiences and Perspectives on State Youth Policy, sponsored by the International Sociological Association Research Committee on Youth and others, Moscow, December 1990.
- "Assets and the Poor: A New Direction in Welfare Policy," invitational presentation at the Meeting of the Profession, National Association of Social Workers, Boston, November 1990.
- "The Moral Equivalent of War? Non-Military Service in Costa Rica," paper delivered at the Inter-University Consortium for International Social Development, San Jose, Costa Rica, August 1990 (with Carmen Maria Castillo).

Policy Innovation

Civic service. Beginning in 1977, undertook historical and international research on non-military national service, including a major study on the *The Civilian Conservation Corps: Effectiveness of the Camps* (1979). Co-authored *National Service: Social, Economic, and Military Impacts* (1982) and *The Moral Equivalent of War? A Study of Non-Military Service in Nine Nations* (1990). Wrote reports, developed research and policy network, organized national and international conferences, gave presentations and congressional testimony, and assisted in writing legislation. Invited to the White House for signing of the National and Community Service Act of 1993 which created AmeriCorps. Consultant to the director of AmeriCorps National Civilian Community Corps in 1994. Organized and helped to design a "national project" on Individual Development Accounts for AmeriCorps VISTA, 1995-1996; this project was doubled in size in 1998 and increased again in 2000. Organized and hosted academic

meeting on productive aging at Washington University in 1998, with papers published in *Productive Aging: Concepts and Controversies* (2001). Active in international network of national youth service. Consultant to Ford Foundation in 1998-2000 to consider global vision and next steps in national and community service; helped plan and carry out international conference in Costa Rica, January 2000. In 2000-01, designing global youth service research and information network. Beginning in 2001, founded the Global Service Institute (GSI), an international, long-term project to build a knowledge base and information network on service. With GSI colleagues, organized and sponsored the first global research meeting on civic service, held in Buenos Aires, September 2002; the papers from this meeting appeared in a special issue of *Nonprofit and Voluntary Sector Quarterly*. Organized second international research meeting in St. Louis, September 2003; third meeting in Accra, Ghana, August 2004; fourth meeting in London, May 2005; and fifth meeting in St. Louis, March 2007. With Amanda Moore McBride, published *Civic Service Worldwide: Concepts and Controversies* (2007).

Youth development. Researched and wrote *Community-Based Youth Services in International Perspective* (1992) for the Carnegie Council on Adolescent Development. This report was printed with the backing of 17 sponsoring organizations and widely distributed to youth-serving organizations. It contributed to the Council's influential study, *A Matter of Time*, which helped define "positive youth development" as an alternative to problem-oriented youth policy in the United States.

Welfare reform. From 1991, helped write federal legislation to raise welfare asset limits. Advised Bush White House in its budget proposal to increase welfare asset limits to \$10,000. Worked with the Clinton White House Working Group on Welfare Reform during 1993-94, particularly regarding increases in asset limits and creating Individual Development Accounts IDAs. In 1994 IDAs were proposed by President Clinton as part of his welfare reform plan. From 1993 to 1998, served on Missouri Governor Carnahan's Welfare Reform Coordinating Committee, which designed, helped to enact, and worked on implementation of Missouri's welfare reform, based on individual contracts. Advised on asset building strategies to accompany welfare reform in Missouri, and advised in more than 20 other states. In 1996, IDAs were included as a state option for using block grant funds in the federal "welfare reform" law, establishing asset building for the poor in federal law. By 2001, nearly all states had raised asset limits in welfare transfers, and over 30 states had included IDAs in their welfare reform plans.

Asset development for the poor in United States. In 1988 articulated the idea of asset-based development policy, including raising welfare asset limits and creating Individual Development Accounts (IDAs), matched savings for the poor. Published *Assets and the Poor: A New American Welfare Policy* (1991), defining this new approach. Undertook policy studies, reports, presentations, legislative writing, and testimony. Helped design IDA demonstrations. Advised the Bush (senior) and Clinton White House, several committees in the House and Senate, the Congressional Black Caucus, and the Congressional Hunger Caucus. Spoke at several meetings in the Bush White House; influenced President Bush's proposal to raise AFDC assets limits to \$10,000. From 1991-present, helped write federal legislation to raise welfare asset limits and create IDA demonstrations. Drafted Missouri legislation for IDAs, which is being used as a legislative model in other states. At November 2002, over 40 states and Puerto Rico had some type of IDA policy. Several other IDA or similar programs had been initiated by federal agencies, including HUD and the Federal Home Loan Bank Board. Co-organizer of First National Conference on IDAs, Chicago, November 1995; and IDA national and international conferences in 1998, 1999, 2000, 2001, 2002, and 2004. Organized and hosted national conferences on state IDA policy in 2001, 2002, and 2003. From 1997, evaluating the "American Dream Demonstration," a multi-site IDA demonstration funded by a consortium of ten private foundations (possibly the largest policy demonstration in the country at this time, outside of "welfare reform"). Initiated development, sale, and support of the Management Information System for Individual Development Accounts (MIS IDA), which from 1997 has been used to manage most operating IDA programs. In October 1998 the "Assets for Independence Act" (AFIA) was signed, creating \$125 million in federal funding for IDAs. Drafted the evaluation language for this act, and during 1999-2000 worked with Department of Health and Human Services and Abt Associates on design of the AFIA evaluation. During 1999, in partnership with the Corporation for Enterprise Development (CFED), advised the Secretary of the Treasury on other asset building anti-poverty initiatives; one of these, a federal campaign for "First Accounts," was adopted in January 2000. Expanded legislation for IDAs, the "Savings for Working Families Act" (SWFA), introduced in the Congress from 2001 through 2007, with support from both parties and the White House. In 2006-07, advised Sen. John Edwards, presidential candidate, on his proposal for "Get Ahead Accounts", matched savings for the poor.

Large-scale, inclusive asset-based policy in the United States. Universal and progressive asset accounts proposed in 1991 in *Assets and the Poor*. In 1996, proposed a system of Universal Savings Accounts (USAs) for

the United States to be used by the entire population for a broad range of policy purposes (retirement security, home ownership, education and training, small business development, and possibly medical care). In 1996 wrote “Social Security in the 21st Century,” which outlines the context of the current shift to asset accounts and emphasizes inclusion of the whole population. From 1996, in partnership with CFED, working with a research and policy team to create USAs as a major domestic policy strategy in the United States. Co-founder and co-chair of the Growing Wealth Working Group, a group of academics and policy analysts examining asset-based social policy options. Consulted with Clinton White House and the Department of Treasury on systems of asset accounts. In January 1999, USAs proposed by President Clinton in State of the Union address, with matched savings for the poor. In 1999 provided IDA research data and policy consultation leading to President Clinton’s January 2000 proposal for multi-purpose, progressively-funded Retirement Savings Accounts (RSAs); in his State of the Union address the President pointed to the influence of IDAs (based on CSD research data) in making this proposal. Organized and hosted an academic meeting on “Inclusion in Asset Building: Research and Policy Symposium” at Washington University in September 2000. In 2000 and 2001, matched savings included in bipartisan Congressional proposals for individual accounts in Social Security. In October 2001, testified before President Bush’s Commission to Strengthen Social Security, advocating inclusion and progressivity in individual accounts above and beyond social insurance (i.e., an “add on” account). CSD data on IDAs quoted in the *Final Report* of the Commission, with progressivity included in some of the policy options, and in the 2002 *Economic Report of the President*. In 2005 testified on *Inclusion in Asset Building* before the Subcommittee on Social Security and Family Policy, Finance Committee, US Senate.

Universal children’s development accounts. In *Assets and the Poor* (1991), IDAs were proposed as universal, progressive accounts beginning at birth. This may have been the first written proposal for an inclusive (universal and progressive) children’s savings account. In 1991, at the request of HUD Secretary Jack Kemp and the Bush White House, developed proposal for all children in America to begin life with an account. In 2000, with CFED, co-hosted a meeting of experts in Washington on universal Children’s Savings Accounts. Between 2000 and 2004 worked with UK government (see below) on the Child Trust Fund, a universal, progressive children’s development account (CDA). In 2003, co-authored with Ray Boshara an op-ed in *New York Times* on a universal CDA. From 2000, with CFED and other partners, planned for a demonstration of CDAs, and designed research for a large CDA initiative known as Saving for Education, Entrepreneurship, and Downpayment (SEED), funded by the Ford Foundation and other foundations. From 2004 through 2013, implementing SEED demonstration and research. From 2005 through 2007, advised Senator John Edwards presidential campaign on universal CDAs.

Asset-based policy in other countries and territories. The concepts of inclusive asset building, matched saving, and IDAs, along with CSD’s research and publications on these topics, have influenced discussions, proposals, and policy developments in other countries:

Australia: From 2000, consulted with members of the Labor Party and private banks regarding matched saving strategies. The Labor Party, particularly Member of Parliament Mark Latham, have proposed several schemes for inclusive asset-based policy, including Lifelong Learning Accounts and Nest-Egg Accounts (in 2003 Latham became head of the Labor Party). In 2002, ANZ Bank and Brotherhood of St. Laurence initiated a matched saving pilot project for Community Partnership Savings Accounts “based on an American model of individual development accounts” and citing CSD research data. In 2005, gave a series of invited presentations and consulted with ANZ and Victoria state government officials on matched savings and asset building; Victoria government moving forward with funding.

Canada: From 1998, consulted with Canadian government and non-profit organizations running IDA programs. Several IDA programs started in Canada, and a large IDA demonstration, Learn\$ave, initiated in 2001. Consulted with Social Demonstration Research Corporation on research design for Learn\$ave. Home\$save, a matched savings program for home ownership, began a demonstration in 2004. Canada is moving forward with plans to provide incentives for low-income families to take advantage of Registered Education Savings Plans, with deposits of \$500 at birth and \$100 per year through age 15, and other educational savings incentives.

China: In 2001, consulted with member of the Social Welfare Secretariat in Hong Kong on asset-based policy options. In November 2002, asset building and CSD’s research on IDAs mentioned in the 16th Communist Party Congress in Beijing, with favorable commentary. In Fall 2004, CSD co-organized and co-sponsored a conference on asset-based policy with Shandong University, with conference papers published as a book in 2005. In January 2005, the Chinese Academy of Social Science and Tsinghua University held conferences in Beijing (I was keynote speaker at both meetings) to discuss asset-based policy options and begin planning demonstration and

research IDA projects. The Taiwan experience (see below) is of great interest to Chinese scholars and policy makers. In Fall 2005, invited to speak on asset building at 21st Century Fourm in Beijing, and consulted on project site in Xin-Jiang region regarding an asset building innovation within the Rural Retirement Insurance scheme. In September 2005, *Assets and the Poor* published in Chinese and received Honorary Professorship from Shandong University, with growing discussion of asset-based policy and theory in China.

Hong Kong: In November 2006 keynote speaker in Hong Kong at a conference on Child Development Accounts (CDAs); in March 2007, Hong Kong government announced creation of a CDA for newborns, though by end of 2007 this had become a demonstration project for about 700 youth.

Indonesia: Co-sponsored conference in 2004 on social development, with emphasis on asset-building. In 2005, advised on including asset-building in social policy reform. Continuing to work with University of Indonesia and Ministry of Social Welfare. In 2005, government proposals and plans for IDA pilot projects. CSD asked to help design the pilots and assist with research. In 2006, *Assets and the Poor* published in Bahasa Indonesian, Sherraden keynote at major conference on asset building, meeting with Minister of Social Welfare, continued planning of asset building pilot projects.

Korea: Responded to numerous inquiries. Government proposal in 2005 to begin an IDA demonstration program; and another government proposal in 2006 to begin a Child Development Account (CDA) program. Keynote speaker on CDAs to Ministry of Health and Social Welfare, November 2006, and in 2007 Korean government is to begin CDAs with institutionalized children, to be expanded to approximately half of all Korean children by 2010.

Mexico: In 1993, consulted with the government of Mexico on shifting a portion of social security retirement policy to asset accounts, and making the system inclusive. In 1996, lead speaker at a research and policy conference in Mexico City on social security, again discussing inclusive asset accounts.

Puerto Rico: In 2007, advised Mayor Miranda Marin of City of Caguas, Puerto Rico, on plan to create Child Development Accounts (CDAs) for all newborns in the city as a community development strategy—the first citywide application of children’s accounts, to begin in 2008, and mayor views as a model for all of Puerto Rico. In 2008, government decides to make all Puerto Rican TANF participants eligible for IDAs. Consulted in both of these initiatives.

Singapore: From 1991-present, have undertaken a major study of Singapore’s Central Provident Fund, a domestic policy system based on asset accounts, and advised government officials. In 2001 Singapore announced a policy of Child Development Accounts (CDAs). In 2004, CDAs expanded to every child through the fourth birth in a family, with government deposits to be used for child care and early educational expenses.

Taiwan: Beginning in 1998 advised the city government of Taipei on IDAs as an anti-poverty strategy, and consulted on design of Family Development Accounts (FDAs) introduced in Taipei in 2000. Taipei FDA research project is led by former PhD student and CSD Research Associate, Li-Chen Cheng. In 2004, this project was slated for expansion to youth development accounts.

Uganda: From 2003, supporting matched saving initiative and research connected with a microenterprise program of International Care and Relief, Uganda, led by Gina Chowa. From 2004, supporting a second matched savings program and research with HIV/AIDS orphans in Uganda, led by Fred Ssewamala, former PhD student and CSD Research Associate.

United Kingdom: In June 2000, advisory session with UK Treasury officials on asset building as an anti-poverty strategy, and made speeches on this topic with David Blunkett, Secretary for Employment and Education. In January 2001 co-hosted an international meeting on “Asset-Based Welfare” in London. In 2001 Prime Minister Tony Blair proposed “progressive, universal” asset-based policies, a Child Trust Fund (saving accounts for all UK children, with greater deposits for the poor), and Saving Gateway (matched savings for adults, a version of IDAs). H.M. Treasury documents in 2001 cite IDA research from CSD. In October 2001, speech on “Wealth and Welfare” with Alistair Darling, Secretary of State for Work and Pensions, at the annual meeting of the Labour Party. In 2001, advised Ruth Kelly, Economic Secretary to the Treasury, and other Treasury officials on Child Trust Fund and Saving Gateway. In September 2002 spoke at seminar at 10 Downing, sponsored by Prime Minister Tony Blair, and gave dinner speech at 11 Downing, hosted by Chancellor of the Exchequer Gordon Brown, on the proposed Child Trust Fund. In April 2003, Prime Minister Blair announced funding for a universal, progressive Child Trust Fund, an account for all newborns in the UK; officials in the Prime Minister’s Office and Treasury sent congratulatory notes crediting CSD research evidence and the September 2002 meetings with influencing this policy decision. In 2004 presented a paper on Assets and Social Mobility at a seminar organized by Chancellor of

the Exchequer Gordon Brown. In 2007, meetings with advisors of Prime Minister Brown at 10 Downing on future of Child Trust Fund and Saving Gateway, and potential influence of these policies abroad.

Regional and global asset-based initiatives:

Africa: From 2001, working with African graduate students at Washington University, known as AssetsAfrica, to develop and initiate one or more asset building demonstration projects in Africa. First demonstration and research project implemented with International Care and Relief, Kampala, Uganda, led by Gina Chowa. Fred Ssewamala (WU graduate, now at Columbia University) initiated a second project in Uganda, CDAs for HIV/AIDS orphans; this project is now expanded and supported by the National Institutes of Health. The long-term plan is to model, test, and disseminate asset building into other African nations.

Global Assets Project. In 2006 CSD joined with the New America Foundation to create the Global Assets Project (GAP). The first major initiative of GAP was a global conference in Singapore in June 2007, bringing together experts in asset building and microfinance. The next major initiative, with other international partners, GAP aims to test CDAs in up to six very poor countries; this project is in development in 2008.

Latin America: Edge Finance in Peru and Colombia, using IDAs as a model, has successfully initiated matched savings among thousands of poor, rural women, using commercial financial providers (aiming for scale and sustainability). In 2008, CSD will present, meet, and discuss expansion of this concept with top level government officials from Argentina, Bolivia, Chile, Colombia, Ecuador, Mexico, and Peru.

Middle East: In 2004, working with Jewish and Arab colleagues, proposed a Middle East Development Account for all Israeli and Palestinian children. As a first step toward this goal, accounts for all impoverished Israelis, Jewish and Arab, are under consideration by national policy-makers. The first IDA program in Israel, which will reach both Jewish and Arab women, will begin in 2008, led by Michal Grinstein-Weiss (WU graduate, now at University of North Carolina).

OECD: Consulted with delegation from OECD attending April 2002 IDA and Asset Building conference in Windsor, Ontario. In 2003, OECD publication of *Asset Building and the Escape from Poverty: A New Welfare Policy Debate* in 2003, for distribution in several languages (translated into Italian and Spanish in 2004); CSD asset-based theory and research cited extensively in this publication.

United Nations: In 2002, IDAs and asset building examples from CSD included in a report on Social Development Partnerships prepared for the UN Commission on Social Development.

US Agency for International Development: In January 2004 presented a paper at a USAID meeting on asset-based development strategies in Washington, DC. A follow-up meeting was held in June 2004.

World Economic Forum: In 2003, helped organize an international planning meeting on asset-based policy in Geneva, Switzerland.

Community Development

IDAs in Community Development. From 1990, advised, helped with design, and provided technical assistance to dozens of IDA programs operating out of community-based organizations around the country. By 2002, the number of community IDA programs exceeded 400, with many more in the planning stages. Conceived and developed the Management Information System for Individual Development Accounts (MIS IDA), software to facilitate management and evaluation of IDA programs, used at most IDA programs in the country from 1997 to the present. Working with United Ways around the county on asset building and IDA programs. By 2002, the United Way of America had developed an initiative on Assets for Family Success, with 35 local United Ways reporting operational IDA programs, 22 in planning, and 57 interested. Focusing on St. Louis, CSD advised in creation of IDA program funded at \$850,000 for 1999-2001 by the United Way of Greater St. Louis, with continuing funding to present. In 2007, United Way of America announced a \$1.5 billion Financial Stability Partnership focused on increasing income, building savings, IDAs, and protecting assets. In 2008, advised President of United Way on research for this initiative.

Community Reinvestment. During 1994-1996, helped organize and establish the St. Louis Reinvestment Corporation (SLRC), a non-profit organization representing 75 congregations and parishes in poor neighborhoods across the entire City. Raised funds for start-up. Provided technical support for SLRC planning and reinvestment initiatives. At the beginning of 1997, helped create the Justine Petersen Housing and Reinvestment Corporation (JPHRC) in St. Louis to promote home ownership and asset building through family development accounts, and served on the board from 1997-99. In 2000, JPHRC formed Great Rivers Community Capital, St. Louis's first community development financial institution.

Graduate Training in Urban Family and Community Development. From 1996, led planning committee at Washington University for an innovative, multi-professional, and interuniversity graduate training program in Urban Family and Community Development, to serve personnel involved in community work, human services, education, government, and other settings in St. Louis. In 1998, the Urban Family and Community Development Program was funded for its first three years of operation by the Danforth Foundation and the State of Missouri. The first cohort of students graduated in December 1999 and the last cohort in December 2001. Over 50 students were trained; some went on to masters degree programs; most are now working in the St. Louis community.

Home Ownership Development Accounts. Worked with the Office of the Mayor of St. Louis in 2002-03 to plan a large demonstration of Homeownership Development Accounts in two St. Louis neighborhoods.

Child Development Accounts. In 2007, advised Mayor Miranda Marin of City of Caguas, Puerto Rico, on plan to create Child Development Accounts (CDAs) for all newborns in the city as a community development strategy—the first citywide application of children’s accounts.

Institution Building

Center for Social Development at Washington University in St. Louis. Founding director of the Center for Social Development (CSD), which began in 1994. During the first decade, built CSD into a leading research and policy center in the applied social sciences, with three primary areas of inquiry and innovation: (1) asset building, (2) civic service, and (3) productive aging. CSD’s work is respected for its academic quality and policy impacts. At its ten-year anniversary, CSD had a core staff of 12, more than 30 faculty associates, and more than 40 graduate research assistants. In its first decade, between 1994 and 2004, CSD organized or co-organized 21 national and international conferences, published more than 170 working papers and reports, published a dozen books or special issues of academic journals, and worked directly in research and policy in over 40 US states and more than 10 countries.

Resources for CSD have come primarily from philanthropic foundations and government agencies in the form of grants and contracts for specific research projects. Some resources have been generated by a technology product that has supported IDA programs. By 2005, annual grant and contract revenue was approximately \$2.5 million. CSD seeks enhanced stability through funding for core operations and endowment. In 2005, with matching grants totaling \$5 million from the Ford Foundation and Washington University, a CSD endowment was initiated. With revenues from software sales and support, and retained reserves, the total endowment reached \$10 million in 2007. The next steps are to increase the CSD endowment to \$15 million by 2010 and \$25 million by 2015, aiming to provide core support and stability for CSD research and policy innovation in the future.

Regarding software, in 1997 CSD created MIS IDA as a management information and database tool for IDA programs. We did this for research purposes, but MIS IDA became the chief tool for managing IDA programs across the country, and as a result by 2007 became the most licensed technology product of any university in the United States (in numbers of licenses, not in terms of revenue). Although not our purpose, MIS IDA has helped to strengthen CSD financially and make CSD more known and visible. In 2008, CSD will exit this software business.

Beginning in 2008, with a firm base now established, endowment payouts will be used to initiate and support new areas of inquiry and expand the scope of CSD research and policy impacts.

Centre for Social Development (Asia) at National University of Singapore. In 2006, a partner CSD proposed at National University of Singapore, approved by Dean of Arts and Sciences, and launched in June 2007 by Tharman Shanmugaratnam, Minister of Education and Second Minister of Finance. CSD at NUS will engage in studies in Asia and in comparative policy, working as a partner with CSD at Washington University in St. Louis.

Honors, Endowed Speeches, Appointments, Fellowships

The Aaron Rosen Lecture on Social Work Research, Society for Social Work and Research, 2008.

The Herman Stein Lecture on International Social Welfare, Case Western Reserve University, 2007.

External Examiner, Social Work, Chinese University of Hong Kong, 2006-present.

Arthur Holly Compton Faculty Achievement Award, Washington University, 2006.

Career Achievement Award, Association for Community Organization and Social Administration, 2006.

One of ten “great minds” in St. Louis, *St. Louis Magazine*, 2005.

Honorary Professorship, Shandong University, Jinan, Shandong Province, China, 2005.

The Joy Sloan Jinks Lecture on Community Development and Organizational Change (inaugural lecture), Florida State University, 2004.

Zellerbach Visiting Professor in Social Welfare, University of California at Berkeley, 2003-04.

Outstanding Faculty Mentor Award (inaugural recipient), Doctoral Program, George Warren Brown School of Social Work, Washington University, 2003.

Outstanding Faculty Mentor Award, Special Recognition, Graduate School of Arts and Sciences, Washington University, 2001, 2003.

Top Ten "Third Way" Books of the 1990s (for *Assets and the Poor*), *Radical Middle Newsletter*, 2003.

Distinguished Alumni Award, School of Social Work, University of Michigan, 2002.

The Fedele F. and Iris M. Fauri Lecture, "Assets, Poverty, and Children," University of Michigan, 2002.

Distinguished Visiting Professor, series of three lectures, Ben Gurion University of the Negev, Beer Sheva, Israel, 2001.

Outstanding Community Person of the Year Award, Social Work Alumni Chapter, University of Missouri, St. Louis, 2001.

Excellence in Community Development Award, "for challenging conventional thought and practice, for demonstrating an extraordinary commitment to building and strengthening assets in every community, for every person, and for leading the field to a better understanding of the role of individual and community wealth," Neighborhood Reinvestment Training Institute, 2001.

The Flynn Prize for Research (second recipient), given to "a scholar who has connected social work research to other fields or new contexts, creating demonstrable change in social well-being," University of Southern California, 2001.

The Sarnat Lecture, "Research on Individual Development Accounts: Implications for a Large and Progressive Asset-Based Policy," University of Southern California, 2001.

The Gerald Seabury Lecture, "Should Every American Have an Asset Account?" University of California at Berkeley, 2000.

The Colston Warne Lecture, "From Research to Policy: Lessons of Individual Development Accounts," American Council of Consumer Interests, San Antonio, 2000.

Distinguished Faculty Award, George Warren Brown School of Social Work, Washington University, 1999.

The John Roatch Global Lecture in Social Policy and Practice, "Community Development and Policy Innovation in a Time of Transition," Arizona State University, 1998.

External Examiner, Department of Social Work and Psychology, National University of Singapore, 1994-1998.

The Robert J. O'Leary Memorial Lecture, "Welfare Reform That Works," The Ohio State University, Columbus, 1996.

Honorary Graduate, AmeriCorps National Civilian Community Corps, 1996.

Distinguished Faculty Award, Washington University, 1994.

Pier Award for Services Supporting Economic Revitalization, Eastside Community Investments, Indianapolis, 1994.

Visiting Fellow, Department of Social Work and Psychology, National University of Singapore, 1992-93.

Fulbright Research Fellowship, "The Central Provident Fund of Singapore," Council on International Exchange of Scholars, Washington, 1992-93.

Chaired Professorship, Benjamin E. Youngdahl Professor of Social Development, Washington University, since 1992.

The Whitney M. Young, Jr., Memorial Lecture, "Assets and Social Policy," University of Illinois at Carbondale, 1991.

Visiting Professor, School of Social Work, Hebrew University of Jerusalem, 1988.

Visiting Professor, Department of Economics, Post-Graduate Division, National University of Mexico, Mexico City, 1987.

Distinguished Achievement Award in the category Scholarly Articles (for "School Dropouts in Perspective," *The Educational Forum*), Educational Press Association of America, 1987.

Visiting Professor, School of Social Work, University of Arkansas at Little Rock, 1980.

Fellowship, U.S. Department of Health, Education, and Welfare; National Institute for Mental Health, 1975-76.

Fellowship, U.S. Department of Health, Education, and Welfare; Social and Rehabilitative Services, 1974-75.

Graduation cum laude, Harvard University, 1970.

Scholarship for Academic Achievement, Harvard University, 1967-68.

Selected Consultations, Advising, Commissioned Papers

Increasing savings accounts worldwide, Bill and Melinda Gates Foundation, 2008.

Financial stability initiative, research agenda, United Way of America, 2008.

Wealth creation and philanthropy, Board of the FB Heron Foundation, 2007.

Asset building and intergenerational poverty, George Kaiser Foundation, Tulsa, OK, 2007.

Asset-based policy, Ministry of the Family, Commonwealth of Puerto Rico, 2007.

Child Development Accounts, research agenda, City of Caguas, Puerto Rico, 2007.

Child Development Accounts, Ministry of Health and Social Welfare, Government of Korea, 2006-present.

Asset building and Individual Development Accounts, Welfare Foundation, Seoul, Korea, 2006-present.

Asset building and Child Development Accounts, Commission on Poverty, Government of Hong Kong, 2006-present.

Asset building in social policy of Indonesia, National Islamic University and Ministry of Social Welfare, 2005-present.

Asset-based policy and financial products, ANZ Bank and Victoria State government, Australia, 2005-present.

Asset-based policy and research, Chinese Academy of Social Sciences, Chinese central government, and Xin-Jiang regional government, 2004-present.

Poverty, asset-based policy, and children's accounts, Senator John Edwards (potential presidential candidate), 2005.

Initiating a Center for Social Development, School of Social Work, University of Southern California, 2004.

Research agenda on asset-based policy, ASPE, US Department of Health and Human Services, 2003-2004.

Administration of the Assets for Independence Act, Office of Community Services, US Department of Health and Human Services, 2002-2004.

Asset-based research and policy, Offices of the Prime Minister and Chancellor of the Exchequer, United Kingdom, 2000-2004.

Asset-based research and policy, Institute for Public Policy Research, United Kingdom, 2000-2004.

Assets for Family Success, United Way of America, 2003.

Homeownership Development Accounts, Office of the Mayor, City of St. Louis, 2002- 2004.

Asset-based policy proposals, Democratic Policy Committee, US Senate, 2002.

Forging partnerships for social development, background paper, meeting in Copenhagen, report drafting, Department of Economic and Social Affairs, United Nations, 2002 (paper with Leila Patel, Gautam Yadama, Margaret Sherraden, Li-Chen Cheng, and Amanda Moore).

Asset-based research and policy, delegation from OECD, 2002.

Macroeconomic policy and social development, Commission for Social Development, United Nations, 2001 (with Guatam Yadama).

Asset building strategies for the poor, economic development and business organizations, Johannesburg, South Africa, 2001.

Youth service policy, Progressive Policy Institute, Washington, DC, 2000.

Asset-based policy options, Social Welfare Secretariat, Hong Kong, 2000.

Design of Family Development Accounts, Office of the Mayor and Taipei City Government, Taiwan, 2000.

Research data and design for Universal Savings Accounts and Retirement Savings Accounts, The White House, 1999-2000.

Evaluation design for the "Assets for Independence Act," US Department of Health and Human Services, 1999-2000 (with Abt Associates).

Planning for initiatives in youth service in global context, Ford Foundation, 1998-2000.

Policy strategies to increase savings and use of financial services among the poor, US Department of the Treasury, 1999 (with Corporation for Enterprise Development).

Design for Universal Savings Accounts, The White House and US Department of Treasury, 1998-99.

Asset building policy and programs for the poor, Ford Foundation and New York University, 1998-99.

Design of Individual Development Account program, Department of Social Services, State of Missouri, 1998.

Strategic planning for asset-building grantmaking, W.K. Kellogg Foundation, Battle Creek, MI, 1998.

Strategic planning for anti-poverty grantmaking, Charles Stewart Mott Foundation, Flint, MI, 1998.

Individual Development Accounts: Policy and Program Design, State of Virginia, 1998.

Lifelong Learning and Educational Accounts, Office of the Vice President, Washington, DC, 1998.

Savings provisions in Electronic Funds Transfers, Office of the Secretary of the Treasury, Washington, DC, 1997.
 Community Reinvestment Act credits for saving activity, US Comptroller of the Currency, Washington, DC, 1997.
 Financial access in the 21st century, US Comptroller of the Currency, Washington, DC, 1997.
 Evaluation of microenterprise projects, Management Systems International, Washington, DC, 1996-1997.
 Design of a national project of Individual Development Accounts, AmeriCorps VISTA (Volunteers in Service to America), Washington, DC, 1995-97.
 Design of policy on Individual Development Accounts, Office of the Treasurer, State of Ohio, 1996.
 Design and evaluation of Individual Development Account program, ADVOCAP Community Action Agency, Fond du Lac, WI, 1995-1996.
 IDAs in community action agencies, Maine Community Foundations, 1996.
 Evaluation design for Asset Accumulation Demonstration in the Food Stamps program, Abt Associates, Cambridge, MA, 1994-1995.
 Evaluation design for First Nation Development Institute's Eagle Staff Fund, Aspen Institute, Washington, and Cornerstone Consultants, West Chester, PA, 1994-95.
 Policy and program innovations for Individual Development Accounts, Corporation for Enterprise Development, Washington, DC, 1994.
 Design and evaluation for a demonstration of Individual Development Accounts, Women's Self-Employment Project, Chicago, 1993-94.
 Evaluation of a demonstration of Individual Development Accounts, Eastside Community Investments, Indianapolis, 1993-94.
 Proposals for asset-based policy, Working Group on Welfare Reform, Family Support and Independence, The White House, Washington, DC, 1993-94.
 Consultation on social welfare policy, Luis Donaldo Colosio, Secretary for Social Development, Mexico, 1993.
 Legislative development for Individual Development Accounts, Select Committee on Hunger, US House of Representatives, 1990-93.
 Planning and evaluation of Individual Development Account experiments, Capital Opportunities, Human Resource Development Corporation, Bozeman, Montana, 1992.
 Proposals for asset-based policy and Child Development Accounts, Economic and Domestic Policy Council, The White House, Washington, DC, 1991-1992.
 Asset building policy, US Department of Housing and Urban Development, 1991-1992.
 Planning Individual Development Accounts at the state level, Corporation for Enterprise Development, Washington, DC, and the States of Iowa and Oregon, 1989-1992.
 Design of benefit-cost analysis in case management, Washington Business Group on Health, Washington, DC, 1991.
 Report on community-based youth services in international perspective, Carnegie Council on Adolescent Development, Washington, DC, 1991.
 Report on history of youth participation in the United States, Charles Stewart Mott Foundation and Johnson Foundations, 1991.
 Evaluation of savings programs in rural villages, Save the Children Association of Honduras, Tegucigalpa, 1991.
 Report on youth policy in the Soviet Union, Youth Policy Institute, Washington, DC, 1990-1991.
 Report on asset-based domestic policy, Progressive Policy Institute, Washington, DC, 1990.

Selected Academic and Professional Service

Advances in Social Work, Editorial Advisory Board, 2001-present.
American Journal of Psychiatric Rehabilitation, reviewer.
Asia Pacific Journal of Social Work and Development, Editorial Committee, 1998-2004; Associate Editor, 2004-present.
 Brookings Institution Press, reviewer.
 Center for Information and Research on Civic Learning and Engagement, University of Maryland, Advisory Board, 2001-present.
 Center on Race and Social Problems, University of Pittsburgh, Advisory Board, 2002-present.
Children and Youth Services Review, Editorial Board, 2004-present.
 Council on Social Work Education, 1979-present:

Social Welfare Policy and Policy Practice Group, 1989-present.
 Association on Community Organization and Social Administration, 1984-present.
 Social Welfare History Group, 1984-present.
 Correspondence Committee for Annual Program Meeting, 1990-91.
 Reaccreditation Site Team, 1989.
Crossroads: An Interdisciplinary Journal of Southeast Asian Studies, reviewer.
 Growing Wealth Working Group, Washington, DC, Founding Co-Chair, 1998-2002.
 Health and Social Research Grants, United Kingdom, reviewer.
 Influencing State Policy, Founding Member of Advisory Board, 1997-present.
 International Consultants on National Youth Policy, Founding Member, 2001-present.
International Journal of Social Welfare, Editorial Advisory Board, 2001-present.
 International Consortium for Social Development, 1984-present.
Journal of Policy Practice, Editorial Board, 2001-present.
Journal of Poverty, Editorial Board, 1995-1999.
Journal of Progressive Human Services, Editorial Advisory Board, 1993-1999.
Journal of Social Services Research, Executive Board, 1997-present.
 Missouri Association for Social Welfare, Board of Directors, St. Louis Division, 1988-92 and 1993-1995.
 National Association of Social Workers (NASW), 1977-present:
 Blue Ribbon Panel on Social Policy, 2002.
 Presidential Advisory Commission on Social Policy, 1995-1997.
 National Welfare Reform Policy Group, 1993-1996.
 National Commission on Employment and Economic Support, 1985-86.
 Chair, Social Policy Committee, Missouri Chapter, 1985-86.
 Board of Directors, Missouri Chapter, 1983-86.
 Executive Committee, St. Louis Unit, 1983-86.
 Liaison to George Warren Brown School of Social Work, 1982-86.
 National Center on Social Policy and Practice (associated with NASW):
 Treasurer and member of Executive Committee, 1991-92.
 Board of Directors, 1990-92.
 National Service Secretariat, Washington, DC, Board of Trustees, 1986-1997.
 National University of Singapore, external examiner in social work, 1993-1996.
 Oxford University Press, reviewer.
 Pathways from Poverty, University of Iowa, Regional Steering Committee, 1995-1996.
 Progressive Policy Institute, Washington, D.C., Senior Scholar, 1990-1998.
 Rutgers University, Office of the Provost, review of the School of Social Work, 1986.
Social Development Issues, Editor, 2004-2008
Social Forces, reviewer.
Social Service Review, reviewer.
Social Work, reviewer.
Social Work Research, reviewer.
 State of Missouri:
 Governor's Welfare Reform Coordinating Committee, 1993-1999.
 "Missourians First" Strategic Planning Team, House of Representatives, 1991-92.
 United Way of Greater St. Louis:
 Board, Family Support Council, 1995-1997.
 Board, Management Assistance Center, 1990-92.
 University of Southern California, Office of the Provost, review of the School of Social Work, 2001.
 University of Wisconsin Press, reviewer.
 Woodrow Wilson Center Press (Johns Hopkins University Press), reviewer.

Selected Service to Washington University

Ambassador from Washington University to the National University of Singapore, 2005-present.
 Personnel Advisory Committee, School of Social Work, 1984-86, 1990-92, 1994-95, 2002-03, 2004-present

Advisory Board, Center for Interdisciplinary Studies, School of Law, 1999-present.
 Founding Director, Center for Social Development, School of Social Work, 1994-present.
 Committee on Social Thought and Analysis, 1991-2006.
 Search Committee for Dean of the School of Social Work, 2003-04.
 Chair, Task Force on the Future of the George Warren Brown School of Social Work, 2002-04.
 Founding Co-Chair of Supervising Committee, Urban Family and Community Development Program, 1998-2001.
 Chair, Doctoral Program in Social Work, 1995-2000.
 Executive Committee, Graduate Council, 1996-98.
 Co-Chair, Planning Committee, Urban Family and Community Development Program, 1996-98.
 Olin Fellowship Committee, 1996-99.
 Committee on Schools, Teachers, and Learning, 1995-96.
 Chair, Committee to Revise Tenure and Promotion Guidelines, School of Social Work, 1995-96.
 Chair, Project 21: Planning for the Future of the School of Social Work, 1993-95.
 Subcommittee on Social Sciences, Law, Social Work, Medicine, and Business, 21st Century Committee, 1990-91.
 Chair, Curriculum Committee, School of Social Work, 1988-90.
 Founding Coordinator, Management Specialization, School of Social Work, 1984-90.
 Administrative Board, Interdisciplinary Program in Organizational Behavior, 1981-89.
 Coordinator, Joint Masters Degree Program in Social Work and Business Administration, 1980-88.
 Faculty Senate Council, 1985-87.

PhD Students Mentored (Chair of Dissertation), Graduation, Current Position

Donna Mae Knights, perhaps 2011
 Jin Huang, perhaps 2010
 Kristen Wagner, perhaps 2010
 Vernon Loke, likely 2009
 Youngmi Kim, likely 2009
 Psyche Southwell, likely 2009
 Gina Chowa, pending 2008, hired as Assistant Professor, University of North Carolina, Chapel Hill
 William Elliott, pending 2008, hired as Assistant Professor, University of Pittsburgh
 Chang-keun Han, 2007, Post-Doctoral Fellow, Washington University in St. Louis
 Michal Grinstein-Weiss, 2004, Assistant Professor, University of North Carolina, Chapel Hill
 Jami Curley, 2004, Assistant Professor, St. Louis University
 Trina Williams Shanks (Williams), 2003, Assistant Professor, University of Michigan, Ann Arbor
 Fred Ssewamala, 2003, Assistant Professor, Columbia University, New York
 Amanda Moore McBride, 2003, Assistant Professor, Washington University in St. Louis
 Min Zhan, 2001, Associate Professor, University of Illinois, Champaign-Urbana
 Yin-Nei Cho, 2001, raising children, New Jersey
 Cynthia Sanders, 2000, Associate Professor, Idaho State University, Boise
 Sondra Beverly, 1999, Associate Professor, University of Kansas, Lawrence (on leave raising children)
 Deborah Adams (Page-Adams), 1995, Associate Professor, University of Kansas, Lawrence
 Suzanne Shepard, 1995, Adjunct Professor, Washington University in St. Louis
 Rashid Saad Albaz, 1992, researcher, Saudi Arabia
 Hann-Jong Chueh, 1992, Associate Professor, Soo-chow University, Taiwan
 Grace Poertner, 1991, Research Director, Wellness Research, St. Charles, Missouri
 Alice K. Johnson Butterfield (Johnson), 1990, Professor, University of Illinois at Chicago

Grants and Contracts Awarded

Research Contract, "American Dream Demonstration Experiment: Wave Four," University of North Carolina (funding from MacArthur and FB Heron Foundations), 2007-2009 (with Lissa Johnson), \$200,000 (pending).
 Research Grant, "The Universal Model in SEED and Children's Savings Accounts," Charles Stewart Mott Foundation, 2007-2008 (with Margaret Clancy and Yunju Nam), \$370,000.

Research Grant, "SEED Initiative," Ford Foundation, 2007-2009 (with Margaret Clancy and Yunju Nam), \$2,715,000.

General Support Grant, "Projects in Wealth Creation," FB Heron Foundation, 2007-2008 (with Lissa Johnson), \$200,000.

Research and Policy Design Grant, "Inclusion in Access to Higher Education: The Universal Model in SEED and Children's Savings Accounts," Lumina Foundation for Education, 2006-2009 (with Margaret Clancy), \$300,000.

Contract for Coalition Building, Tuskegee University, support from Ford Foundation, "Building a Coalition in the Southern Black Belt States for an Inclusive Asset Building Policy and Program Agenda with Focus on Hurricane Victims and Black Owned Land Loss," 2006-2008 (with Gena Gunn), \$87,000.

Research and Policy Grant, "Asset Building in China: Pilot Project and Policy Influence," Levi-Strauss Foundation, Asia, 2006-2008 (with Li Zou), \$150,000.

Research Grant, "The Universal Model in SEED and Children's Savings Accounts," Charles Stewart Mott Foundation, 2006-2007 (with Margaret Clancy), \$300,000.

Research Grant, "Issues and Opportunities for an International Agenda in Asset Building", FB Heron Foundation, 2006-07, \$50,000.

Grant for Conference and Planning, "Asset Building: An International Conference," Citigroup Foundation, 2006-2007 (with Li Zou, in partnership with New America Foundation), \$350,000 (with supplement).

Research and Development Grant, "EITC and Indian Tribes," Annie E. Casey Foundation, 2005-2006 (with Karen Edwards and Dana Klar), \$43,000.

Policy Development Grant, "Inclusive State Asset-Building Networks and Innovative Asset Policy Agendas," Levi-Strauss Foundation, 2006-2008 (with Karen Edwards and Gena Gunn), \$50,000.

Research Grant, "The Global Service Institute," Ford Foundation, 2005-2008 (with Amanda Moore McBride), \$1,500,000.

Research and Policy Grant, "Asset Building Research and Policy in the States," Charles Stewart Mott Foundation, 2005-2007 (with Karen Edwards and Gena Gunn), \$200,000.

Research Grant, "Continuation of Core Funding for the Program on Asset Building and Community Development," Ford Foundation, 2005-2007, \$200,000.

Research Grant, "The SEED Initiative and Partnership: CSD's Roles and Responsibilities," Ford Foundation, 2005-2007 (with Margaret Clancy), \$2,565,000.

Research Grant, "General Support for Research on Inclusion in Wealth Creation," FB Heron Foundation, 2005-06, \$150,000.

Endowment Matching Grant, "Center for Social Development Endowment," Ford Foundation, 2005, \$2,500,000.

Endowment Matching Contribution, "Center for Social Development Endowment," Washington University, 2005, \$2,500,000.

Research Grant, "Research on Savings for Education, Entrepreneurship, and Downpayment (SEED)," MetLife Foundation, 2005, \$50,000.

Research Grant, "Universal Policy Model and Research in SEED," Charles Stewart Mott Foundation, 2004-06 (with Margaret Clancy), \$200,000.

Research Contract, "Poor Finances: Assets and Low-Income Households," Urban Institute, funding from ASPE, US Department of Health and Human Services, 2004-06 (with Yunju Nam), \$83,000.

Research Grant, "Increasing Access to Higher Education by Studying Low-income Participants in a 529 Plan with Inclusive Features," Lumina Foundation, 2004-2006 (with Margaret Clancy), \$119,000.

Research Grant, "The Expanded SEED Initiative and Partnership: CSD's Roles and Responsibilities," Ford Foundation, 2004-2005 (with Margaret Clancy), \$468,000.

Research Contract, "Research on Individual Development Accounts: Implications for Saving and Asset Accumulation Policy for Older Adults," AARP Foundation, 2004 (with Michelle Putnam and Nancy Morrow-Howell), \$41,000.

Research Grant, "Productive Aging Research," Metropolitan Life Foundation, 2004-05 (with Nancy Morrow-Howell), \$120,000.

Research and Writing Grant, "Wealth Building in Rural America," National Rural Funders Collaborative, F.B. Heron Foundation, and Kellogg Foundation, 2004-05 (with Jami Curley, Michal Grinstein-Weiss, and Gena Gunn), \$118,000..

Research Grant, "Research on Savings for Education, Entrepreneurship, and Downpayment (SEED)," MetLife Foundation, 2004, \$100,000.

Research and Writing Grant, "Assets and Human Investment," Charles Stewart Mott Foundation, 2004, \$90,000.

Research Contract, "Outcome Assessment Framework for Entrepreneur Corps," Corporation for Community and National Service, 2003-04 (with Amanda Moore McBride), \$269,000.

Research Grant, "Research on IDAs in the States and the American Dream Demonstration," Charles Stewart Mott Foundation, 2003-2005 (with Karen Edwards), \$300,000.

Research Grant, "Asset Building in the JeffVanderLou Neighborhood," Danforth Foundation, 2003-04 (with Stephanie Boddie), \$100,000.

Research Grant, "Continuation of Evaluation of an Individual Development Account Demonstration," Ford Foundation, 2003-2005, \$400,000.

Research Grant, "Continuation of Core Funding for the Program on Asset Building and Community Development," Ford Foundation, 2003-2005, \$400,000.

Research Grant, "The Global Service Institute," Ford Foundation, 2003-2005 (with Amanda Moore McBride), \$1,500,000.

Research Contract, "Research on Savings for Education, Entrepreneurship, and Downpayment (SEED)," Corporation for Enterprise Development (funding from multiple foundations) 2003, \$125,000.

Research Contract, "Individual Development Accounts and Microenterprise," Corporation for Enterprise Development, 2003 (with Fred Ssewamala), \$30,000.

Research and Policy Grant, "IDA Policy in the States," Annie E. Casey Foundation, 2003 (with Karen Edwards), \$50,000.

Research Grant, "Research on an Individual Development Account Demonstration," FB Heron Foundation, 2002-2004, \$150,000.

Research and Policy Grant, "Taking Children and Youth Asset Building to Scale: Inclusion in College Savings Plans," Ford Foundation, 2002-2004 (with Margaret Clancy), \$200,000.

Research and Policy Grant, "IDA Policy in the States: Missouri-Kansas Asset Building," Ewing Marion Kauffman Foundation, 2002-2004 (with Karen Edwards), \$75,000.

Research Planning and Design Contract, "Research Design for Savings for Education, Entrepreneurship, and Downpayment (SEED)," Corporation for Enterprise Development (funding from multiple foundations) 2002, \$85,000.

Research and Policy Grant, "IDA Policy in the States," Charles Stewart Mott Foundation, 2001-2003 (with Karen Edwards), \$100,000.

Research and Policy Grant, "IDA Policy in the States," Ford Foundation, 2001-2003 (with Karen Edwards), \$200,000.

Research Grant, "The Global Service Institute," Ford Foundation, 2001-2003, \$3,000,000.

Research Grant, "Continuation of Evaluation of an Individual Development Account Demonstration," Ford Foundation, 2001-2003, \$400,000.

Research Grant, "Continuation of Core Funding for the Program on Asset Building and Community Development," Ford Foundation, 2001-2003, \$400,000.

Research and Policy Grant, "IDA Policy in the States," Annie E. Casey Foundation, 2001-2002 (with Karen Edwards), \$75,000.

Research Contract, "Evaluation of an Individual Development Account Demonstration," Corporation for Enterprise Development (funding from Charles Stewart Mott Foundation, John D and Catherine T MacArthur Foundation, Fannie Mae Foundation, Levi Strauss Foundation, Ewing Marion Kauffman Foundation, Citigroup Foundation, and Moriah Fund), 2001-2002, \$200,000.

Research Grant, "Evaluation of an Individual Development Account Demonstration," FB Heron Foundation, 2000-2002, \$150,000.

Research Design Contract, "Research Design for a Children and Youth Savings Account Policy Demonstration," Corporation for Enterprise Development (funding from the Fannie Mae Foundation), 2001, \$65,000.

Research Grant, "Productive Engagement of Older Adults: Effects on Well-Being" Longer Life Foundation, 2000-2001 (with Nancy Morrow-Howell), \$88,000.

Research Contract, "Evaluation of an Individual Development Account Demonstration," Corporation for Enterprise Development (funding from Charles Stewart Mott Foundation, John D and Catherine T MacArthur

Foundation, Fannie Mae Foundation, Levi Strauss Foundation, Ewing Marion Kauffman Foundation, Citigroup Foundation, and Moriah Fund), 2000-2001, \$195,000.

Grant for Technology Design, "Building and Tracking the IDA Field," Charles Stewart Mott Foundation, 2000-2001, (with Lissa Johnson), \$136,000.

Research Grant, "The Relationship between Asset Building and Insurance," Metropolitan Life Insurance Foundation, 1999-2002, \$150,000.

Policy Research and Design Grant, "Individual Development Accounts, Children's Savings Accounts, and Universal Savings Accounts," Ford Foundation, 1999-2001, \$700,000.

Research Grant, "Continuation of Evaluation of an Individual Development Account Demonstration," Ford Foundation, 1999-2001, \$200,000.

Research Grant, "Continuation of Core Funding for the Program on Asset Building and Community Development," Ford Foundation, 1999-2001, \$400,000.

Research Design Contract, "Research Design for the Assets for Independence Act," Abt Associates (funding from Office of Community Services, Department of Health and Human Services), 1999-2000, (with Lissa Johnson), \$97,000.

Research Contract, "Evaluation of an Individual Development Account Demonstration," Corporation for Enterprise Development (funding from Charles Stewart Mott Foundation, John D and Catherine T MacArthur Foundation, Fannie Mae Foundation, Levi Strauss Foundation, Ewing Marion Kauffman Foundation, Citigroup Foundation, and Moriah Fund), 1999-2000, \$189,000.

Grant for Graduate Training Program and Evaluation, "The Urban Families and Community Development Program," Family Investment Trust, State of Missouri, 1998-2001, \$800,000.

Grant for Graduate Training Program and Evaluation, "The Urban Families and Community Development Program," Danforth Foundation, 1998-2001, \$225,000.

Research Grant, "Evaluation of an Individual Development Account Demonstration," FB Heron Foundation, 1998-2000, \$150,000.

Grant for Research on Educational Savings Accounts, "Bridges to Life Options," Annie E Casey Foundation, 1998-2000 (with Wendy Auslander and Curtis McMillan), \$100,000.

Research Contract, "Evaluation of an Individual Development Account Demonstration," Corporation for Enterprise Development (funding from Charles Stewart Mott Foundation, John D and Catherine T MacArthur Foundation, Fannie Mae Foundation, Levi Strauss Foundation, Ewing Marion Kauffman Foundation, and Moriah Fund), 1998-99, \$173,000.

Grant for Academic Conference and Book, "Perspectives on Productive Aging," National Institute on Aging, 1998-99 (with Nancy Morrow-Howell and James Hinterlong), \$26,000.

Research and Community Development Donation, "Evaluation of IDAs, Community Development, and Productive Aging," Mary Roatch, 1998-99, \$30,000.

Research and Development Grant, "Evaluation of a Individual Development Account Demonstration, Strategic Planning, and Policy Development," Joyce Foundation, 1998-99, \$229,000.

Design Contract, "Individual Development Accounts: Model Program for Missouri," Department of Social Services, State of Missouri, 1998, \$20,000.

Research Grant, "Core Funding for the Program on Asset Building and Community Development," Ford Foundation, 1997-99, \$300,000.

Research Grant, "Evaluation of an Individual Development Account Demonstration," Ford Foundation, 1997-1999, \$115,000.

Research Contract, "Evaluation of an Individual Development Account Demonstration," Corporation for Enterprise Development (funding from Charles Stewart Mott Foundation, John D and Catherine T MacArthur Foundation, Fannie Mae Foundation, Levi Strauss Foundation, Ewing Marion Kauffman Foundation, and Moriah Fund), 1997-98, \$192,000.

Research Contract, "Wave Four of the Self Employment Learning Project: Data Analysis and Reporting," Aspen Institute (longitudinal study of microenterprise programs funded by the Ford Foundation and C.S. Mott Foundation), 1997, \$33,000.

Planning Grant, "Planning a Graduate Training Program in Urban Community Development," Danforth Foundation, 1997, \$57,000.

Research Grant, "Evaluation of an Individual Development Account Demonstration," FB Heron Foundation, 1996-98, \$100,000.

Research Contract, "Evaluation of an Individual Development Account Demonstration, Planning Phase," Corporation for Enterprise Development (funding from the CS Mott Foundation), 1996-1997, \$64,000.

Research Grant, "Evaluation of an Individual Development Account Demonstration, Planning Phase," Ford Foundation, 1996-1997, \$80,000.

Research and Development Grant, "Individual Development Accounts: Strategic Planning, Innovation, Networking, and Evaluation," Joyce Foundation, 1996-97, \$218,000.

Research Contract, "Wave Four of the Self Employment Learning Project: Data Collection," Aspen Institute (longitudinal study of microenterprise programs funded by the Ford Foundation and CS Mott Foundation), 1996, \$45,000.

Community Development Grant, "Organizing and Developing a Reinvestment Corporation and Planning Individual Development Account Demonstration in St. Louis," Charles Stewart Mott Foundation, 1995-96, \$156,000.

Research and Development Grant, "Taking Individual Development Accounts to the Next Level in the Midwest: Evaluation Design, Networking, and Support," Joyce Foundation, 1994-95, \$131,000.

Research Grant, "The Central Provident Fund of Singapore," supplemental funding for Fulbright project, Rockefeller Foundation, New York, 1993-94, \$54,000.

Grant for publication and distribution of a report, "The Central Provident Fund of Singapore: Lessons for the United States," Dennis Trading Group, Inc., Chicago, Illinois, 1993-94, \$10,000.

Research Grant, "Social and Economic Effects of the Central Provident Fund on Members and Households," supplemental funding for Fulbright project to support survey research, National University of Singapore, 1993 (with Ngiam Tee Liang and S. Vasoo), \$22,000.

Research Grant, "National Service Policy and Program Performance in China and Israel: Part of an International Comparative Study," Ford Foundation, New York, 1987-1989, \$10,000.

Research Grant, "A Study of Katimavik, an Innovative Canadian Youth Program," Canadian Embassy of the United States, Washington, 1985-86, \$5,000.

Research Grant, "Networks of Organized Volunteers for Natural Hazards Preparedness," National Science Foundation, Washington, 1984-86 (with David Gillespie), \$120,000.

Grant for Policy Study in Scandinavia, German Marshall Fund of the United States, 1985, \$1,500.

Research Grant, "Planning and Implementation of the Civilian Conservation Corps," Eleanor Roosevelt Institute, Hyde Park, 1981-82, \$1,500.

Dissertation Research Grant, "The Civilian Conservation Corps: Effectiveness of the Camps," US Department of Labor, Washington, 1978-80, \$14,000.