



**OCTOBER 11, 2023, MEETING OF THE CALIFORNIA HOPE, OPPORTUNITY,
PERSERVERANCE AND EMPOWERMENT (HOPE) ADVISORY WORKGROUP**

Minutes

Wednesday, October 11, 2023, 1:00 pm

State Treasurer’s Office
901 P Street
1st floor Conference room 102 Sacramento,
CA 95814

1. Call to order and roll call

Kasey O’Connor, Executive Director called meeting to order at 2:03 pm.

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| Chair | Stephanie | Tom |
| Executive Director | Kasey | O’Connor |
| Program Manager | Aguirre | Rebekah |
| CDSS | Chow | Salena |
| New School | Radcliffe | David |
| UCLA - Fielding School of Public health | Zewde | Naomi |
| Western Center on Law and Poverty | Dozier | Antionette |
| California Competes | Johnson | Anna |
| Oakland Promise | Kelleher | Joci |
| CDPH | Moore | Dana |
| End Poverty in California (EPIC) | Berry | Patrice |
| SDSU San Diego | Dominguez | Sunni |
| UCLA - D | Dr. Mays | Vickie |
| Dept of Financial Protection & Innovation | Hisatomi | Nicole |
| GRACE | Jimenez | Yesenia |
| Stanford Center on Poverty and Inequality | Kimberlin | Sara |
| Prosperity Now | Markoff | Shira |
| California Youth Connection | Sosa | Jordan |
| John Burton Advocates for Youth (JBAY) | Vanfelden | Cody |
| Marked by Covid | Urquiza | Kristin |
| California Budget & Policy Center | Anderson | Alissa |
| GRACE | Salazar | Angelica |
| San Francisco Foundation | Brown | Christa |
| MyPath | Martinez | Loraina |
| Golden 1 Credit Union | Quan | Barbara |
| (DHCS) | Riley | Pamela |

2. Welcome and introductory comments — Deputy Treasurer, Stephanie Tom, Chair

Deputy Treasurer Stephanie Tom welcomed the group and provided comments regarding the timely



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submission of the Report to Legislature due February 1, 2024.

3. Executive Director's Report —Kasey O'Connor, Executive Director

Executive Director O'Connor provided updates on the last Board meeting on August 30, 2023. Discussed the modeling of \$5,000 per youth and looking at other options to get to that amount. ED O'Connor also updated on the investment of \$116 million and the feedback from the board on the report to legislature. She also updated on the youth panel of experts and the update on the narrative design team. November 8 will be the final advisory meeting. November 29 will be the final HOPE Board meeting with possibility of December meeting if the report to legislature needs one more review. SB 544 was signed and will alter the Bagley Keene teleconference rules effective January 1, 2024. Deputy Treasurer Tom called for public comment. There were none.

4. Review and Discussion of Eligibility & Outreach Work Group Progress — Andrea Luquetta

a. Recommendations to the Eligibility & Outreach Work Group

Andrea Luquetta provided an update on the subgroup. Eligibility will be children who met eligibility as of September 2022 which is when the law took effect. Youth will be able to withdraw funds at 18 or earlier with exigent circumstances. Discussed manual and auto enrolment for youth and youth will pull funds by 26 and will still access services up to 30 years old. Partner with CBOs for ongoing youth engagement.

Ms. Luquetta concluded this section.

Sunni Dominguez asked for clarification on opening eligibility to primary caregivers.

Ms. Luquetta responded that currently it is only primary parent or guardian, but we are looking at statutory changes to include this.

5. Review and Discussion of Data Sharing & Privacy Work Group Progress — Andrea Luquetta

a. Recommendations to the Data Sharing & Privacy Work Group

Ms. Luquetta provided an update on recommendations from the subgroup. We are developing agreements with NAPHSIS, CDE, Medi-Cal, FTB and CDSS. Looking at the least amount of information necessary for eligibility verification and enrollment such as decedents name, birth month and year, last residence. We will ensure to protect data and privacy while working with our other agencies that we are entering into agreements. We will work with state and federal tribes and tribal courts. Program manager RFP will require trauma-informed customer service for youth and in multiple languages. We will use data stewardship agreements to protect privacy and confidentiality.

Deputy Treasurer Tom opened for comments. There were none.

6. Review and Discussion of the Funds per Youth and Investment Work Group — Andrea Luquetta

a. Recommendations to the Funds per Youth and Investment Work Group

Ms. Luquetta updated on the current modeling based on achieving \$5,000 per youth by 18 years of age. What would it take to get the youth \$10,000 each. Alissa Anderson and Monica Saucedo with Cal



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Budget and policy center provided an update on how to reach \$10,000 per youth by investing allocated money.

David Radcliffe wanted it noted what Dr Hamilton scholarship had accomplished.

Joci Kelleher also mentioned the baby bond program in the state of Connecticut.

Antoinette Dozier commented that it is important to ensure we are not putting restrictions on the youth for how to spend the money.

Yesenia Jiminez agreed with not imposing restrictions on youth as well. Yesenia also wanted the reason why no restrictions on youth in the report.

Naomi Zewde also commented about importance of providing support to youth to show why we are not imposing restrictions.

Angelica Salazar wanted to know if they would see a draft of the RFP.

ED O'Connor responded the RFP would not be ready before the last meeting.

Deputy treasurer called for any public comment. There are none.

7. Review and Discussion of Administrative Infrastructure & Timelines Work Group Meeting — Andrea Luquetta

a. Recommendations to the Administrative Infrastructure & Timelines Work Group

Ms. Luquetta provided an update on the subgroup. We will create an evaluation plan that measures the impact and how the funds helped them and the outcomes. How are we creating narratives that are widely adopted. We will have to use philanthropy to support the program. The statute allocated funds but the funds must be used for the youth so any other funds will need to come from CBO to support the services for the youth.

Ms. Luquetta provided a voting link for members to vote on the best narrative framework. The highest vote was “an unparallel public investment in the economic future of California’s most financially vulnerable children” Also had the group write in certain phrases that describes the impact of HOPE.

8. Review recommended statutory changes — Andrea Luquetta

Ms. Luquetta provided an update on recommended statutory changes that will be included in the Report to legislator. There was discussion about various recommended statutory changes. One important is amending tax code to ensure funds are exempt from counting as income.

Antoinette Dozier wanted tax language to count as resources and income.

Yesenia Jiminez recommended amending to provide an opportunity to all youth born into poverty in California. She also wanted to add that the two nonvoting members are changed to voting members. This intent language will be included in SB 242. Could we look again at a wealth tax.

9. General public comment

Kasey O'Connor called for public comment. There are no comments. ‘

10. Closing comments and adjournment

Meeting was adjourned at 4:08 pm by Kasey O'Connor on behalf of the chair