



***“TOOLS FOR SUCCESS” WEBINAR SERIES  
FOR ASSETS FOR INDEPENDENCE  
GRANTEES***

**Strategic Partnerships for IDA Programs**

**March 7, 2012**

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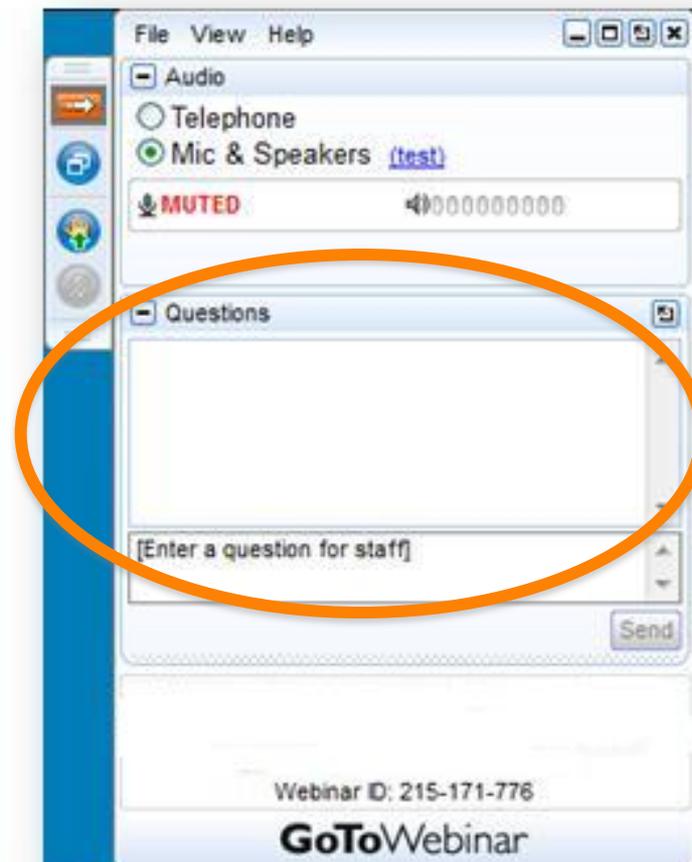
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# Housekeeping

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# Not an AFI grantee yet?

- Assets for Independence (AFI), which is administered through the Office of Community Services (OCS) at the U.S. Department of Health and Human Services, provides federal funding to community-based nonprofits and government agencies for Individual Development Accounts (IDAs).
- To learn more about applying, visit [www.idaresources.org](http://www.idaresources.org)
- Upcoming Orientation Session:
  - AFI Question and Answers Conference Call for Prospective Grantees
  - Tuesday, March 20, 2012. 2:00 PM - 3:30 PM Eastern
  - Register at [www.idaresources.org](http://www.idaresources.org)

# Your Guest Speakers

- **Sharon Henderson**

Vice President of Strategic Initiatives  
Prosperity Works



- Prosperity Works builds the capacity of organizations and advocates for policies that generate economic prosperity for all New Mexicans.

# Your Guest Speakers

- **Rebekah Barger**

IDA Program Manager

Neighborworks® Umpqua



- Neighborworks® Umpqua works for and with low and moderate income people to provide safe affordable housing and community-based economic opportunity so that our community may collectively and individually recognize its intrinsic value and realize its potential.

# Your Moderator

- **Johanna Barrero**  
AFI Resource Center



- The AFI Resource Center provides training and technical assistance to AFI grantees, their project partners, and other organizations that are providing asset building services across the nation.

# Today we will cover...

- How effective partnerships can improve your program outcomes and your participants' success rate
- Accountability systems that promote effective partnerships
- Statewide initiatives and programs that are considered natural partners for IDA programs
- Leveraging volunteers and other resources for your IDA program

# Why are strategic partnerships important?

- Use the skills and resources that are available in your community
- Complement organizational strengths and capacity for their mutual benefit
- Help extend your program's reach
- Add value to your clients
- Save you time and money

# Effective partnerships can also help you...

- ...Boost enrollment by referring clients to your program
- ...Provide asset-specific training and other supportive services to your clients

# What to look for in a strategic partnership

- Natural fit with your program
- Organizational culture of your partner:  
Do they “get it”?
  - Do they see value in the partnership?
  - Does your program help advance their mission or is it just adding work for them?
  - Do you have “buy in” from the staff that you will be interacting with the most

# Natural partners for IDA programs

- Financial institutions
- Community Action Agencies
- Other nonprofits and IDA providers
- Government agencies
- Local businesses
- Local foundations
- Colleges and universities

# Examples of effective partnerships and collaborations

# Prosperity Works

- Tribal Entities
- State government agencies:
  - New Mexico Children, Youth and Family department
  - Vocational Rehabilitation
- SBDC
- Homewise Inc.

# Neighborworks® Umpqua

- GEAR UP IDA project
  - The Ford Family Foundation
  - GEAR UP schools
  - University of Oregon system
- Other IDA providers
- Local community colleges

**What mechanisms or systems  
do you use to ensure  
accountability?**

# Strategies for Accountability

Prosperity Works	Neighborworks® Umpqua
<p><b>MOAs and MOUs when there's a financial obligation</b></p> <ul style="list-style-type: none"><li>• financial institution</li><li>• sub-grantees</li></ul>	

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<p>Mission relationship to IDA tool</p> <p>Community obligation (unspoken accountability)</p>	<p><b>Loose agreements (“handshake” model) with partners such as:</b></p> <ul style="list-style-type: none"> <li>• <b>GEAR UP schools</b></li> </ul>

**How can you tell when a  
partnership is not working –  
and what can you do about it?**

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- Communicate, communicate, communicate
- Discuss options for resolving issues
  - More TA needed
  - More structure/less structure
- Dissolve the relationship if it is not manageable

# Prosperity Works

- Pay attention to referrals; stay in touch.
- Get them involved and engaged
- Offer additional resources: what can we do on our end to help them?
- End the partnership
- Sample MOA: [http://prosperityworks.net/wp-content/uploads/2011/08/2011-2012\\_MOA\\_BOILERPLATE.pdf](http://prosperityworks.net/wp-content/uploads/2011/08/2011-2012_MOA_BOILERPLATE.pdf)

**What advice would you offer others looking to build or strengthen partnerships?**

# Prosperity Works

- Bundle IDAs with services that people are already using.
- Present as a “product,” not a “program”
- Help partners see how this program will help them advance their mission
- Be clear, clear, clear with expectations

# Neighborworks® Umpqua

- Understand the core structure of the agency you are partnering with so you can see where the IDA program best fits
- Provide training to several staff members at your partner organization in case there's turnover
- Educate partners on the principles behind the IDA program – and get their buy-in

# Questions for the Speakers



# Contact Information

For general questions about the AFI program,  
visit [www.idaresources.org](http://www.idaresources.org).

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Vice-President of Strategic Initiatives  
Prosperity Works  
[sharon@prosperityworks.net](mailto:sharon@prosperityworks.net)
- **Rebekah Barger**  
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- **Johanna Barrero**  
AFI Resource Center  
[johanna.barrero@idaresources.org](mailto:johanna.barrero@idaresources.org)

# Upcoming “Tools for Success” Webinars

- **Financial Institution Partnerships for IDA Programs**  
**March 13, 2012**
- To register, visit  
[www1.gotomeeting.com/register/638096041](http://www1.gotomeeting.com/register/638096041)