



"Tools for Success" webinars for Assets for Independence grantees:

A Refreshed Approach to Technical Assistance for AFI Grantees

Friday, April 26th, 2013

12:30 – 1:30 p.m. PST / 3:30 – 4:30 p.m. EST

Jimmy Crowell: Good afternoon everyone, and Happy Friday! Welcome to our webinar **A Refreshed Approach to Technical Assistance for AFI Grantees**. This webinar is the next in our series of "Tools for Success" webinars designed for Assets for Independence grantees 1 and sub-grantees. My name is Jimmy Crowell, and I'd like to welcome you to our conversation today.

Before we start today's presentation, I'd like to begin with a few housekeeping items. If you're having trouble dialing in, you can listen through your computer using speakers or connecting a headset to your computer.

If you're having technical difficulties such as trouble connecting to the visual portion of the webinar, send us an e-mail and we'll send you the Power Point file as an attachment so that you can follow along. The e-mail address is tmurphy@cfed.org.

Today's webinar is being recorded, so you will be able to review it on demand. You will receive a follow up email in a week or two with details on how to access the recording. We will also send a copy of the PowerPoint presentation that is being used today and a transcript.

We have a number of participants registered today, so your phone lines have been muted to ensure sound quality.

We encourage you to send questions at any time during this presentation by using the Questions box in your GoToWebinar Control Panel as you see on your screen. We will try to answer as many of your questions as we can after the presentation during the Q and A session.

Our first guest speaker is Janelle George. Janelle is the Program Manager at the Assets for Independence program in the Office of Community Services. Assets for Independence (AFI) enables community-based nonprofits and government agencies to implement and demonstrate an assets-based approach for giving low-income families a hand up out of

poverty. AFI projects help participants save earned income in special-purpose, matched savings accounts called Individual Development Accounts (IDAs).

Janelle George: Hi everyone and thank you so much for joining us today. We are really looking forward to providing you some new and robust information on our technical assistance program.

Jimmy Crowell: And this is me. I'm Jimmy Crowell and I work for the 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.

For today's presentation, we have four objectives. We are going to discuss AFI's refreshed strategy for technical assistance to AFI grantees; we are going to discuss when and why you might want or need technical assistance for your AFI IDA program; we are going to review technical assistance resources; and finally we will answer any questions you have about AFI's technical assistance offerings, so be sure to take advantage of this time and utilize your GoToWebinar Question box.

With that, I am going to pass it over to Janelle who will walk through the goals of AFI's technical assistance portfolio.

Janelle George: Thank you, Jimmy. The Assets for Independence (AFI) program in the Office of Community Services (OCS) supports comprehensive training and technical assistance programs to advance the successful implementation of federally-funded IDA programs across the country. AFI coordinates the execution of grantee trainings and the dissemination of technical assistance tools through a partnership with national stakeholder organizations. Through these partnerships and the technical assistance resources we offer, we intend to help grantees spend down their AFI grants and manage successful programs, meet AFI reporting requirements, understand oversight and compliance responsibilities, learn about promising practices and innovative strategies and engage in knowledge-sharing and foster an open dialogue among the field. Our goal is to ensure the highest standard of customer service. As the AFI program manager, if you ever experience challenges with receiving technical assistance from any of the three avenues I am about to discuss, you should contact me directly.

Now, if you are an AFI grantee and you need someone to consult with, who can help you? Well, grantees can receive direct technical assistance from a TA provider via three avenues: the AFI Resource Center Helpdesk, AFI Program Specialists or direct TA providers.

The AFI Resource Center Helpdesk can answer simple programmatic questions such as: When is my report due? Where can I find information on completing my financial report? What are the participant eligibility guidelines? What is the minimum savings period? Can you give me some information on choosing a financial literacy curriculum? Who is my Program Specialist?

Every AFI grantee is assigned a Program Specialist to help guide you through the management of your AFI grant and to ensure that grantees are compliant with program rules. Program Specialists communicate with grantees often via structured and routine meetings but also ad-hoc when grantees run into some problems. Typical scenarios where grantees should reach out to their Program Specialists include: A participant is closing on a home purchase next week and the bank is confused about how to treat match funds; Can you help? How does the closeout period work? We requested a drawdown last month and the funds still have not appeared in our account.

Direct technical assistance providers are AFI-experts that conduct site visits and conference calls for grantees who need custom and intensive support. Grantees are chosen to take part in a site visit or a conference call if they are having trouble meeting important program benchmarks. Typically, grantees are chosen for direct support via program outcome data analysis from recommendations made by Program Specialists. If a grantee is not selected for direct TA but feels they could benefit, they should contact their Program Specialist and discuss possibilities.

Some common instances where direct TA would be implemented include: We have a year and a half left and need help getting our savers through the pipeline; can you help? My predecessor applied for this large grant; where do I start pulling this IDA program together? We have a high attrition rate, what can we do to boost retention? Half of our nonfederal funding commitments have fallen through -- what can I do? We'd like to add education IDAs, what should we think about? How can we streamline our housing IDA program for a two-year time frame?

How do grantees access the different avenues of technical assistance available to them? This next slide really gets at the "how" of our technical assistance delivery and separates out the different avenues for how grantees access the different types of TA resources. "Core Curriculum" resources are required for all grantees, "Self-Service" resources are self-paced and accessible on-demand via the internet (such as the resources online at www.idaresources.org) and "Deeper Dives" are TA services grantees are selected to take advantage of based on data analysis and recommendations from your Program Specialist.

What types of technical assistance options are available? This diagram really explains the "what" of AFI's technical assistance offerings. The boxes in blue are the different "categories" of TA resources we provide. We want to offer different types of TA resources because everyone learns differently and we want to be sure that every grantee can benefit from technical assistance. The boxes in orange, green and blue are the actual TA resources themselves. As you can see, we offer bi-monthly calls, ad-hoc requests and new grantee orientation via our "core curriculum," tools and templates, e-learning modules, webinars and other resources are available via "self-service" and TA lite conference calls, TA site visits and learning cohorts are available via our "deeper dives."

The “core curriculum,” if you will, of AFI TA are resources or trainings that are standard among grantees. All grantees must complete the new grantee orientation which consists of a series of webinars and conference calls over a 6-month period that go over the basics of setting up an IDA program. The goals of the new grantee orientation session are; to build and foster working relationships between new grantee staff and their AFI Program Specialist; to create the sense that there is a shared responsibility for success between the grantee and their AFI Program Specialist; to help new grantees to launch their projects in a timely manner, in compliance with AFI regulations, and in alignment with their current situations – committed monies on hand, actual financial institution partners, staffing, etc.; to teach AFI grantees early on what success looks like and how to use benchmarks to make sure they are on track; and to engage supervisors and financial staff as a team to help them understand their specific roles in the project.

Another resource that is standard for all grantees is your Program Specialist. Your Program Specialist should be your “go-to” source of official information regarding AFI. To foster a working relationship between grantees and Program Specialists, Program Specialists will schedule bi-monthly conference calls with their grantees to check up on program benchmarks and to give grantees a chance to troubleshoot. However, Program Specialists will make themselves available outside of these bi-monthly calls if a concern needs to be addressed.

“Self-service” TA consists of resources, learning communities and tools grantees can access online and on their own time. The AFI Resource Center should be your first stop for accessing these “on-demand” tools. Here you can find recorded webinars on a variety of different topics. You can also register for future webinars at the AFI Resource Center. The “Tools for Success” guides are tools and templates that are created to help grantees successfully manage their grants.

The IDA Network Listserv, at www.idanetwork.org, is a knowledge sharing community where grantees can seek advice and help from their peers.

Here is a screenshot of the homepage of the AFI Resource Center, accessible via www.idaresources.org. This red circle highlights the announcement section. Here grantees can find information on new events, how to register and other important notifications. From the homepage of idaresources.org, grantees can access information regarding program rules, regulations and procedures via the “Managing Your AFI Grant” landing page.

After clicking on the “Managing Your Grant” landing page, grantees can scroll to the bottom of the page to access drop-down menus containing a variety of tools, templates and pre-recorded webinars on an array of different topics. Some popular tools and templates that grantees request are the Participant Eligibility Worksheet, the Program Design Checklist and the AFI Rules and Regulations Guide. Some popular webinars include: “Finding Ready Savers: Innovative Recruitment Strategies to Increase Program Completion,” a webinar focused on how to identify savers who are most ready for the AFI IDA program, “Course Corrections: Re-Assessing Your Capacity and Revising Program Design,” a webinar that lays

out the different design changes an AFI IDA program can make and when they should make them and “Determining Participant Eligibility and Tracking Participant Progress,” a webinar that revisits AFI eligibility rules and shows grantees how to use the Participant Eligibility Worksheet.

“Deeper Dives,” are more intensive and customized technical assistance that usually involves one-on-one support from a direct TA provider. Grantees are selected for site visits, TA Lite conference calls or learning cohorts through data analysis of programmatic outcomes given in grantee data reports and recommendations from Program Specialists. If you have not been recommended for one of these resources but would like to, consult your Program Specialist.

In summary, we hope you see how these TA resources come together to help AFI grantees successfully support low-income households to purchase assets and build a better future for themselves. We believe you all are doing important, valuable work in the field, and I look forward to any questions you have about how to access AFI supported technical assistance.

Jimmy Crowell: Great, thanks Janelle. If anyone has any questions, you can enter them into your question box in the GoToWebinar control panel. We have gotten some in already so, Janelle, I am just going to throw them out there. The first question is; if a grantee has materials that haven't been created on idaresources.org, who should they contact?

Janelle George: Your first contact would be the AFI Helpdesk as they document all inquiries the AFI program receives and they will in turn forward that to the appropriate personnel that works with AFI and the helpdesk via our technical assistance contract.

Jimmy Crowell: Thanks. I have another question in from a grantee that wasn't able to take part in the new grantee orientation, which is a new offering. Can they still do that even if they are in their second year?

Janelle George: Yes, they can. The new grantee orientation, in terms of the dates for this upcoming cohort, have not been established yet. You should send a message to your Program Specialist so that we can ensure that you are added to the list. Again, because, when we do provide information about participation in that, we only send it to the new grantees that were awarded. So send us an email and we can ensure that you're added to that list.

Jimmy Crowell: Great. Another question is; who do I turn to if my Program Specialist has changed or is unresponsive?

Janelle George: You can turn to me. As I mentioned earlier, if you are having challenges, regardless of whether it's the Program Specialist or any of the other resources, even if it's the self-service resources, perhaps, you see information that is not as clear and it may be that we need to revamp it, you can contact me directly. I will let you know that we are in the process of doing some re-assignments for a couple of reasons, one because we have new agencies

that we will be adding on as grantees and so we work to balance out the number of grantees that are assigned per Program Specialist so there may be some changes that you see but again if you have any questions or concerns you can feel free to send me an email or just pick up the phone and call.

Jimmy Crowell: Thanks. I have another question here; who establishes the bi-monthly check-in calls?

Janelle George: The bi-monthly check in calls should be established by the Program Specialist. Each Program Specialist initiates that in a different way, some will send an e-mail and try to schedule calls over the next four months, the next two calls. Others will do it on a bi-monthly basis in terms of scheduling those calls. I would encourage you to work with your Program Specialist as we encourage them to do the same to negotiate a time that is feasible and works for everyone in terms of availability and then I would also encourage you, since the Program Specialists do have certain areas regarding your projects that we ask that they address but it does not mean that your bi-monthly call needs to be limited to those topics, so in anticipation of the call, if you have questions or concerns you would like to bring up I would encourage you to provide those to the Program Specialist ahead of time and, in that case, it may be then that they can provide you with a response at the time of the bi-monthly call.

Jimmy Crowell: And I have a colleague here who is helping me field questions from webinar participants so he is going to throw out another question. His name is Parker.

Parker Cohen: Thank you Jimmy. This question asks; can you provide a reserve fund interest allocation formula for programs using the online data collection form rather than using the AFI??

Janelle George: Can you say the question one more time?

Parker Cohen: Sure. Can you provide a reserve fund interest allocation formula for programs using the online data collection forms rather than using the AFI??

Janelle George: I can inquire as to whether we can do that. What I would need to do is check in with our technical assistance provider that's responsible for our data collection and our online forms for grantees that perhaps that they don't use AFI squared or maybe they use another system for their data collection and see if that's a possibility. Based off of how technical the question is, I think it would probably be best that I also follow up with you prior to contacting our TA provider so I can ensure that I completely understand what the outcome is that you are trying to get with this new form. So, Jimmy, if you can perhaps get that information or document that so we can follow-up with this specific question.

Jimmy Crowell: No problem.

Parker Cohen: We have another question. It says; there is some confusion about how the change in reporting will be going through grant solutions. Will there be some follow-up instruction on the changes? If not, who do we contact?

Janelle George: We can provide some follow up regarding grant solutions. Again, you can always contact the Helpdesk first or your Program Specialist. I can offer a very basic clarification now and then follow-up in more detail later. As hopefully all of you are aware, you should have received a notice a couple of months ago that we were beginning to work with the grant solutions system which is a new system grants management system that was adopted into the Administration for Children and Families. So, with this new system, it allows and provides the opportunity for grantees to submit their reports and, let me be specific, to submit their reports like the PPR, the performance progress report, as well as the SF 425, which is the federal financial report. So grantees can upload those documents and submit that via grant solutions. They can also submit their information as it relates to requesting a no-cost extension via grant solutions. This is a change from way back when it used to only be paper documents which later it moved to documents being submitted electronically via e-mail and now we have this system that is accessible by grantees, the program office, as well as grants management. Just to clarify, in terms of your reporting, your annual data report, that is unchanged so grants solutions is specific to, again, the PPR, the program progress report, and then SF 425, which is the federal financial report.

Jimmy Crowell: Great. Another question is; does AFI organize any in-person convenings for the field of grantees?

Janelle George: Historically, we have had what is called or referred to as the AFI Institute and my understanding is that took place every 2 years. There was a time when there was funding where we could bring grantees together and the AFI Institute focused primarily on financial education and other important information to assist grantees in terms of administering their project. To date, we have not been able to get the resources to actually fund bringing grantees into a central location and also, being sensitive to the fact that we recognize that the amount of administrative funds associated with each grant is quite limited and aside from using those funds for the project having enough surplus to, in essence, pay for your own travel and accommodations would be a bit taxing. It is something that we are trying to look at to see if there is another way to establish some sort of convening even if it can't be in-person but we would welcome any suggestions or ideas that you have that might speak to ensuring that that takes place.

Jimmy Crowell: Thanks. Another question; so some grantees have developed tools of their own. Where could they send them if they want to suggest a new tool?

Janelle George: The first resource is the list serv that I spoke about. That is a resource that grantees use to stay connected to one another. I believe, if you're asking more about a library or sort of data base, it may be possible for us to house something on the idaresources.org website but we also try to be mindful because we don't want that website to become too overwhelming. Send us the question and your ideas and we can investigate into if they are

more helpful and we'll look to grantees to also suggest to us what they think might be most efficient and effective for them.

Jimmy Crowell: Great, thanks Janelle and I got a question in regarding how to access webinars. If you have any question about any previous webinars or anything you can contact me directly at jimmy.crowell@idaresources.org. That's jimmy.crowell@idaresources.org. And I will be more than happy to send exact links to previous webinars if you did not receive that follow-up e-mail in the past. I just want to encourage people to take this time to submit any more questions. Janelle is there anything you would like to high light about AFIs TA right now?

Janelle George: The main thing that I will highlight is that, while this is sort of a refreshed approach, part of it is based off of changes that we wanted to see and it was born internally, but it is also based off of feedback that we have gotten over the past 12 to 18 months about what would be helpful for grantees and what might also be helpful to AFI as a network, if you will. The first thing I'll say is thanking you for providing that feedback. You are the ones that are actually in the field doing the work and so it really is helpful to get feedback in terms of how what we're doing here in the central office is translating out in the field and if it is not helpful and official, we can look at revamping it or it may be that it needs to be excluded or stopped but we do appreciate your feedback regarding the TA. The other thing that I will mention is that we are working to add more Program Specialists to the AFI team and so hopefully within the next six months, I know that sounds like a long time, hopefully within that time period, we will have more resources on our end to assist in addressing your questions and helping you to facilitate your projects.

Jimmy Crowell: Great and I just got a question in that piggy-backs off of that. What is the ratio of Program Specialists to grantees?

Janelle George: The Program Specialists have an average of about 30 grantees and so it really depends on what their other sort of ad-hoc responsibilities are, if you will, but on average it is about 30. I would say by the end of this year, with the two funding cycles that we are completing, that most Program Specialists will average about 40.

Jimmy Crowell: Great thanks Janelle. It looks like there are no more questions filtering in. We can end early, it is Friday. So this is for everyone that wants to enjoy an extra half hour of work. Again, this webinar was recorded and will be posted to the website. As you can see on your screen, here is the contact information for the AFI Resource Center. Feel free to call -1-866-778-6037 or email info@idaresources.org. Janelle, thank you so much for going over this.

Janelle George: Thank you, Jimmy.

Jimmy Crowell: Before you leave today I am going to ask people to respond to an evaluation question that will pop up on your screen. It will only take a few seconds and it will help us asses the quality of the webinar. I want to thank everyone again and I hope everyone has a wonderful weekend.