

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

### **A Refreshed Approach to Technical Assistance for AFI Grantees**

April 26, 2013



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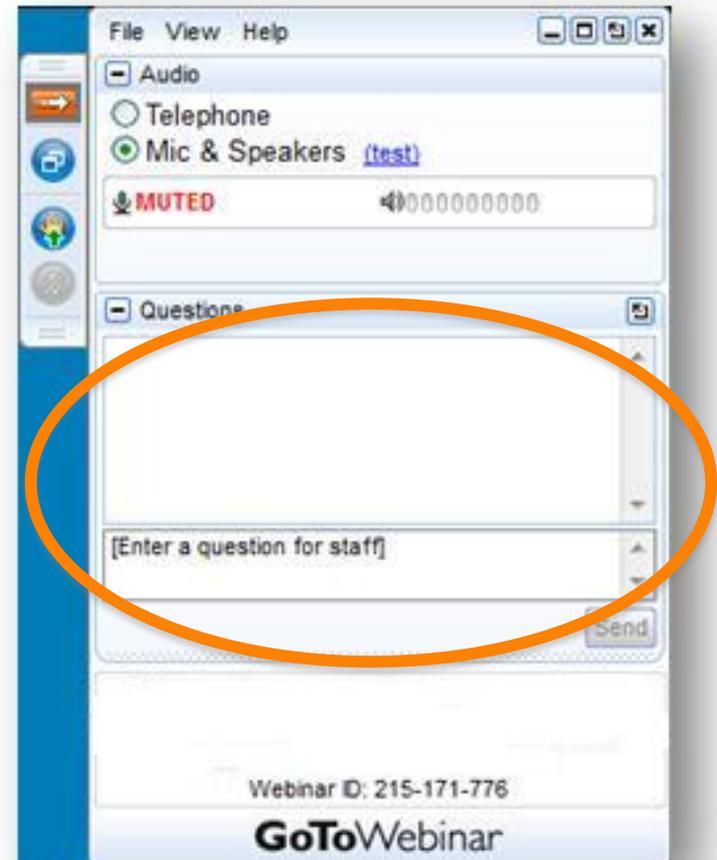
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# Housekeeping

- This webinar is being recorded.
- A transcript and link to the recording will be available a week or two after the webinar.
- The webinar will last for 1 hour.
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# Housekeeping

- All webinar attendees are muted to ensure sound quality.
- Use the question box in your webinar Control Panel to ask questions at any time.



# Your Guest Speakers

- **J. Janelle George**

Program Manager

Assets for Independence

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).

# Your Moderator

- **Jimmy Crowell**

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's Objectives

- Discuss AFI's refreshed strategy for technical assistance to AFI grantees;
- Discuss when and why you might want or need technical assistance for your AFI IDA program;
- Review technical assistance resources;
- Answer any questions you have about AFI's technical assistance offerings.

# Technical Assistance Goals

To help grantees:

- Spend their AFI grants and manage successful programs
- Meet AFI reporting requirements
- Understand oversight and compliance responsibilities
- Learn about promising practices and innovative strategies
- Engage in knowledge-sharing and an open dialogue among the field

# Who can grantees turn to for help?

**AFI Resource Center  
Helpdesk**

- **Routine questions that have clear answers.**

**Program Specialists  
(AFI staff)**

- **More difficult and complex questions, or questions involving federal policy.**

**Direct TA Providers**

- **Most complex and support-intensive questions.**

# AFI Resource Center Helpdesk

- Fields calls and e-mails from AFI grantees and provides answers to simple programmatic questions
  - Phone: 866-778-6037
  - E-mail: [info@idaresources.org](mailto:info@idaresources.org)
- **Common questions:** When are my reports due? Where can I find information on completing my reports (i.e. performance progress report, annual data report, 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?

# AFI Program Specialists

- Program Specialists are assigned to each AFI grantee to assist with specific program management issues.
  - Conduct bi-monthly conference calls
  - Available for troubleshooting
- **Common questions:** 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

- Direct TA providers conduct site visits and conference calls for grantees who need custom, intensive support
- **Common questions:** 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 ; How 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 IDA's, what should we think about? How can we streamline our housing IDA program for a two-year time frame? Should we change our match rate from 2:1 to 4:1?

How can grantees access the different technical assistance resources?

“Core Curriculum”

Standard support for all grantees

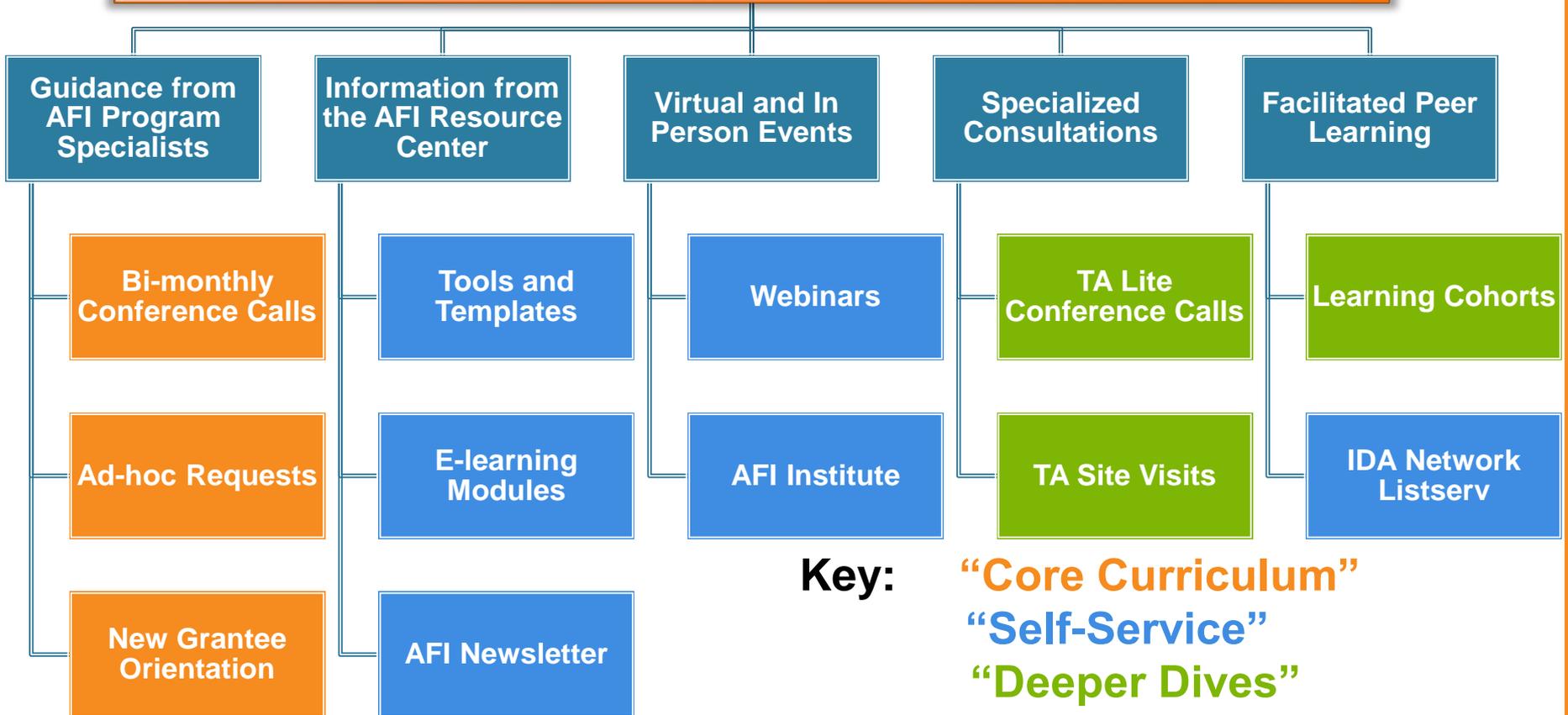
“Self-Service”

User-driven resources accessible on-demand

“Deeper Dives”

Customized, one-on-one support

# What types of technical assistance are available?



# “Core Curriculum”:

*Standard support for every grantee*

- New grantee orientation
  - Series of webinars and conference calls over a 6-month period
- Bi-monthly calls with AFI Program Specialists
  - This is an opportunity to discuss successes and challenges in your program.
- Troubleshooting
  - Communicate with your Program Specialist often; they are always there to help!

# “Self-Service”:

*Tools and resources you can access on-demand*

- AFI Resource Center: [www.idaresources.org](http://www.idaresources.org)
  - “Tools for Success” Webinars – live and recorded
  - “Tools for Success” Guides
  - E-learning modules: These are self-directed, web-based “mini-courses” on managing an AFI IDA program.
  - Grantee Handbook
- IDA Network Listserv: [www.idanetwork.org](http://www.idanetwork.org)
  - Members of the listserv exchange information and ideas about how to structure and manage their IDA programs.



U.S. Department of Health & Human Services Administration for Children & Families

**AFI** Assets for Independence Resource Center **IDAresources.org**

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About AFI Resource Center

About AFI

Success Stories

Locate a Project Near You

Apply for an AFI Grant

e-Newsletters

## About AFI

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### > Announcements

**[Notification of Intended Changes to HHS' Grants Policy Statement](#)** ▶

This memorandum is designed to notify grantees of planned changes to the Grants Policy Statement. [Read more](#)

**[Revised 2013 Application Due Dates and Modified Funding Opportunity Announcement](#)** ▶

The due dates for the Fiscal Year 2013 AFI applications have been revised to **March 25, 2013 & May 24, 2013**. [Read more...](#)

**[Spring 2013 Applicant Webinar Series](#)** ▶

The AFI Resource Center will host a series of webinars for new and returning applicants about planning, applying, and developing resources for an AFI project. [View the webinar descriptions and schedule](#)

**[AFI Awards Nearly \\$7 Million for IDA Projects in September 2012](#)** ▶

The Office of Community Services (OCS) awarded 28 AFI grants in September 2012 totaling nearly \$7 million to community-based organizations and government agencies. [View Grants Awarded](#)

**[Updating AFI Grant Application Due Dates](#)** ▶

### > Topics & Tools

General Information

**Managing Your AFI Grant**

Guidance and forms for grantees



**Financial Education**

Deliver effective financial training



**Fundraising**

Tools for leveraging

Populations

**ASSET Initiative**

A Partnership to Encourage Asset Development



**Data Management**

Learn to manage data to increase your project's efficiency and simplify the data reporting process



**EITC and Tax Assistance**

**Financial Stability for Families with Young Children**

Connecting early learning communities to asset building



**Building Assets for Fathers and Families**

Helping families in the child support system



**People With Disabilities**

ADMINISTRATION FOR  
**CHILDREN & FAMILIES**



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Fundraising

Tools for leveraging

EITC and Tax Assistance

People With Disabilities

### Other AFI Project Changes

[Requesting an Extension of Your Grant Period](#)

[Requesting a No-Cost Extension for any](#)

[Nearing the End of Your Grant Period](#)

[Nearing the End of Your Grant Period](#)

[Tools for Success](#)

[Tools for Success Case Study Series](#)

[Tools for Success Webinar Series](#)

[Enhancing Your Financial Education Program](#)

[Your Questions Answered Webinar: A Dialogue with IDA Funders](#)

[Finding Ready Savers: Innovative Recruitment Strategies to Increase Program Completion](#)

[Fundraising Resources for IDA Programs](#)

[IDAs for Small Businesses: Crafting the Best Program for Your Clients](#)

[IDAs for Education: Effective Strategies to Partner with Educational Institutions](#)

[Boosting Participant Retention in a Sluggish Economy](#)

[More Than Just a Wish: Planning for your AFI Project](#)

[Getting Started: Understanding AFI Program Rules and Regulations \(May 2012\)](#)

["Matchmaker, Matchmaker..." Finding and Vetting Network Partners](#)

[The Road Less Traveled - Innovative Solutions in Rural IDA Programs](#)

[Joining Forces - Creating Successful IDA Networks](#)

[Financial Institutions Partnerships for IDA Programs](#)

[Strategic Partnerships for IDA Programs](#)

[Behavioral Strategies for IDA Program Recruitment, Enrollment, and Retention](#)

[Fundraising Strategies for IDA Programs](#)

[Putting Savers on the Fast Track: Strategies for Express IDA](#)

[Telling Your Story: The Power of Effective Messaging](#)

[Red Light, Green Light, Determining IDA Applicants' Eligibility](#)

[State and Local IDA Funding](#)

[Ready, Set, Save: Assessing IDA Participants](#)

[Tools for Success Guides](#)

[Behavioral Strategies for Successful IDA Programs](#)

[Rules and Regulations for AFI Programs](#)

[IDA Program Brochure](#)

[Program Design Checklist](#)

[Donor Profile Template](#)

[Proposal Worksheet](#)

[Fundraising Resources](#)

[Creating a Powerful Message for your AFI Program](#)

[Creating a Powerful Message for your AFI Program - Planning Template](#)

[Tips for Recruiting AFI IDA Participants Who Are Ready to Save](#)

[AFI IDA Eligibility Worksheet](#)

[AFI IDA Participant Tracking Form](#)

- Popular Webinars:**
- "Finding Ready Savers"
  - "Course Corrections"
  - "Determining Participant Eligibility"

- Popular Guides:**
- "Participant Eligibility Worksheet"
  - "Program Design Checklist"
  - "AFI Rules and Regulations"

## "Deeper Dives":

More intensive, customized and/or one-on-one support and advice – grantees are selected to participate

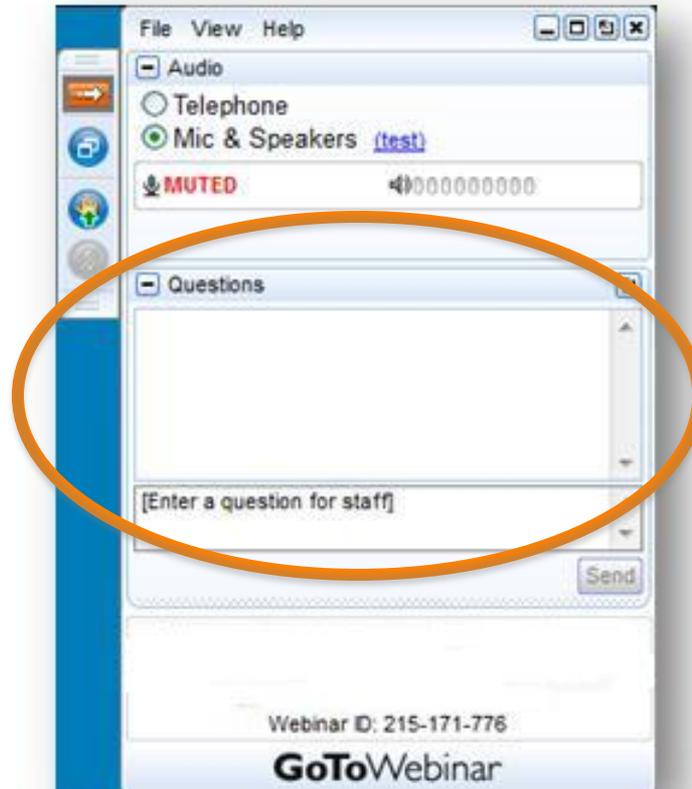
- AFI technical assistance site visits
  - These involve a 1 day visit to your organization where program materials and procedures are reviewed in depth.
- “TA Lite” conference calls
  - These are hour long group calls facilitated by a direct TA provider where grantees can ask specific questions regarding their IDA programs.
- Learning cohorts
  - These are facilitated peer learning groups of grantees with similar characteristics facing challenges such as fundraising, recruitment, and retention

# Technical Assistance Goals

To help grantees:

- Spend their AFI grants and manage successful programs
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# Questions?



# Thank you!

If you have additional questions, please consult:

- Your AFI Program Specialist
- AFI Resource Center:
  - 1-866-778-6037
  - [info@idaresources.org](mailto:info@idaresources.org)
  - [www.idaresources.org](http://www.idaresources.org)