



AFI Coaching Cohort 3 Session 3

June 4, 2015

EMILY: Hi. Has anyone joined us?

ANA: Yes, we're joining you from Puerto Rico.

EMILY: Great. Is that Ana?

ANA: Yes, Ana and (*coworker*). She is going to be working the program with me.

EMILY: We have Puerto Rico and Ohio. Anyone else? I expected we might have some attrition over the course of the sessions. We can make this quick. I'll also offer you guys that we're actually holding this session again, tomorrow, for the third cohort. Sorry. Could I get you guys to put yourselves on mute here, at the beginning? Thanks. We're also going to offer this session, this third session, tomorrow at 11:00 eastern and, also, 2:00 PM eastern. If you want to join those conversations, as well or instead, that's definitely fine. This is great. I can give you all my attention. I'm happy to answer any questions you have. The last time we talked, it definitely sounded like both of you were planning on applying on June 15th. I assume that you're both deep into looking at the application package, and you have all your registrations set up with grants.gov. Do you have any questions about navigating the application package or how that'll work with grants.gov?

ANA: No.

SAM: No questions here.

EMILY: What are you working with, right now? What are your challenges, right now, in getting the application finalized and wrapped up? Are you feeling like you're in a good place, or are there some things you're wrestling with?

ANA: I have a problem here, in Puerto Rico. We applied for the 501(c)(3) certification, and we paid for the expedited version. That was back at the beginning of March, and we still haven't received the 501(c)(3). I'm really worried about that because the municipality can't apply. I have to have the 501(c)(3), even though they are applying. I'm very worried about that.

EMILY: Does that mean, probably, that you do not have a DUNS identifier set up, yet? Do you have to have the 501(c)(3) first?

ANA: If we don't have the 501(c)(3), then the municipality can't apply. That's what I understood from the RFP.

EMILY: Right. A government agency can apply, but they have to do so in partnership with a 501(c)(3).

ANA: Yes, and we don't have it.

EMILY: In case it may not happen in the next two weeks, would you want to try to find another 501(c)(3) partner? Or would you want to put off until October?

ANA: We're the only 501(c)(3) that knows how to run the program. There is no other 501(c)(3) here, in Puerto Rico, that can run an IDA program.

EMILY: Could another 501(c)(3) have a different role, and you could both be partners?

ANA: Yes. We could find out.

EMILY: ...doing a VITA site, a free tax corporation.

ANA: Yes, we do that here, in the municipality.

EMILY: Is there a 501(c)(3) that is involved with that?

ANA: No. The municipalities offer itself with the Puerto Rican IRS. I approached another organization, and they were not interested because they wanted the administration money, and I'm the one that's going to do the work. I wasn't going to give them the money.

EMILY: Right. That's a reality, I guess.

ANA: Yes. That's a challenge.

EMILY: It sounds like waiting until the October deadline is going to be a better situation for you.

ANA: I hope not because the mayor is waiting for us to submit the application by this June, so we have to go to the legislature. We have the money.

EMILY: What other pieces do you need to get in place, after you receive your 501(c)(3) certification?

ANA: Go to the legislature, so they can do whatever they have to do in order to submit that resolution with the application, saying that the money is there and they approve that money is used for IDAs.

EMILY: Has the resolution been voted on?

ANA: No. It's ready, but it's not voted on. The legislature has been meeting every... It's in between the floor and the wall because if I don't have the 501(c)(3), then the legislature is not going to give me the money, either.

EMILY: I don't know that they need to give you the money. They need to give the applicants the money. I thought we were saying the principality was going to be the applicants.

ANA: Yes.

EMILY: Could you get the resolution approved with the principality as the applicants?

ANA: Yes.

EMILY: I would hate to put off this process any longer.

ANA: Yes. The resolution is ready. It's just a matter of presenting it to the legislature, so I don't think that should be a problem. I'll do it that way. We'll do it with the municipality as the applicant, and they don't even have to mention... On there, I said that we're going to be involved in the administration of the program.

EMILY: That would make sense to me. Primarily, the documentation needs to be addressed to the applicants, not the partners. It seems like you should be able to move forward with that.

ANA: Yes. Thank you.

EMILY: Do you know who, as the principality, would be the one to actually submit the application?

ANA: The Economic Development Department within the municipality.

EMILY: They have everything set up with the DUNS, the authorized organizational representative and all that kind of stuff?

ANA: Yes. I think so.

EMILY: I would encourage you to move forward with getting that documentation.

ANA: I'm actually writing to the mayor right now, with a program fact sheet. I almost lost this money. I had to call CSCD. I had to call everyone so they could give me some facts about IDA, so I could defend the project. I won, but I almost lost the money.

EMILY: It's not just getting it, in the first place. It's fighting to keep it. I wanted to hear about, sorry, something specific I was going to ask you. Really, the 501(c)(3) documentation is the only barrier to applying in June.

ANA: Yes, just that.

EMILY: Thanks for that update. We will definitely keep our fingers crossed that things can move forward.

ANA: If not, I'm going to mention to them what you just said; to get another 501(c)(3) to also be a partner, but without getting any money.

EMILY: That seems hard to do in two weeks.

ANA: No. The municipality actually has six non-profits. I'm the only one that doesn't have the 501(c)(3) because my organization is only two years old. We have other organizations, within the municipality, that have 501(c)(3), so that shouldn't be hard. The mayor is the president of all six boards of directors.

EMILY: Interesting. Well then, maybe.

ANA: All he has to say is "Partner."

EMILY: Let's switch gears to Ohio CDC Association. Sam, what stage are you at in the application process, and what are you wrestling with right now?

SAM: We've done it a couple times, so we're pretty familiar with it. The only trouble we're having right now is the trouble that we have every time, which is getting all of our partners' (*unclear*) and everything in on time.

EMILY: The partners' memorandum of agreement?

SAM: Yes. We ask for a whole list of things for them to send it to help us write the application correctly. Sometimes they can be a little slow about it.

EMILY: Right. They don't see it as quite as pressing as you do.

SAM: Yes because they are not the ones here on the 14th, into the night.

EMILY: Did you figure out how to respond to the question about availability of assets for purchase?

SAM: I've been doing a little research on it, and I think we'll be able to show availability. I'm not sure if it will be exactly what they're looking for. I don't know if you've talked to them further about it, if they have any further thoughts about it. Sorry. Were you going to say something?

EMILY: No, I haven't received any further guidance about what that would look like.

SAM: Yes, so there will be something in there about it, at the very minimum.

EMILY: Do you have any questions for me? Are there any ways that I can point you to resources that would help with getting the application completed?

SAM: I don't think so. I don't have any questions. I was just calling in and seeing if anybody else had anything, like a creative question that we didn't think about it. I don't think we have any further questions.

EMILY: It sounds like both of you know exactly what you need to do in order to get the application in before the June 15th deadline. I'll go ahead and wrap this up, unless you have any more questions, because it sounds like you know what you need to do. I'll let you get back to it.

ANA: We're fine. Thank you. I appreciate it.

SAM: Good to talk to you. Thank you.

EMILY: Thanks. Bye.

ANA: Bye.

SAM: Bye.