

AFI PPR Long-Form

Just the New Fields

The following fields are new to annual data collection for AFI. They are appearing for the first time as part of the new AFI PPR Long-Form for the reporting period of fiscal year 2015. The field numbers here correspond to the new AFI PPR Long-Form.

The following table can help grantees ensure their forms and data collection tools incorporate the new fields.

Project Activity	Where data is collected in PPR
Participant recruitment and enrollment	IDA Holder Enrollment: C001 – C003, C009 – C012 IDA Holder Demographics at Time of Enrollment: Section E, parts A only
Providing financial education and services to participants	Training, Services And Assistance Offered for AFI IDA Holders: Section D
Participant saving progress	IDA Savings: C004 – C008
Emergency and unmatched withdrawals	Unmatched Withdrawals: C040 – C058
Asset-purchases	Matched Withdrawals: C014 – C039 IDA Holder Demographics at Time of Enrollment, for IDA Holder Who Made Matched Withdrawal: Section E, parts A only IDA Holder Demographics at Time of Matched Withdrawal: Section F

Section A – Project Information and Administration

New fields regarding project information and administration include: the geographic service area and type of the project; source types of non-federal cash match now in-line with how they are referred to in the AFI Funding Opportunity Announcement; the amount of each non-federal cash source; and the number and names of project partners that independently open and administer AFI IDAs.

A003. Geographic Service Area

Use generally available geographic and/or political boundaries such as cities, counties, etc.

A004. Service Area Type

Selection Options – allows for multiple selections

- An Urbanized Area (UAs) of 50,000 or more people;
- An Urban Cluster (UCs) of at least 2,500 and less than 50,000 people;
- A Rural Area

A006. Non-Federal Cash Source Type

Selection Options – select one per source type

- Grantee organization
- Individual(s)
- State legislative entity
- Tribal legislative entity
- County legislative entity

- City legislative entity
- Other legislative entity (please specify)
- Foundation
- Financial Institution
- Non-profit service organization
- Other third-party organization (please specify)

A006. [Non-Federal Cash Source] Amount of Funds

A012. Number of project partners who independently open and administer AFI IDAs.

A013. Names of project partner organization(s).

Upload a Word, Excel, or PDF file that lists the full name project partners that independently open and administer AFI IDAs, acronyms will not be accepted. The number of partners on that list must be the same as the number reported in AFI-A012. Documents that include project partners' contact information are preferred, but not required. If you entered 0 in AFI-A012, do not upload a file.

Section B – IDA Design

One new field regarding IDA design is a text field for grantees to describe limitations on lump sum deposits.

B014. Limitations on Lump Sums Deposits [all asset types]

Describe the limitations on lump sum deposits (e.g. amount of lump sum deposits, frequency of lump sum deposits).

Section C – AFI IDA Holder Account Activity

New fields regarding AFI IDA holder account activity include: the number of applicants found eligible; the number of IDAs transferred into and out of the AFI project; the number of IDA holders who have met requirements for a making a matched withdrawal, but have not yet made a matched withdrawal; the number of IDA holders who made matched withdrawals in multiple asset categories; the number of IDAs closed following matched withdrawals; fields that break down emergency and other unmatched withdrawals into subcategories; and an optional field on the number of people on a waiting list to open an AFI IDA.

C002. Total number applicants found eligible.

Enter the number of applicants who were found eligible for an AFI IDA.

C005. Total number of AFI IDAs transferred to this grant from a different AFI grant held by your organization.

Enter the number of AFI IDAs transferred to this grant that were previously part of a different AFI IDA project held by your organization.

C008. Total number of AFI IDA holders who have met all requirements for making a matched withdrawal, but have not completed a matched withdrawal.

Enter the number of AFI IDA holders who have completed all requirements for making a matched withdrawal (e.g. saved for at least six months, reached savings goal, had business plan approved), but have not made a matched withdrawal.

C013. Optional: Number of people on the waiting list to open an AFI IDA because all available slots are full.

This is an optional question; no reply is required. Enter the number of people who are on the waiting list to open an AFI IDA on the last day of this reporting period.

C035. Total number of AFI IDA holders who made matched withdrawals in multiple asset categories

Enter the number of AFI IDA holders making withdrawals in multiple asset categories. For example, if an AFI IDA holder makes one matched withdrawal for post-secondary training and makes additional matched withdrawals for business capitalization.

C039. Total number of AFI IDAs closed following matched withdrawals and asset purchases by the AFI IDA holder.

Enter the number of AFI IDAs closed when AFI IDA holders withdrew their savings and received match funds for an authorized matched withdrawal.

C040 & C041. Total number/amount of AFI IDA holders who made an emergency withdrawal for expenses for medical care or necessary to obtain medical care.

Enter the total number/amount of AFI IDA holders who made authorized emergency withdrawals for expenses for medical care or necessary to obtain medical care for the AFI IDA holder or the spouse or dependent of the AFI IDA holder.

C042 & C043. Total number/amount of AFI IDA holders who made an emergency withdrawal for payments necessary to prevent eviction or foreclosure.

Enter the total number/amount of AFI IDA holders who made authorized emergency withdrawals for payments necessary to prevent the eviction of the AFI IDA holder from their residence, or foreclosure on the mortgage for the principal residence of the AFI IDA holder.

D044 & C045. Total number/amount of AFI IDA holders who made an emergency withdrawal for payments to meet necessary living expenses following loss of employment.

Enter the total number/amount of AFI IDA holders who made authorized emergency withdrawals for payments necessary to enable the AFI IDA holder to meet necessary living expenses following loss of employment.

C048. Total amount AFI IDA holder savings deposited to replenish AFI IDAs after authorized emergency withdrawals.

Enter the total amount of AFI IDA holder savings deposited to replenish AFI IDAs after authorized emergency withdrawals.

C051 & C052. Total number/amount of AFI IDA holders transferred to a different AFI grant held by your organization.

Enter the total number/amount of AFI IDA holders transferred to a different AFI grant held by your organization.

C053 & C054. Total number/amount of savings of AFI IDA holders who were terminated from the project because the AFI IDA holder did not meet project requirements.

Enter the total number/amount of savings of AFI IDA holders who were terminated from the project because the AFI IDA holder did not meet project requirements (e.g. failure to replenish emergency withdrawal within 12 months, did not meet required project deposit frequency, etc.).

C055 & C056. Total number/amount of AFI IDA holders who withdrew their savings and exited the project for any other reason.

Enter the total number/amount of AFI IDA holders who withdrew their savings and exited the project for any other reason. Please include here any AFI IDA holders that were not able to make a matched withdrawal and exited the project due to moving out of your service area, death, etc.

Section D – Training, Services and Assistance Offered for AFI IDA Holders

The PPR asks for the following information on the training, services, and assistance listed below. *Not all of these are changes from past data collection, but the new fields help to more uniformly apply the same questions across support offered.*

Questions:

1. Asks if provided and, if yes, if optional or required
2. If applicable, asks what is the hours or other requirement
3. Asks if support was provided by grantee, partner, or both
4. Asks for number of unique IDA holder who received the support

Training, Services, or Assistance	Question 1: If provided	Question 2: Requirement	Question 3: Who provided	Question 4: Participants receiving
D001-004. Economic literacy or financial education	X	X	X	X
D005-008. First-home purchase asset specific education or training	X	X	X	X
D009-012. Business capitalization asset specific education or training	X	X	X	X
D013-016. Postsecondary education or training asset specific education	X	X	X	X
D017-020. Financial counseling or coaching	X	X	X	X
D021-024. Budgeting assistance	X	X	X	X
D025-028. Credit counseling	X	X	X	X
D029-032. Loans	X	X	X	X
D033-036. Peer support	X	X	X	X
D037-040. Mentoring	X	X	X	X
D041-044. Case management	X	X	X	X
D045-048. Employment support	X	X	X	X
D049-051. Cash assistance	X		X	X
D052-054. Child care	X		X	X
D055-057. Transportation	X		X	X
D058-060. Medical treatment	X		X	X
D061-063. Crisis management treatment	X		X	X

Section E – AFI IDA Holder Demographics at the Time of Enrollment

New fields regarding AFI IDA holder demographics at the time of enrollment include: slight changes to the options in the race category; a separate ethnicity category; adding an option about pre-paid cards in the banking category; asking for the total household size; and adding additional options for the number of children and adults in a household.

E002. IDA Holder Race a. All IDA Holders b. IDA Holders Who Made Matched Withdrawal

Available Option	New?	Previous field name
Black		African American
Asian or Pacific Islander		
White		Caucasian
American Indian or Alaskan Native		Native American
Multiracial	New	
Unknown		
Declined to ID	New	

E003 IDA Holder Ethnicity a. All IDA Holders b. IDA Holders Who Made Matched Withdrawal

Available Option	New?	Previous field name
Hispanic or Latino		Hispanic (was in race/ethnicity field)
Not Hispanic or Latino		
Declined to ID	New	

E013 IDA Holder Banking a. All IDA Holders b. IDA Holders Who Made Matched Withdrawal

Available Option	New?	Previous field name
Ever held a checking account		
Ever held a savings account		
Ever used direct deposit		
Ever used a pre-paid card	New	
Declined to ID	New	

E014 Total Household Size a. All IDA Holders b. IDA Holders Who Made Matched Withdrawal

Available Option	New?	Previous field name
One	New	
Two	New	
Three	New	
Four	New	
Five	New	
Six	New	
Seven	New	
Eight+	New	
Declined to ID	New	

E015 Household Composition - Adults a. All IDA Holders b. IDA Holders Who Made Matched Withdrawal

Available Option	New?	Previous field name
One		
Two		
Three		
Four		
Five		
Six		Six or more
Seven	New	
Eight+	New	
Declined to ID	New	

E016 Household Composition - Children a. All IDA Holders b. IDA Holders Who Made Matched Withdrawal

Available Option	New?	Previous field name
One		
Two		
Three		
Four		
Five		
Six		Six or more
Seven	New	
Eight+	New	
Declined to ID	New	

Section F – AFI IDA Holder Demographics at the Time of Final Matched Withdrawal

The PPR has four new fields that ask for demographics information *at time of final matched withdrawal* for participants who made a final matched withdrawal.

F001. Participant Demographic at Asset Purchase - Educational Attainment

F002. Participant Demographic at Asset Purchase - Home Ownership

F003. Participant Demographic at Asset Purchase - Business Ownership

F004. Participant Demographic at Asset Purchase - TANF Recipients