

FO Call Minutes

4-7-09

Attending Call: Itzel Spehar, Brenda Lewis, Rebekah Barger, Thomas Jensen, Maggie Reilly, Letty Duran, Rebeca Potasnik, Deanne Grant, Kenny LaPoint, Laura Fritz, Leah Murray, Joy Hunt, Cynthia Winter

Not in Attendance: Mercy Corps NW, Warm Springs CAT

Check Ins:

CASA – has finalized funding awards with the majority of their partners. Partners are starting to get applications in.

E’Dev – is sorting out their funding for the year. They have received six applications to date which puts them near capacity for 2009.

NAYA – has just released their job announcement & description for an Achievement Coach. They hope to hire for this position in the very near future. They are accepting applications for educational and micro business IDAs. They have a short wait list for homeownership IDAs. Ben will be transitioning out of working on IDAs and into Financial Wellness. Irena Soloman will take his place on IDAs after tax season is over. They are holding Financial Wellness classes every other month now versus monthly. This has increased participation size. Their last class had 17 participants.

NI – Hired Laura Fritz as Housing Manager. She will oversee the IDA program at NI. They have set a deadline of May 15th for all IDA applications. To assist participants in determining if they are ready for an IDA, they have created a one page “IDA Fact Sheet” that outlines program requirements. If they are oversubscribed on IDAs they will initiate a lottery system to distribute available slots.

PHC – They have seen an increased demand for IDAs and have allocated all 2009 funding already. They have 12 qualified individuals on their wait list and are no longer accepting applications.

UCDC – started blasting a monthly email to participants to keep them motivated and engaged. They have also started a newsletter that goes out to current and past participants to keep the buzz about IDAs going in their community.

MCNW – no report

WSCAT – no report

Program Updates

- Outcome Tracker Webinars is scheduled for April 10th. It will focus on reports and queries.
- Quarterly Reports are due to Joy on April 21st – this will be the last time we use this reporting format. A new format will be presented and discussed during the May FO call.
- In June we will do “Best Practice Sharing” The following will be shared:
 - CASA – Options include financial institution training, education IDA models, an income calculation tool, and misconceptions around AFI funding
 - E-Dev – Will provide a topic to Joy no later than April 30th
 - NAYA – Will share their client coaching philosophy
 - NI – Will discuss the videos they have been incorporating into financial literacy classes
 - PHC – Outline for quarterly meetings with IDA grads that have met program requirements but not yet purchased their asset. These meetings are helping grads move into the purchase stage of program completion.
 - UCDC – IDA Newsletter and email
 - MCNW – The process of refining a microenterprise curriculum to fit client needs

- WSCAT –
- PSU Exit Surveys – 213 “completers” exit surveys have been received. Only 5 “non-completers” surveys have been received.
- Site Visits – Joy will be meeting with FOs this summer to review where they are on their work plans, diversity goals, etc. She will send PSU survey results out to the FOs prior to the meetings.
- Income Guidelines – HB2258 has passed and is waiting for the Governor’s signature. HB2258 will allow FOs to choose between 80% of AMI for the county or 200% of poverty to determine income eligibility – whichever is higher. The Bill must be signed and go through Rules and/or a waiting period before it can be put into use.
- Joy asked if there was interest in tracking “IDA success stories” via the website or a directory. This might include things like tracking IDA-financed business, homeowners, students, etc. in each county. The project would require FOs to provide regular updates to NPF to keep the information current; however, the data could be used to support business in your area that were started by IDAs as well as to inform legislators about what’s happening in their communities.
ACTION: We will continue this discussion at the June FO meeting. In the meantime, please send thoughts and ideas to Joy.
- Tax Credit Marketing – Cynthia has been meeting with a marketing guru that specializes in “convergence marketing” a targeted, specialized form of direct marketing as a method of reaching targeted audiences needing tax credits in a down economy. We will be pulling the FOs into this process as/if it develops.
- Vision Retreat – Joy is completing the minutes of the meeting. NPF will work with HCS and FOs to narrow and clarify our measurable outcomes. A refined list of measurable outcomes will be presented in June.

IDA Training Suggestions for June

- Using IDAs with Pass Accounts – Part II (build on previous training now that FOs are working with people that have Pass Accounts)
- IDAs and Foster Youth – What you need to know as well as tangible information on how to enroll foster youth in OT.

Meeting Adjourned