

## Summer 2013 Statewide Conversations

### I. Introductions

#### a. Who is in the room?

##### i. Name, Organization, Connection to IDAs

#### b. Oregon IDA Initiative

##### i. Brief Intro, History, and Growth Trajectory

1. The Initiative invests in the personal and financial growth of individuals to build strong communities throughout Oregon.
2. Legislation passed in 1999 – since then, we've been growing consistently as an Initiative.
3. 75% Tax Credit – \$10M limit hit in December 2012 for the first time. On similar trajectory now.
4. Largest IDA Initiative in country – over 2,750 graduates and 3,000 current open accounts!
5. Structure of the Initiative – current FOs, networks

##### ii. 2013 Funding process – why we're here.

1. Hit fundraising ceiling in December 2012, plateau for the near future.
2. Purposefully held back funding in Spring to be thoughtful and deliberate in how we invest our growth –
3. These statewide conversations are intended to influence how we evaluate future funding proposals as well as guide policy conversations as we move towards 2015 (Tax Credit Expiration).
4. We are hoping for input and insight into four topics:
  - a. New opportunities for the IDA Initiative to serve Oregon communities
  - b. Initiative structure, sustainability, and possible service model innovations
  - c. Feedback on the current scope and impact of the Initiative
  - d. Possible priorities to guide future growth of the IDA Initiative
5. Funding process will be discussed at the end of our time (and is detailed on the website).

### II. Where are we? (Share Data)

#### a. Who have we served and who are we serving?

#### b. Who/What is successful?

#### c. Who/What are we missing?

#### d. Are there other IDA delivery models we should be open to?

#### e. What should we be considering as an Initiative?

### III. Next Steps

#### a. Timeline:

- i. Currently – Statewide Conversations
- ii. August 30 – LOI are due
- iii. Sept 3-13 – Initiative partners discuss input and LOI
- iv. Sept 13 – Invitations for RFP are issued
- v. Oct 11 – Proposals due
- vi. Oct 31 – Awards announced
- vii. Nov 1 – Contracts begin