

Application Questions

Please include discussion of the following topics. If we already know the answer to the question, feel free to reference already existing knowledge without more depth or omit entirely. If we need more information, we will request it.

Vision, Outcomes, and Impact – no more than 1 page

- Explain the vision, purpose, and key outcomes of your proposal. If successful, what impact do you hope to achieve through your IDA project? How will that impact be shared with the entire Oregon IDA Initiative?

Organizational Capacity and Program Design – no more than 6 pages

- Reflecting on the past calendar year, please describe what you've learned and how your program has evolved. What were your most significant accomplishments in 2016? What were your most significant challenges?

Please describe how your organization operates as a Fiduciary Organization.

- Please describe your organization's leadership role as an FO in the Oregon IDA Initiative:
 - What unique expertise do you bring to the FO table? How will your organization contribute to the growth and success of the entire Oregon IDA Initiative?
 - Is your organization able to commit to participating fully in the FO leadership role over the 2017-18 program year? What does that look like?
- Please describe your organization's administrator role as an FO, in particular:
 - How does your program staff work across departments within your agency?
 - What challenges do you face? How are you supported in solving those challenges?

Please describe your proposed 2017-18 IDA project, including any new goals or innovations.

- What opportunities and challenges do you anticipate taking on in 2017-18?
- How are you considering strengthening your project's alignment with other state resources – leveraging already existing work of other agencies or creating more efficient systems to support participants? What challenges do you foresee in this effort?
- Which communities do you intend to work with and how will you reach them? Why is your organization best equipped to serve them?
- Will you develop new or deepen existing partnerships; if so, how? Are you considering any shifts away from current partnerships; if so, how and why? How do you plan to coordinate with other FOs who may be partnering with the same organizations in other or similar ways?
- Is your organization or network interested in piloting any new savings goals? If so, how will the expansion strengthen the Oregon IDA Initiative? What programs or plans do you already have in place that would support your expansion of asset categories?

Timeline for Implementation – no more than 1 page

- Please include a timeline for implementation, including a plan to over-allocate matching resources granted by March 31, 2018.

Proposed Use of Funds – no more than 1 page (this limit does not include the budget form)

- Seventy-five percent (75%) of award funds may be used for participant matching funds, twenty percent (20%) of funds granted for case management and education, and five percent (5%) for program administration. Please use the budget form attached to this application to briefly describe how you would use each category. If the standard percentages do not fit your project's needs, you may adjust the percentages in the form and include 1-2 paragraphs in your narrative describing why the proposed percentages are necessary.
- What other resources will you be leveraging with your IDA funds? How long will your budget for these grant funds last? Is there a point at which the program and admin to support clients associated with this award will need to come from another source?