

April 2024 FO Meeting



Agenda at a glance

9am	Welcome!
9:15am	20 min opening activity
9:35am	Initiative changes based on saver feedback- identifying top priorities
9:55am	Breakout Groups by priority
10:15am	Report-out from groups
10:35am	BREAK
10:50am	2024 work plan next steps / Q&A
11:05am	Breakout Groups: Reflecting on your racial equity goal from your 2023 work plan, or other equity advancements at your program or organization
11:45am	Report-out from tables
12:00pm	FO Report-out
12:30pm	LUNCH
1:30PM	Open Discussion/ FO Feedback
2:20pm	STRETCH BREAK
2:30pm	Breakout groups: As we engage the IDA Advocacy Coalition, OHCS, and Legislators about a plan for increased IDA funding, what questions do you have that need to be answered first?
3:00pm	Updates
3:30pm	Meeting adjourned

Confederated Tribes of Warm Springs

Bands of the Warm
Springs, Wasco and
Paiute Native American
Tribes

<https://warmsprings-nsn.gov/history/>



The Warm Springs reservation is dark blue and the land they ceded to the United States is light blue. The Columbia Basin is dark tan.

Opening Activity




- **The Opener//**
- Take It Back, back in the Day: Elementary, Middle, or High School
- **Recall a favorite song that invoked you to dream BIG and be carefree with creativity and wonder.**
- *What was the song/album? Please share the name of song/album and artist.*
- *What was the BIG dream? By chance did that dream come into existence?*
- Spend 5 minutes Reflecting and Recording your responses

Opening Activity



- **The Opener//**
- Take It Back, back in the Day: Elementary, Middle, or High School
- At your tables in pairs. Share Your Responses
 - 10 minutes Pair & Share
- **Recall a favorite song that invoked you to dream BIG and be carefree with creativity and wonder.**
- *What was the song/album? Please share the name of song/album and artist.*
- *What was the BIG dream? By chance did that dream come into existence?*
- Large Group – 1-2 Share- Outs – 5minutes



*What's a change in policy or practice **Initiative-wide** that we should consider in response to participant feedback?*

2024 Work Plans

Key Info

- No Quarter 1 Report - First report will be Q2, due end of October
- **Work Plan Drafts Due: May 15th***
- Work plan should cover 12-15 months (potential 3-month adjustment)
- Plan align with reporting progression quarter to quarter toward the goal
 - Successes
 - Progress
 - Challenges
 - Measurable Outcomes

2024 Work Plans

Process – instructions will be included in email

Step 1: New work plan template emailed – early next week

Step 2: Review & complete work plan template by May 15

Step 3: Schedule meeting w/NP to review/discuss

Step 4: Finalize work plan & budget for contract

Step 5: Sign contract

2024 Work Plans

Initiative-wide grant administration alignment

Goal 1: towards full allocation of funds from all open grant years. Please share any challenges or opportunities you have identified in reaching enrollment goals, while prioritizing equity.

Goal 2: Grant close-out: Close old grants (2019 and earlier) – FOs will need to request extensions if they still have grants prior to 2020.

Digital Accessibility

Minimum Initiative-wide goal: every saver has access to the portal to see saver info and savings module, and FO staff are equipped to support saver access.

Program Goals: What else might your program do to support digital accessibility for savers?

2024 Work Plans

Questions?

2023 racial equity work plan goal breakouts:

We aim to create a container and hold space for FOs to share and generate through reflection and information sharing around practice. This FO meeting we will be focusing on 2023 racial equity work plan goal.

Reflect on your racial equity goal from your 2023 work plan, or other equity advancements at your program or organization.

- Tabletop discussion with prompts. **(40 minutes)**
- Each group first identify report and note taker for large group share out **(5 minutes)**
- Large Group Report Outs **(15 minutes)**



2023 racial equity work plan goal breakouts:

Reflecting on your racial equity goal from your 2023 work plan, or other equity advancements at your program or organization, discuss the following questions in small groups:

- What were some successes related to your 2023 work plan racial equity goal or IDA Program's equity advancements?
- What were some challenges in advancing equity goals or activities?
- How did you measure outcomes?
- What external support did you receive that helped advance your equity goal?



2023 racial equity work plan goal breakouts:

Prompt Questions:

- What were some successes related to your 2023 work plan racial equity goal or IDA Program's equity advancements?
- What were some challenges in advancing equity goals or activities?
- How did you measure outcomes?
- What external support did you receive that helped advance your equity goal?

FO Report-out



Lunch



2025 Legislative Next Steps

- FOs should keep the people that need to be involved from your org connected to the IDA Advocacy Coalition
- Rep. Ruiz and Sen. Weber have committed to working with us in the lead-up to the 2025 session
- No simple magic bullet yet identified. It's political. Options we know of include:
 - Increasing the size of the tax credit
 - Increasing the sale price of the tax credit
 - Eliminating the tax credit and establishing a different funding source
 - ???



2025 Legislative Proposal

As NP engages Legislators, the IDA Advocacy Coalition, OHCS, and other stakeholders to develop a legislative proposal for a stable, increased IDA funding source:

- What questions do you have that need to be answered first?



Tax Credits

Donation total: \$7,853,875
- Tax credit balance (unclaimed): \$431,512.36

Consistent donations were coming in all the way through tax day

NP to extract and analyze data about 2023's Tax Credit

NP to identify ways for FOs to support increased donations in 2024

Already accepting IDA Donations eligible for 2024 IDA Tax Credits. Repeat donors are ready!



Survey Questions

NP sent a link to a survey for your feedback about those 2 questions:

Question 1: Do you agree or disagree: This one-time boost in funding should be used to fund FOs through June 30, 2025, also enabling the IDA Initiative to move to a July 1 Program Year start date

- 10 responses: 6 strongly agree, 3 agree, 1 neutral.

Question 2: Do you agree or disagree: NP should hold back a portion of the 2023 Tax Credit revenue to add it to 2025's grant.

- 10 responses: 3 strongly agree, 3 agree, 3 neutral, 1 disagree



RE:Conference

Session Proposals now open- Due May 31

Marketplace vendor applications also open



Saver Advisory Council

- NP is launching an IDA Saver Advisory Council, meeting quarterly starting later this month.
- Some members are the same savers that were on the panel at IDA Day.
- Goal is to learn from savers, be guided by savers, and inform future recommendations.
- NP will share more in the future, after the group identifies as specific areas of interest/focus.



Next Steps

Contracting Next Steps:

- Q4 work plans- Due April 30
- 2024 Program Year work plan Drafts- Due May 15
- Q4 Fiscal:- Due May 15
- 2024 Program Year Budget- instructions to come from Jane soon

Upcoming Meetings:

- IDA Advocacy Workgroup- May 2
- FO Call- May 16



Closing

I leave thinking...
I leave feeling...





Oregon **IDA Initiative**