

FAIM Coordinator Meeting

Wednesday November 17th, 2010 at Territory Golf Course, St. Cloud

Attendees: Jan Backlin, Cari Evavold, Jill Fyre Anderson, Kate Ouverson, Ann Macgregor, Mona Elmahdy, Heather Thormodson, Sarah Priest, Amanda Peterson, Steve Kaari, Robbie Stier, Joelle Hoeft, Rachel Forsyth, Wendy Heath, Danette Ringwalski, Shannon Lambert, Julia Cheng, Nancy Verstrait, Susan Hilla, Marcia Otte, Sandy O'Fallon, Emily Bedziack, Joan Karrow, Rhonda Otteson, Pauline Johnston, Teresa McCauley, Kelly Ehrenberg, Maggie Canby, Becky Johnson, Angela Larson, Wilhelmina Holder, Luta \_\_\_\_\_,

**Introductions and new news:**

Kelly: EAP has 3000 applications in already.

Rhonda: Received Sgt Schriever Award (Hooray for Rhonda!!).

Robbie: having financial audit currently

Maggie Canby

Steve: Filling in as Eric's in San Fran

Sandy: new ED

Emily: request from Patrick—interested in information/intake form for VITA... please send to him.

Susan: new ED, and HS review

Mona: 3 financial literacy classes coming up

Wendy: partnership developed with Workforce Center and LSS for Financial Literacy and is working really well. Having training on Holiday spending and keeping your budget in control. Also working on class for preparing for taxes.

Danette: Getting ready for HS review.

Marcia: today found out that Board of Child and Safety.

Angela: First community Connect event – 400 attendees and a big success! Partnership with MVAC and SW Minn Housing Partnership – having variety of courses in multiple languages.

Cari: waiting for auditor's questions. Last month, participated (framed pictures) in Extreme Home Makeover in Moorhead... watch for episode and January!

Becky: staff changes going on, departments shifting... next few months will be very busy. Colleen will be on maternity leave next month. Streamlining structure to benefit clients.

Kate: auditors have had many questions for FAIM payouts – all going well thus far. WCMCA also continued with Food Drops – 97 in one very small town... significant need in our communities. We had a

large donation of hand-knitted items to give away at the four communities. Nimble Fingers on the Prairie – will be receiving an Allies in Action Award this year from our agency.

### **State Report**

Joelle presented information from CFED conference regarding framework for achieving household financial security: offering as a resource. Center of Financial Innovations grant was applied for on behalf of FAIM program. CFED conference: Administration of Children and Families: adopting asset building in all of their program areas. Denise DeVan is assisting the Administration and might be a possible pairing with FAIM.

Tax Primer (old “To Your Benefit”) in-person training coming up on Jan. 11. Webinar also scheduled for Jan. 20<sup>th</sup>. Look for more info to come.

IRS calendar for self-employed individuals out – Joelle has order forms if you are interested (they are free). United Way calendars will be available again, and will be partnering with tax sites to distribute them statewide.

State budget: new legislative session – expect big changes esp. with state deficit and this year is a funding year. This will affect FAIM, HS, CSBG, and all other state grants.

FAIM is in the base – coming in already in the budget, and would have to be removed if they want to change it (means we’re in a good place). We will be working with WCMCA on grant contracts when we get word from state.

Ladders out of Poverty state taskforce: built out of the Commission to End Poverty. This taskforce is focusing on asset building. Have 3 subgroups: asset building, financial education, and community supports/engagements. Taskforce will meet on Thursday; Joelle will be talking about 4-cornerstones, Dan will talk about FAIM coaching/classes, etc.

Questions: Sarah - Citizen’s League is encouraging people to provide input on state budget changes.

Kate – republican party will be making rounds and announcing chairs of committees: please consider attending to support our causes. Dec. 9<sup>th</sup> – statewide meetings regarding taskforce will take place at various CAP agencies: please consider attending these as well.

### **Coordinator’s report**

Working with Dan Weber: will be having a training on Vista Share, spec. reports helpful for coaches. It will be in scheduled in January. Will also be having training on new tax law: W-9’s and how these affect FAIM payouts/processes. 1099s will now be required to be issued: this will mean we will need to get more info from vendors.

Thank you for your quick response to Cari’s request for information requested from auditors. We cheer for your promptness!!

Follow-up: as you request a payout, please include reason for the purchase. This is at the request of auditors and OEO. Can be as simple as stating as “home purchase” or “for landscaping business” etc.

Amended contract is now available on the website (for asset change). Please submit to Cari as soon as you have this completed for accuracy.

Extension request for 0375 has been submitted. Extension for 0423 will be submitted in December. Currently working on report to Congress – once it has been approved by AFI, it will be posted on the website. Will have ready by December: will outline of all funding, etc.

Currently in process of authoring new federal grant for new round of FAIM accounts. Seeking info on how long process will take so we can marry federal and state funds. Question: Sarah – new program for no match requirement? Kate – proposal, not a law yet, and has not moved forward yet.

Kate has been invited to be a part of taskforce subcommittee – both asset building and financial education.

Jan. 12<sup>th</sup> – training on 1099, Vista Share and Pam Johnson will present on strategies for communicating with law makers. Will be a full day – probably 10 to 3. Will most likely be in St. Cloud... will send out info as soon as things are locked down. FAIM 101 will also be available that day, and we can accommodate that as well.

Question: Sarah – can be similar training on Visions reports? Kate – please all send in what reports you need and we will get that information and have it available that day. Jan – keep in mind that the request needs to be specific about what information you would like a report to give you.

### **2011 Conference**

Jan – went through proposals for trainings. Have 18 filled now, and 3 or 4 more open. Looked at scheduling: Wed and Thurs is conference, and Friday is Daryl Dahlheimer. Will not be a dinner provided. Awards banquet will be at lunch. April 20<sup>th</sup>, 21<sup>st</sup> + 22<sup>nd</sup> for Daryl.

Kate: request came in was that some free time scheduled in would be appreciated. One duty-free meal will be an option now this year.

Question: Sarah – fee be reduced? Kate: yes, but now an extra fee for Daryl.

If you have requests for training or have a suggestion of speaker, contact us please.

### **Reporting by Grant:**

0423 will need to move 42 to 0375 (Metro area only). Our over-enrollment leaves us at a good position to do this. Average drop rate is 10/month.

### **VistaShare concerns:**

Program will be changes.

### **Documentation concerns:**

Cari – if you received info on September payouts, please take a look at this. Issues with third-party billing: we promised a larger amount than pay, the vendor can hold us responsible for that amount.

They do not want to bill the student for changes either, so make sure you are sending amendments/updates to Cari and the school.

Big stores are rejecting our checks (Telecheck company is the issue). Many small issues that are not things we can change. Resolution: before your client goes into the store, contact store management and explain the process. Have the client call our office if they do have issues with the cashier so we can work with Telecheck to get these processed while they are still in the store. If you can, please go with your client. Stores that have rejected our checks: Target, Best Buy, Sears. Mona – when go in with client and have issues, store asked for her personal id and holding her personally responsible for that check. Rhonda – is there something we can do at the corporate level? Heather – contacted store manager and had all items pulled, and client asked for manager and handled transaction. Kate – we will take all of these suggestions and try our best to solve this issue. Rhonda – suggests we hold merchandise with CC, but send check. Joelle – can we check with AFI resource center?

**FAIM visions Questions:**

Got together to refine visions program to make it easier. Will train at the Financial Literacy conference. Changed layout SRAS codes are also on spreadsheet. Major change: clients will be in 2 components- Financial Literacy will be its own component, and then their individual asset. Also added milestones, NPIs, and CAR codes. Will be available on the website to view. Joelle – currently tracking services provided, but only mandated to collect successes. Is this helpful? Kate and Jan – yes definitely, especially to give to funders.

**Q?/A=** Mona – have we resolved issues of soft/hard pull? Jan – have been working with credit bureau to get this resolved. Sarah – might be the difference between lending agencies and agencies who only do counseling. Account holders will have credit report pulled (by Bremer). Kate will call Cindy to make sure that this is not happening.

**Next meeting:**

January 12, St. Cloud Library 10-3