

Using Technology to Streamline Participant Experience and Increase Retention

AFI Virtual Coffee Webinar Series

July 12, 2017



Office of Community Services
Administration for Children and Families
U.S. Department of Health and Human Services

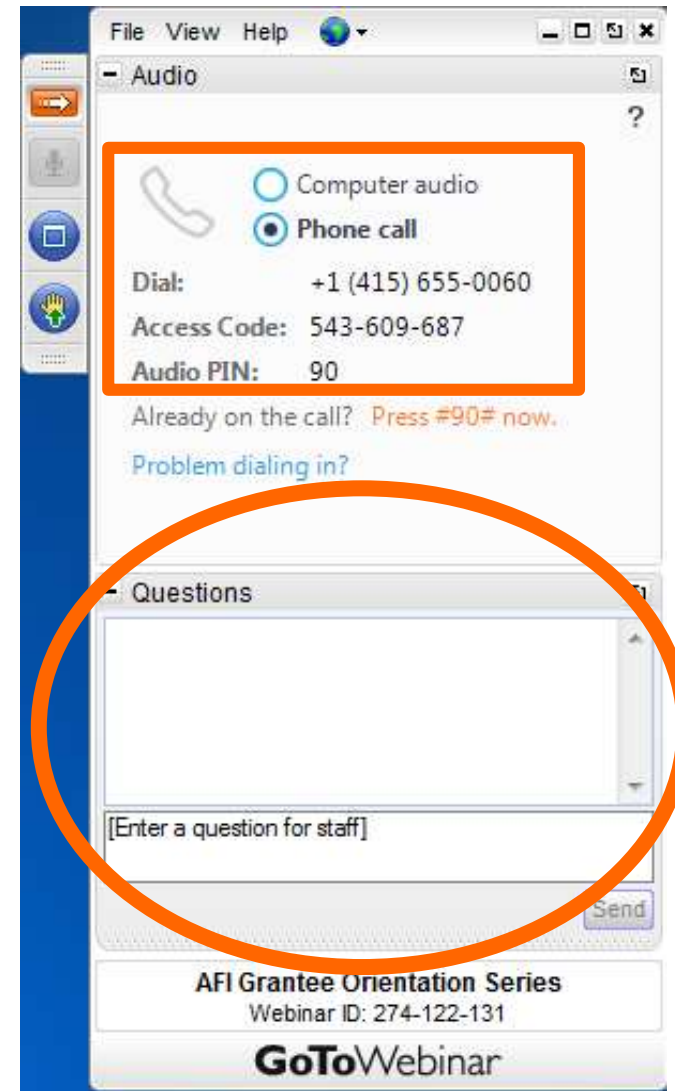


Introduction of Speakers

- Ola Wadibia, Prosperity Now
- Amy Shir, Prosperity Now

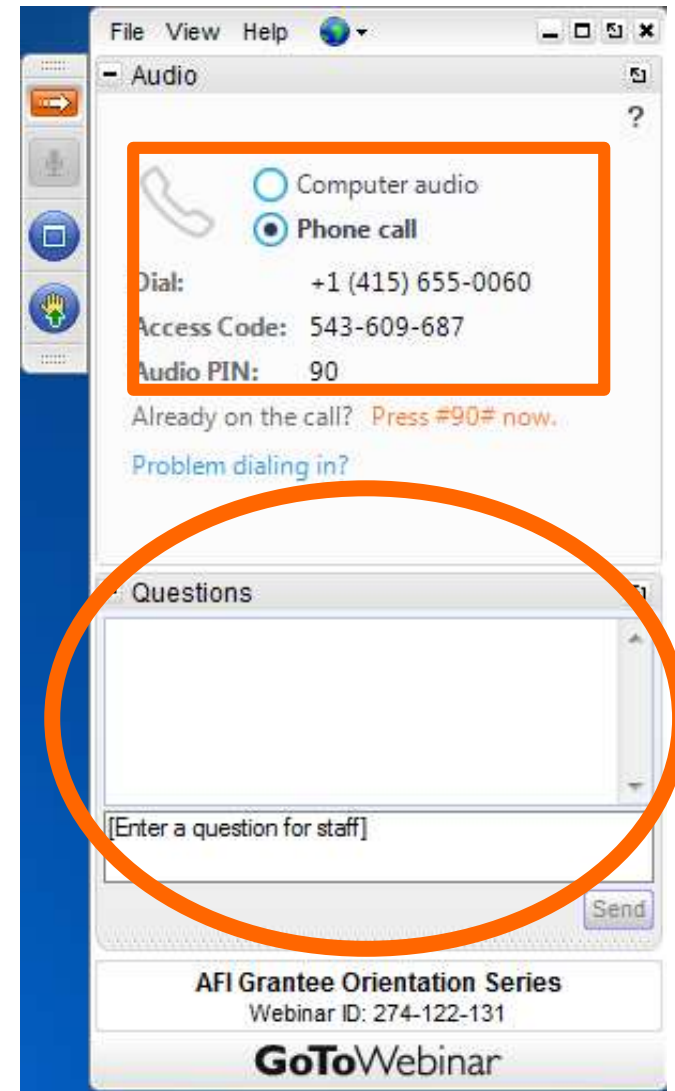
Connecting to Audio

- Choose the appropriate audio setting (computer or phone)
- Ask a question any time by typing the question into the text box on the GoToWebinar Control Panel
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 - Email us at ssueiro@prosperitynow.org



Housekeeping

- This webinar is being recorded!
 - All attendees are muted to ensure sound quality.
 - Though we might unmute selected attendees during the troubleshooting section.
 - A video recording and transcript will be available on idaresources.acf.hhs.gov at a later date.
- The webinar will last approximately 60 minutes.



Objectives for Today

- Learn about the IDA savings process and how to optimize the participants' experience and retention in the program using technology.
- Hear case studies and learn about fellow grantee experiences and challenges in using technological tools in their IDA program.
- Discuss the value added of using technology to optimize the process and increase participants' retention.
- Discuss strategies and resources that are useful for selecting a technological tool.

A Few Questions For You



What is your level of experience with managing an AFI project?



What is your role with your AFI project?



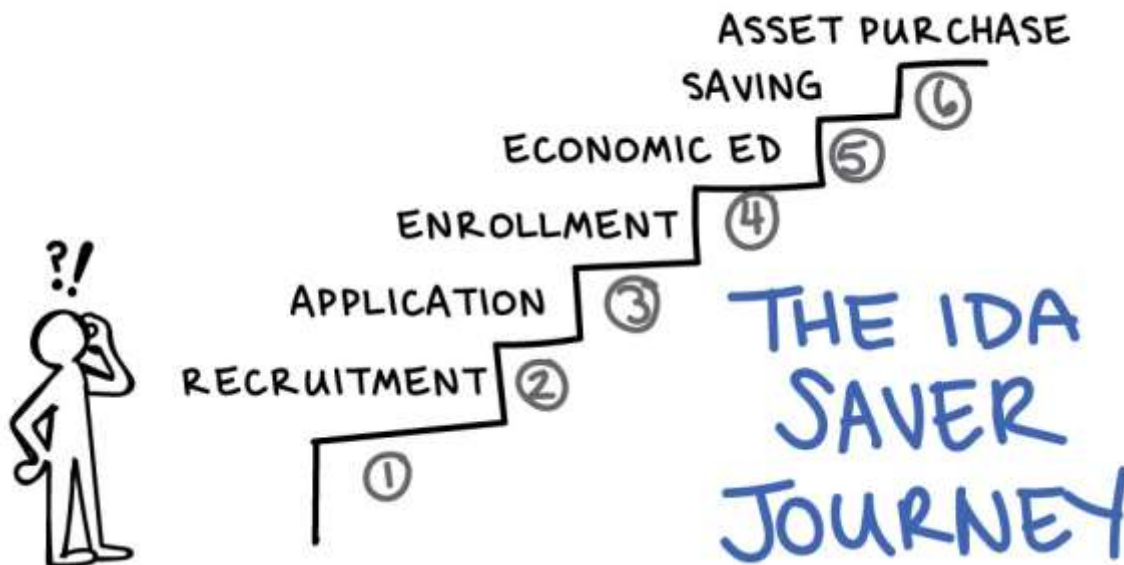
How satisfied are you with your participant retention?



A REFRESHER ON THE PARTICIPANT JOURNEY



Six Steps in the IDA Saver's Journey



Recruitment

- Who is your target population or target participant?
- How do these prospective participants learn about the IDA project?

Application

- How do prospective participants initiate the process to enroll?
- How does your program determine eligibility?

Enrollment

- How do eligible participants begin their participation in the program?

Economic Education

- What asset specific education will you offer to and require of participants?
- In what format will the education be delivered, who will provide it and what curricula will be used?

Saving

- How do participants deposit their savings?
- How can the project support participants in their savings journey?
- How will participants track their savings?

Asset Purchase

- How will participants know they have met their goal?
- How will they make their asset purchase?

PANELIST: AMY SHIR,
PROSPERITY NOW



Why Streamline the Participant Experience?

- Support participants complete their asset purchases in a timely fashion
 - What are the participant's challenges with completing their savings, taking financial and asset-specific education, and completing their asset purchases?

Why Streamline the Participant Experience?

- Leveraging technology
 - Helps anticipate and resolve challenges that arise for participants' and prevent them from achieving an asset purchase
 - Supports the smooth administration of the program so grantees meet the AFI requirements

Challenges Participants Might Encounter

- **Scenario #1:** Student attempts to balance school and work and forgets about the savings timeline
- **Scenario #2:** Single parent is limited by transportation barriers and struggles to come to classes or go to financial institution
- **Scenario #3:** Life happens – participant loses job, is evicted, experiences medical emergencies, etc.

Challenges Program Administrators Might Encounter

- Nearing end of grant period
- Using your 15% administrative dollars effectively to communicate with clients and get them to complete the program and make an asset purchase

Meeting People Where They Are

- How do we make participation more accessible?
- How can we make the process more cost-effective for program administrators?

More Questions For You



Communicating Regularly:

How are you communicating with clients during the savings period?

- Texting or emailing clients prior to their next savings deposit
- Texting or emailing clients after a missed savings deposit
- Texting or emailing prior to their next class or coaching session
- Texting or emailing after their class or coaching session
- Other



Virtual Education

What type of economic education do you provide?

- Virtual
- In-Person
- Both



Tracking Savings:

Can clients view their accounts and match accrual online?

- Yes
- No



Virtual Supports:

How do you provide case management and financial coaching services?

- Remote
- In-person
- Both

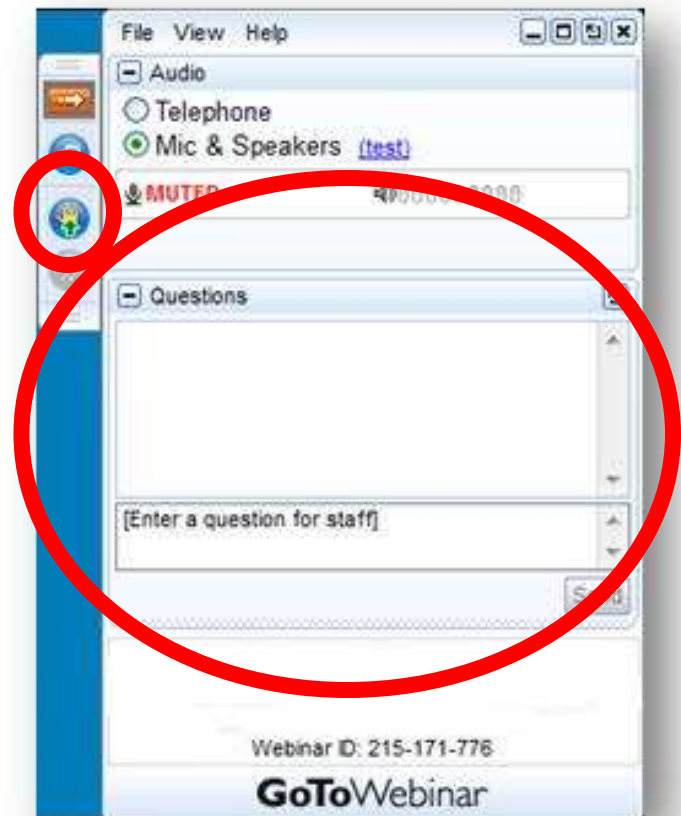


Troubleshooting Discussion:
Support your fellow grantees with
technological solutions



Audio Reminder

- We will select a series of questions to troubleshoot during this session
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AFI Resource Center

- Home: idaresources.acf.hhs.gov
 - Calendar: <http://idaresources.acf.hhs.gov/Calendar>
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- Help Desk:
 - Email: info@idaresources.org
 - Phone: 1-866-778-6037

Thank You!

