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# Report to Congress:

## Assets for Independence Program

Status at the Conclusion of the Fifteenth Year

Results through September 30, 2014

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

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## Executive Summary

This Fifteenth Annual Report presents the status of the Assets for Independence (AFI) program as of the end of fiscal year (FY) 2014, including the understanding of AFI program policy and specific project operations. It provides a brief overview of the AFI program's origin and ongoing administration, basic mechanics, and operational characteristics. The Report also identifies key outputs and critical outcomes. This report does not necessarily reflect current AFI program policy and operations as there may have been changes since FY 2014.

### Why Asset Building Matters

Asset building is an anti-poverty strategy that seeks to help low-income people move toward greater self-sufficiency by accumulating savings and acquiring long-term assets. Assets such as postsecondary education, homeownership, and business development offer individuals and families the opportunity to support long-term economic development by allowing them to invest for their future. Asset building is a complement to anti-poverty programs that support income for day-to-day needs. Asset building programs can help low-income individuals and families set goals, plan for the future, and progress toward financial stability and self-sufficiency.

### Program Overview

The Assets for Independence program was established by the Assets for Independence Act ("the AFI Act") in Title IV of the Community Opportunities, Accountability, and Training and Educational Services Act of 1998 (Public Law 105-285). The Office of Community Services (OCS), within the Administration for Children and Families (ACF), at the U.S. Department of Health and Human Services (HHS), administers the AFI program. The AFI program is a multi-site, national demonstration supporting innovative asset building projects, which feature Individual Development Accounts (IDAs), financial education, and related services that enable low-income people to improve their economic status and become self-sufficient.

The program involves three components: (1) grant funding for IDA projects; (2) support for grantees and their partners through federal staff support and training and technical assistance provided by the HHS AFI Resource Center; and (3) ongoing research and evaluation on the impacts of AFI projects and IDAs.

IDAs are restricted savings accounts through which low-income, asset-poor individuals combine their own savings with matching public and private funds to purchase a first home, capitalize a business, or pay for postsecondary education or training. AFI projects must assist participants in the demonstration project in obtaining the skills and information necessary to achieve economic self-sufficiency.

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Congress has appropriated funds for the AFI program annually since FY 1999. In FY 2014, funding for the AFI program totaled approximately \$19 million. Per Sections 404(7) and 405(g) of the AFI Act, the AFI program is authorized to award grants to the following entities:

- ▶ All non-profit entities with 501(c)(3) status;
- ▶ State or local government agencies, or tribal governments, applying jointly with a non-profit with 501(c)(3) status;
- ▶ Financial institutions that are federally certified as either a Low-Income Credit Union or a Community Development Financial Institution and that demonstrate a collaborative relationship with a local community-based organization whose activities are designed to address poverty in the community and the needs of community members for economic independence and stability; and
- ▶ Entities deemed eligible under Section 405(g) of the AFI Act, specifically the Indiana Housing and Community Development Authority and the Pennsylvania Department of Community and Economic Development.

Grantees use each AFI grant to support one AFI project for five years. Some grantees are administering concurrent grants, meaning they are managing several AFI projects simultaneously. Through FY 2014, HHS has funded 438 organizations to implement 846 regular AFI projects. HHS has also awarded an additional 27 grants to the states of Indiana and Pennsylvania to implement two special state AFI projects. Results of those projects are presented separately in **Section 7**. Additionally, 13 AFI grants have been made under the Native Asset Building Initiative, described in **Section 8**. Please note, the term “regular AFI projects” is used throughout this report to refer to all AFI projects that are not the special state AFI projects or AFI projects awarded under the Native Asset Building Initiative.

HHS provides training and technical assistance to AFI grantees and their project partners, as appropriate, primarily through the AFI Resource Center. The AFI Resource Center works to increase knowledge about providing IDAs and related services. It conducts periodic training webinars and administers a website available to all AFI grantees.

## **AFI Grantees and the Projects Administered**

AFI projects are distributed across the nation. While many projects are focused on particular localities and/or neighborhoods, others administer projects that serve statewide, multi-state, or nationwide areas.

Grantees work in partnership with many organizations to provide participants with support and assistance to succeed with IDAs. They collaborate with community-based organizations to provide financial education, credit counseling, and other services, such as first-time home buyer assistance, support for starting a small business, and help with planning to attend higher education. Grantees also work closely with financial institutions, such as banks and credit

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unions that hold participants' IDAs and project reserve funds. AFI projects must assist participants in the demonstration project in obtaining the skills and information necessary to achieve economic self-sufficiency. Training may focus on such topics as budgeting, responsible credit use, savings, investments, and taxes. Many grantees also provide "asset-specific" training on homeownership, postsecondary education, and entrepreneurship. Some grantees offer other support services to their AFI project participants such as employment assistance, transportation, and medical care referrals.

- ▶ On average, projects reporting through FY 2014 required participants to complete **11.3 hours of financial education** training before purchasing an asset.
- ▶ Many projects required participants to attend training focused on the type of asset being purchased. The average number of hours required for training varied by asset purchase type, ranging from **5.0 hours to 9.8 hours**.
- ▶ **Sixty-nine percent of projects provided financial counseling.** Sixty-eight percent provided credit repair for participants, 37 percent provided advanced financial education, and 28 percent offered loan assistance. The most frequently offered services are financial counseling, credit repair, mentoring, peer support, structured planning exercises, crisis management, and employment support.

### **Characteristics of IDAs Provided by AFI Projects**

HHS encourages grantees to customize their AFI projects to meet the unique needs of their populations and geographic areas. Therefore, features and requirements vary greatly among the AFI projects.

AFI grantees may offer IDA match rates (combining federal and non-federal matching funds) ranging from \$1 to \$8 for each \$1 of earned income saved by a participant. AFI projects may use up to \$2,000 of federal funding and must use at least the same amount of non-federal funding to match participant IDA savings within the project period. Match rates and participant monthly savings requirements vary by project. In FY 2014:

- ▶ Eighty-eight percent of AFI projects allowed their participants to pursue homeownership as an asset goal, 86 percent allowed participants to pursue postsecondary education or training, and 81 percent allowed business capitalization. Twenty-eight percent of all projects allowed participants to transfer account savings to a spouse's or dependent's IDA.
- ▶ A match of \$2 for each \$1 saved was the most common match rate across all three major asset purchase goals.
- ▶ Maximum amounts matched varied among projects, and ranged from \$130 to \$4,000; the average was \$1,545 for the five-year project period.

- ▶ Among projects that have required participants to make a minimum monthly savings deposit, the amount of that minimum varies. The average minimum monthly deposit amount was \$27.

## Characteristics of IDA Holders

The primary characteristics of individuals with IDAs have remained relatively constant over the demonstration's 15 years, even with considerable growth in the number of AFI projects across the nation. Please note, characteristic information was not reported for some account holders, therefore not all categories will total 100 percent.

- ▶ **Gender.** Of all account holders, 70 percent were female and 27 percent were male.
- ▶ **Race/Ethnicity.** Of all account holders, 40 percent were African American, 28 percent were Caucasian, 17 percent were Hispanic, five percent were Asian American, two percent were Native American, and four percent were "other."
- ▶ **Marital Status.** More than half of all account holders (52 percent) were single at the time of enrollment, while 21 percent were married, 13 percent were divorced, five percent were separated, and one percent was widowed.
- ▶ **Number of Adults in Household.** More than half of all account holders (53 percent) lived in a household with only one adult at the time of enrollment (i.e., lived alone or were single parents), while 29 percent lived in a household with two adults; nine percent lived in a household with three or more adults.
- ▶ **Number of Children in Household.** Of all account holders, 66 percent were members of a household with at least one child at the time of enrollment; twenty-one percent of all account holders lived in a household with three children or more.
- ▶ **Household Income.** Of all account holders, 38 percent had household incomes greater than 150 percent of the federal poverty line<sup>1</sup> at the time of enrollment; twenty-two percent reported income between the poverty line and 150 percent of the poverty line, while a similar percentage reported income below the poverty line (26 percent).
- ▶ **Residence Area.** Seventy-nine percent of account holders live in urban areas (major or minor), while 14 percent live in rural or remote areas.
- ▶ **Education Status.** A large majority of participants completed high school or some postsecondary education or training at the time of enrollment (82 percent). More than half of account holders (53 percent) had at least some college education at the time of enrollment, while 15 percent held a bachelor's or graduate degree.

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<sup>1</sup> The federal poverty line for 2014 for most of the U.S was \$11,670 for an individual plus \$4,060 for each additional person. For more information, see <http://aspe.hhs.gov/prior-hhs-poverty-guidelines-and-federal-register-references>.

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- ▶ **Age.** Thirty-one percent of all account holders were 30 to 39 years of age at the time of enrollment. Approximately one-fourth of account holders (26 percent) were in their twenties, while 19 percent were in their forties.
  - ▶ **Employment Status.** Eighty-one percent of IDA participants were employed either full-time or part-time. Three percent of all participants were unemployed or retired at the time of enrollment (these participants would have to become employed or otherwise have a source of earned income in order to make deposits into their IDAs).
  - ▶ **Account Holder Banking Experience.** AFI grantees provide information about account holders' experiences with various banking services prior to enrollment, as well as their use of automatic allotment/direct deposit service to make contributions to their IDAs:
    - Half of all account holders (50 percent) had ever held a savings account.
    - About two-thirds (65 percent) had ever held a checking account.
    - Twenty-one percent had ever used direct deposit for their paychecks.

## Program Outputs and Outcomes

The following bullets summarize the major outputs and outcomes for the regular AFI projects through FY 2014.

- ▶ **Outreach and Enrollment.** Through FY 2014, 241,791 individuals participated in orientations at regular AFI projects. Of those who attended an orientation, 96,982 opened an AFI IDA.
- ▶ **Completion of General Financial Education and Asset-Specific Training.** Through FY 2014, regular AFI projects reported that 96,989 participants completed general financial education requirements, averaging 11.3 hours of training. In addition, 36,114 participants completed training related to homeownership, 19,030 participants completed training related to business capitalization, and 21,553 participants completed training related to postsecondary education.
- ▶ **Accounts Opened.** Through FY 2014, a total of 96,982 individuals opened 98,295 AFI IDAs. 7,256 of these accounts were opened in FY 2014.
- ▶ **Intended Use of IDA Savings.** Through FY 2014, 50 percent of all participants enrolled in an AFI project with the intention of using their IDAs for purposes of purchasing a home, while 20 percent enrolled with the intention of capitalizing a business, and 26 percent enrolled with the intention of pursuing postsecondary education or training.
- ▶ **Savings Deposited.** In the 98,295 IDAs opened in regular AFI projects through FY 2014, account holders have deposited a total of \$100,026,683 in earned income, or an average of \$1,018 per account.
- ▶ **Withdrawals.** A total of 86,853 participants have withdrawn \$83,728,464 of earned income saved in their IDAs. A total of 44,995 participants made withdrawals for asset

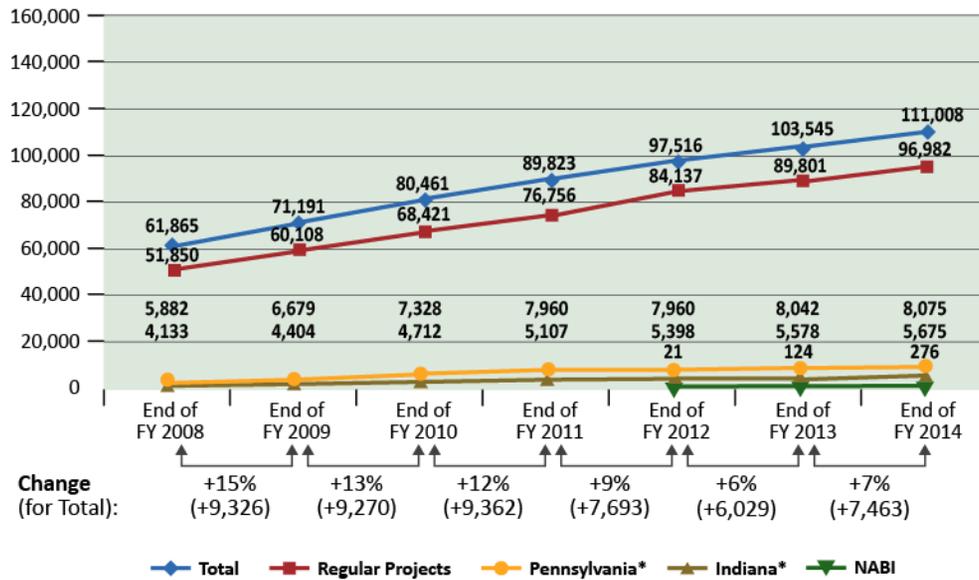
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purchases; 5,245 participants made approved emergency withdrawals; and 36,613 participants made unapproved withdrawals.

- ▶ **Asset Purchases.** Through FY 2014, 44,995 participants withdrew a total of \$197,356,454—\$57,600,739 in participant savings, \$66,213,023 in federal match, and \$73,542,693 in non-federal match funds for purchasing an asset or transferring to the IDA of a spouse or dependent. The average amount of savings plus matching funds withdrawn was \$4,386.
  - 15,480 participants withdrew a total of \$77,361,371 to purchase a home: \$23,552,768 of their own savings, \$25,164,684 in federal match, and \$28,643,919 in non-federal match. The average amount of savings plus matching funds per home purchase was \$4,998.
  - 12,570 participants withdrew a total of \$55,014,309 to capitalize a business: \$16,747,717 of their own savings, \$18,665,519 in federal match, and \$19,601,073 in non-federal match. The average amount of savings plus matching funds to capitalize a business was \$4,377.
  - 16,726 participants withdrew a total of \$64,166,361 to pay for postsecondary education: \$17,111,715 of their own savings, \$22,070,882 in federal match, and \$24,983,764 in non-federal match. The average amount of savings plus matching funds for postsecondary education or training was \$3,836.
  - 219 participants transferred \$188,539 of their own savings plus match funds to a spouse's or dependent's IDA.

## Exhibit ES 1: Results for Regular AFI Projects and Special State Projects Through FY 2014

### Number of Participants Who Opened IDAs\*



\* State numbers only reflect participants who opened IDAs with AFI support.

### SUMMARY OF RESULTS

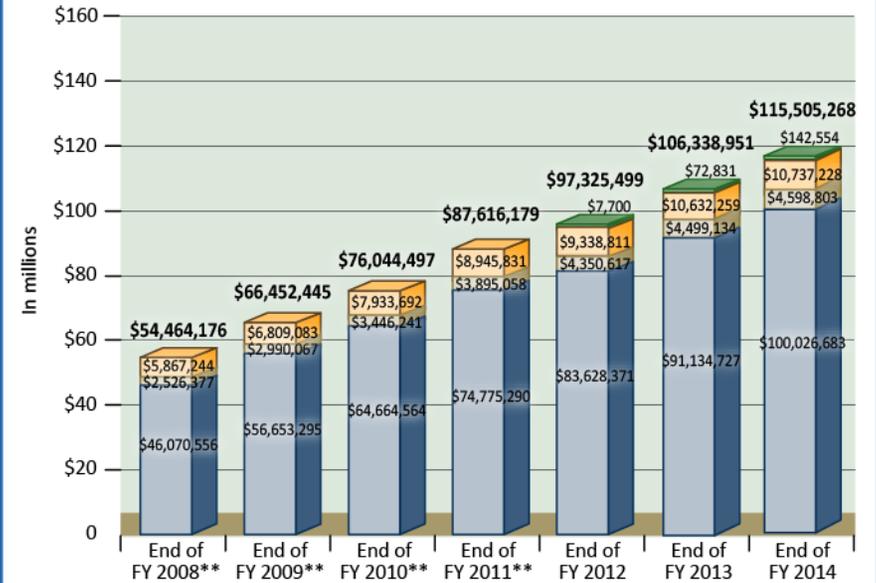
Through FY 2014, 111,008 participants opened IDAs – 96,982 in regular AFI projects, 13,750 in special state AFI projects, and 276 in NABI projects—and deposited \$115,505,268 of earned income into their IDAs.

Approximately 53,900 participants completed financial education and used their IDA savings and matching funds for asset purchases. The following numbers of participants withdrew funds from their IDAs for approved purchases:

- ▶ 17,569 for homeownership
- ▶ 13,569 for business capitalization
- ▶ 19,511 for postsecondary education or training
- ▶ 2,976 for other asset purchases (allowed in the State of Pennsylvania only); and
- ▶ 231 for transfers to IDAs of a spouse or dependent.

Participants used approximately \$225.8 million for asset purchases, which includes the combined value of their own IDA savings (\$67.0 million) and matching funds (\$158.8 million).

### Cumulative Amounts Deposited into IDAs by Account Holders\*



Average Deposits Per:

NABI IDA:					\$367	\$587	\$517
Pennsylvania IDA:	\$997	\$1,019	\$1,083	\$1,124	\$1,056	\$1,322	\$1,330
Indiana IDA:	\$611	\$679	\$763	\$730	\$780	\$807	\$810
Regular Project IDA:	\$889	\$943	\$945	\$974	\$994	\$1,015	\$1,031

\* Some of the state numbers in this graph are estimations or approximations.

\*\* Indiana numbers for FY 2008 – FY 2011 only represent participant savings that qualified to be matched by the state.



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## Program Inputs

Through FY 2014, HHS has awarded 886 AFI grants totaling approximately \$241.7 million. These grants included approximately \$214.2 million awarded to 438 organizations to implement and administer 846 regular AFI projects. These grants also included \$2.3 million awarded to 13 organizations to implement and administer AFI projects as part of the Native Asset Building Initiative. In addition, \$25.2 million was awarded to the states of Indiana and Pennsylvania via 27 grants for the special state AFI projects.

Grantees are required to support their AFI projects with a combination of federal AFI funds and cash from non-federal sources, and must adhere to requirements of the AFI Act regarding the maintenance of such funds.<sup>2</sup> The amount provided by non-federal sources must be at least equal to the federal AFI grant amount. Grantees maintain federal and non-federal match funds in the project reserve funds, from which they support program costs and provide funds to match participant IDA savings.

Grantees may deposit non-federal funds as they wish in terms of amount and timing throughout the project period. However, they must deposit into their project reserve fund an amount of non-federal funds at least equal to the amount of AFI funds requested in order to draw down federal funds. As of the end of FY 2014, AFI grantees deposited \$144,913,287 from non-federal sources into their project reserve funds, while drawing down a cumulative total of \$134,939,850 of their federal AFI grants.<sup>3</sup>

## Special State AFI Projects in Indiana and Pennsylvania

AFI supports two special AFI projects administered by the states of Indiana and Pennsylvania. These states were administering state-level IDA programs before the AFI program was created. The AFI Act (Section 405(g)) authorizes HHS to award grants to further these states' ongoing IDA programs (Applications from the states are evaluated competitively and awarded on merit). Because programs in Indiana and Pennsylvania are based partially on state law rather than the AFI Act, elements of these special AFI projects are different from regular AFI projects. For example, requirements for participant eligibility, saving patterns, and allowed purchases vary slightly in the state programs.

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<sup>2</sup> Note that all grantees received federal AFI funds to support their projects. Some grantees also receive other federal funds to support other services provided to clients who are participating in AFI projects. Unless otherwise indicated, all references to "federal funds" in this report are to only the federal AFI grant, not any other federal funds grantees have received.

<sup>3</sup> Note that not all funds awarded were drawn down because AFI grants have five-year project periods. Grantees may draw down the funds in any increment as needed over the period. For example, they may draw down the entire amount early in the project period or at intervals throughout their project.

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### *Indiana IDA Program*

In Indiana, the following outcomes have occurred since 1999:

- ▶ 5,675 participants have opened IDAs and a total of 4,715 participants have completed their savings and received matching funds with support of AFI grants.
- ▶ Participants have withdrawn an average of \$639 from their IDAs for qualified asset purchases.
- ▶ Forty-eight percent of participants used their IDA resources for education, while 33 percent used their IDA resources for homeownership and 19 percent used their IDA resources for business capitalization.

### *Pennsylvania Family Savings Account Program*

In Pennsylvania, the following outcomes have occurred since 1999:

- ▶ 8,075 people have opened accounts, and, of these, 1,111 participants have completed their savings and received matching funds with support of AFI grants.
- ▶ Participants have withdrawn an average of \$1,558 in savings and received an average of \$1,555 in matching funds to buy a home, obtain higher education, capitalize a small business, and finance home repair or automobile purchase, and other purchases allowable by the FSA program.

### **Native Asset Building Initiative (NABI)**

The Native Asset Building Initiative (NABI) is a joint funding opportunity offered through a partnership between the AFI program and Social and Economic Development Strategies (SEDS) program administered by ACF's Administration for Native Americans (ANA). The purpose of this initiative is to increase access to and awareness of asset building opportunities in native communities.

Under NABI, organizations administer one project with two grants: one AFI grant and one SEDS grant. These programs are complementary, both supporting economic self-sufficiency. Grantees use their AFI funds to match participants' IDA savings, following the same rules as regular AFI projects. Grantees may use their SEDS funds to support NABI project administration and other project activities, such as asset building strategies other than IDAs. Projects funded under this initiative plan to provide an array of services that will help native individuals and families achieve greater financial stability.

### *NABI Projects*

AFI has awarded grants under NABI for four consecutive fiscal years. In FY 2011, five organizations were award grants totaling \$1.1 million to implement the AFI portion of their NABI projects. In FY 2012, AFI awarded grants to four organizations, totaling \$600,000. In FY

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2013, AFI awarded grants to two organizations, totaling \$330,000. In FY 2014, AFI awarded grants to two organizations, totaling \$272,463.

Through FY 2014, 276 participants opened IDAs with AFI support. Participants had deposited \$142,554 in personal savings (an average of \$517 per participant). Participants also used \$49,203 of their own savings to make qualified asset purchases (an average of \$834 per participant). The total amount of matching funds disbursed (AFI and non-federal funds combined) was \$176,034.

## **Program Evaluation and Other Activities**

In the fall of 2011, ACF launched a random assignment evaluation of the impact of AFI program participation on savings, savings patterns and asset purchase by low-income individuals and families at two AFI grantee sites. This random assignment evaluation will improve understanding of the program's overall impact on early participant outcomes. The two study sites have been selected – RISE Financial Pathways in Los Angeles, CA and Prosperity Works in New Mexico.

The final report with early results, approximately 12 months after random assignment, will be available in 2016.

This experimental study builds on the 2008 AFI quasi-experimental evaluation<sup>4</sup> as well as various studies of other non-AFI funded IDA projects, and offers the first rigorous, experimental test of the AFI program. The 2008 evaluation, which used data collected from the early- to mid-2000s, found that individuals and families derived substantial benefits from participating in the program. Participants were 35 percent more likely to become homeowners, 84 percent more likely to become business owners and nearly twice as likely to pursue postsecondary education or training compared with a corresponding national sample of AFI-eligible non-participants in the general U.S. population.

AFI is an important platform for bringing IDAs, financial education, credit and debt counseling, access to federal tax credits, and other financial capability and asset-building strategies to working families throughout the nation. Collaborations have included pilots with Head Start grantees in Massachusetts and Pennsylvania and the Utah State Temporary Assistance for Needy Families (TANF) agency. ACF provides support through its national AFI Resource Center, which is an important source of information, best practices, and guidance on IDAs and related services for AFI grantees and other organizations. In addition to collaborating with other programs within ACF, the Office of Community Services (OCS) is actively engaged in the Financial Literacy and Education Commission (FLEC) as a way to disseminate and leverage the knowledge developed through the AFI program with other federal partners. For example, ACF

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<sup>4</sup> Available online at <http://www.acf.hhs.gov/programs/ocs/resource/afi-program-evaluation>.

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partnered with the Consumer Financial Protection Bureau to explore how financial capability services can be integrated into youth employment programs.

Through the AFI Resource Center, ACF provides training and technical assistance to all AFI grantees and, as appropriate, their partners. This information is presented via topical conference calls and webinars, customized technical assistance, and a website.

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## Introduction

The Fifteenth Report to Congress provides an update on the status of the Assets for Independence (AFI) program through the end of fiscal year (FY) 2014, including the understanding of AFI program policy and specific project operations. This report does not necessarily reflect current AFI program policy and operations as there may have been changes since FY 2014. This section presents the overall organization of the Report, as well as briefly describes the methodology upon which the underlying analysis is based.

The term “regular AFI projects” is used throughout this report to refer to all AFI grants that are not the special AFI projects administered by the states of Indiana and Pennsylvania or AFI projects awarded under the Native Asset Building Initiative. Information on these projects is presented separately, in **Sections 7** and **8** respectively.

### Organization of this Report

This report includes nine sections and an appendix, organized within the following framework:

- ▶ **Section 1: Program Overview.** This section provides an overview of the AFI program, including the status of the ongoing program evaluation, as well as detailed information about the AFI program’s core elements.
- ▶ **Section 2: AFI Grantees and the Projects Administered.** This section of the report presents information on the variety of organizations that have received AFI grants and are administering Individual Development Account (IDA) projects. It highlights two major types of AFI-funded IDA projects—single agency projects and network projects—and provides information on sources of non-federal funding used. It also includes details on staffing arrangements and the various types of training and supportive services that grantees provide to the participants.
- ▶ **Section 3: Characteristics of IDAs Provided by AFI Projects.** This section presents descriptive information on allowable uses of IDA savings and matching funds, match rates, match levels, and savings rules, which grantees are permitted to define individually within federal requirements.
- ▶ **Section 4: Characteristics of IDA Holders.** This section summarizes demographic information on participants who have opened IDAs.
- ▶ **Section 5: Program Outputs and Outcomes.** This section provides aggregate information on the program’s critical outcomes, such as the number of participants served, the number of IDAs opened, the total and average amounts of earned income deposited into IDAs, the numbers of assets purchased, and the amount of IDA savings and match used for asset purchases. Additionally, this section presents participants’ intended uses of savings at the time of enrollment. The section also presents estimates of the number of participants who have completed financial education and asset-specific training.

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- ▶ **Section 6: Program Inputs.** This section of the report highlights the essential inputs and fiscal aspects of each regular AFI project. It discusses the trends in uses of AFI grant funds and presents details about the grantees' project reserve funds (required bank account[s] in which the grantee maintains grant funds and non-federal funds for the project).
  - ▶ **Section 7: Special State AFI Projects in Indiana and Pennsylvania.** This section describes the two special AFI projects in the states of Indiana and Pennsylvania, their distinctive features, and outcomes to date.
  - ▶ **Section 8: Native Asset Building Initiative (NABI).** This section describes the AFI grants implemented through a partnership with NABI, their distinctive features, and outcomes to date.
  - ▶ **Section 9: Program Evaluation and Other Activities.** This final section describes ongoing research about the program, the ASSET Initiative, and the AFI Resource Center's menu of training and technical assistance services.
  - ▶ **The Appendix.** Descriptive information about each project and data on key performance indicators and achievements of each AFI grant from the program's inception in 1999 through FY 2014 is presented in the **Appendix** to this report. The tables present each grant recipient's organization name and state, along with the number of IDAs opened; cumulative amounts of savings deposited into IDAs; and the number of participants who purchased assets with their IDA savings and match funds.

**Appendix Table 1** presents project details and highlights of AFI grantees by state in order of award date. (AFI project awards have been made to entities in all states except Rhode Island and Wyoming.) Each grant through FY 2014 is presented on a separate row, so grantees with multiple AFI awards may appear more than once.

**Appendix Table 2** presents these same key project outputs-- the number of IDAs opened; cumulative savings deposited into IDAs; and the number of participants who purchased assets – for each AFI grant awarded through FY 2014 in order of award date, allowing the reader to review the same metrics by grant cohort.

Data presented in the tables were provided by grantees and illustrate final information for grants that have ended in years prior to FY 2014, as well as partial information for ongoing projects and those whose project periods were ending at the close of FY 2014.

Information on individual projects also appears in project profiles organized geographically by state online at <http://idaresources.acf.hhs.gov/afigrantees>.

## Methodology

This report is based on information submitted in fall 2014 from 431 regular grantees, two special state grantees, and eleven grantees funded under the Native Asset Building Initiative (NABI). The 41 newly funded regular AFI grant and two newly funded NABI grants, which have only begun project operations at the end of FY 2014, did not provide data for this report. Grantees used electronic reporting forms to provide the required information. Most of the

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data provided by grantees are cumulative from the date the grantee received its AFI grant to the end of FY 2014 (September 30, 2014). For example, in the FY 2014 report, grantees that received funding at the end of FY 2010 provided four years of data, while those that received their AFI grants at the end of FY 2011 provided three years of data.

HHS, through its AFI Resource Center, provided technical support to grantees on data collection processes and strategies throughout FY 2014. There was intensive assistance available to ensure that grantees would provide correct and timely data for this report.

Unless otherwise noted, the unit of analysis in this report is the AFI project. Each AFI grant supports one AFI project. Grantees that have received more than one AFI grant provided separate data for each of its AFI projects. Thus, the number of “projects that responded” refers to the number of AFI projects for which data was included, not the number of grantee organizations that are administering the projects. Moreover, each table displays the number of AFI projects that provided data for the particular analysis.

## **Why Asset Building Matters**

Asset building is an anti-poverty strategy that seeks to help low-income people move toward greater self-sufficiency by accumulating savings and acquiring long-term assets. Assets such as postsecondary education, first-home purchase, and/or business capitalization offer individuals and families the opportunity to support long-term economic development by allowing them to invest for their future.

Research has shown that savings can help low-income families in times of economic hardship. Additionally, there is promising research regarding the interaction of savings and attending and graduating from college. There are indications that savings and assets may result in additional non-financial benefits, such as positive effects on psychological and social well-being; additional research is needed to fully establish such benefits. Through supportive services, savings incentives, and assistance with acquiring assets, asset building programs can help low-income individuals and families set goals, plan for the future, and progress toward financial stability and self-sufficiency.

## **Why AFI Matters**

Through the AFI program, the federal government has signaled that asset building for low-income individuals is important. Beyond the number of people served through the program and the amount of funds saved, the AFI program has made notable contributions to the broader field of asset building for low-income individuals. The AFI program has enabled many individuals, families, and communities to benefit from IDAs and it has increased awareness of this approach to addressing poverty. As evidenced herein, AFI grants have been awarded to a range of diverse organizations with many small grants being awarded to smaller, community-based organizations. With the diffusion of AFI programs throughout the United States, many

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grantees have used the program to serve specific low-income populations in need, such as residents of public housing, Native Americans, individuals with disabilities, victims of domestic violence, refugees, and youth.

### *How is a Demonstration Program Different?*

Congress authorizes social services demonstration programs such as AFI to develop knowledge needed to determine which program models should be encouraged and to inform effective program design and public policy.

### *Shared Ownership*

The AFI demonstration model actively involves consumers, advocates, service providers and beneficiaries in education, joint planning, and consensus building related to design, implementation, funding and evaluation of the project. An equitable sharing of costs among public and private partners and program participants reflects joint ownership and responsibility in the effort to enable and encourage increased self-sufficiency. Support of a community of practice, sharing resources and disseminating knowledge are all ways that AFI supports both the growing field of IDA practitioners and other social service programs.

### *Cooperative Efforts*

The AFI program's support of the asset building field has helped foster cooperative efforts across multiple agencies and programs, both public and private. The program actively cooperates with other federal programs to enhance the ability of eligible participants to realize improved economic stability as a result of their own effort and earnings.

### *Evaluation Findings*

In evaluating demonstration success, policy makers and other stakeholders need a clear understanding of the program's potential impact. In FY 2011 HHS awarded a contract to conduct a small scale experimental study of program impact. More information on this evaluation is provided in **Section 9**.

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## Section 1

# Program Overview

This section provides an overview of the AFI program and provides information about the AFI program’s core elements. It includes the following subsections:

- ▶ AFI Program—Grants, Training, and Evaluation
- ▶ Fundamentals of Individual Development Accounts (IDAs)
- ▶ Features of AFI Projects
- ▶ Typical Processes from Participant Recruitment to Asset Purchase
- ▶ Processes for Administering IDA Savings and Matching Funds
- ▶ Example of AFI Project Finances
- ▶ Use of AFI Funds—Programmatic and Other Influences

### **AFI Program—Grants, Training, and Evaluation**

The AFI program is a multi-site, national demonstration. AFI was established by the Assets for Independence Act (the “AFI Act”) in Title IV of the Community Opportunities, Accountability, and Training and Educational Services Act of 1998 (Public Law 105-285). The program was created to demonstrate the effectiveness of IDAs and related asset building strategies. It also provides a base of information for developing knowledge about the most effective ways of using IDAs, financial education, and related asset-based strategies. These strategies enable low-income people to improve their economic status and become economically self-sufficient.

The program includes three components: 1) grant funding for two types of projects that make up the overall demonstration (regular projects and special state projects); 2) support for grantees and their partners through training and technical assistance provided by HHS via the AFI Resource Center; and 3) ongoing research and evaluation about project administration and the impacts of AFI projects and IDAs, as required by the AFI Act.

#### ***Regular AFI Projects***

Through the end of FY 2014, HHS has awarded 846 five-year grants for regular AFI projects. This includes 41 newly funded FY 2014 AFI projects which have only recently begun project operations and did not provide data for this report. AFI projects are either Single Agency Projects, in which the grantee manages all aspects of the IDA project itself; or Network Projects, in which the grantee coordinates and provides AFI grant funding for a number of other community-based organizations that administer IDAs directly over a wider geographic area. In the Network Project arrangement, the grantee entity retains overall authority and responsibility for administering the AFI grant.

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### *Special State Projects*

The AFI program also includes funding and support for two special state-level projects being implemented by the state governments of Indiana and Pennsylvania. These two states had IDA projects that preceded the AFI program. The AFI Act authorizes HHS to provide AFI funding to support the two states' IDA projects, provided that the appropriate state agencies submit acceptable applications for funding. See **Section 7** for more information.

### *Native Asset Building Initiative Projects*

In FY 2011, OCS and ACF's Administration for Native Americans (ANA) initiated a partnership, the Native Asset Building Initiative (NABI). NABI is a joint funding opportunity through which eligible organizations can apply for both the AFI program and ANA's Social and Economic Development Strategies (SEDS) program. These programs are complementary, both supporting economic self-sufficiency. If funded, organizations administer one NABI project with two grants: one AFI grant and one SEDS grant. Grantees use their AFI funds to match participants' IDA savings, following the same rules as regular AFI projects. AFI has awarded grants under NABI in each year from FY 2011 through FY 2014, awarding 13 grants to date. See **Section 8** for more information.

### *Program Evaluation and Knowledge Development about IDAs*

As required by the AFI Act, HHS supports research and evaluation of the impact of the AFI program. See **Section 9** of this report for information about the ongoing research.

### *AFI Training and Technical Assistance*

HHS has developed a significant training and technical assistance strategy to support AFI grantees and their project partners in implementing projects and collecting information for the ongoing studies about the impacts of IDAs. In September 2014, HHS contracted with the Corporation for Enterprise Development (CFED) to build the capacity of AFI grantees through training and technical assistance. CFED is a non-profit organization that is a leader in the field of asset building that has been supporting IDA programs for many years.

## **Fundamentals of Individual Development Accounts**

IDAs are personal savings accounts in which low-income participants save earned income and receive federal and non-federal matching funds for the purpose of accumulating savings to make purchases of allowed economic assets. Allowed types of asset purchases include first-home purchase, business capitalization, and postsecondary education or training. Participants also are permitted to transfer their IDA savings to support the asset goal of an account-holding spouse or dependent. The earned income that participants save in their IDA and use for authorized asset purchases is matched by the AFI project.

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Participating individuals typically open their IDA and make regularly scheduled deposits over a two or three year period, although some are able to save sufficient funds in as few as six months. While participants save in their IDAs, grantees and their project partners provide them with an array of training and supportive services. All AFI projects provide financial education and basic money management training. Many also provide other supportive services to enable the participants to stay on track with their savings plans.

AFI-funded IDA projects may provide each participant a maximum of \$2,000 in federal funds and must provide at least an equal amount of non-federal funds to match the participant's IDA savings. Projects establish the rate at which they provide the match – known as the “match rate” – according to the design of their project and their participants' needs. Match rates can vary from \$1 in match funds for every \$1 the participant deposits in his or her IDA, to as much as \$8 in match funds for every \$1 saved. Projects with higher match rates enable participants to qualify for the maximum amount of federal and non-federal match funds after saving a smaller amount of earned income, while those with lower match rates require participants to deposit more earned income into their IDAs to qualify for the maximum allowed amount of match funds.

## **Features of AFI Projects**

The asset building field has matured since the establishment of the AFI program in 1998. The field has developed knowledge about essential core elements and promising practices in administering IDA projects and related services to low-income families. Nearly every AFI-funded project has incorporated these elements into their project structure. Many aspects of project design are based on a grantee's capacity to implement a complex IDA project, and the availability of partner organizations that will provide the needed services outside of the AFI funding. The elements of individual AFI projects also may be influenced by requirements imposed on grantees by their non-federal funding partners. Some AFI projects offer extensive services for participants, particularly those that have resources other than their federal AFI grant and associated non-federal match to finance those services. In addition, the AFI Act requires grantees to include specific design and fiscal administration features in their projects.

Participants may use their accumulated IDA savings plus the match funds to purchase a first home, capitalize a business, or pursue postsecondary education or training.<sup>5</sup> They also may transfer their IDA resources to a spouse's or dependent's IDA. If participants withdraw savings from their IDAs for purchases other than those allowed by the AFI Act, they forfeit the match funds.

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<sup>5</sup> See Section 404(8) of the AFI Act.

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The AFI program is the largest federal funder of IDA programs in the United States. Since its inception, it has provided approximately \$158.8 million in federal and non-federal funds to support 53,856 participants in the regular projects, two special state projects, and NABI projects in purchasing long-term assets. Through the AFI program, the federal government has signaled to the field that asset building for low-income individuals is important.

Beyond the number of people served through the program and the amount of funds saved, the AFI program has made notable contributions to the broader field of asset building for low-income individuals. For instance, CFED has asked IDA programs to answer a voluntary survey about their programs. Recent results continue to demonstrate the extent to which IDA programs across the country rely on federal funds from the AFI program to support their efforts.<sup>6</sup> The AFI program has enabled many individuals, families, and communities to benefit from IDAs and it has increased awareness of this approach to addressing poverty. As this report shows, AFI grants have been awarded to a range of diverse organizations with many small grants being awarded to smaller, community-based organizations. The AFI program has supported many grantees using AFI projects to serve specific low-income populations in need, such as residents of public housing, Native Americans, individuals with disabilities, survivors of domestic violence, refugees, and youth.

In addition, the AFI program has added to the knowledge base about IDA programs and asset building for low-income families. For example, the AFI Evaluation,<sup>7</sup> a quasi-experimental impact study released in 2008, added to the empirical literature on IDAs. The study compared AFI program participants to a comparison group drawn from a national survey implemented by the U.S. Census Bureau (for example, the Survey of Income and Program Participation) and found that there were positive impacts of AFI program participation on allowable asset purchases – first-time home acquisition, business capitalization, postsecondary education. Additional information on AFI evaluation efforts is in **Section 9**.

The following bullets describe the core administrative and programmatic features. Those required by the AFI Act are noted.

- ▶ **Non-Federal Funds.**<sup>8</sup> Project budgets must include non-federal cash contributions in an amount at least equal to the AFI grant. Grantees are permitted to draw down their federal grant award in increments, up to an amount equivalent to their non-federal cash contributions to date.

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<sup>6</sup> Corporation for Enterprise Development 2013 IDA Program Survey, [http://cfed.org/assets/pdfs/2013\\_IDA\\_Program\\_Survey\\_-\\_Key\\_Findings.pdf](http://cfed.org/assets/pdfs/2013_IDA_Program_Survey_-_Key_Findings.pdf).

<sup>7</sup> Assets for Independence Evaluation Process Study and Impact Study, 2008: <http://www.acf.hhs.gov/programs/ocs/resource/afi-program-evaluation>

<sup>8</sup> See Section 405(c)(4) of the AFI Act.

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- ▶ **Participant Eligibility.**<sup>9</sup> Individuals may participate in an AFI project if they either:
    - Are a member of a household that is eligible for their state’s Temporary Assistance for Needy Families (TANF) program, or
    - Have an adjusted gross household income equal to or less than 200 percent of the federal poverty line, or are eligible for the federal Earned Income Tax Credit (EITC) and if their household net worth is less than \$10,000 (excluding the value of a primary dwelling unit and one motor vehicle).
  - ▶ **IDA Match Rate.**<sup>10</sup> Grantees match participants’ earned income IDA deposits at rates ranging from a minimum of \$1 to a maximum of \$8 in matching funds for each dollar. The maximum amount grantees may use in federal AFI funds to match a participant’s IDA savings is \$2,000 (maximum amount of \$4,000 for a household). Grantees must match federal contributions with at least an equal amount of funds from non-federal sources.
  - ▶ **Uses of IDA Balances.**<sup>11</sup> Participants may use IDA savings and matching funds for a first-home purchase, to capitalize a business, or to pursue postsecondary education or training. They also may transfer their IDA resources to a spouse’s or dependent’s IDA for the purchase of any of the three assets.
  - ▶ **Project Reserve Fund.**<sup>12</sup> Grantees must maintain a special bank account or a series of such accounts, called the project reserve fund, to hold the federal AFI grant and the required non-federal funds.
  - ▶ **Financial Education.**<sup>13</sup> Grantees provide participants with general financial education, money management training, and asset-specific training over a number of weeks, months, or years.
  - ▶ **Use of Grant Funds for Project Administration.** Grantees may use no more than 15 percent of the federal grant funds to support project administration, as described in more detail later in this section.
  - ▶ **Data Collection and Reporting.** Grantees are required to collect and maintain information about ongoing program operations for annual reports and the evaluation of the AFI program.
  - ▶ **Marketing and Recruitment** to inform the community and prospective participants about the AFI project, IDAs, and other asset building strategies and to encourage eligible individuals to enroll.

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<sup>9</sup> See Section 408 of the AFI Act.

<sup>10</sup> See Section 410 of the AFI Act.

<sup>11</sup> See Section 404(8) of the AFI Act.

<sup>12</sup> See Section 407 of the AFI Act.

<sup>13</sup> See Section 407(c)(1)(A) of the AFI Act.

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- ▶ **Periodic Orientations** for informing potential participants about the AFI project, the value of financial education, the concept of using an IDA to promote long-term self-sufficiency, and overall policies and procedures.
  - ▶ **Participant Eligibility Determination Procedures** to ascertain whether applicants meet the federal eligibility requirements and any additional criteria set by the grantee organization or its non-federal funders.
  - ▶ **Selecting and Maintaining Relationships with Financial Institutions.** Grantees select which federally insured financial institutions, or state insured financial institutions if no federally insured financial institution is available, will hold the project reserve fund and participants' IDAs.
  - ▶ **Savings Plan Agreements** that include key program details and specific responsibilities of the participant and the agency administering the IDA project (the AFI grantee or a sub-grantee), such as:
    - Participant's savings goal;
    - Timeframe for achieving chosen goal and schedule for making savings deposits;
    - Participant's planned use of his or her IDA savings and match;
    - Amount of IDA match funds the project will allocate to the participant's IDA (i.e., the maximum match and match rate);
    - Financial education activities that the project will provide and the participant will attend;
    - Any asset-specific training that the participant will receive; and
    - Other program requirements.
  - ▶ **Account Deposit Requirements** that govern the amount of deposits made by participants into their IDAs, as well as the frequency with which participants must make deposits.
  - ▶ **Asset-Specific Training** about the type of asset the participants plan to purchase, such as training on homeownership, entrepreneurship training for those seeking to capitalize businesses, or academic counseling for those pursuing postsecondary education or training.
  - ▶ **Case Management and Coaching** throughout the savings period, which may include assistance on a variety of topics, such as credit counseling, tax preparation, the federal Earned Income Tax Credit (EITC) and other refundable tax credits, as well as employment counseling, child care, family counseling, or other services provided either directly or through partner organizations.
  - ▶ **Record Keeping, Data Collection, and Data Management** for overall project management, including the submission of required annual reports and the development of information for the national evaluation of the AFI program.

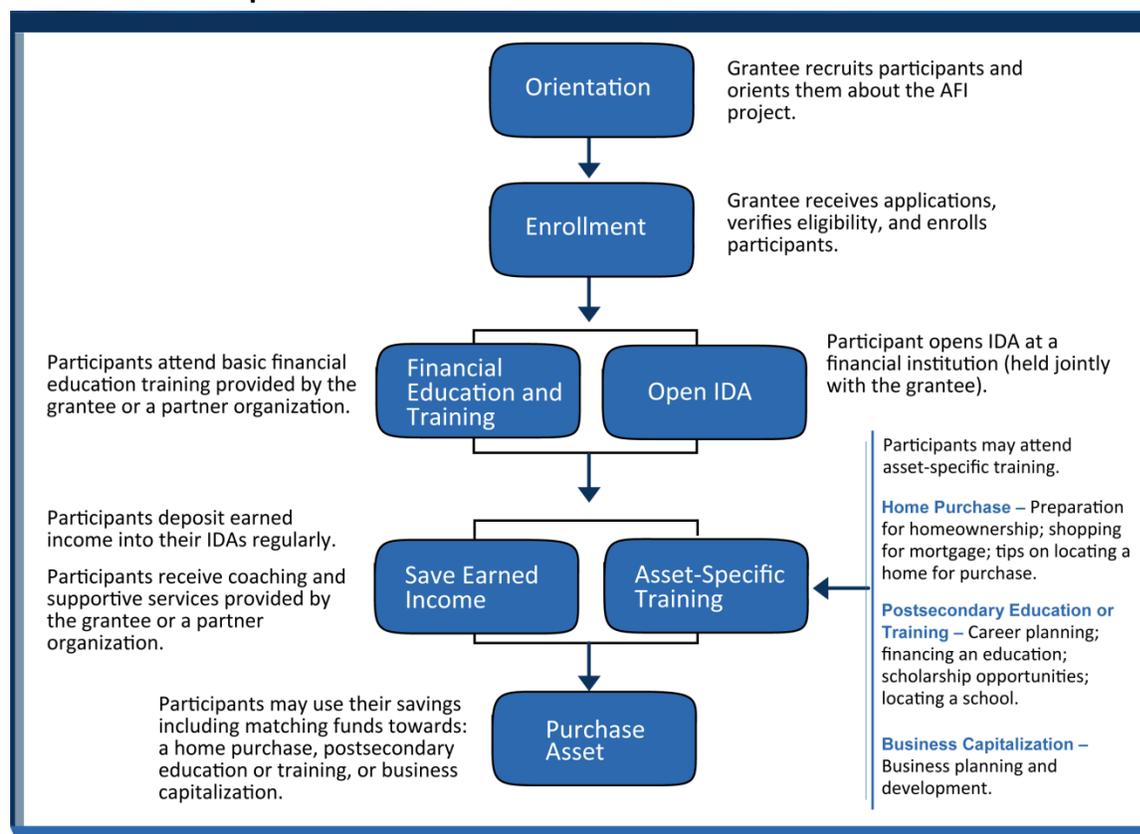
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## Typical Processes from Participant Recruitment to Asset Purchase

Working within the AFI Act's requirements, most grantees use a multi-step process, depicted in **Exhibit 1.1**, to provide services for their project participants. In a typical project, prospective participants first attend an orientation session to learn about IDAs, the benefits of saving regularly, and other strategies to help them manage their money for the long term. Then, they submit applications that include proof of eligibility. The grantee reviews the applications, determines eligibility, and enrolls selected participants. The grantee and each participant develop a savings plan agreement that outlines the roles and responsibilities of each party. Lastly, participants attend any required financial education classes and either subsequently or simultaneously open IDAs.

Once they have opened their IDAs, participants begin saving earned income and making deposits into their IDAs. The amounts they save and the schedule of deposits are established by the grantee. Participants make deposits in their IDA for a designated period of time – typically, over a number of years, but at least for a minimum of six months. During the savings period, grantees may provide them with coaching, case management, and other support services including asset-specific training. Finally, after participants have achieved their savings goals and satisfied all other project requirements, grantees disburse the matching federal and non-federal funds directly to the appropriate third parties to enable participants to make asset purchases with the IDA funds.

## Exhibit 1.1: Participant Activities and Grantee Services: From Orientation to Asset Purchase



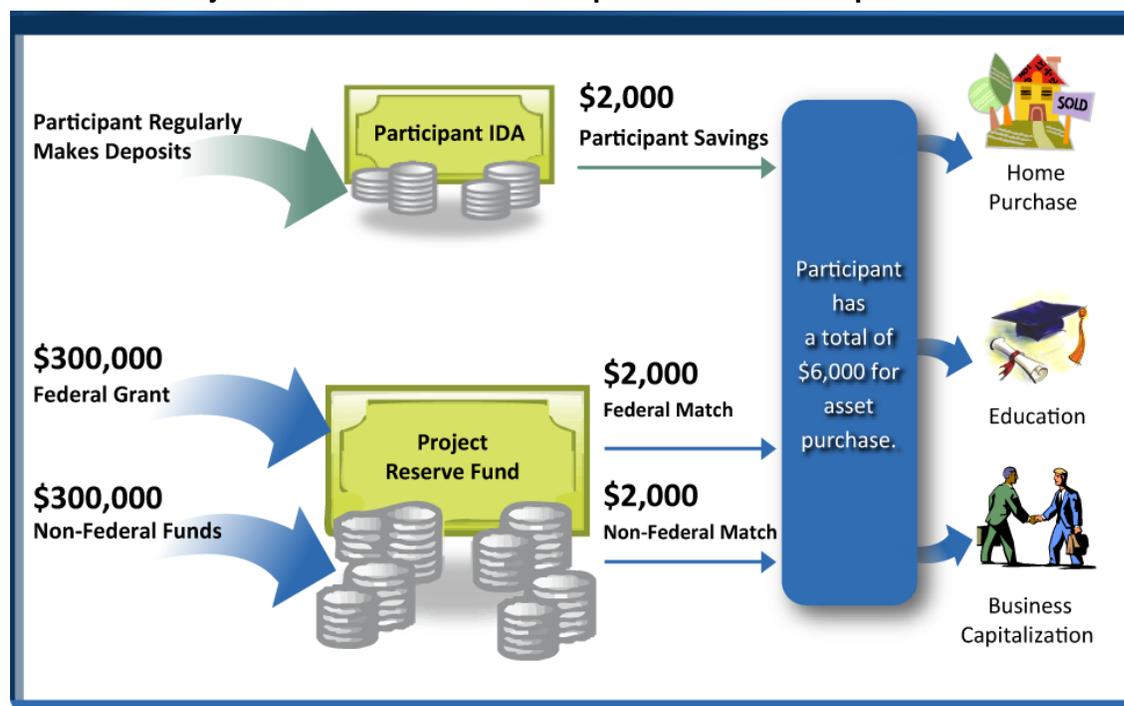
Note: Exhibit 1.1 illustrates a participant's path in a typical AFI project, though projects may vary their procedures. For example, some grantees require financial education before participants open the IDAs, while other grantees allow participants to open the IDAs and begin saving before or while receiving financial education.

## Processes for Administering IDA Savings and Matching Funds

**Exhibit 1.2** illustrates the flow of money from the grantee's project reserve fund to match a participant's savings for an asset purchase. As described earlier in the section, grantees maintain the federal AFI grant funds and required non-federal funds in a bank account or a series of such accounts, termed the project reserve fund. When the participant wishes to use his or her IDA savings to make a qualified purchase, grantees disburse the participant's savings from his or her IDA and the matching federal and non-federal funds from the project reserve fund. The grantee makes the disbursement directly to appropriate third parties, such as mortgage lenders, education institutions, or vendors for business capitalization expenses.

**Exhibit 1.2** shows, as an example, a project that provides \$2 in match funds for each \$1 the participant saves. In this example, the participant saves \$2,000 in his IDA. The grantee provides \$4,000 of match funds composed of equal parts federal AFI grant funds (\$2,000) and non-federal funds (\$2,000). In total, the participant has access to \$6,000, composed of their IDA savings and federal and non-federal match funds, for an asset purchase.

**Exhibit 1.2: Project Reserve Fund and Participant IDA – An Example**

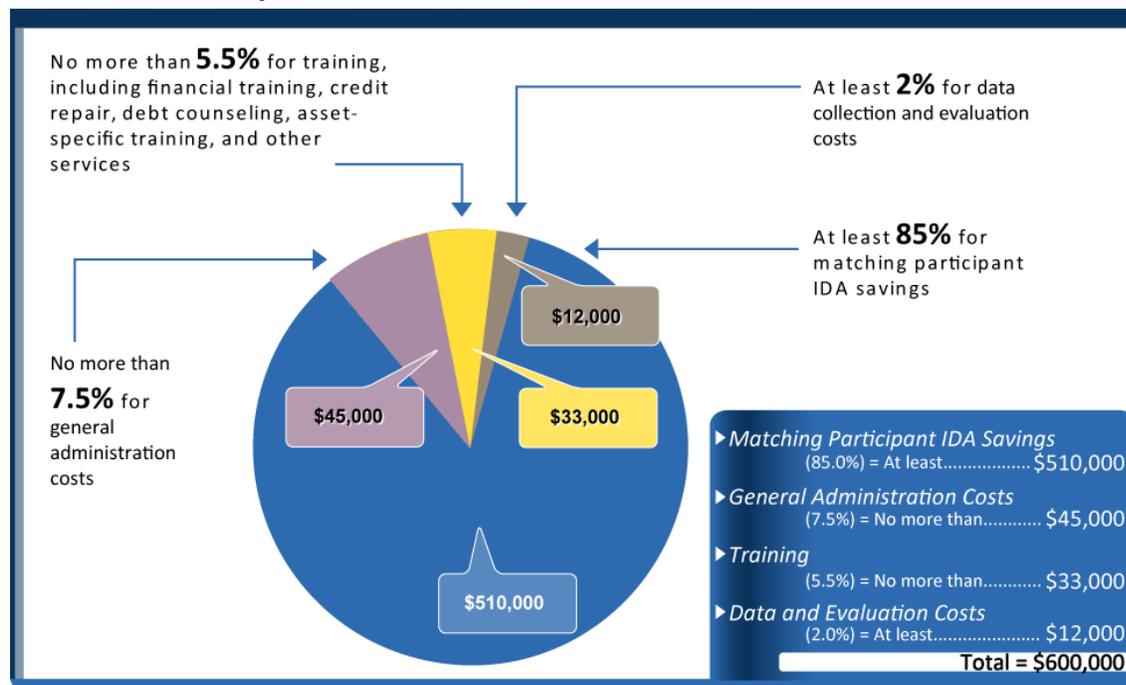


### Example of AFI Project Finances

The AFI Act requires grantees to allocate at least 85 percent of the combined total amount of their federal grant funds and non-federal cash contributions to match participant IDA savings. They may use no more than 7.5 percent of the AFI grant funds for general administration, participant outreach, participant case work and coaching, and other services for participants. No more than 5.5 percent may be used for training including financial literacy, credit repair, debt counseling, and asset-specific training. Finally, grantees must budget at least two percent of their grant funds for data collection and expenses related to the program evaluation.

**Exhibit 1.3** provides an illustration of these allocation requirements and the allowed uses of funds for an AFI project with a \$600,000 grant. The \$600,000 required non-federal match for the project is not shown in the exhibit.

### Exhibit 1.3: AFI Project Finances: Allowed Uses of Federal AFI Grant



- ▶ **Matching Participant IDA Savings.** At least \$510,000 of the AFI grant (plus at least an equal amount of non-federal funds) must be used to match participant IDA savings. This project could provide the allowable maximum amount of \$2,000 in federal funds to 255 participants or serve a larger number of participants who receive less than the allowable maximum amount of federal funds.
- ▶ **General Administration Costs.** No more than \$45,000 of the AFI grant may be used for administration over the project’s five years.
- ▶ **Training and Participant Support.** No more than \$33,000 of the AFI grant may be used for financial education, credit counseling and repair, participant training or other non-administrative costs.
- ▶ **Data and Evaluation Costs.** At least \$12,000 of the AFI grant must be used over the five-year project period for data collection, reporting, and evaluation.

### Use of AFI Funds—Programmatic and Other Influences

#### Programmatic Influences

- ▶ **Non-Federal Match Requirement.** The AFI Act currently requires AFI project budgets to include non-federal match funds, which must be greater than or equal to the federal AFI grant amount. Documentation of non-federal match commitment is required as part of the AFI application. Grantees are not allowed to have access to their federal grant award funds until they have deposited the corresponding amount of non-federal funds into their project reserve fund. If any match funds are not maintained over the five-year period of

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the grant award grantees are not permitted to access the corresponding amount of federal funding.

The non-federal match requirements can often delay program activities and influence participation. For example, one AFI grantee had non-federal match funds committed by its state. These funds were later retracted due to significant cuts in the state's budget. In this case, the grantee did solicit and receive additional non-federal match funds from a private organization, but that is not always the case.

- ▶ **Limited Administrative and Program Support.** Grantees are limited in the amount of federal AFI funds available for administrative and program support. These activities include financial education and related costs for participants opening an AFI-funded IDA. Marketing and recruitment; project implementation and management, account maintenance, training and support, and partnership development are just some of the many activities associated with successfully administering a five-year AFI project. AFI grantees have consistently acknowledged that outreach, recruitment, and participant support activities are challenging, due to limited administrative and program support.

### *Other Influences*

- ▶ **Economy, Unemployment, and Participant Savings Rates.** Federal match funds can go unused when participants are unable to meet their savings goal and make an asset purchase due to unplanned withdrawals. Participant recruitment and savings retention rates are strongly associated with the level of unemployment and availability of adequate jobs. First, the success of participant recruitment is framed by the number of eligible applicants. One of the eligibility requirements for participation in AFI-funded IDA programs is the ability to contribute earned income. Second, participant savings are influenced and compromised by non-programmatic factors (i.e., personal emergencies, credit approval for house purchase). Some participants withdraw their savings to address unplanned emergencies, while others do so simply to support their basic needs. The influence of the economy and unemployment rate on participant recruitment and savings retention is significant. For example, one AFI grantee that left awarded funding unutilized was located in a mining community where many residents had become unemployed. The high rate of unemployment made participant recruitment difficult and savings difficult for those enrolled in the program.
- ▶ **Partnership Challenges.** The partnership a grantee has with a financial institution plays a critical role in the successful administration of an AFI Project. Financial institutions maintain the Project Reserve Fund where grantees hold the federal AFI grant, the required non-federal funds and participant IDAs. Non-federal cash and in-kind support typically have also been contributed by financial institutions. The consolidation of financial partners has made it difficult for some grantees to secure resources and supports needed to operate a successful AFI project.

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## Section 2

### AFI Grantees and the Projects Administered

This section provides information on regular AFI projects made through FY 2014 (805 awards).

Information on awards made to Indiana and Pennsylvania is summarized in **Section 7**.

Information on awards made under the Native Asset Building Initiative is summarized in **Section 8**. Additionally, 41 awards for regular AFI projects were made in September 2014 and there was not sufficient time in FY 2014 for these awards to begin significant implementation. This section includes the following subsections:

- ▶ Types of AFI Grantees
- ▶ AFI Project Structures – Single Agency Projects and Network Projects
- ▶ Sources of Non-Federal Funding
- ▶ Target Populations
- ▶ Support Services Offered
- ▶ Project Staffing

#### Types of AFI Grantees

HHS awards AFI grants to nonprofit entities and state, local, or Tribal government agencies that partner with nonprofits. It also awards grants to credit unions classified as “low-income credit unions”<sup>14</sup> and community development financial institutions (CDFIs) that are collaborating with local community-based anti-poverty organizations.

As shown in **Exhibit 2.1**, by the end of FY 2014, the most common AFI project grantee types were community action agencies (29 percent), human services organizations (12 percent), and community development corporations (9 percent). Other common grantee types included local United Way agencies (8 percent); Community Development Financial Institutions or Credit Unions (8 percent); nonprofit housing organizations (6 percent); state, local, or Tribal government agencies (6 percent); and faith-based organizations (6 percent). Less common grantee types included microenterprise development agencies, youth development agencies, and workforce development agencies. These statistics about grantee types are generally consistent with data reported in previous years.

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<sup>14</sup> As designated by the National Credit Union Administration (NCUA), a low-income credit union is defined in Part 701.34 of the NCUA Rules and Regulations as a credit union with a majority of members that either earns less than 80 percent of the average of all wage earners, as established by the Bureau of Labor Statistics, or has an annual household income that falls at or below 80 percent of the median household income for the nation as established by the Census Bureau.

### Exhibit 2.1: Types of AFI Grantees

Type of AFI Grantee	Percentage at End of FY 2012	Percentage at End of FY 2013	Percentage at End of FY 2014
Community Action Agency	30%	30%	29%
Human Services Organization	12%	12%	12%
Community Development Corporation	10%	10%	9%
Local United Way	8%	8%	8%
Community Development Financial Institution/Credit Union	7%	8%	8%
Nonprofit Housing Organization	5%	6%	6%
State, Local, or Tribal Government Agency	6%	6%	6%
Faith-based Organization	6%	6%	6%
Microenterprise Development Agency	3%	3%	3%
Youth Development Agency	1%	1%	1%
Workforce Development Agency	0%	0%	0%
Other (for example, Consumer Credit Counseling organizations, domestic violence prevention agencies)	8%	10%	10%
Number of Grantees Reporting	371	378	401

Note: Grantees that received multiple grants were counted only once.

### AFI Project Structures—Single Agency Projects and Network Projects

The administrative framework of an AFI project depends on the grantees' needs and resources. Grantees may administer two types: either Single Agency Projects or Network Projects.

#### *AFI Single Agency Projects*

Of the 805 regular projects analyzed for this report, a total of 544 representing 68 percent reported that their organization was the sole operator of the grant, without any formal sub-recipient relationships with other organizations. This framework is called an "AFI Single Agency Project." With this arrangement, the grantee organization takes full responsibility for enrolling participants, opening IDAs with the financial institution partner, providing supportive services, managing all federal and non-federal funds, and reporting to HHS. While these grantees work independently in administering the grant and providing the IDAs, many of them partner and collaborate with other agencies that assist with providing particular services for project participants, such as financial education training, ongoing coaching, or other supportive services. **Exhibit 2.2** provides information on the structure and responsibilities of a typical AFI Single Agency Project.

## Exhibit 2.2: AFI Single Agency Projects

### Grantee Responsibility

- ▶ Administers the federal AFI grant
- ▶ Develops and manages the required non-federal cash contribution
- ▶ Manages partnership(s) with at least one financial institution
- ▶ Manages the project reserve fund
- ▶ Publicizes the AFI project and presents orientations
- ▶ Enrolls participants
- ▶ Provides financial education or partners with one or more organization(s) that provide financial education
- ▶ Assists participants with opening an IDA
- ▶ Provides participants with intensive supportive services
- ▶ Assists participants with asset purchase
- ▶ Assists participants who make emergency withdrawals or drop out of the project
- ▶ Reports to HHS
- ▶ Provides data for the AFI program evaluation

### Sources of Funding/Support

- ▶ AFI program grant
- ▶ Non-federal contributions
- ▶ Partner agencies that provide funding and in-kind support
- ▶ Partner financial institutions

### *AFI Network Projects*

A total of 255 AFI projects (32 percent) through FY 2014 were operated by grantees that use the AFI Network Project model. These grantees had formal sub-recipient arrangements with other organizations that enroll participants, open IDAs with them, provide services to participants, and assist with data collection and project implementation. AFI Network Projects are designed to create administrative efficiencies in providing IDA services over a larger geographic area. The typical AFI Network Project includes the grantee organization as the “lead” agency responsible for administering the grant and several partners that are sub-recipients of the AFI grant funds. However, this arrangement can vary by Network Project. **Exhibit 2.3** provides an outline of the division of responsibilities of the typical AFI Network Project.

## Exhibit 2.3: AFI Network Projects

### Grantee Responsibility

- ▶ Administers the federal AFI grant
- ▶ Develops and manages the required non-federal cash contribution
- ▶ Manages partnership(s) with at least one financial institution
- ▶ Manages the project reserve fund
- ▶ Reports to HHS
- ▶ Provides data for the AFI program evaluation

### Grantee and Sub-recipient Responsibility

- ▶ Receives sub-grant or contract from the AFI grantee (sub-recipient only)
- ▶ Reports to the AFI grantee (sub-recipient only)
- ▶ Publicizes the AFI project and presents orientations
- ▶ Enrolls participants
- ▶ Provides financial education or partners with one or more other organization(s) that provide the financial education
- ▶ Assists participants with opening an IDA
- ▶ Provides participants with intensive supportive services
- ▶ Assists participants with asset purchase
- ▶ Assists participants who make emergency withdrawals or drop out of the project

### Sources of Funding/Support

- ▶ AFI program grant
- ▶ Non-federal contributions
- ▶ Partner agencies that provide funding and in-kind support
- ▶ Partner financial institutions

Many sub-recipient organizations that have been part of an AFI network project provide support for key components of the overall project, such as recruitment, enrollment, financial education, asset-specific training, homeownership assistance, case management, and other services for participants.

The precise roles and responsibilities and level of direct participant involvement of the lead agency varied from network to network. **Exhibit 2.4** shows four major functions of AFI projects and whether the lead agency shares the responsibility of each function with the sub-recipients, is solely responsible for the functions, or gives the responsibility solely to the sub-recipients.

#### Exhibit 2.4: Shared Functions in AFI Network Projects

Major Function	AFI Network Projects in which Grantee Shares Function with Sub-recipients	AFI Network Projects in which Grantee Provides the Function	AFI Network Projects in which Grantee Sub-recipients Provide the Function
Maintain Documentation/Records for Reporting and Evaluation Purposes	70%	14%	11%
Open IDAs with Participants	41%	23%	34%
Raise Non-Federal Cash for the Project	26%	63%	7%
Manage the Project Reserve Fund	10%	86%	2%
Number of Projects Reporting	215	215	215

#### Sources of Non-Federal Funding

All AFI grantees are required to ensure that their project budget includes non-federal cash resources at least equal to the amount of their federal AFI grant funds. Grantees rely on a wide range of sources for this financial support. Grantees report that they often need more funding and in-kind support for project administration costs, such as staff salaries, facilities, and financial education materials. Non-federal cash and in-kind support typically are contributed by financial institutions (i.e., banks and credit unions), foundations, businesses, individuals, educational institutions, and faith-based organizations. State and local agencies, which include housing authorities, workforce development organizations, and human services agencies, and other entities, also have contributed non-federal funding.

Some AFI grantees access funding from federal sources to support their projects. For example, local Community Action Agencies, which have access to Community Services Block Grant (CSBG) funds administered by their states and HHS, are able to use those funds to provide services to their participants who meet CSBG eligibility requirements. However, those grantees are not allowed to use CSBG funds as their required non-federal funding.

Similarly, some grantees are able to access Community Development Block Grant (CDBG) funds, which are administered by their state or local governments and the U.S. Department of Housing and Urban Development. These grantees use CDBG funds to support their AFI projects. Because the CDBG authorizing law allows recipient agencies to use those funds to match other federal grant funds, some grantees use CDBG to leverage the AFI grant funds.

The most common sources of non-federal funding, whether the funds are used to match participant IDA savings or to support project services and operating costs, are shown in **Exhibit 2.5**.

### Exhibit 2.5: Sources of Non-Federal Funding for IDA Match and Project Operations

Type of Non-AFI Funding	AFI Projects that Have Received Type of Funding	
	Type of Funds Used for Matching Participant Savings	Type of Funds Used for Project Operation
Financial Institutions	45%	43%
Foundations	36%	36%
State Government Agencies	20%	21%
Local United Way Agencies	25%	28%
Businesses	16%	16%
Local Government Agencies/Housing Authorities	17%	18%
Individuals	14%	11%
Community Development Block Grant (CDBG)*	9%	12%
Federal Home Loan Banks <sup>15</sup>	4%	2%
Faith-based Organizations	4%	4%
Civic Fraternal Organizations	4%	4%
Community Services Block Grant (CSBG) **	N/A	17%
Number of Projects Reporting	766	766

\* Grantees may use CDBG funds as the source of the required non-federal cash contribution to provide participant matching funds and/or support services for participants.

\*\* Grantees are prohibited from using CSBG funds as the source of the required non-federal cash contribution that supports the participant match.

<sup>15</sup> The Federal Home Loan Banks (FHLBanks) are 12 regional cooperative banks that U.S. lending institutions use to finance housing and economic development in their communities. Created by Congress, the FHLBanks contribute to affordable housing through the Affordable Housing Program (AHP). AHP is a flexible program that uses funds in combination with other programs and funding sources, like Low-Income Housing Tax Credits and the Community Development Block Grant.

## Target Populations

The AFI program allows grantees to focus their program outreach on specific populations within the income eligibility guidelines (described in *Section 1*). **Exhibit 2.6** shows the percentage of AFI projects that target specific populations.

**Exhibit 2.6: Target Populations**

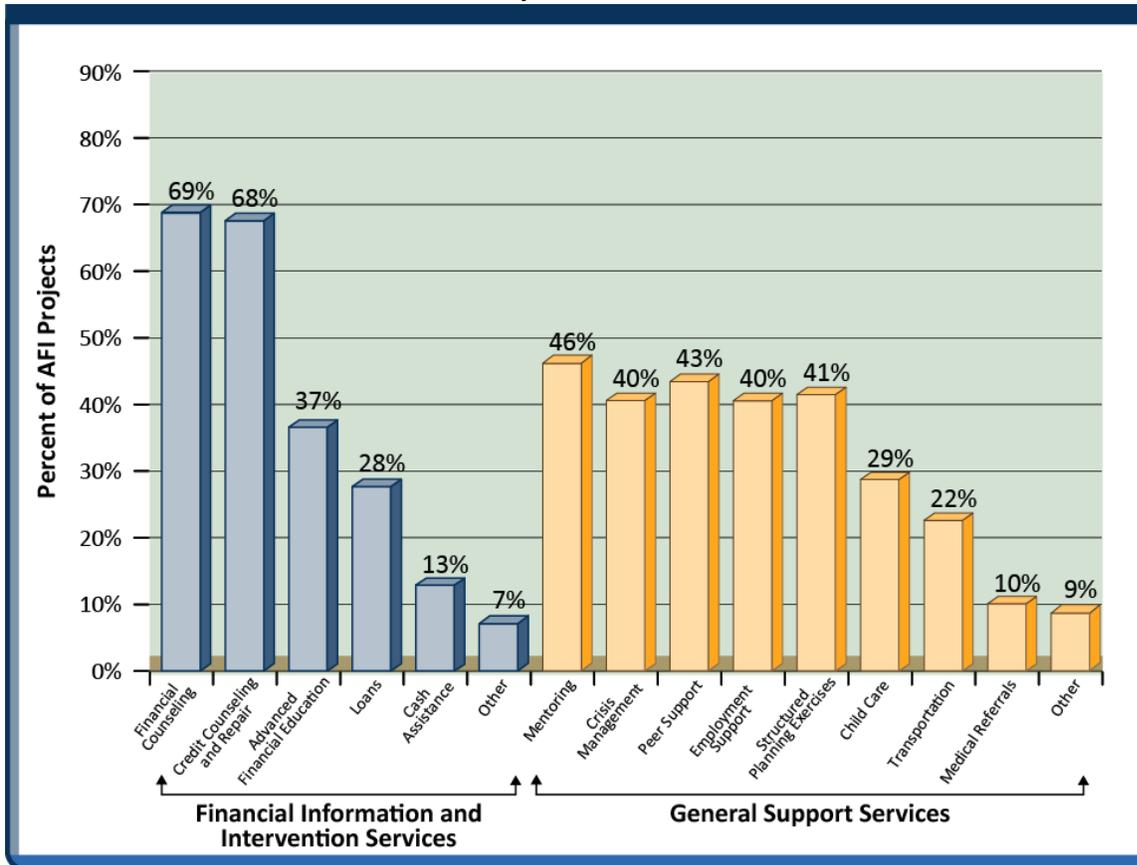
Target Populations	AFI Projects Focusing on the Population
TANF Recipients/TANF-eligible Individuals	43%
Families with Children	40%
EITC Outreach Project Clients	34%
Single Parents	34%
Women	32%
Hispanics or Latinos	29%
African Americans	28%
Residents of Public Housing	27%
Individuals with Disabilities	19%
Native Americans or Alaskan Natives	19%
Survivors of Domestic Violence	19%
Refugees/Immigrants	16%
Asians	16%
Youth (ages 13-18 years)	14%
Native Hawaiians or Other Pacific Islanders	13%
Prisoners/Former Prisoners	13%
Individuals Experiencing Homelessness	12%
Employees of a Particular Organization	7%
Seasonal/Migrant Workers	6%
Number of Projects Reporting	639

## Support Services Offered

In addition to financial and asset-specific education, AFI grantees and their partner organizations may provide an array of support services to their participants other than through their AFI projects. Many grantees are community-based human services organizations that routinely provide a variety of support services to their clients, including their AFI project participants. Examples of general support services include employment support, child care,

transportation, medical referrals, crisis management, mentoring, and peer support. **Exhibit 2.7** provides information on the services offered by AFI grantees and their project partners.

**Exhibit 2.7: Services Provided to Participants**



## Project Staffing

Grantee staffing varies from project to project, as shown in **Exhibit 2.8**. The level of staffing used depends on a number of factors including whether the project is using a Single Agency or Network Project administrative framework and the availability of funding other than their AFI grant, such as additional non-federal resources.

**Exhibit 2.8: Average Number of FTE Staff per Project, by Number of IDA Holders**

Projects with This Number of Reported Account Holders	Average Number of FTE Employees	Average Number of FTE Volunteers	Total Average FTE Staff (Employees plus Volunteers)
0	0.15	0.01	0.16
1 to 24	0.33	0.03	0.36
25 to 74	0.50	0.05	0.55
75 to 149	0.65	0.05	0.70
150 or More	0.84	0.06	0.90
Overall Average	0.56	0.04	0.60
Number of Projects Reporting	787	787	787

Note: One Full-Time Equivalent (FTE) is equal to 40 hours per week. Each AFI project reported an average number of hours worked (specific to its AFI project) per week by employees and volunteers.

In addition, many grantees rely on AmeriCorps VISTA volunteers to provide these services at very low costs. These volunteers provided nearly 1,689 hours per week for AFI projects through FY 2014.

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## Section 3

### Characteristics of IDAs Provided by AFI Projects

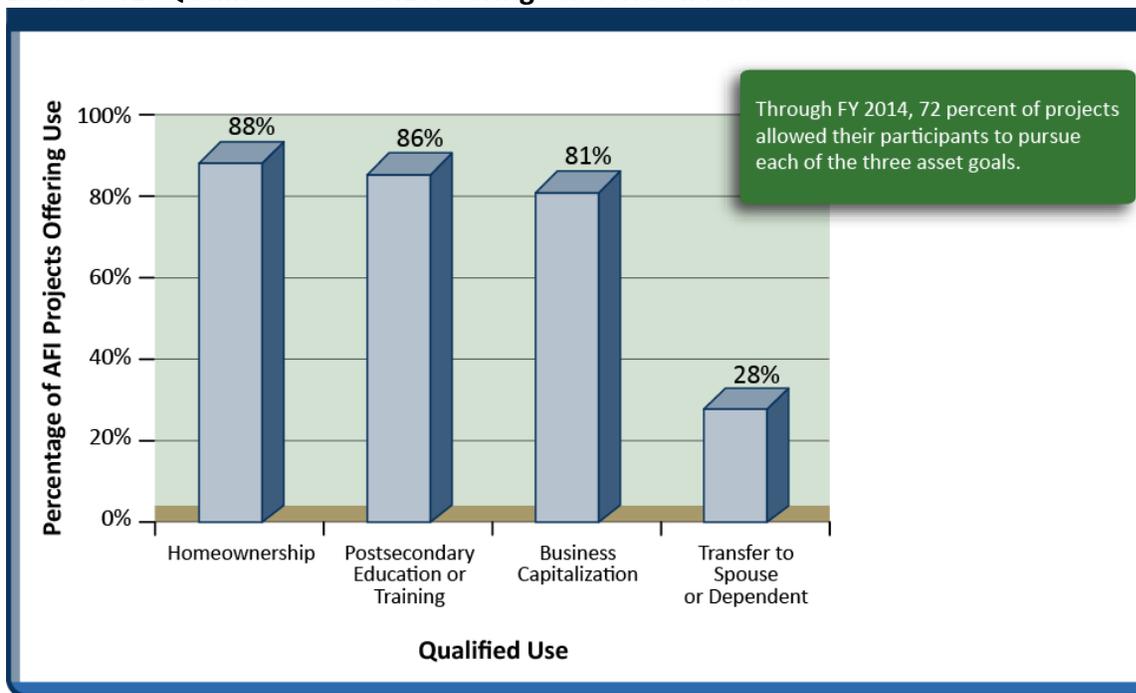
This section provides information on regular AFI projects made through FY 2014 (805 awards). The AFI Act stipulates particular uses of IDA savings and the maximum amount of federal matching funds that may be provided for an asset purchase. Within the federal requirements, grantees may define project-specific requirements such as match rates and deposit amounts. This section provides information on the trends in IDAs provided by AFI grantees. It includes the following sub-sections.

- ▶ Allowed Uses of IDA Savings and Matching Funds
- ▶ Match Rates
- ▶ Match Levels and Savings Requirements

#### **Allowed Uses of IDA Savings and Matching Funds**

The AFI program allows three types of asset goals—homeownership, postsecondary education or training, and business capitalization. Grantees may choose to focus on one or more of these asset goals. The majority of grantees allow their participants to save for any of these three goals, with homeownership being the most common. In addition, grantees may allow participants the option to transfer their IDA to a spouse’s or dependent’s IDA for purchase of one of the three allowed asset types. **Exhibit 3.1** shows the percentage of AFI projects that allowed their participants to pursue each of the asset goals as well as the transfer options.

### Exhibit 3.1: Qualified Uses of IDA Savings and Match Funds



### Match Rates

The AFI program allows grantees to establish the match rate—the ratio of matching funds they will provide for each dollar a participant saves in his or her IDA. The match rate may range from \$1 in AFI project funds for each \$1 in earned income saved in the IDA (a \$1 to \$1 match rate) up to \$8 in AFI project funds for each \$1 saved (an \$8 to \$1 match rate). Projects with higher match rates allow participants to qualify for the maximum amount of allowed match based on deposits of less earned income. Projects with lower match rates require participants to deposit more earned income in order to qualify for the maximum amount of match funds.

**Exhibit 3.2** shows the percentage of AFI projects that offered each match rate by allowable asset goals. The most common match rate was \$2 to \$1 for each asset goal, followed by \$3 to \$1. Twenty-two percent of AFI projects provided a match of \$4 to \$1 or greater.

Typically, AFI projects offered a single match rate to all participants based on their asset goal (i.e. \$2 to \$1 for homeownership). However, a few AFI projects—8 percent to 11 percent depending on the asset goal, also provide varying match rates. This scenario is listed as “varied rates” in **Exhibit 3.2**. This variation in match rate is especially prevalent among AFI Network Projects, where sub-recipient sites may offer different match rates depending on the needs of their community and requirements of their non-federal funders.

**Exhibit 3.2: Percentage of Projects with Each Match Rate by Asset Goal**

Match Rate Provided	Asset Goal: Homeownership	Asset Goal: Business Capitalization	Asset Goal: Postsecondary Education or Training
\$1 to \$1	6%	8%	7%
\$1.5 to \$1	0%	0%	0%
\$2 to \$1	50%	58%	52%
\$2.5 to \$1	1%	1%	1%
\$3 to \$1	20%	14%	16%
\$4 to \$1	19%	15%	15%
\$5 to \$1	1%	1%	1%
\$6 to \$1	0%	0%	1%
\$7 to \$1	0%	0%	0%
\$8 to \$1	3%	3%	6%
Varied Rates	11%	8%	11%
Number of Projects Reporting	636	588	630

Note: For each asset goal, the number of AFI projects reporting includes only those grants allowing that specific use.

## Match Levels and Savings Requirements

**Exhibit 3.3** provides information about participant IDA deposit and savings characteristics and the maximum amount of IDA savings that can be matched by the AFI project. The AFI Act sets a maximum amount of \$2,000 in federal grant funds that may be provided as matching funds for a participant’s asset purchase. The amount of participant savings that will be matched varies from project to project within this federal requirement.

**Exhibit 3.3** also shows three additional IDA characteristics that differ among projects—the minimum initial or opening deposit, the minimum monthly savings, and the number of missed deposits allowed. These characteristics differed based on the availability of funds, match rate, participant needs, and other factors.

**Exhibit 3.3: Savings and Match Characteristics**

Savings and Match Characteristic*	Average	Range	Number of Projects with Varying Characteristics	Number of Projects Reporting
Maximum dollar amount of IDA savings that will be matched	\$1,545	\$130 to \$4,000	118	700
Minimum initial or opening IDA deposit	\$25	\$0 to \$625	113	730
Minimum monthly IDA deposit	\$27	\$0 to \$217	153	710
Number of deposits a participant may miss before being terminated	2.8	0 to 12	206	695

\* Some grantees did not report complete information for each savings and match characteristics question asked, so information in this exhibit is based on data provided by a varying number of grantees.

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## Section 4

# Characteristics of IDA Holders

This section provides information on regular AFI projects made through FY 2014 (805 awards). AFI grantees provided demographic information on participants who have opened IDAs. Because the data were collected at the time the participants enrolled in the AFI project, it reflects information about all participants. This includes those that successfully completed their asset purchase, those who are still saving towards their asset purchase, and those who used the savings for non-qualified purposes without receiving IDA match funds.

In most cases, the characteristics of individuals who opened accounts have remained relatively constant over time, even with the increased number of AFI projects operating across the nation. A summary of the characteristics of account holders through FY 2014 follows. Please note, characteristic information was not reported for some account holders, therefore not all categories will total 100 percent.

- ▶ **Gender.** A majority of all participants who had opened IDAs are female (70 percent), while 27 percent of all participants are male.
- ▶ **Race/Ethnicity.** Of all account holders, 40 percent are African American, while 28 percent are Caucasian, 17 percent are Hispanic, five percent are Asian American, two percent are Native American, and four percent are “other.”
- ▶ **Marital Status.** Fifty-two percent of all account holders were single at the time of enrollment, while 21 percent were married, 13 percent were divorced, five percent were separated, and one percent was widowed.
- ▶ **Number of Adults in Household.** Fifty-three percent of all account holders lived in a household with only one adult at the time of enrollment (i.e., lived alone or were single parents), while 29 percent lived in a household with two adults, and nine percent lived in a household with three or more adults.
- ▶ **Number of Children in Household.** Of all account holders, 66 percent were members of a household with at least one child at the time of enrollment, and 21 percent lived in a household with three children or more.
- ▶ **Household Income.** Of all account holders, 38 percent had household incomes greater than 150 percent of the federal poverty line<sup>16</sup> at the time of enrollment; 22 percent reported income that was between the poverty line and 150 percent of the poverty line, while 26 percent reported income that was below the poverty line.

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<sup>16</sup> The federal poverty line for 2014 for most of the U.S was \$11,670 for an individual plus \$4,060 for each additional person. For more information, see <http://aspe.hhs.gov/prior-hhs-poverty-guidelines-and-federal-register-references>.

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- ▶ **Residence Area.** Of all account holders, 79 percent lived in urban areas (major or minor), whereas 14 percent lived in rural or remote areas at the time of enrollment.
  - ▶ **Education Status.** The vast majority of participants who opened IDAs completed high school or some postsecondary education or training at the time of enrollment (82 percent). More than half of account holders (53 percent) completed at least some college education at the time of enrollment, while 15 percent held a bachelor's or graduate degree.
  - ▶ **Age.** Thirty-one percent of all account holders were 30 to 39 years of age at the time of enrollment. Approximately one-fourth of account holders (26 percent) were in their twenties, while a similar percentage (19 percent) were in their forties.
  - ▶ **Employment Status.** Eighty-one percent of all participants who opened IDAs were employed either full-time or part-time. Three percent of all participants were unemployed or retired at the time of enrollment (these participants would have to become employed before contributing to an IDA in order to deposit earned income).
  - ▶ **Account Holder Banking Experience.** AFI grantees provide information about account holders' experiences with various banking services prior to enrollment, as well as their use of automatic allotment/direct deposit service to make contributions to their IDAs.
    - Half of all account holders (50 percent) had ever held a savings account.
    - About two-thirds (65 percent) had ever held a checking account.
    - Twenty-one percent had ever used direct deposit for their paychecks.

## Section 5

### Program Outputs and Outcomes

This section provides information on regular AFI projects made through FY 2014 (805 awards). This section presents data on the following key program outputs and outcomes:

- ▶ Outreach and Participant Enrollment
- ▶ Completion of Financial Education and Asset-Specific Training
- ▶ Number of IDAs Opened
- ▶ Intended Use of IDA Savings at the Time of Enrollment
- ▶ Amount of Savings Deposited in IDAs
- ▶ Asset Purchases and Other Withdrawals
- ▶ Savings Balances in Open IDAs

#### Outreach and Participant Enrollment

After recruiting interested individuals and families, grantees that administer AFI-funded IDA projects guide prospective participants through the AFI requirements, ideally taking them from orientation to asset purchase. As shown in **Exhibit 1.1** in **Section 1**, the typical project includes multiple steps for participants starting with attending an orientation session and ending with the purchase of an asset. **Exhibit 5.1** focuses on the earlier stages of this process: application, enrollment, and opening an IDA.

As **Exhibit 5.1** shows, based on data provided by all regular projects reporting through the FY 2014 cycle, nearly 241,791 individuals have participated in an orientation. Of these, 125,479 (52 percent) have submitted an application. Since FY 1999, 104,376 individuals have enrolled in an AFI project, and 96,982 have opened an IDA.

**Exhibit 5.1: Participation Rates for Progression through Initial AFI Project Steps**

AFI Project Step	Number of Individuals	Percent
Individuals participating in an AFI project orientation	241,791	N/A
Of those who attended an orientation, the share who submitted an application	125,479	52%
Of those who submitted an application, the share who enrolled in the project	104,376	83%
Of those who enrolled, the share who opened an IDA	96,982	93%
Number of Projects Reporting	787	787

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Individuals benefit from participating in AFI activities, even if they do not reach the end goal of purchasing an asset. For example, some may attend an orientation session, enroll, and receive services such as financial education training, financial and debt counseling, and savings coaching. Others may open an IDA and start saving earned income. Participants benefit from the knowledge gained through each of these steps.

## **Completion of Financial Education and Asset-Specific Training**

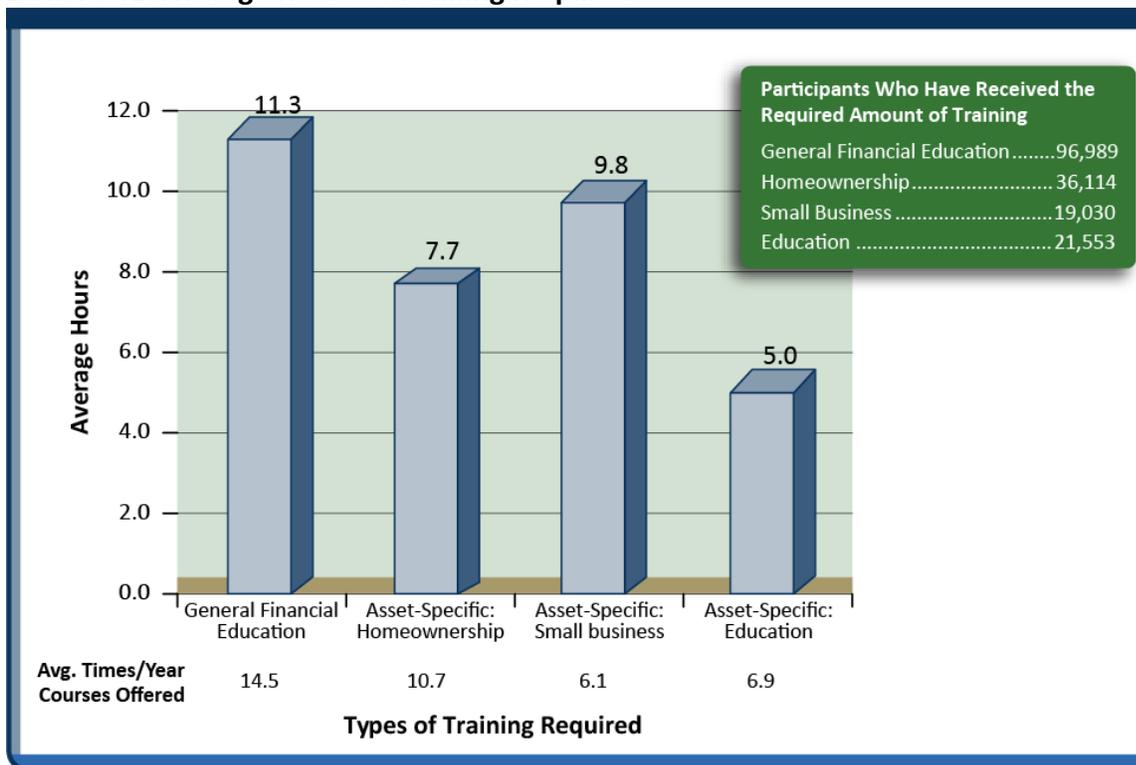
Grantees provide their participants training in general financial education. In addition, they may offer participants training related to the participants' intended asset purchase goals.

### ***Financial Education***

Grantees ensure that project participants take part in financial education classes, whether they provide the training directly or rely on partners to do so. Instruction typically covers a number of core topics, such as budgeting, saving, credit use, investments, and taxes. HHS does not specify a particular curriculum that grantees must use. Some grantees develop their own financial education curriculum, while most use or adapt curricula developed by other organizations. Forty percent of grantees used the "Money Smart" curriculum distributed by the Federal Deposit Insurance Corporation (FDIC); four percent used "Finding Pathways to Prosperity" published by the National Endowment for Financial Education; and an additional 26 percent used a combination of both curricula. Sixty percent of grantees offered customized curricula based on the needs of their participants.

**Exhibit 5.2** presents information on the type and amount of training grantees required their participants to take, as well as the average number of times the training was offered and participant training completion rates.

**Exhibit 5.2: Average Hours of Training Required**



### *Asset-Specific Training*

In addition to general financial education, many AFI grantees also require and provide specialized training that is specific to the participants’ savings and asset purchase goals. This training ensures that participants not only have information on how to purchase their chosen assets, but also on how to maintain them. **Exhibit 5.2** also provides information on grantee requirements and participant completion rates regarding this training.

### **Number of IDAs Opened**

Through September 2014, participants in the 805 regular AFI projects opened a total of 98,295 IDAs. Of these, 7,256 were opened in FY 2014. The **Appendix** provides project-by-project information about the number of accounts opened.

### **Intended Use of IDA Savings at the Time of Enrollment**

As shown in **Exhibit 5.3**, 50 percent of account holders who had opened IDAs through FY 2014 did so with the intention, at enrollment, to save for homeownership. Twenty-six percent of account holders intended to use their IDAs for postsecondary education or training, and 20 percent intended to use their IDAs for business capitalization. Very few account holders (less than one percent) indicated at the time of enrollment that they intended to transfer their savings to the IDA of a spouse or dependent. While these trends have remained fairly

consistent over the past five years, eight percent fewer enrolling participants intended to pursue homeownership and five percent more intended to pursue education goals at the end of the FY 2014 than at the end of FY 2009.

**Exhibit 5.3: Account Holders’ Intended Use of IDA Savings at Time of Enrollment**

Intended Use of IDA	Percentage of Account Holders	
	2009-2013 Average	End of FY 2014
Homeownership	55%	50%
Business Capitalization	20%	20%
Postsecondary Education or Training	23%	26%
Transfer to Spouse’s or Dependent’s IDA	<1%	<1%
Number of Projects Reporting	601	772

Note: Due to rounding, the percentages in some of the tables in this section do not add to 100 percent.

**Amount of Savings Deposited in IDAs**

At of the end of FY 2014, 98,295 IDAs were opened through a regular AFI project with a total of \$100,026,683 deposited by account holders. The average participant savings amount has consistently increased from year to year since FY 2005, reaching \$1,018 in FY 2014.

**Asset Purchases and Other Withdrawals**

The AFI program has strict guidelines for how participants may use the savings they deposit into their IDAs and the matching funds they receive from their AFI project.

Participants deposit earned income into their IDAs. The AFI legislation requires participants to wait at least six months between opening their IDA and making an asset purchase. Participants may access their savings and the matching funds only for expenses related to an approved asset purchase (first-home purchase, business capitalization, or postsecondary education or training). They may use their savings without matching funds for certain allowable emergency expenses. AFI legislation allows emergency withdrawals of unmatched savings for medical expenses of a participant and that individual’s spouse or dependent; to prevent eviction or foreclosure on a participant’s primary residence; and to cover necessary living expenses following loss of employment.

When participants are ready to purchase an asset, the AFI project will match the participants’ savings with AFI funds and at least an equal amount of non-federal funds. Participants who withdraw savings to cover emergency needs do not receive any matching funds at that time, and they must replenish their IDA for the amount withdrawn within 12 months in order to continue as a participant. Furthermore, a participant who withdraws IDA savings for any other non-permitted purpose may be suspended or terminated from the AFI project.

### Withdrawals of All Types

Through FY 2014, a total of 86,853 participants in regular AFI projects had withdrawn \$83,728,464 of the earned income they had saved from their IDAs. **Exhibit 5.4** shows the total participants making withdrawals and the total and average amounts they withdrew.

**Exhibit 5.4: Summary of Participant Withdrawals of All Types through FY 2014**

Withdrawals	Total Participants	Total Withdrawals		Average Withdrawal
		Amount	%	
Asset Purchase First home, postsecondary education or business expense purchases	44,995	\$57,600,739	69%	\$1,280
Emergency Medical expenses, living expenses following loss of employment, prevention of eviction or foreclosure	5,245	\$3,366,402	4%	\$642
Other May include voluntary withdrawal due to relocation, change in circumstances, or inability to fulfill program requirements	36,613	\$22,761,323	27%	\$622
<b>Total</b>	<b>86,853</b>	<b>\$83,728,464</b>	<b>100%</b>	<b>\$964</b>
Number of Projects Reporting	763	763	763	763

### Withdrawals for Asset Purchases

Since the beginning of the AFI program, a total of 44,995 participants completed asset purchases through FY 2014, including 15,480 asset purchases for homeownership, 12,570 asset purchases for business capitalization, and 16,726 asset purchases for postsecondary education or training; a total of 219 participants transferred savings to a family member. The total number of participants completing asset purchases through FY 2014 represents a 13 percent increase over the 39,909 participants who had completed an asset purchase through FY 2013.

The 44,995 participants who purchased assets through FY 2014 withdrew \$197,356,454 in savings and match funds for purchasing an asset or transferring funds to a spouse's or dependent's IDA. The total amount withdrawn for purchasing an asset through FY 2014 represents an increase of nearly \$22.7 million over the total amount withdrawn for purchasing an asset through FY 2013. The average amount withdrawn by the 44,995 participants who purchased assets through FY 2014 was \$4,386; the average through FY 2013 is \$9 more than the \$4,377 average withdrawal per participant through the end of FY 2013.

The average amount of participant withdrawals has increased steadily over the last five years, from \$4,248 as of the end of FY 2010, to \$4,268 as of the end of FY 2011, to \$4,370 as of the end of FY 2012, to \$4,377 as the end of FY 2013, and to \$4,386 as of the end of FY 2014.

Summary data for total and average withdrawals by asset purchase type, including values for participant savings and federal and non-federal match funds disbursed, are presented in **Exhibit 5.5**.

**Exhibit 5.5: Total and Average Participant Withdrawals and IDA Match Funds Disbursed**

Participant Withdrawals and IDA Match Funds Disbursed	Cumulative Withdrawals as of End of FY 2014				
	Home-ownership	Business Capitalization	Education or Training	Family Transfer	Total*
Number of participants making these withdrawals	15,480	12,570	16,726	219	44,995
Total amount of savings withdrawn by participants	\$23,552,768	\$16,747,717	\$17,111,715	\$188,539	\$57,600,739
Average amount of savings withdrawn by each participant	\$1,521	\$1,332	\$1,023	\$861	\$1,280
Federal grant funds disbursed as IDA match funds	\$25,164,684	\$18,665,519	\$22,070,882	\$311,937	\$66,213,023
Non-federal funds disbursed as IDA match funds	\$28,643,919	\$19,601,073	\$24,983,764	\$313,937	\$73,542,693
Total savings and IDA match funds disbursed	\$77,361,371	\$55,014,309	\$64,166,361	\$814,413	\$197,356,454
Average total funds used for asset purchase	\$4,998	\$4,377	\$3,836	\$3,719	\$4,386
Number of projects reporting*	762	746	763	621	723

\*Some participants made withdrawals from their IDAs for multiple purposes, such as education and business capitalization. Such participants are counted in both types of withdrawals. In addition, the figures reflect the number of participants who made withdrawals for an asset purchase, not the number of withdrawals made. For example, a participant using his or her IDA for postsecondary education or training expenses might make multiple withdrawals for tuition expenses across a number of semesters.

### ***Allowable Emergency Withdrawals***

Participants may access their IDA savings with permission from the grantee in certain emergency situations, such as for purchasing medical care, preventing eviction, stopping foreclosure of a mortgage, or meeting living expenses following loss of employment. Participants who withdraw their earned income from their IDAs in such situations do not receive matching funds when they make the withdrawal. In order to remain a project participant after withdrawing funds to pay for an emergency expense, participants must replenish their IDA to its original balance within 12 months.

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IDA savings were an important source of emergency support for a number of AFI project participants. As of the end of FY 2014, a total of 5,245 participants in regular AFI projects had withdrawn a total of \$3,366,402 of their IDA savings for emergency costs, or an average of \$642 per participant, as shown in **Exhibit 5.4**. The total amount withdrawn for emergency situations was four percent of the total amount of all withdrawals.

### *Other Withdrawals*

While participants are encouraged strongly to abide by their savings plans and not make withdrawals other than for asset purchases, some IDA participants have found it necessary to withdraw savings before they are ready to purchase their planned asset. Participants who make such withdrawals may be suspended or removed from the AFI project, and they forfeit access to any matching funds.

As of the end of FY 2014, a total of 36,613 participants had made such withdrawals (presented in **Exhibit 5.4**). These participants had withdrawn a total of \$22,761,323 from their IDAs, or an average of \$622 per participant. By comparison, 33,652 participants had withdrawn \$20,933,740 as of the end of FY 2013. HHS does not require grantees to provide information about why participants made these ‘other’ withdrawals.

### **Savings Balances in Open IDAs**

The number of active IDAs changes as participants open and close accounts within each fiscal year. Newly funded AFI projects or projects within their first two years of operation may have a high number of open IDAs and only a few participants ready to make asset purchases. Mature AFI projects may have fewer open IDAs as in previous years but they have a high number of participants making asset purchases and closing out their IDAs. For the past five years the average number of open IDAs is 14,213. In FY 2014, this number was 17,529.

Similarly, the average amount of earnings the participants save in their IDAs varies from project to project and are impacted by many obstacles to self-sufficiency; such as the local workforce economy and the ability of participants to find and maintain employment. These 17,529 open IDAs cumulatively contained \$10,875,417 of participants’ savings; the average balance in each IDA was \$620.

## Section 6

### Program Inputs

This section provides information on regular AFI projects made through FY 2014 (805 awards). The AFI program has several requirements governing the management of federal AFI grant funds and non-federal funds that grantees use to support their AFI projects. It also has specific rules that grantees and participants must follow concerning the administration of participant IDAs and the money the grantee will provide in the form of matching funds.

This section provides information about grantee maintenance of federal and non-federal project funds, including:

- ▶ Federal AFI Grants Awarded
- ▶ Federal AFI Grant Funds Deposited into the Project Reserve Funds
- ▶ Non-Federal Funds Deposited into the Project Reserve Funds

#### Federal AFI Grants Awarded

Congress has appropriated funding for the AFI Program annually since 1999, when the program was authorized. Funding levels have ranged over the years; in FY 2014, funding for the AFI program totaled approximately \$19 million.

Since the time AFI was established in 1999, HHS awarded 886 AFI grants totaling approximately \$242 million. These grants included \$214.2 million awarded to 438 organizations to implement and administer 846 regular AFI projects, as well as \$25.2 million awarded to the states of Indiana and Pennsylvania via 27 grants for the two special state AFI projects.<sup>17</sup> Finally, these grants included \$2.3 million to 13 organizations to implement projects under the Native Asset Building Initiative. As shown in **Exhibit 6.1**, HHS awarded varying numbers of competitive grants and grant amounts each year.

**Exhibit 6.1: Grant Amount and Number of Grants Awarded by Fiscal Year**

Fiscal Year	Number of Grants Awarded	Regular AFI Projects Award Amount (millions)	Special State Projects Award Amount (millions)	NABI Award Amount (millions)	Total Awards (millions)
1999	40	\$9.6	\$1.9	-	\$11.5
2000	27	\$4.4	\$1.7	-	\$6.1
2001	83	\$20.4	\$1.5	-	\$21.9

<sup>17</sup> Awards to Indiana and Pennsylvania are considered one project each for reporting purposes.

Fiscal Year	Number of Grants Awarded	Regular AFI Projects Award Amount (millions)	Special State Projects Award Amount (millions)	NABI Award Amount (millions)	Total Awards (millions)
2002	69	\$16.8	\$2.0	-	\$18.8
2003	51	\$15.4	\$1.8	-	\$17.2
2004	62	\$17.7	\$1.8	-	\$19.5
2005	44	\$13.2	\$2.0	-	\$15.2
2006	68	\$20.4	\$1.0	-	\$21.4
2007	56	\$15.2	\$3.0	-	\$18.2
2008	66	\$16.0	\$2.0	-	\$18.0
2009	51	\$11.8	\$1.0	-	\$12.8
2010	53	\$10.2	\$1.0	-	\$11.2
2011	66	\$13.3	\$1.0	\$1.1	\$15.4
2012	61	\$11.1	\$1.5	\$0.6	\$13.2
2013	45	\$11.4	\$1.0	\$0.3	\$12.7
2014	44	\$8.7	\$1.0	\$0.3	\$10.0

Numerous grantees received multiple AFI grants to support several projects. **Exhibit 6.2** describes these organizations in terms of the number of grants awarded to support regular AFI projects. Among the 438 organizations that received grants for regular AFI projects through FY 2014, most received only one AFI grant ever (61 percent); 18 percent received two grants, while 8 percent received three grants. Thirteen percent of organizations received four or more grants. Grantee organizations submitted competitive proposals for each separate grant received. HHS awarded AFI grants to organizations based in 48 states and the District of Columbia.<sup>18</sup> Additionally, 255 projects are run by network grantees that utilized 1,288 sub-grantees to reach more participants.

**Exhibit 6.2: Number of Grants Awarded per Organization**

Number of Grants Awarded	Number of Organizations	Percent of Organizations
One Grant	268	61%
Two Grants	78	18%
Three Grants	33	8%
Four Grants	21	5%

<sup>18</sup> All states except Wyoming and Rhode Island have had an AFI project awarded to one or more entities in their state.

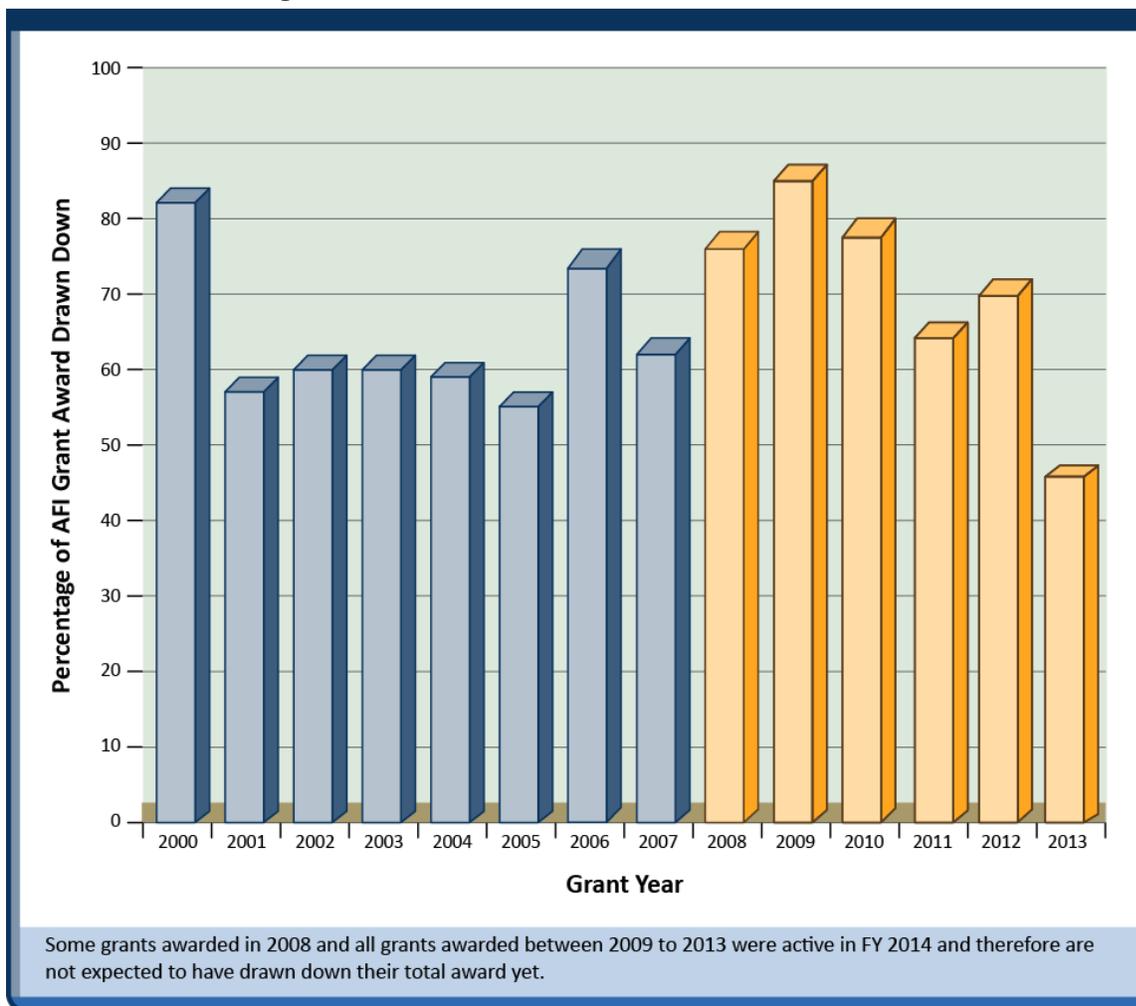
Number of Grants Awarded	Number of Organizations	Percent of Organizations
Five Grants	18	4%
Six Grants	11	3%
Seven Grants	3	<1%
Eight Grants	3	<1%
Nine Grants	0	0%
Ten Grants	0	0%
Eleven Grants	1	<1%
Twelve Grants	1	<1%
Thirteen Grants	0	0%
Fourteen Grants	0	0%
Fifteen Grants	1	<1%
<b>Total</b>	<b>438</b>	<b>100%</b>

### Federal AFI Grant Funds Deposited into the Project Reserve Funds

As of the end of FY 2014, grantees administering regular AFI projects accessed or drew down and deposited into their project reserve funds a cumulative total of \$134,939,850 of their federal AFI grants. In general, the rates of accessing the federal AFI grant funds have varied from project to project and have been affected by a number of factors. AFI grants have five-year project periods. Grantees may draw down the funds in any increment as needed over the period. For example, they may draw down the entire amount early in the project period or at intervals throughout their project. To draw down AFI grant funds, grantees must deposit an equal or greater amount of non-federal funds.

**Exhibit 6.3** presents information on what percentage of total grant dollars drawn down by grantees for each fiscal year since 2000. As of the end of FY 2014, forty-six percent of federal funds for FY 2013 grants were drawn down. The percent of funds drawn down typically increases as grantees move further along the grant lifecycle and begin matching participants' savings. In this exhibit, years for which all grants have expired are presented in blue, while years in which some or all of the grants are still active are presented in yellow.

**Exhibit 6.3: Percentage of Federal AFI Grant Drawn Down**



An examination of the percentage of federal AFI grant funds accessed by AFI grantees whose projects concluded by the end of FY 2014 (meaning that the grant had ended and was not in its closeout period), revealed that more than half of all projects (60 percent) had drawn down between 75 to 100 percent of their grant funds. Fourteen percent had not drawn down any of their AFI grant.

### **Non-Federal Funds Deposited into the Project Reserve Funds**

In accordance with the AFI Act, AFI grantees must provide non-federal funds to support the project in an amount at least equal to the federal grant award. Grantees maintain the federal and non-federal funds in a special account or series of accounts called a project reserve fund. **Exhibit 1.2 in Section 1** illustrates the structure of a typical grantee's project reserve fund. The grantee maintains its federal AFI grant funds and non-federal funds in this account from which it supports project activities and matches participant savings. Though not required, many grantees also allocate additional amounts of cash, as well as in-kind resources, from sources

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other than their AFI grant for administering their projects and providing services to their participants.

Grantees may deposit the non-federal funds as they wish in terms of amount and timing throughout the project period. However, they must deposit non-federal funds of at least the amount of AFI funds requested in order to draw down federal funds. As of the end of FY 2014, regular AFI project grantees deposited \$144,913,287 of non-federal funds into their respective project reserve funds, an increase of more than \$11.7 million since FY 2013. The deposits of non-federal funds (\$144,913,287) exceeds the amount of federal funds (\$134,939,850) that have been drawn down and deposited into their project reserve funds by seven percent; grantees may not draw down federal funds without matching non-federal cash, but they may deposit more non-federal funds than is required by AFI into their project reserve fund.

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## Section 7

# Special State AFI Projects in Indiana and Pennsylvania

Section 405(g) of the AFI Act authorizes HHS to award grants to support state-administered IDA projects that were authorized by state legislation and funded prior to the passage of the AFI Act. These programs are exempt from requirements in Sections 407 through 411 of the AFI Act if those requirements were inconsistent with their respective state legislation when AFI was enacted. Two states—Indiana and Pennsylvania—meet these criteria. This section describes the two state projects and provides an update on the status of each of them as of the end of FY 2014.

### Indiana IDA Program

The Indiana IDA program is administered by the Indiana Housing and Community Development Authority (IHCDA). Established by state law in 1997, it was one of the earliest large-scale IDA programs in the country.

This subsection describes the following aspects of the Indiana IDA program:

- ▶ Funding Sources and Program Administration
- ▶ Financial Education and Asset-Specific Training
- ▶ Account Holders and their Characteristics
- ▶ Participant Savings and Withdrawals

#### *Funding Sources and Program Administration*

Until AFI funding became available in FY 1999, the Indiana program relied solely on state funding. Currently, its primary sources of funding are the AFI program and annual state appropriations. As shown in **Exhibit 7.1**, from FY 1999 through FY 2014, the program was awarded a total of \$15,124,944 in AFI funds.<sup>19</sup> During this period, the program also was appropriated \$13,969,372 in state funds.

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<sup>19</sup> HHS did not award an AFI grant to the State of Indiana in FY 2006. The state submitted an application in FY 2006, but HHS deferred awarding a grant until early FY 2007. The state of Indiana subsequently submitted an application in FY 2007, and HHS awarded a grant based on that application as well in FY 2007.

**Exhibit 7.1: AFI Grant Awards per Fiscal Year: Indiana IDA Program**

Fiscal Year	AFI Grant Award Amount
1999	\$930,000
2000	\$700,000
2001	\$494,944
2002	\$1,000,000
2003	\$1,000,000
2004	\$1,000,000
2005	\$1,000,000
2006	\$0
2007	\$2,000,000
2008	\$1,000,000
2009	\$1,000,000
2010	\$1,000,000
2011	\$1,000,000
2012	\$1,000,000
2013	\$1,000,000
2014	\$1,000,000
<b>Total</b>	<b>\$15,124,944</b>

Annually, IHCD awards year-long contracts to sub-recipients across the state to administer IDA projects. In FY 2014, IHCD awarded contracts to 25 sub-recipient agencies. **Exhibit 7.2** displays the types of organizations that received contracts from IHCD in FY 2014. The most common agency types among sub-recipients were Community Action Agency and Housing Authority or Organization (40 percent each).

**Exhibit 7.2: Types of Sub-recipient Agencies: Indiana IDA Program**

Sub-recipient Agency Type	Number of Sub-recipients	Percentage of Sub-recipients
Community Action Agency	10	40%
Housing Authority or Organization	10	40%
Faith-based Organization	0	0%
Human Services Organization (nonprofit) or Agency	5	20%
<b>Total</b>	<b>25</b>	<b>100%</b>

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### ***Financial Education and Asset-Specific Training***

Participants are required to complete eight hours of financial literacy education. Currently, several financial literacy curricula are utilized, but the state is working to create a standardized financial literacy program. Additionally, participants are required to complete at least six hours of asset-specific training. Through the end of FY 2014, more than 5,910 participants completed financial literacy training and 6,935 participants completed asset-specific training.<sup>20</sup>

### ***Account Holders and their Characteristics***

From FY 1999 through FY 2014, 5,675 participants opened IDAs with AFI support. Through the end of FY 2014, 71 percent of participants who opened accounts were female and 21 percent were male. Caucasians opened the majority of accounts (52 percent), while African American participants represented another 28 percent of all account holders. When account holders enrolled, 44 percent were single, 22 percent were married, 19 percent were divorced, 5 percent were separated, and 2 percent were widowed. The majority of account holders were the only adult living in their household at the time of enrollment (55 percent); a significant percentage of account holders had one or two children (43 percent). A majority of account holders (59 percent) were between 20 and 39 years old when they enrolled.

At the time of enrollment, 35 percent held only a high school diploma while less than half (43 percent) had received education beyond the high school level (an associate's degree, some college, a college degree, some graduate school, or a graduate degree). When they enrolled in the IDA program, 55 percent of account holders were employed full-time.<sup>21</sup>

### ***Participant Savings and Withdrawals***

As of the end of FY 2014, participants had deposited \$4,598,803 in personal savings (an average of \$810 per participant). This amount represents only participant savings that qualified to be matched by the state. As participants have an indefinite period of time to make a qualified asset purchase, they may continue to save beyond the initial four-year savings period. As such, additional participant savings may not be captured in these figures.

From FY 1999 through FY 2014, 4,715 participants used \$3,012,481 of their own savings to make qualified asset purchases. The total amount of matching funds disbursed (AFI and state funds combined) was \$12,511,929. An additional \$328,967 was withdrawn in unmatched savings for emergencies or due to termination from the project.

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<sup>20</sup> These numbers may not represent unique individuals. It is possible that an individual completed more than one type of asset-specific training.

<sup>21</sup> Although all sub-recipients reported project data for this year's report, some sub-recipients did not collect or report certain demographic information from participants. As such, these figures are based on incomplete information. The share of "unknown" demographic information ranged from 8 percent (gender) to 19 percent (employment status). Participants not employed at the time of enrollment would have to become employed before contributing to an IDA (in order to deposit earned income).

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The largest subset of participants who made withdrawals (48 percent, or 2,250 participants) did so for postsecondary education. The second largest subset made withdrawals for homeownership (33 percent, or 1,569 participants). Finally, 19 percent (896 participants) used IDA funds for business capitalization. Participants can use their savings to make more than one asset purchase, so these groups of participants are not mutually exclusive.

## **Pennsylvania Family Savings Account Program**

The Pennsylvania Family Savings Account (FSA) program, administered by the Pennsylvania Department of Community and Economic Development (DCED), became operational in 1998.

This subsection describes the following elements of the Pennsylvania FSA program:

- ▶ Funding Sources and Program Administration
- ▶ Financial Education and Asset-Specific Training
- ▶ Account Holders and their Characteristics
- ▶ Participant Savings and Withdrawals

### ***Funding Sources and Program Administration***

The FSA program first received AFI support in FY 1999. Since that time, DCED allocated nearly \$26 million in state and federal funds to the program. Funding sources included the AFI program (\$10,082,000); state appropriations (\$10,228,000); the Temporary Assistance for Needy Families (TANF) program (\$6,000,000); and the Community Services Block Grant (CSBG) program (\$46,000).

**Exhibit 7.3** identifies all AFI awards for the Pennsylvania FSA program through FY 2014. The data reported for FY 2014 was calculated by aggregating information across all of these awards.

### Exhibit 7.3: AFI Grant Awards per Fiscal Year: Pennsylvania FSA Program

Fiscal Year	AFI Grant Award Amount
1999	\$930,000
2000	\$1,000,000
2001	\$1,000,000
2002	\$1,000,000
2003	\$826,000
2004	\$826,000
2005	\$1,000,000
2006	\$1,000,000
2007	\$1,000,000
2008	\$1,000,000
2009	\$0*
2010	\$0
2011	\$0
2012	\$500,000
2013	\$0
2014	\$0
<b>Total</b>	<b>\$10,082,000</b>

\*The reduction in funds was in line with administrative priority changes, which removed the FSA program from the annual state budget.

**Exhibit 7.4** displays the types of organizations that ever received AFI funding from DCED. The FSA program has been administered by 51 sub-recipients across the state, 48 of which have received AFI support. The most common sub-recipient type was Community Action Agency (54 percent).

### Exhibit 7.4: Types of Sub-recipient Agencies: Pennsylvania FSA Program

Sub-recipient Agency Type	Number of Sub-recipients	Percentage of Sub-recipients
Community Action Agency	26	54%
Human Services Organization (nonprofit) or Agency	11	23%
Housing Authority or Organization	5	10%
Community Development Corporation	3	6%
Local United Way agencies	2	4%
Faith-based Organization	1	2%
<b>Total</b>	<b>48</b>	<b>99%*</b>

\*The total is 99% due to rounding.

### *Financial Education and Asset-Specific Training*

Participants are required to attend at least four general financial education classes, each of which is typically four hours in length. They also must participate in at least two other asset-

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specific training sessions, which vary in length based on the asset purchase goal. Participants must complete the general financial education classes and the asset-specific training sessions prior to asset purchase. Through FY 2014, 4,022 participants completed general financial education classes, while 4,519 completed asset-specific courses.<sup>22</sup>

### *Account Holders and their Characteristics*

Since its inception, the Pennsylvania FSA program allocated funds to support 14,219 participants through FY 2014. Approximately 11,400 participants opened IDAs through the FSA program, of which 8,075 received AFI support. A total of 4,087 participants graduated from the program, 1,111 of which received AFI support.

Through the end of FY 2014, 57 percent of account holders were female and 18 percent were male.<sup>23</sup> Caucasians opened the majority of accounts (39 percent); African Americans represented the next largest group of account holders (28 percent). When account holders enrolled, 36 percent had never been married and 30 percent had been married at some point. Forty six percent of account holders were the sole head of household (either lived alone or were single parents at the time of enrollment). Nearly one-third (31 percent) of account holders had either one or two children at the time of enrollment; 21 percent had no children. Slightly more than one-third (37 percent) of account holders were between 20 and 39 years old when they enrolled.

Thirty four percent of account holders were employed full-time when they enrolled; another 15 percent held part-time jobs.<sup>24</sup> At the time of enrollment, 25 percent had attained only a high school diploma, while 35 percent had received education beyond the high school level (an associate's degree, some college, a college degree, some graduate school, or a graduate degree).

### *Participant Savings and Withdrawals*

From FY 1999 through FY 2014, 8,075 individuals opened FSAs with AFI support. They deposited \$10,737,228 million into their FSAs. By the end of FY 2014, 4,087 participants made matched withdrawals from their FSAs.

Of the 4,087 participants who made matched withdrawals from their FSAs, 73 percent (2,976 individuals) did so for Pennsylvania-specific authorized uses. The most popular authorized uses were home repair (31 percent) and car purchase related to employment or education (27

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<sup>22</sup> The number of participants that completed asset-specific courses does not necessarily represent unique individuals, as individuals may have completed more than one type of asset-specific training.

<sup>23</sup> Although all sub-recipients reported project data for this year's report, some sub-recipients did not collect certain demographic information from participants. As such, these figures are based on incomplete information.

<sup>24</sup> Participants not employed at the time of enrollment would have to become employed before contributing to an IDA (in order to deposit earned income).

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percent), while home purchase and education (both AFI authorized and Pennsylvania authorized uses) each represented 13 percent and 12 percent of qualified withdrawals, respectively.

Those making withdrawals for qualified asset purchases withdrew \$6,366,228 of their own savings. The amount of matching funds (AFI and other sources combined) disbursed for these purchases was \$6,356,090 for a qualified asset purchases. The average amount of participants' own savings withdrawn for qualified purchases is slightly higher than the matched amount because participants are allowed to continue making deposits into their accounts after meeting the maximum matched savings amount and to save past the allowed matching time period, but the excess savings are not matched by the FSA program.

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## Section 8

### Native Asset Building Initiative (NABI)

This section describes the Native Asset Building Initiative (NABI) and provides information about the status of AFI projects administered as part of NABI. NABI is a joint funding opportunity, offered through a partnership between the AFI program and the Social and Economic Development Strategies (SEDS) program administered by ACF's Administration for Native Americans (ANA). The purpose of this initiative is to increase access to and awareness of asset building opportunities in native communities.

The SEDS program is complementary to the AFI program. Through SEDS, ANA promotes the goal of economic and social self-sufficiency for American Indians, Alaska Natives, Native Hawaiians, and Native American Pacific Islanders. Native communities are asset-rich in culture and community, though many Native community members are asset-poor in economic assets.

Two of the most frequently identified challenges for native asset building projects are the lack of funding for administering the project and the lack of funding for providing comprehensive asset building tools. This initiative is an attempt to address these challenges. Grantees access AFI funds to match participants' IDA savings, following the same rules as regular AFI projects. These same grantees may use their SEDS funds to support project administration and other implementation activities, such as asset building strategies other than IDAs. Projects funded under this initiative plan to provide an array of services that will help Native individuals and families achieve greater financial stability.

This section describes the following aspects of the NABI program:

- ▶ AFI Grants Awarded
- ▶ Program Design
- ▶ Financial Education and Asset-Specific Training
- ▶ IDAs, Participant Savings, and Withdrawals

#### **AFI Grants Awarded**

AFI has awarded grants under NABI for four consecutive fiscal years—FY 2011 through FY 2014. In FY 2011, AFI awarded five grants totaling \$1.1 million. In FY 2012, AFI awarded four grants totaling \$601,029. In FY 2013, AFI awarded two grants totaling \$330,000. In FY 2014, AFI awarded two grants totaling \$272,463.

### Exhibit 8.1: AFI Grant Awards per Fiscal Year: NABI

Fiscal Year	Number of Awards	AFI Grant Award Amount
2011	5	\$1,137,329
2012	4	\$601,029
2013	2	\$330,000
2014	2	\$272,463
<b>Total</b>	<b>13</b>	<b>\$2,340,821</b>

#### *Program Design*

NABI projects are subject to the same program design constraints as regular AFI Projects and focus on the same array of financial education and matched savings activities. Of the 11 NABI projects that have begun implementation to date (the two awarded in FY 2014 did not provide data for this report), eight projects (73 percent) allowed participants to pursue homeownership as an asset goal. Eleven projects (100 percent) allowed participants to pursue education as an asset goal. Nine projects (82 percent) allowed participants to pursue business capitalization as an asset goal. Two projects (18 percent) allowed participants to transfer matched savings to dependents.

NABI projects offered match rates from \$2 for every \$1 saved to \$8 for every \$1 saved for each asset purchase type, except for transfer to dependents which had match rates ranging from \$4 for every \$1 saved to \$5 for every \$1 saved.

#### *Financial Education and Asset-Specific Training*

Participants are required to complete an average of 9 hours of financial literacy education. A majority of the NABI projects use the Building Native Communities curriculum as part of their training. Additionally, participants are required to complete several hours of asset-specific training.

- ▶ For homeownership, participants are required to complete an average of 12 hours of training.
- ▶ For education, participants are required to complete an average of 5 hours of training.
- ▶ For business capitalization, participants are required to complete an average of 15 hours of training.

Through the end of FY 2014, 1,077 participants completed financial literacy and asset-specific training.

#### *IDAs, Participant Savings and Withdrawals*

Through FY 2014, 276 participants opened IDAs with AFI support. Participants deposited \$142,554 in personal savings (an average of \$517 per participant). Through FY 2014, 59

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participants made matched withdrawals for asset purchases. Of those, 9 were for homeownership, 36 were for education, and 14 for business capitalization. The total participant savings withdrawn for these 59 participants was \$49,203; the total matching funds (AFI and other sources combined) was \$176,034.

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## Section 9

### Program Evaluation and Other Activities

As a demonstration program, AFI prioritizes developing knowledge about the program and leveraging what has already been learned. This section provides additional information about these key aspects of the Department's support for AFI grantees and the asset building field:

- ▶ Program Evaluation
- ▶ ASSET Initiative
- ▶ AFI Resource Center

#### Program Evaluation

In the fall of 2011, ACF's Office of Planning, Research, and Evaluation, in partnership with OCS, launched a random assignment evaluation of the impact of AFI program participation on savings, savings patterns and asset purchase by low-income individuals and families at two AFI grantee sites. This experimental study builds on the 2008 AFI quasi-experimental evaluation as well as various studies of other non-AFI funded IDA projects, and offers the first rigorous, experimental test of the AFI program.

This random assignment study on the impact on savings, saving patterns and asset purchases for AFI program participants will include qualitative assessments and field reports as well as quantitative assessment of the effect of IDA program participation on civic, psychological, and social outcomes as well as economic outcomes (e.g. savings, qualified asset purchases, assets, debts, and net worth). The two study sites are RISE Financial Pathways in Los Angeles, California and Prosperity Works in New Mexico. Participant enrollment and baseline data collection for the evaluation began in January 2013 and ended in July 2014. The final report with early results, approximately 12 months after random assignment, will be available in 2016.

The 2008 AFI evaluation,<sup>25</sup> which used data collected from the early- to mid-2000s, found that individuals and families derived substantial benefits from participating in the program.

Participants were 35 percent more likely to become homeowners, 84 percent more likely to become business owners and nearly twice as likely to pursue postsecondary education or training compared with a corresponding national sample of AFI-eligible non-participants in the general U.S. population.

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<sup>25</sup> Available at <http://www.acf.hhs.gov/programs/ocs/resource/afi-program-evaluation>.

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## ASSET Initiative

ACF views AFI as a platform for bringing IDAs, financial education, credit and debt counseling, access to federal tax credits, and other financial capability and asset-building strategies to working families throughout the nation. Building on lessons learned from the AFI program, ACF launched an agency-wide initiative— the Assets, Savings, Support, Education and Training, or ASSET Initiative— in FY 2010. ASSET Initiative collaborations have included pilots with Head Start grantees in Massachusetts and Pennsylvania and the Utah State Temporary Assistance for Needy Families (TANF) agency. In addition to collaborating with other programs within ACF, OCS is actively engaged in the Financial Literacy and Education Commission (FLEC) as a way to disseminate and leverage the knowledge developed through the AFI program with other federal partners. For example, ACF partnered with the Consumer Financial Protection Bureau to explore how financial capability services can be integrated into youth employment programs, jointly publishing a report entitled *Building Financial Capability in Youth Employment Programs*.<sup>26</sup>

## AFI Resource Center

The AFI Resource Center provides training and technical assistance to AFI grantees, their sub-recipients, and other partners. In September 2014, HHS contracted with the Corporation for Enterprise Development (CFED) to build capacity, foster innovation, and improve performance in the AFI program through needs- and evidence-based resources and services. CFED is a non-profit organization that is a leader in the field of asset building that has been supporting IDA programs for many years. Technical assistance is provided as part of the AFI Resource Center, as are other services. Here are some examples of the training and technical assistance that HHS provided in FY 2014.

- ▶ **Conference Calls and Webinars.** HHS sponsored conference calls and webinar-based presentations on asset building issues and AFI administrative matters, featuring tools and other resources. The presentations were geared to AFI grantees and potential applicants.
- ▶ **Customized Technical Assistance.** Staff and consultants provided telephone or in-person assistance to AFI grantees and potential applicants on issues such as recruiting participants, project design, application procedures, building partnerships, and related topics.
- ▶ **Data Support.** Staff and consultants continued to provide support for grantees for collecting and using data for reporting and project management.

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<sup>26</sup> This report is available online at <http://www.acf.hhs.gov/programs/ocs/resource/building-financial-capability-in-youth-employment-programs>.

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- ▶ **Websites.** HHS continued to manage websites that provide general information about asset building, the AFI program, funding opportunities, and other resources for grantees, their partners, and the public. The AFI Resource Center web address is <http://idaresources.acf.hhs.gov/> and the AFI program web page is <http://www.acf.hhs.gov/programs/ocs/programs/afi>.
  - ▶ **E-Newsletter.** The AFI Resource Center distributed two e-newsletters to AFI grantees, their project partners and other organizations. The newsletter has been a platform for featuring successful grantees, highlighting effective practices, and announcing upcoming training events.

## Appendix

The following tables present information about each of the 859 regular and NABI AFI projects for the Fourteenth Report to Congress. The following tables include Pennsylvania and Indiana grantees that are not part of special state grants. It highlights design features and key outputs. The tables present the following elements about each project:

### *Project Details*

- ▶ Grant Number
- ▶ Grant Period (fiscal year)
- ▶ Location of Grantee (state)
- ▶ Grantee Name
- ▶ Grant Amount

### *Project Highlights*

- ▶ Number of IDAs Opened
- ▶ Cumulative Amount of IDA Deposits
- ▶ Participants Who Have Purchased an Asset

## Background

**Appendix Table 1** presents project details and highlights of AFI grantees by state in order of award date. **Appendix Table 2** presents these same key project outputs in order of award date to show metrics by grant cohort.

These tables are configured with one row for each grant awarded through FY 2014. Many grantees have received multiple AFI grants and are administering more than one AFI project simultaneously. For these grantees, the tables present information about each of the grantee's projects on different rows. For example, if a grantee administers three AFI projects, information about its three projects is shown in three separate rows, each with the same grantee name listed.

Data presented in the tables was provided by grantees and illustrates final information for grants that have ended in years prior to FY 2014 as well as partial information for those whose project periods were ending at the close of FY 2014 and for ongoing projects. Projects in their initial years typically report fewer outputs while setting up the project and helping participants open IDAs. Projects in the fourth or fifth years of their AFI grant have had more time to operate and their participants typically start to make asset purchases with their savings and match funds; therefore, these grantees often report more outputs.

Some grantees reported opening zero participant IDAs and therefore also show zero for the cumulative amount of IDA deposits and the number of participants who have purchased an asset. There are several reasonable explanations as to why a grantee may have reported opening zero IDAs. For those grantees administering a newly awarded project, the project likely is focused on initiating the project and has not had sufficient time yet to recruit participants and open accounts. Additionally, the grantee may be administering multiple grants and is enrolling new participants in the older projects in order to maximize the grant funding before opening new IDAs under their more recent grants. However, some projects that have

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completed their project periods already were unable to implement the project as planned and reported zero outcomes. Grantees may have had difficulty raising non-federal match funding for their project and thus were unable to draw down the federal AFI funds in order to implement the project or may have decided to relinquish the grant at some point during the project period. These projects either did not draw down any of the federal grant funds or would have had to return any unused federal grant funds at the end of their project period. The AFI Resource Center uses the data provided to identify grantees that may benefit from individualized technical assistance.

## Appendix Table 1: Project Details and Highlights by Grant State

*Grants are sorted first by state and then by award date.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0165	2002 - 2008	AL	Tuscaloosa Housing Authority	\$25,000	18	\$4,125	0
90EI0269	2004 - 2009	AL	Family Services Center	\$88,940	14	\$8,803	2
90EI0360	2005 - 2011	AL	United Way of Central Alabama	\$201,529	132	\$183,713	62
90EI0405	2006 - 2012	AL	United Way of Central Alabama	\$655,000	392	\$424,378	135
90EI0496	2007 - 2013	AL	United Way of Central Alabama	\$115,000	75	\$91,856	41
90EI0556	2008 - 2014	AL	Tuscaloosa Housing Authority	\$25,000	0	\$0	0
90EI0585	2009 - 2015	AL	United Way of Central Alabama	\$186,765	151	\$143,434	44
90EI0737	2011 - 2016	AL	United Way of Central Alabama	\$128,853	63	\$82,862	24
90EI0804	2013 - 2018	AL	United Way of Central Alabama	\$300,000	52	\$27,797	0
90EI0256	2003 - 2009	AK	Cook Inlet Tribal Council, Inc.	\$625,000	246	\$189,468	31
90EI0466	2007 - 2012	AK	Alaska Business Development Center, Inc.	\$129,412	6	\$2,965	0
90EI0547	2008 - 2014	AK	Cook Inlet Lending Center, Inc.	\$233,000	200	\$187,340	96
90EI0590	2009 - 2014	AK	Urban League of Anchorage Alaska	\$106,000	37	\$34,605	11
90EI0634	2010 - 2015	AK	Cook Inlet Lending Center, Inc.	\$174,118	140	\$75,776	0
90EI0037	1999 - 2004	AZ	Kentucky River Foothills Development Council, Inc.	\$39,950	25	\$16,183	10
90EI0068	2001 - 2007	AZ	City of Tucson	\$45,000	76	\$68,883	44
90EI0069	2001 - 2007	AZ	Mesa Community Action Network, Inc.	\$155,000	202	\$335,567	58
90EI0181	2002 - 2008	AZ	City of Tucson	\$100,000	121	\$95,199	0
90EI0247	2003 - 2009	AZ	Mesa Community Action Network, Inc.	\$540,000	396	\$501,748	173
90EI0329	2004 - 2009	AZ	Southeastern Arizona Community Action Program, Inc.	\$300,000	0	\$0	0
90EI0292	2004 - 2010	AZ	Chicanos por la Causa	\$70,000	44	\$47,272	10
90EI0310	2004 - 2010	AZ	Mesa Community Action Network, Inc.	\$307,060	78	\$70,172	27
90EI0350	2005 - 2011	AZ	Mesa Community Action Network, Inc.	\$571,000	242	\$206,484	130
90EI0413	2006 - 2012	AZ	Nogales Community Development Corporation	\$280,001	146	\$206,086	90
90EI0422	2006 - 2012	AZ	City of Tucson	\$110,000	68	\$45,000	45
90EI0429	2006 - 2012	AZ	BOTHANDS, Inc.	\$75,900	43	\$37,784	3
90EI0467	2007 - 2013	AZ	Mesa Community Action Network, Inc.	\$250,000	248	\$321,677	121
90EI0641	2010 - 2015	AZ	Mesa Community Action Network, Inc.	\$250,000	332	\$207,000	206
90EI0658	2010 - 2015	AZ	International Rescue Committee, Inc. - Phoenix, AZ	\$572,991	111	\$300,752	16

\*For details about the grants administered by the two state AFI projects, please see Section 7: Special State AFI Projects in Indiana and Pennsylvania.

## Appendix Table 1: Project Details and Highlights by Grant State

*Grants are sorted first by state and then by award date.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0685	2011 - 2016	AZ	Catholic Community Services of Southern AZ, Inc.	\$400,000	87	\$162,827	47
90EI0739	2012 - 2017	AZ	Arizona State University	\$250,000	99	\$44,059	74
90EI0764	2012 - 2017	AZ	Arizona Board of Regents, University of Arizona	\$1,000,000	167	\$76,321	120
90EI0777	2012 - 2017	AZ	Mesa Community Action Network, Inc.	\$100,000	91	\$30,800	20
90EI0794	2012 - 2017	AZ	ABOR for and on behalf of Northern Arizona University	\$300,000	59	\$23,658	38
90EI0808	2013 - 2018	AZ	Arizona State University	\$1,000,000	14	\$7,829	10
90EI0817	2013 - 2018	AZ	Mesa Community Action Network, Inc.	\$100,000	48	\$14,458	1
90EI0820	2013 - 2018	AZ	Arizona Board of Regents, University of Arizona	\$585,504	61	\$24,260	39
90EI0827	2013 - 2018	AZ	ABOR for and on behalf of Northern Arizona University	\$335,504	7	\$3,287	6
90EI0871	2014 - 2019	AZ	Arizona Board of Regents, University of Arizona	\$1,000,000	0	\$0	0
90EI0873	2014 - 2019	AZ	ABOR for and on behalf of Northern Arizona University	\$500,000	0	\$0	0
90EI0878	2014 - 2019	AZ	Arizona State University	\$1,000,000	0	\$0	0
90EI0046	2000 - 2006	AR	Southern Bancorp Community Partners	\$125,000	183	\$125,197	93
90EI0067	2001 - 2006	AR	Economic Opportunity Agency of Washington County, Inc.	\$11,500	10	\$6,667	10
90EI0158	2002 - 2008	AR	Economic Opportunity Agency of Washington County, Inc.	\$50,000	16	\$9,675	11
90EI0160	2002 - 2008	AR	South Arkansas Community Development	\$22,770	48	\$17,086	20
90EI0206	2002 - 2008	AR	Southern Bancorp Community Partners	\$250,000	232	\$107,523	59
90EI0231	2003 - 2008	AR	Economic Opportunity Agency of Washington County, Inc.	\$20,000	17	\$10,667	12
90EI0259	2003 - 2008	AR	South Arkansas Community Development	\$23,000	0	\$0	0
90EI0272	2004 - 2009	AR	Crowley's Ridge Development Council, Inc.	\$52,942	33	\$19,988	8
90EI0337	2005 - 2011	AR	Central Arkansas Development Council	\$40,080	71	\$32,153	31
90EI0340	2005 - 2011	AR	Crawford-Sebastian Community Development Council	\$216,715	334	\$191,405	95
90EI0494	2007 - 2012	AR	Southern Bancorp Community Partners	\$160,000	313	\$179,304	114
90EI0576	2009 - 2014	AR	Southern Bancorp Community Partners	\$176,471	321	\$167,568	123
90EI0716	2011 - 2016	AR	Southern Bancorp Community Partners	\$352,941	141	\$61,581	16
90EI0760	2012 - 2017	AR	Crawford-Sebastian Community Development Council	\$137,000	20	\$14,924	6
90EI0864	2014 - 2019	AR	Central Arkansas Development Council	\$58,824	0	\$0	0
90EI0001	1999 - 2004	CA	Peninsula Community Foundation	\$250,000	190	\$203,578	126
90EI0007	1999 - 2004	CA	CHARO Community Development Corporation	\$100,000	0	\$0	0

\*For details about the grants administered by the two state AFI projects, please see Section 7: Special State AFI Projects in Indiana and Pennsylvania.

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*Grants are sorted first by state and then by award date.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0024	1999 - 2005	CA	East Bay Asian Local Development Corporation	\$260,773	281	\$611,500	150
90EI0039	1999 - 2005	CA	Fresno County Economic Opportunities Commission	\$86,879	70	\$94,168	34
90EI0040	1999 - 2005	CA	Community Action Partnership of Riverside County	\$57,500	219	\$199,226	42
90EI0013	1999 - 2008	CA	Mercy Housing California	\$79,500	88	\$50,178	26
90EI0053	2000 - 2005	CA	West Enterprise Center	\$53,038	44	\$32,370	41
90EI0055	2000 - 2005	CA	Community Action Partnership of Sonoma County	\$50,000	27	\$29,799	20
90EI0117	2001 - 2003	CA	San Francisco Foundation Community Initiatives Fund	\$200,000	0	\$0	0
90EI0071	2001 - 2006	CA	City of Los Angeles	\$500,000	306	\$257,659	191
90EI0098	2001 - 2006	CA	AnewAmerica Community Corporation	\$107,965	75	\$114,143	52
90EI0134	2001 - 2006	CA	Mercy Housing California	\$115,500	42	\$24,161	6
90EI0148	2001 - 2006	CA	Northeast Community Federal Credit Union	\$25,000	12	\$22,422	10
90EI0070	2001 - 2007	CA	United Way of Greater Los Angeles	\$499,059	376	\$477,602	163
90EI0120	2001 - 2007	CA	Community Action Commission of Santa Barbara County	\$10,000	5	\$11,777	5
90EI0147	2001 - 2007	CA	Community Action Partnership of Sonoma County	\$50,000	3	\$6,148	3
90EI0150	2001 - 2007	CA	Community Action Partnership of Riverside County	\$250,000	121	\$187,096	52
90EI0192	2002 - 2003	CA	San Francisco Foundation Community Initiatives Fund	\$800,000	0	\$0	0
90EI0187	2002 - 2007	CA	Northeast Community Federal Credit Union	\$47,060	14	\$29,928	9
90EI0167	2002 - 2008	CA	AnewAmerica Community Corporation	\$96,353	58	\$137,497	48
90EI0178	2002 - 2008	CA	Community Action Commission of Santa Barbara County	\$34,000	29	\$11,223	6
90EI0183	2002 - 2008	CA	Jefferson Economic Development Institute	\$150,600	61	\$53,248	51
90EI0186	2002 - 2008	CA	Fresno County Economic Opportunities Commission	\$80,000	39	\$46,532	20
90EI0199	2002 - 2008	CA	United Way of Greater Los Angeles	\$1,000,000	905	\$1,190,851	322
90EI0204	2002 - 2008	CA	East Bay Asian Local Development Corporation	\$230,590	31	\$40,299	15
90EI0222	2003 - 2007	CA	Earned Assets Resource Network	\$461,800	308	\$464,670	149
90EI0221	2003 - 2008	CA	Earned Assets Resource Network	\$800,000	423	\$635,199	180
90EI0223	2003 - 2008	CA	Opportunity Fund	\$188,250	118	\$184,483	104
90EI0224	2003 - 2008	CA	West Enterprise Center	\$47,058	10	\$10,049	7
90EI0263	2003 - 2008	CA	Community Action Commission of Santa Barbara County	\$42,000	0	\$0	0
90EI0268	2003 - 2008	CA	Alliance for African Assistance	\$125,000	25	\$31,103	14

\*For details about the grants administered by the two state AFI projects, please see Section 7: Special State AFI Projects in Indiana and Pennsylvania.

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0237	2003 - 2009	CA	Community Action Partnership of Sonoma County	\$50,000	13	\$17,797	11
90EI0252	2003 - 2009	CA	Community Action Partnership of Riverside County	\$300,000	220	\$282,582	69
90EI0322	2004 - 2009	CA	Valley Small Business Development Corporation	\$160,640	0	\$0	0
90EI0270	2004 - 2010	CA	United Way of Greater Los Angeles	\$588,824	567	\$530,000	364
90EI0277	2004 - 2010	CA	Earned Assets Resource Network	\$1,000,000	583	\$878,494	275
90EI0293	2004 - 2010	CA	Community Housing Development Corporation	\$105,000	31	\$32,752	13
90EI0298	2004 - 2010	CA	Cabrillo Economic Development Corporation	\$162,350	20	\$9,965	19
90EI0303	2004 - 2010	CA	AnewAmerica Community Corporation	\$255,873	19	\$40,401	17
90EI0331	2005 - 2010	CA	Sacramento Mutual Housing Association	\$211,765	0	\$0	0
90EI0335	2005 - 2011	CA	Associated Community Action Program	\$500,000	409	\$154,017	39
90EI0359	2005 - 2011	CA	Earned Assets Resource Network	\$1,000,000	597	\$905,533	314
90EI0380	2006 - 2011	CA	Northeast Community Federal Credit Union	\$40,000	0	\$0	0
90EI0382	2006 - 2011	CA	Opportunity Fund	\$500,000	316	\$538,482	302
90EI0394	2006 - 2011	CA	RISE Financial Pathway (formerly LA Community Financial Resource Center)	\$200,000	0	\$0	0
90EI0399	2006 - 2011	CA	City of Los Angeles	\$500,000	0	\$0	0
90EI0392	2006 - 2012	CA	California Coalition for Rural Housing	\$290,000	72	\$85,971	17
90EI0414	2006 - 2012	CA	Community Action Partnership of Riverside County	\$352,000	228	\$278,184	76
90EI0437	2006 - 2012	CA	Developmental Services Support Foundation for Kern, Inyo and Mono Counties	\$105,000	51	\$55,258	28
90EI0480	2007 - 2008	CA	Orange County United Way	\$470,588	0	\$0	0
90EI0460	2007 - 2012	CA	Weingart Center Association	\$656,251	0	\$0	0
90EI0484	2007 - 2012	CA	United Way of Greater Los Angeles	\$1,000,000	330	\$603,296	224
90EI0487	2007 - 2012	CA	Community Action Partnership of San Bernardino County	\$253,256	228	\$285,000	52
90EI0491	2007 - 2012	CA	Opportunity Fund	\$1,000,000	544	\$898,049	489
90EI0461	2007 - 2013	CA	Fresno County Economic Opportunities Commission	\$500,000	241	\$428,577	212
90EI0470	2007 - 2013	CA	City of Oakland	\$250,000	157	\$263,302	102
90EI0482	2007 - 2013	CA	San Diego Housing Commission	\$100,000	99	\$120,137	56
90EI0522	2008 - 2013	CA	Earned Assets Resource Network	\$1,000,000	446	\$779,824	296

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90EI0540	2008 - 2013	CA	Santa Cruz Community Credit Union	\$75,000	58	\$131,204	54
90EI0521	2008 - 2014	CA	San Diego Housing Commission	\$150,000	178	\$140,320	46
90EI0523	2008 - 2014	CA	United Way of Kern County, Inc.	\$152,900	99	\$133,221	62
90EI0534	2008 - 2014	CA	Community Housing Development Corporation	\$69,000	31	\$43,188	14
90EI0567	2008 - 2014	CA	Arcata Economic Development Corporation	\$136,500	83	\$73,636	67
90EI0582	2009 - 2015	CA	California Coalition for Rural Housing	\$335,300	39	\$50,257	25
90EI0584	2009 - 2015	CA	Community Action Partnership of Riverside County	\$352,000	302	\$204,029	83
90EI0593	2009 - 2015	CA	Community Action Partnership of Sonoma County	\$50,000	52	\$71,630	38
90EI0608	2009 - 2015	CA	Santa Cruz Community Credit Union	\$28,000	20	\$30,047	13
90EI0622	2010 - 2015	CA	Juma Ventures	\$142,369	197	\$168,922	120
90EI0640	2010 - 2015	CA	Opportunity Fund	\$1,000,000	560	\$910,736	446
90EI0648	2010 - 2015	CA	Earned Assets Resource Network	\$1,000,000	336	\$571,275	217
90EI0669	2010 - 2015	CA	Human Response Network	\$23,000	7	\$12,007	0
90EI0673	2011 - 2016	CA	RISE Financial Pathway (formerly LA Community Financial Resource Center)	\$494,706	118	\$96,758	5
90EI0684	2011 - 2016	CA	Arcata Economic Development Corporation	\$91,096	36	\$40,314	36
90EI0687	2011 - 2016	CA	Renaissance Entrepreneurship Center	\$287,500	23	\$28,224	9
90EI0692	2011 - 2016	CA	California State University	\$150,000	96	\$28,967	0
90EI0694	2011 - 2016	CA	Community Action Partnership of San Bernardino County	\$300,000	99	\$108,000	26
90EI0704	2011 - 2016	CA	San Diego Housing Commission	\$150,000	34	\$14,559	2
90EI0714	2011 - 2016	CA	Juma Ventures	\$164,706	157	\$91,655	16
90EI0717	2011 - 2016	CA	Community Housing Development Corporation	\$120,000	45	\$36,584	4
90EI0727	2011 - 2016	CA	Pacific Asian Consortium in Employment	\$199,411	59	\$35,187	16
90EI0734	2011 - 2016	CA	Ventura County Community Development Corporation	\$184,000	29	\$7,210	26
90EI0744	2012 - 2017	CA	Consumer Credit Counseling Service of Ventura County DBA Sur	\$25,000	0	\$0	0
90EI0770	2012 - 2017	CA	Juma Ventures	\$420,000	112	\$46,050	0
90EI0773	2012 - 2017	CA	Dry Creek Rancheria Band of Pomo Indians	\$50,000	9	\$12,358	2
90EI0789	2012 - 2017	CA	Community Action Partnership of Sonoma County	\$50,000	0	\$0	0
90EI0797	2012 - 2017	CA	Developmental Services Support Foundation for Kern, Inyo and Mono	\$80,500	8	\$1,515	0

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Counties							
90EI0798	2012 - 2017	CA	Time for Change Foundation	\$126,000	0	\$0	0
90EI0810	2013 - 2018	CA	Poverty Solutions, Inc.	\$500,000	25	\$1,275	0
90EI0822	2013 - 2018	CA	Community Action Partnership of Riverside County	\$115,000	37	\$28,724	0
90EI0826	2013 - 2018	CA	Shield of Faith Christian Center	\$400,000	93	\$20,812	2
90EI0832	2013 - 2018	CA	West Angeles Community Development Corporation	\$625,000	25	\$2,850	0
90EI0833	2013 - 2018	CA	Youth Policy Institute	\$581,941	0	\$0	0
90EI0835	2013 - 2018	CA	Operation Jump Start	\$185,750	0	\$0	0
90EI0841	2013 - 2018	CA	Opportunity Fund	\$1,000,000	222	\$154,193	54
90EI0853	2014 - 2019	CA	Citadel Community Development Corporation	\$300,000	0	\$0	0
90EI0867	2014 - 2019	CA	AnewAmerica Community Corporation	\$176,471	0	\$0	0
90EI0026	1999 - 2008	CO	Mile High United Way	\$150,000	260	\$203,148	103
90EI0136	2001 - 2006	CO	Mile High United Way	\$500,000	246	\$202,207	132
90EI0197	2002 - 2008	CO	Mile High United Way	\$1,000,000	93	\$89,970	74
90EI0273	2004 - 2010	CO	Pikes Peak Community Action Agency, Inc.	\$200,000	151	\$111,418	111
90EI0353	2005 - 2011	CO	Mile High United Way	\$849,409	309	\$281,540	222
90EI0412	2006 - 2012	CO	Foothills United Way	\$100,000	75	\$52,459	73
90EI0495	2007 - 2012	CO	Del Norte Neighborhood Development Corporation	\$45,000	0	\$0	24
90EI0610	2009 - 2014	CO	Mile High United Way	\$352,941	193	\$180,279	144
90EI0705	2011 - 2016	CO	Mile High United Way	\$352,941	153	\$132,655	80
90EI0752	2012 - 2017	CO	Foothills United Way	\$89,000	39	\$31,639	13
90EI0781	2012 - 2017	CO	Pikes Peak Community Action Agency, Inc.	\$235,000	31	\$26,206	18
90EI0857	2014 - 2019	CO	Foothills United Way	\$100,000	0	\$0	0
90EI0002	1999 - 2008	CT	CTE, Inc.	\$215,000	78	\$358,140	68
90EI0057	2000 - 2005	CT	Family Services Woodfield, Inc.	\$130,000	50	\$25,687	21
90EI0059	2000 - 2006	CT	Connecticut Department of Labor	\$400,000	237	\$307,330	107
90EI0072	2001 - 2007	CT	Co-Opportunity, Inc.	\$40,000	44	\$61,315	22
90EI0130	2001 - 2007	CT	CTE, Inc.	\$139,000	45	\$159,162	40
90EI0142	2001 - 2007	CT	Connecticut Department of Labor	\$100,000	57	\$48,152	13

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90EI0156	2002 - 2008	CT	Co-Opportunity, Inc.	\$49,412	37	\$34,019	11
90EI0164	2002 - 2008	CT	Connecticut Department of Labor	\$207,500	102	\$107,691	42
90EI0236	2003 - 2009	CT	Co-Opportunity, Inc.	\$90,000	38	\$43,120	13
90EI0311	2004 - 2009	CT	Empower New Haven, Inc.	\$475,000	75	\$74,344	27
90EI0282	2004 - 2010	CT	Connecticut Department of Labor	\$200,000	186	\$150,439	80
90EI0296	2004 - 2010	CT	Co-Opportunity, Inc.	\$45,000	26	\$27,757	9
90EI0367	2005 - 2011	CT	Co-Opportunity, Inc.	\$45,000	14	\$24,387	10
90EI0390	2006 - 2011	CT	CTE, Inc.	\$150,000	36	\$65,760	14
90EI0465	2007 - 2012	CT	Neighborhood Housing Services of New Haven	\$58,824	16	\$23,089	0
90EI0628	2010 - 2015	CT	Co-Opportunity, Inc.	\$47,059	17	\$22,231	8
90EI0647	2010 - 2015	CT	TEAM - Training, Education, and Manpower, Inc.	\$35,000	15	\$12,216	2
90EI0661	2010 - 2015	CT	Human Resources Agency of New Britain, Inc.	\$150,588	41	\$9,464	14
90EI0712	2011 - 2016	CT	Co-Opportunity, Inc.	\$23,600	6	\$2,559	0
90EI0836	2013 - 2018	CT	Community Action Agency of New Haven	\$58,825	0	\$0	0
90EI0073	2001 - 2006	DE	First State Community Loan Fund	\$500,000	508	\$494,016	181
90EI0289	2004 - 2010	DE	First State Community Loan Fund	\$195,000	339	\$336,549	145
90EI0381	2006 - 2012	DE	First State Community Loan Fund	\$250,000	295	\$219,669	34
90EI0561	2008 - 2013	DE	First State Community Loan Fund	\$250,000	162	\$189,332	61
90EI0732	2011 - 2016	DE	First State Community Loan Fund	\$105,000	6	\$9,340	3
90EI0767	2012 - 2017	DE	YWCA Delaware	\$19,411	14	\$9,093	1
90EI0003	1999 - 2008	DC	Capital Area Asset Building Corporation	\$379,720	276	\$226,721	145
90EI0189	2002 - 2008	DC	Capital Area Asset Building Corporation	\$500,000	328	\$259,897	141
90EI0214	2002 - 2008	DC	Second District Religious, Educational and Charitable Development Projects, Inc.	\$200,000	6	\$4,400	0
90EI0330	2004 - 2009	DC	District of Columbia, Department of Mental Health	\$200,000	0	\$0	0
90EI0319	2004 - 2010	DC	NCB Capital Impact	\$150,000	31	\$31,623	14
90EI0417	2006 - 2011	DC	National Credit Union Foundation	\$415,725	213	\$303,879	33
90EI0459	2007 - 2013	DC	Capital Area Asset Building Corporation	\$1,000,000	697	\$480,071	304
90EI0735	2011 - 2016	DC	Capital Area Asset Building Corporation	\$617,500	225	\$94,966	35

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## Appendix Table 1: Project Details and Highlights by Grant State

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0042	2000 - 2005	FL	Western Perrine Community Development Corporation	\$100,000	0	\$0	0
90EI0074	2001 - 2006	FL	First Coast Workforce Development, Inc.	\$10,000	0	\$0	0
90EI0075	2001 - 2006	FL	Aid to Victims of Domestic Abuse, Inc.	\$50,000	3	\$5,705	1
90EI0112	2001 - 2006	FL	North Dade Community Development Corporation	\$1,000,000	0	\$0	0
90EI0209	2002 - 2008	FL	Fresh Ministries, Inc.	\$1,000,000	289	\$193,179	44
90EI0258	2003 - 2009	FL	Capital Area Community Action Agency	\$35,000	14	\$7,554	3
90EI0262	2003 - 2009	FL	Partners for Self Employment, Inc.	\$679,500	629	\$660,551	223
90EI0328	2004 - 2009	FL	Dream Builders of Tallahassee, Inc.	\$421,670	30	\$13,000	9
90EI0280	2004 - 2010	FL	United Way of Palm Beach County	\$353,000	503	\$512,340	92
90EI0306	2004 - 2010	FL	Broward County Board of County Commissioners	\$130,000	90	\$162,393	58
90EI0333	2005 - 2011	FL	United Way of Palm Beach County	\$235,300	55	\$50,667	19
90EI0347	2005 - 2011	FL	YWCA of Greater Miami, Inc.	\$260,000	71	\$78,377	23
90EI0362	2005 - 2011	FL	Central Community Redevelopment Agency	\$176,500	4	\$1,349	0
90EI0416	2006 - 2011	FL	Miami-Dade County	\$1,000,000	0	\$0	0
90EI0377	2006 - 2012	FL	Broward County Board of County Commissioners	\$505,702	304	\$384,340	153
90EI0388	2006 - 2012	FL	Northeast Florida Community Action Agency, Inc.	\$250,000	51	\$42,400	11
90EI0438	2006 - 2012	FL	Osceola County Council on Aging, Inc.	\$47,400	33	\$13,825	16
90EI0483	2007 - 2012	FL	United Way of Palm Beach County	\$235,300	50	\$114,656	19
90EI0532	2008 - 2014	FL	Broward County Board of County Commissioners	\$222,500	128	\$119,242	84
90EI0544	2008 - 2014	FL	United Way Suncoast	\$350,000	104	\$122,867	42
90EI0549	2008 - 2014	FL	Partners for Self Employment, Inc.	\$317,000	249	\$510,380	150
90EI0570	2009 - 2015	FL	United Way of Volusia - Flagler Counties, Inc.	\$150,000	40	\$45,635	29
90EI0573	2009 - 2015	FL	Family Foundations of Northeast Florida, Inc.	\$287,500	245	\$183,079	53
90EI0581	2009 - 2015	FL	Catholic Charities of Northwest Florida	\$60,000	11	\$17,928	8
90EI0630	2010 - 2015	FL	Catholic Charities Bureau, Inc	\$100,000	0	\$0	0
90EI0683	2011 - 2016	FL	Osceola County Council on Aging, Inc.	\$28,230	4	\$1,650	3
90EI0756	2012 - 2017	FL	Housing Partnership, Inc.	\$50,000	30	\$46,989	12
90EI0792	2012 - 2017	FL	Broward County Board of County Commissioners	\$267,279	56	\$26,832	3
90EI0805	2013 - 2018	FL	United Way Suncoast	\$100,000	42	\$14,333	0

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90EI0806	2013 - 2018	FL	Housing Partnership, Inc.	\$50,000	21	\$14,886	1
90EI0819	2013 - 2018	FL	Miciah Deleston Foundation for Families	\$50,000	15	\$8,650	0
90EI0876	2014 - 2019	FL	Broward County Board of County Commissioners	\$185,000	0	\$0	0
90EI0047	2000 - 2006	GA	United Way of Metropolitan Atlanta	\$387,340	408	\$394,800	329
90EI0140	2001 - 2007	GA	United Way of Metropolitan Atlanta	\$295,294	120	\$99,824	94
90EI0208	2002 - 2008	GA	Atlanta Cooperative Development Corporation	\$1,000,000	30	\$10,991	0
90EI0211	2002 - 2008	GA	Economic Opportunity for Savannah Chatham County Area	\$50,000	46	\$17,851	6
90EI0253	2003 - 2008	GA	Core Neighborhood Revitalization, Inc.	\$37,750	22	\$13,250	0
90EI0257	2003 - 2008	GA	New Birth Missionary Baptist Church	\$1,000,000	0	\$0	0
90EI0326	2004 - 2010	GA	Economic Opportunity for Savannah Chatham County Area	\$250,000	136		33
90EI0348	2005 - 2010	GA	Antioch Urban Ministries, Inc.	\$1,000,000	0	\$0	0
90EI0369	2005 - 2010	GA	Zion Hill Community Development Corporation	\$10,000	15	\$11,645	8
90EI0401	2006 - 2011	GA	United Way of Metropolitan Atlanta	\$138,000	83	\$45,870	31
90EI0449	2007 - 2013	GA	CSRA Economic Opportunity Authority, Inc.	\$92,000	18	\$16,337	4
90EI0454	2007 - 2013	GA	City of Hinesville	\$50,000	24	\$21,141	8
90EI0552	2008 - 2013	GA	Columbus Housing Initiative, Inc. dba NeighborWorks Columbus	\$160,000	139	\$52,989	30
90EI0526	2008 - 2014	GA	The Center for Working Families	\$250,000	148	\$59,670	107
90EI0607	2009 - 2014	GA	United Way of Metropolitan Atlanta	\$160,000	66	\$70,420	60
90EI0799	2012 - 2017	GA	CSRA Economic Opportunity Authority, Inc.	\$26,000	19	\$16,323	2
90EI0011	1999 - 2004	HI	Hawaii Alliance for Community Based Economic Development	\$116,022	76	\$73,007	40
90EI0023	1999 - 2005	HI	ALU LIKE, Inc.	\$500,000	408	\$410,319	131
90EI0255	2003 - 2008	HI	Pacific Gateway Center	\$115,000	45	\$51,568	45
90EI0271	2004 - 2010	HI	ALU LIKE, Inc.	\$142,500	89	\$116,689	50
90EI0701	2011 - 2016	HI	Wai'anae Community Re-Development Corporation	\$258,829	52	\$21,000	11
90EI0891	2014 - 2019	HI	Institute for Native Pacific Education & Culture (INPEACE)	\$175,000	0	\$0	0
90EI0336	2005 - 2011	ID	United Way of Treasure Valley	\$500,000	165	\$202,603	76
90EI0653	2010 - 2015	ID	United Way of Treasure Valley	\$118,000	17	\$23,985	5
90EI0663	2010 - 2015	ID	Southeastern Idaho Community Action Agency	\$25,000	17	\$12,732	5
90EI0010	1999 - 2004	IL	Women's Self Employment Project	\$315,000	497	\$144,243	221

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90EI0045	2000 - 2006	IL	Illinois Community Action Association	\$159,576	232	\$225,925	82
90EI0061	2000 - 2006	IL	Steans Family Foundation	\$386,741	207	\$208,381	131
90EI0062	2000 - 2006	IL	Bethel New Life, Inc.	\$60,000	65	\$143,335	34
90EI0179	2002 - 2007	IL	Steans Family Foundation	\$408,011	195	\$177,533	67
90EI0200	2002 - 2007	IL	Illinois Community Action Association	\$239,000	115	\$103,576	46
90EI0202	2002 - 2008	IL	Partnership Accounts for Individual Development	\$100,000	71	\$104,714	42
90EI0239	2003 - 2008	IL	Fellowship Missionary Baptist Church	\$1,000,000	0	\$0	0
90EI0242	2003 - 2008	IL	Goodcity NFP	\$16,941	0	\$0	0
90EI0260	2003 - 2008	IL	Central Advisory Council, Inc.	\$200,000	0	\$0	0
90EI0234	2003 - 2009	IL	Neighborhood Housing Development Corporation	\$50,588	2	\$1,075	2
90EI0312	2004 - 2009	IL	South Side Community Federal Credit Union	\$460,000	0	\$0	0
90EI0314	2004 - 2010	IL	Goodcity NFP	\$470,588	103	\$124,300	18
90EI0345	2005 - 2011	IL	Bethel New Life, Inc.	\$1,000,000	883	\$923,441	133
90EI0387	2006 - 2012	IL	Illinois Department of Human Services	\$1,000,000	165	\$0	193
90EI0563	2008 - 2013	IL	Community Action Partnership of Lake County	\$100,000	26	\$5,904	6
90EI0754	2012 - 2017	IL	Catholic Charities of the Archdiocese of Chicago	\$35,000	16	\$9,850	2
90EI0837	2013 - 2018	IL	Two Rivers Regional Council	\$22,235	4	\$612	0
90EI0248	2003 - 2009	IN	John H. Boner Community Center	\$64,400	67	\$49,297	58
90EI0358	2005 - 2010	IN	LaCasa of Goshen, Inc.	\$94,000	20	\$33,477	20
90EI0440	2006 - 2011	IN	John H. Boner Community Center	\$129,000	69	\$50,107	44
90EI0555	2008 - 2014	IN	United Way of Greater Lafayette and Tippecanoe County	\$128,750	34	\$53,716	22
90EI0635	2010 - 2015	IN	Community Action of Southern Indiana, Inc.	\$300,000	32	\$35,753	9
90EI0656	2010 - 2015	IN	LaCasa of Goshen, Inc.	\$104,000	26	\$53,566	20
90EI0671	2010 - 2015	IN	John H. Boner Community Center	\$112,500	85	\$95,500	81
90EI0859	2014 - 2019	IN	LaCasa of Goshen, Inc.	\$230,000	0	\$0	0
90EI0008	1999 - 2005	IA	ISED Ventures (Iowans for Social and Economic Development)	\$500,000	485	\$1,417,469	282
90EI0076	2001 - 2006	IA	John Lewis Coffee Shop, Inc.	\$500,000	0	\$0	0
90EI0173	2002 - 2008	IA	ISED Ventures (Iowans for Social and Economic Development)	\$500,000	479	\$695,184	302
90EI0531	2008 - 2009	IA	United Way and Community Foundation of Northwest Iowa	\$87,400	0	\$0	0

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90EI0520	2008 - 2013	IA	ISED Ventures (Iowans for Social and Economic Development)	\$558,825	472	\$766,923	454
90EI0510	2008 - 2014	IA	Iowa Credit Union Foundation	\$342,080	300	\$411,310	142
90EI0603	2009 - 2014	IA	Iowa Credit Union Foundation	\$257,920	200	\$252,518	45
90EI0721	2011 - 2016	IA	Practical Farmers of Iowa	\$128,000	24	\$33,460	7
90EI0031	1999 - 2005	KS	The Family Conservancy, Inc.	\$298,344	379	\$238,177	155
90EI0129	2001 - 2007	KS	The Family Conservancy, Inc.	\$470,588	666	\$364,644	257
90EI0295	2004 - 2010	KS	The Family Conservancy, Inc.	\$205,882	70	\$91,610	22
90EI0462	2007 - 2012	KS	El Centro, Inc.	\$45,000	28	\$30,100	9
90EI0611	2009 - 2015	KS	Interfaith Housing Services	\$350,000	234	\$473,065	162
90EI0769	2012 - 2017	KS	The Family Conservancy, Inc.	\$141,176	63	\$57,014	8
90EI0800	2012 - 2017	KS	Interfaith Housing Services	\$350,000	136	\$110,264	9
90EI0879	2014 - 2019	KS	Interfaith Housing Services	\$130,000	0	\$0	0
90EI0009	1999 - 2008	KY	The Center for Women and Families	\$82,873	97	\$119,367	57
90EI0041	2000 - 2005	KY	Mountain Association for Community Economic Development	\$4,000	0	\$0	0
90EI0077	2001 - 2007	KY	Owsley County Action Team, Inc.	\$9,870	12	\$4,320	9
90EI0149	2001 - 2007	KY	The Center for Women and Families	\$103,500	88	\$68,011	41
90EI0177	2002 - 2008	KY	The Center for Women and Families	\$176,470	125	\$107,207	7
90EI0284	2004 - 2009	KY	Kentucky Domestic Violence Association, Inc.	\$115,700	88	\$99,924	59
90EI0378	2006 - 2012	KY	Kentucky Domestic Violence Association, Inc.	\$300,000	341	\$320,859	156
90EI0383	2006 - 2012	KY	The Center for Women and Families	\$195,500	0	\$0	0
90EI0398	2006 - 2012	KY	The Race For Education, Inc.	\$164,706	72	\$50,483	72
90EI0432	2006 - 2012	KY	New Directions Housing Corporation	\$100,000	76	\$52,681	13
90EI0519	2008 - 2014	KY	Kentucky Domestic Violence Association, Inc.	\$300,000	289	\$287,332	141
90EI0557	2008 - 2014	KY	The Race For Education, Inc.	\$470,368	157	\$77,176	144
90EI0595	2009 - 2014	KY	Jewish Family & Career Services of Louisville	\$46,999	45	\$98,794	37
90EI0642	2010 - 2015	KY	The Center for Women and Families	\$133,000	102	\$125,784	53
90EI0649	2010 - 2015	KY	Hazel Joyce Wiley Career & Financial Literacy Institute, Inc	\$56,500	0	\$0	0
90EI0659	2010 - 2015	KY	United Way of the Bluegrass	\$1,000,000	390	\$388,020	145
90EI0746	2012 - 2017	KY	Kentucky Domestic Violence Association, Inc.	\$218,200	167	\$61,665	18

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90EI0772	2012 - 2017	KY	The Race For Education, Inc.	\$537,446	30	\$11,320	12
90EI0829	2013 - 2018	KY	Jewish Family & Career Services of Louisville	\$429,000	34	\$7,658	1
90EI0848	2014 - 2019	KY	Kentucky Domestic Violence Association, Inc.	\$352,941	0	\$0	0
90EI0883	2014 - 2019	KY	Jewish Family & Career Services of Louisville	\$34,150	0	\$0	0
90EI0054	2000 - 2005	LA	Administrators of the Tulane Education Fund	\$155,000	114	\$130,543	57
90EI0114	2001 - 2006	LA	Caleb Community Development Corporation	\$120,000	12	\$5,088	0
90EI0126	2001 - 2006	LA	Northeast Louisiana Delta Community Development Corporation	\$10,837	1		0
90EI0145	2001 - 2006	LA	Administrators of the Tulane Education Fund	\$800,000	147	\$35,000	12
90EI0152	2002 - 2007	LA	Caleb Community Development Corporation	\$200,000	0	\$0	0
90EI0244	2003 - 2008	LA	Total Community Action, Inc.	\$100,000	218	\$260,711	40
90EI0321	2004 - 2010	LA	Total Community Action, Inc.	\$300,000	156	\$185,336	47
90EI0374	2005 - 2010	LA	Word of Faith Church International	\$1,000,000	0	\$0	0
90EI0443	2006 - 2012	LA	United Way of Southeast Louisiana	\$1,000,000	351	\$509,004	146
90EI0588	2009 - 2014	LA	Southern University at Shreveport	\$200,000	72	\$36,478	25
90EI0637	2010 - 2012	LA	Iberia Comprehensive Community Health Center, Inc.	\$50,000	0	\$0	0
90EI0816	2013 - 2018	LA	United Way of Southeast Louisiana	\$250,000	27	\$14,064	0
90EI0016	1999 - 2005	ME	Penquis Community Action Program, Inc.	\$117,000	151	\$176,348	78
90EI0038	1999 - 2005	ME	Coastal Enterprises, Inc.	\$109,500	181	\$461,695	92
90EI0143	2001 - 2006	ME	Penquis Community Action Program, Inc.	\$35,000	33	\$38,595	21
90EI0151	2001 - 2007	ME	Coastal Enterprises, Inc.	\$437,644	13	\$19,099	6
90EI0163	2002 - 2008	ME	Penquis Community Action Program, Inc.	\$400,000	116	\$106,945	61
90EI0452	2007 - 2012	ME	Penquis Community Action Program, Inc.	\$50,000	28	\$39,760	22
90EI0502	2008 - 2014	ME	Penquis Community Action Program, Inc.	\$125,000	84	\$89,138	70
90EI0586	2009 - 2015	ME	Penquis Community Action Program, Inc.	\$100,000	50	\$41,230	42
90EI0598	2009 - 2015	ME	Penquis Community Action Program, Inc.	\$50,000	28	\$37,041	16
90EI0646	2010 - 2015	ME	Penquis Community Action Program, Inc.	\$50,000	26	\$31,744	1
90EI0674	2011 - 2016	ME	Penquis Community Action Program, Inc.	\$50,000	21	\$28,036	0
90EI0740	2012 - 2017	ME	Penquis Community Action Program, Inc.	\$50,000	23	\$15,929	16
90EI0815	2013 - 2018	ME	Penquis Community Action Program, Inc.	\$100,000	23	\$11,391	0

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90EI0006	1999 - 2005	MD	Southern Maryland Tri-County Community Action Committee	\$175,000	151	\$30,522	23
90EI0105	2001 - 2006	MD	Maryland Center for Community Development	\$367,590	0	\$0	0
90EI0127	2001 - 2006	MD	Institute for Responsible Fatherhood and Family	\$1,000,000	0	\$0	0
90EI0210	2002 - 2007	MD	Mission of Mercy Empowerment Center, Inc.	\$75,000	0	\$0	0
90EI0266	2003 - 2008	MD	Collective Banking Group of PG County & Vicinity	\$200,000	0	\$0	0
90EI0249	2003 - 2009	MD	Allegany County Human Resources Development Commission, Inc.	\$155,000	77	\$45,348	21
90EI0542	2008 - 2008	MD	Advocates for Homeless Families, Inc.	\$50,000	0	\$0	0
90EI0543	2008 - 2013	MD	Washington County Community Action Council	\$30,000	1	\$2,040	0
90EI0691	2011 - 2016	MD	Community Action Council of Howard County MD	\$30,000	16	\$8,984	1
90EI0790	2012 - 2017	MD	Garrett County Community Action Committee, Inc	\$81,000	1	\$826	0
90EI0886	2014 - 2019	MD	United Way of Frederick County	\$200,000	0	\$0	0
90EI0015	1999 - 2005	MA	Allston Brighton Community Development Corporation	\$90,050	96	\$103,402	69
90EI0043	2000 - 2005	MA	Employment Resources, Inc.	\$40,000	14	\$24,750	12
90EI0078	2001 - 2006	MA	International Institute of Boston	\$42,353	24	\$45,340	24
90EI0116	2001 - 2006	MA	Organization for a New Equality, Inc.	\$132,360	9	\$13,835	9
90EI0141	2001 - 2007	MA	Allston Brighton Community Development Corporation	\$59,373	40	\$57,900	34
90EI0159	2002 - 2008	MA	Montachusett Opportunity Council, Inc.	\$211,766	132	\$120,826	86
90EI0170	2002 - 2008	MA	YouthBuild USA	\$110,294	54	\$20,743	20
90EI0188	2002 - 2008	MA	Allston Brighton Community Development Corporation	\$333,762	84	\$109,707	0
90EI0207	2002 - 2008	MA	Community Service Network, Inc.	\$57,500	24	\$82,363	10
90EI0245	2003 - 2009	MA	Allston Brighton Community Development Corporation	\$50,588	13	\$22,000	11
90EI0307	2004 - 2009	MA	Community Service Network, Inc.	\$75,997	0	\$0	0
90EI0285	2004 - 2010	MA	YouthBuild USA	\$705,883	207	\$121,728	52
90EI0302	2004 - 2010	MA	Springfield Partners for Community Action	\$411,765	181	\$176,424	75
90EI0361	2005 - 2011	MA	United Way of Massachusetts Bay, Inc.	\$500,000	218	\$322,834	126
90EI0468	2007 - 2012	MA	Allston Brighton Community Development Corporation	\$34,588	25	\$23,758	12
90EI0490	2007 - 2012	MA	Community Teamwork	\$90,000	61	\$109,953	36
90EI0476	2007 - 2013	MA	Massachusetts Association for Community Action	\$425,882	190	\$280,573	103
90EI0514	2008 - 2014	MA	Citizens for Citizens, Inc.	\$23,530	10	\$24,339	9

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90EI0601	2009 - 2015	MA	Massachusetts Association for Community Action	\$145,882	42	\$51,961	17
90EI0604	2009 - 2015	MA	The MIDAS Collaborative	\$202,000	162	\$200,133	123
90EI0681	2011 - 2016	MA	Springfield Partners for Community Action	\$350,590	179	\$175,309	39
90EI0762	2012 - 2017	MA	The MIDAS Collaborative	\$426,823	242	\$278,999	57
90EI0813	2013 - 2018	MA	Community Teamwork	\$90,000	13	\$17,918	1
90EI0861	2014 - 2019	MA	The MIDAS Collaborative	\$300,000	0	\$0	0
90EI0028	1999 - 2005	MI	FiveCAP, Inc.	\$270,000	121	\$105,724	33
90EI0029	1999 - 2005	MI	Michigan Neighborhood Partnership	\$114,915	248	\$169,523	82
90EI0093	2001 - 2007	MI	United Way for Southeastern Michigan	\$450,000	185	\$137,611	184
90EI0108	2001 - 2007	MI	Community Action Agency of Jackson	\$470,588	349	\$318,557	101
90EI0124	2001 - 2007	MI	City Vision, Inc.	\$469,567	565	\$423,033	174
90EI0125	2001 - 2007	MI	Oakland Livingston Human Services Agency	\$470,000	248	\$198,267	131
90EI0131	2001 - 2007	MI	Michigan Neighborhood Partnership	\$500,000	291	\$650,290	91
90EI0175	2002 - 2007	MI	Northwest Michigan Community Action Agency, Inc.	\$58,823	93	\$59,586	36
90EI0251	2003 - 2008	MI	Christian Business Network	\$1,000,000	0	\$0	0
90EI0233	2003 - 2009	MI	Northwest Michigan Community Action Agency, Inc.	\$176,470	246	\$102,142	113
90EI0254	2003 - 2009	MI	United Way for Southeastern Michigan	\$117,647	125	\$55,625	49
90EI0317	2004 - 2009	MI	Legal Services of Eastern Michigan	\$100,000	226	\$76,686	71
90EI0294	2004 - 2010	MI	Michigan State University	\$87,500	23	\$21,575	20
90EI0418	2006 - 2011	MI	Community Action Agency of Jackson	\$176,500	193	\$173,896	121
90EI0442	2006 - 2011	MI	Michigan Neighborhood Partnership	\$511,871	127	\$75,007	0
90EI0385	2006 - 2012	MI	Ojibwa Housing Authority and Ojibwa Community College	\$64,702	37	\$30,024	32
90EI0420	2006 - 2012	MI	Oakland Livingston Human Services Agency	\$172,500	174	\$169,645	87
90EI0426	2006 - 2012	MI	United Way for Southeastern Michigan	\$176,400	236	\$141,527	83
90EI0427	2006 - 2012	MI	Northwest Michigan Community Action Agency, Inc.	\$176,400	164	\$139,134	93
90EI0448	2007 - 2013	MI	Inner City Christian Federation	\$176,400	176	\$154,875	117
90EI0471	2007 - 2013	MI	Community Action Agency of Jackson	\$35,294	42	\$43,232	6
90EI0545	2008 - 2014	MI	Oakland Livingston Human Services Agency	\$132,352	74	\$58,943	42
90EI0564	2008 - 2014	MI	Community Action Agency of Jackson	\$218,824	160	\$168,636	85

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0587	2009 - 2015	MI	Keweenaw Bay Ojibwa Housing and Community Development Corporation	\$64,702	30	\$21,779	18
90EI0620	2010 - 2015	MI	Community Action Agency of Jackson	\$88,235	86	\$67,383	18
90EI0621	2010 - 2015	MI	United Way for Southeastern Michigan	\$88,235	57	\$59,711	19
90EI0623	2010 - 2015	MI	Inner City Christian Federation	\$138,941	116	\$105,292	86
90EI0626	2010 - 2015	MI	Oakland Livingston Human Services Agency	\$88,235	69	\$66,202	23
90EI0627	2010 - 2015	MI	Northwest Michigan Community Action Agency, Inc.	\$111,176	84	\$81,957	35
90EI0706	2011 - 2016	MI	Oakland Livingston Human Services Agency	\$88,235	65	\$53,525	16
90EI0707	2011 - 2016	MI	Northwest Michigan Community Action Agency, Inc.	\$88,235	49	\$35,223	3
90EI0723	2011 - 2016	MI	Community Action Agency of Jackson	\$114,706	42	\$26,812	9
90EI0733	2011 - 2016	MI	Inner City Christian Federation	\$100,000	88	\$66,600	8
90EI0736	2011 - 2016	MI	United Way for Southeastern Michigan	\$88,235	45	\$30,174	3
90EI0750	2012 - 2017	MI	Legal Services of Eastern Michigan	\$100,000	409	\$242,562	5
90EI0776	2012 - 2017	MI	Oakland Livingston Human Services Agency	\$88,235	42	\$10,673	1
90EI0783	2012 - 2017	MI	Northwest Michigan Community Action Agency, Inc.	\$88,235	19	\$15,143	0
90EI0786	2012 - 2017	MI	Community Action Agency of Jackson	\$88,235	15	\$5,749	1
90EI0787	2012 - 2017	MI	Inner City Christian Federation	\$86,250	56	\$21,887	0
90EI0830	2013 - 2018	MI	Eastern Michigan University	\$35,000	6	\$1,150	0
90EI0834	2013 - 2018	MI	Wayne Metropolitan Community Action Agency	\$88,235	2	\$232	0
90EI0845	2013 - 2018	MI	Oakland Livingston Human Services Agency	\$100,000	1	\$20	0
90EI0855	2014 - 2019	MI	Northwest Michigan Community Action Agency, Inc.	\$118,235	0	\$0	0
90EI0862	2014 - 2019	MI	Inner City Christian Federation	\$88,235	0	\$0	0
90EI0866	2014 - 2019	MI	Community Action Agency of Jackson	\$88,235	0	\$0	0
90EI0882	2014 - 2019	MI	Telamon Corporation	\$58,824	0	\$0	0
90EI0030	1999 - 2004	MN	Ramsey Action Programs, Inc.	\$495,797	748	\$566,869	335
90EI0228	2003 - 2009	MN	West Central Minnesota Communities Action, Inc.	\$1,000,000	1124	\$813,481	692
90EI0283	2004 - 2010	MN	Lutheran Social Service of Minnesota	\$705,882	0	\$469,491	335
90EI0291	2004 - 2010	MN	West Central Minnesota Communities Action, Inc.	\$359,152	445	\$342,528	240
90EI0375	2006 - 2012	MN	West Central Minnesota Communities Action, Inc.	\$230,000	255	\$200,516	162

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90EI0423	2006 - 2012	MN	West Central Minnesota Communities Action, Inc.	\$1,000,000	1011	\$733,696	592
90EI0475	2007 - 2012	MN	Lutheran Social Service of Minnesota	\$470,588	249	\$297,486	203
90EI0702	2011 - 2016	MN	American Indian Community Development Organization	\$255,000	42	\$33,744	6
90EI0711	2011 - 2016	MN	West Central Minnesota Communities Action, Inc.	\$934,458	589	\$250,694	82
90EI0823	2013 - 2018	MN	Inver Hills Community College	\$999,980	33	\$2,816	0
90EI0890	2014 - 2019	MN	MIGIZI Communications, Inc.	\$97,463	0	\$0	0
90EI0083	2001 - 2006	MS	Jackson County Civic Action Committee, Inc.	\$35,000	10	\$5,000	2
90EI0264	2003 - 2009	MS	AJFC Community Action Agency, Inc.	\$500,000	154	\$58,798	19
90EI0384	2006 - 2011	MS	Mississippi Association of Community Action Agencies	\$250,000	0	\$0	0
90EI0538	2008 - 2014	MS	Mercy Housing and Human Development, Inc.	\$380,000	207	\$174,826	64
90EI0660	2010 - 2015	MS	United Way of Southeast Mississippi	\$116,500	37	\$18,527	21
90EI0695	2011 - 2016	MS	Delta State University	\$59,000	4	\$525	0
90EI0012	1999 - 2004	MO	United Way of Greater St. Louis	\$325,270	292	\$198,950	150
90EI0049	2000 - 2008	MO	People's Community Development Corporation	\$250,000	126	\$80,475	38
90EI0081	2001 - 2006	MO	Redevelopment Opportunities for Women, Inc.	\$15,000	10	\$7,672	4
90EI0107	2001 - 2006	MO	The Learning Exchange, Inc.	\$50,000	38	\$4,051	1
90EI0109	2001 - 2007	MO	Missouri Association for Community Action	\$1,000,000	178	\$181,840	61
90EI0219	2002 - 2007	MO	St. Martin's Child Center, Inc.	\$273,240	0	\$0	0
90EI0172	2002 - 2008	MO	Great Rivers Community Trust	\$235,000	248	\$233,019	127
90EI0184	2002 - 2008	MO	Redevelopment Opportunities for Women, Inc.	\$25,000	4	\$7,524	4
90EI0194	2002 - 2008	MO	United Way of Greater St. Louis	\$220,494	217	\$221,368	120
90EI0196	2002 - 2008	MO	People's Community Development Corporation	\$250,000	193	\$127,986	193
90EI0212	2002 - 2008	MO	Opportunities Industrialization Center of the Midwest	\$500,000	289	\$334,200	46
90EI0225	2003 - 2008	MO	Assemblies of God Financial Services	\$1,000,000	15	\$20,994	0
90EI0327	2004 - 2009	MO	Opportunities Industrialization Center of the Midwest	\$500,000	28	\$29,400	1
90EI0355	2005 - 2011	MO	United Way of Greater St. Louis	\$211,765	173	\$193,863	96
90EI0357	2005 - 2011	MO	East Missouri Action Agency, Inc.	\$60,000	25	\$31,964	8
90EI0430	2006 - 2011	MO	Great Rivers Community Trust	\$300,000	147	\$178,002	118
90EI0396	2006 - 2012	MO	Hi-Tech Charities	\$900,000	345	\$463,274	319

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90EI0411	2006 - 2012	MO	Missouri Association for Community Action	\$400,000	63	\$90,080	39
90EI0512	2008 - 2014	MO	Beyond Housing	\$230,100	169	\$127,258	112
90EI0606	2009 - 2014	MO	Urban Strategies	\$117,647	42	\$6,506	8
90EI0638	2010 - 2012	MO	Ozarks Area Community Action Corporation	\$32,200	3	\$40	0
90EI0633	2010 - 2015	MO	United Way of Greater Kansas City	\$223,529	83	\$35,275	37
90EI0666	2010 - 2015	MO	East Missouri Action Agency, Inc.	\$30,000	16	\$11,709	1
90EI0726	2011 - 2016	MO	United Way of Greater St. Louis	\$211,764	104	\$94,321	38
90EI0782	2012 - 2017	MO	Missouri Association for Community Action	\$150,000	21	\$10,062	5
90EI0161	2002 - 2008	MT	District 7 Human Resources Development Council	\$147,500	60	\$118,938	35
90EI0301	2004 - 2009	MT	Poverello Center, Inc.	\$59,280	0	\$0	0
90EI0376	2006 - 2012	MT	Montana Credit Unions for Community Development	\$52,000	44	\$19,838	38
90EI0409	2006 - 2012	MT	Neighborhood Housing Services, Inc. of Great Falls	\$130,000	74	\$67,477	53
90EI0472	2007 - 2013	MT	District 7 Human Resources Development Council	\$70,000	47	\$68,266	24
90EI0477	2007 - 2013	MT	Montana Credit Unions for Community Development	\$20,000	20	\$13,954	15
90EI0506	2008 - 2014	MT	Montana Credit Unions for Community Development	\$20,000	17	\$20,603	11
90EI0524	2008 - 2014	MT	Montana Home Ownership Network	\$250,000	119	\$134,184	72
90EI0654	2010 - 2015	MT	Montana Credit Unions for Community Development	\$117,600	64	\$26,518	45
90EI0665	2010 - 2015	MT	Neighborhood Housing Services, Inc. of Great Falls	\$130,000	60	\$46,679	26
90EI0670	2010 - 2015	MT	District 7 Human Resources Development Council	\$97,500	60	\$49,590	24
90EI0688	2011 - 2016	MT	Rural Dynamics Incorporated	\$150,000	2	\$75	0
90EI0703	2011 - 2016	MT	The Peoples Partner for Community Development	\$100,000	16	\$6,689	3
90EI0745	2012 - 2017	MT	Montana Credit Unions for Community Development	\$180,000	27	\$8,842	8
90EI0763	2012 - 2017	MT	Montana Credit Unions for Community Development	\$95,000	59	\$24,274	30
90EI0865	2014 - 2019	MT	Montana Home Ownership Network	\$131,690	0	\$0	0
90EI0877	2014 - 2019	MT	District 7 Human Resources Development Council	\$125,000	0	\$0	0
90EI0110	2001 - 2007	NE	New Community Development Corporation	\$30,000	22	\$26,400	22
90EI0324	2004 - 2009	NE	Family Housing Advisory Services, Inc.	\$15,000	10	\$10,200	0
90EI0364	2005 - 2010	NE	Lincoln Action Program	\$30,000	19	\$29,779	14
90EI0370	2005 - 2010	NE	Family Housing Advisory Services, Inc.	\$51,360	26	\$26,000	0

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90EI0507	2008 - 2012	NE	The Residential Care Consortium	\$207,059	11	\$1,200	0
90EI0624	2010 - 2015	NE	Community Action of Nebraska, Inc.	\$172,500	84	\$47,584	27
90EI0742	2012 - 2017	NE	Community Action of Nebraska, Inc.	\$37,500	0	\$0	0
90EI0779	2012 - 2017	NE	Omaha Nation Community Response Team	\$176,470	0	\$0	0
90EI0846	2013 - 2018	NE	First Ponca Financial	\$180,000	2	\$375	0
90EI0018	1999 - 2004	NV	Economic Opportunity Board of Clark County	\$90,000	52	\$67,964	32
90EI0033	1999 - 2005	NV	Community Services Agency and Development Corporation	\$70,719	81	\$71,209	0
90EI0227	2003 - 2008	NV	Community Services Agency and Development Corporation	\$150,000	108	\$54,805	28
90EI0730	2011 - 2016	NV	Financial Guidance Center	\$167,500	22	\$13,683	1
90EI0825	2013 - 2018	NV	Housing for Nevada	\$200,000	0	\$0	0
90EI0082	2001 - 2007	NH	New Hampshire Community Loan Fund	\$590,000	456	\$771,332	261
90EI0241	2003 - 2009	NH	New Hampshire Community Loan Fund	\$590,000	344	\$538,562	127
90EI0344	2005 - 2010	NH	Rockingham Community Action	\$235,311	0	\$0	0
90EI0478	2007 - 2013	NH	New Hampshire Community Loan Fund	\$294,118	236	\$459,830	134
90EI0583	2009 - 2015	NH	New Hampshire Community Loan Fund	\$294,118	158	\$263,094	74
90EI0710	2011 - 2016	NH	New Hampshire Community Loan Fund	\$294,118	113	\$118,804	13
90EI0791	2012 - 2017	NH	New Hampshire Community Loan Fund	\$176,471	0	\$0	0
90EI0089	2001 - 2006	NJ	Camden County Council on Economic Opportunity, Inc.	\$70,000	143	\$73,649	50
90EI0123	2001 - 2007	NJ	New Jersey Department of Community Affairs	\$200,000	134	\$162,507	61
90EI0180	2002 - 2007	NJ	Newark Preschool Council, Inc.	\$50,000	0	\$0	0
90EI0185	2002 - 2008	NJ	Camden County Council on Economic Opportunity, Inc.	\$249,000	113	\$194,000	79
90EI0300	2004 - 2010	NJ	Camden County Council on Economic Opportunity, Inc.	\$75,000	39	\$47,500	8
90EI0372	2005 - 2011	NJ	Allies, Inc.	\$23,000	7	\$8,356	4
90EI0457	2007 - 2008	NJ	New Jersey Department of Community Affairs	\$1,000,000	0	\$0	0
90EI0565	2008 - 2014	NJ	Collaborative Support Programs of New Jersey	\$117,647	33	\$40,800	8
90EI0571	2009 - 2014	NJ	Newark Now, Inc.	\$100,000	8	\$5,319	0
90EI0597	2009 - 2015	NJ	United Way of Essex and West Hudson	\$439,900	83	\$46,244	24
90EI0718	2011 - 2016	NJ	Catholic Charities, Diocese of Camden, Inc.	\$10,000	5	\$6,200	3
90EI0801	2013 - 2018	NJ	New Jersey Academy for Aquatic Sciences	\$12,500	0	\$0	0

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90EI0803	2013 - 2018	NJ	Catholic Charities, Diocese of Camden, Inc.	\$127,000	23	\$21,613	6
90EI0811	2013 - 2018	NJ	All Saints Community Service and Development Corporation	\$44,118	0	\$0	0
90EI0831	2013 - 2018	NJ	HOPES CAP, Inc	\$100,000	0	\$0	0
90EI0850	2014 - 2019	NJ	Camden County Council on Economic Opportunity, Inc.	\$50,000	0	\$0	0
90EI0102	2001 - 2006	NM	Northwest New Mexico Community Development Corporation	\$386,807	0	\$0	0
90EI0122	2001 - 2006	NM	Northwest New Mexico Community Development Corporation	\$386,807	187	\$112,764	45
90EI0305	2004 - 2009	NM	Women's Economic Self-Sufficiency Team	\$146,500	209	\$100,353	128
90EI0288	2004 - 2010	NM	Prosperity Works	\$1,000,000	620	\$544,281	448
90EI0415	2006 - 2011	NM	Women's Economic Self-Sufficiency Team	\$177,500	177	\$89,256	126
90EI0456	2007 - 2013	NM	HELP-New Mexico, Inc.	\$1,000,000	157	\$119,191	99
90EI0504	2008 - 2014	NM	Prosperity Works	\$1,000,000	581	\$548,130	428
90EI0579	2009 - 2015	NM	Prosperity Works	\$1,000,000	334	\$270,088	127
90EI0609	2009 - 2015	NM	Women's Economic Self-Sufficiency Team	\$400,000	181	\$219,101	128
90EI0755	2012 - 2017	NM	Community Action Agency of Southern New Mexico	\$50,000	24	\$15,727	11
90EI0888	2014 - 2019	NM	Prosperity Works	\$500,000	0	\$0	0
90EI0025	1999 - 2005	NY	Affordable Housing Partnership of Albany County, Inc.	\$52,500	45	\$18,017	17
90EI0020	1999 - 2008	NY	Mount Hope Housing Company, Inc.	\$137,569	0	\$0	0
90EI0048	2000 - 2006	NY	Non-Profit Assistance Corporation	\$497,240	536	\$349,061	121
90EI0079	2001 - 2006	NY	Community Action of Greene County, Inc.	\$20,000	2	\$2,403	1
90EI0084	2001 - 2006	NY	Action for A Better Community, Inc.	\$60,000	15	\$9,947	0
90EI0144	2001 - 2006	NY	Lower Eastside People's Federal Credit Union	\$52,500	109	\$104,750	92
90EI0085	2001 - 2007	NY	YWCA of Rochester and Monroe County	\$133,412	93	\$29,329	21
90EI0099	2001 - 2007	NY	Suffolk Community Development Corporation	\$58,850	27	\$35,265	3
90EI0115	2001 - 2007	NY	Fifth Avenue Committee, Inc.	\$89,412	55	\$35,334	15
90EI0119	2001 - 2007	NY	Community Capital New York dba Westchester Housing Fund	\$21,800	38	\$21,228	15
90EI0121	2001 - 2007	NY	Alternatives Federal Credit Union	\$58,832	78	\$67,452	53
90EI0190	2002 - 2007	NY	Concord Community Development Corporation	\$25,000	0	\$0	0
90EI0205	2002 - 2007	NY	Banana Kelly Community Improvement Association, Inc.	\$52,941	0	\$0	0
90EI0155	2002 - 2008	NY	Alternatives Federal Credit Union	\$58,824	77	\$64,298	55

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90EI0174	2002 - 2008	NY	Mount Hope Housing Company, Inc.	\$352,941	210	\$310,125	135
90EI0218	2002 - 2008	NY	Local Development Corporation of East New York	\$110,000	32	\$34,938	10
90EI0240	2003 - 2009	NY	Community Capital New York dba Westchester Housing Fund	\$20,000	15	\$6,834	9
90EI0286	2004 - 2009	NY	Food Bank for New York City	\$69,000	155	\$1,600	0
90EI0276	2004 - 2010	NY	Fifth Avenue Committee, Inc.	\$45,294	37	\$20,000	6
90EI0290	2004 - 2010	NY	Mount Hope Housing Company, Inc.	\$75,000	48	\$66,000	22
90EI0332	2005 - 2011	NY	Belmont Housing Resources for WNY	\$46,000	30	\$51,219	20
90EI0393	2006 - 2012	NY	Chinatown Manpower Project	\$525,000	39	\$98,774	31
90EI0395	2006 - 2012	NY	Housing Trust Fund Corporation	\$1,000,000	97	\$133,445	45
90EI0450	2007 - 2012	NY	Belmont Housing Resources for WNY	\$30,000	15	\$14,463	13
90EI0485	2007 - 2012	NY	Alternatives Federal Credit Union	\$58,824	57	\$60,655	52
90EI0479	2007 - 2013	NY	New York City Administration for Children's Services	\$176,470	7	\$5,945	7
90EI0500	2007 - 2013	NY	The Salvation Army - West Nyack, NY	\$50,000	43	\$48,392	11
90EI0525	2008 - 2014	NY	New York State Office of People with Developmental Disabilities	\$1,000,000	100	\$79,979	35
90EI0527	2008 - 2014	NY	Belmont Housing Resources for WNY	\$148,650	115	\$86,541	44
90EI0605	2009 - 2014	NY	Alternatives Federal Credit Union	\$58,824	56	\$60,062	53
90EI0599	2009 - 2015	NY	Ifetayo Cultural Arts Academy	\$35,294	37	\$44,994	26
90EI0713	2011 - 2016	NY	Syracuse Cooperative Federal Credit Union	\$47,055	31	\$49,235	14
90EI0729	2011 - 2016	NY	Belmont Housing Resources for WNY	\$60,000	5	\$466	0
90EI0766	2012 - 2017	NY	Alternatives Federal Credit Union	\$64,706	58	\$31,865	9
90EI0793	2012 - 2017	NY	Community Action Organization of Erie County, Inc.	\$26,000	4	\$541	0
90EI0796	2012 - 2017	NY	Albany Community Action Partnership	\$100,000	24	\$5,362	5
90EI0824	2013 - 2018	NY	Monroe Community College	\$200,000	30	\$2,628	0
90EI0842	2013 - 2018	NY	Sapna NYC	\$33,036	8	\$1,040	0
90EI0854	2014 - 2019	NY	Pro Action of Steuben and Yates, Inc.	\$28,750	0	\$0	0
90EI0874	2014 - 2019	NY	Alternatives Federal Credit Union	\$88,235	0	\$0	0
90EI0019	1999 - 2005	NC	North Carolina Department of Labor	\$331,785	760	\$811,179	191
90EI0092	2001 - 2006	NC	Western Carolina Community Action, Inc.	\$20,000	16	\$26,751	9
90EI0088	2001 - 2007	NC	United Way of Forsyth County	\$500,000	814	\$279,177	171

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90EI0137	2001 - 2007	NC	North Carolina Department of Labor	\$668,215	1285	\$943,246	218
90EI0230	2003 - 2009	NC	Western Carolina Community Action, Inc.	\$20,000	22	\$26,748	9
90EI0309	2004 - 2010	NC	United Way of Forsyth County	\$250,000	165	\$393,691	103
90EI0338	2005 - 2011	NC	Durham Regional Community Development Group	\$80,000	178	\$80,055	20
90EI0391	2006 - 2012	NC	North Carolina Department of Labor	\$88,500	155	\$67,230	57
90EI0428	2006 - 2012	NC	City of Gastonia	\$70,588	20	\$12,912	8
90EI0528	2008 - 2013	NC	City of High Point	\$47,000	5	\$1,000	2
90EI0546	2008 - 2013	NC	Choanoke Area Development Association of NC, Inc.	\$125,000	158	\$87,527	34
90EI0518	2008 - 2014	NC	Monroe-Union County Community Development Corporation	\$72,000	68	\$49,493	25
90EI0550	2008 - 2014	NC	North Carolina Department of Labor	\$287,500	176	\$133,623	45
90EI0553	2008 - 2014	NC	United Way of Forsyth County	\$400,000	404	\$160,909	106
90EI0618	2009 - 2015	NC	North Carolina Department of Labor	\$150,000	97	\$72,013	21
90EI0875	2014 - 2019	NC	United Way of Forsyth County	\$200,000	0	\$0	0
90EI0191	2002 - 2008	ND	Southeastern North Dakota Community Action Agency	\$32,000	25	\$29,643	13
90EI0246	2003 - 2009	ND	Southeastern North Dakota Community Action Agency	\$22,000	11	\$16,326	9
90EI0356	2005 - 2011	ND	Red River Valley Community Action	\$10,000	5	\$4,606	5
90EI0481	2007 - 2013	ND	Red River Valley Community Action	\$115,000	79	\$114,429	54
90EI0559	2008 - 2013	ND	Red River Valley Community Action	\$6,600	4	\$6,089	3
90EI0600	2009 - 2014	ND	Red River Valley Community Action	\$143,750	93	\$152,508	70
90EI0708	2011 - 2016	ND	Red River Valley Community Action	\$143,750	86	\$113,832	34
90EI0852	2014 - 2019	ND	Red River Valley Community Action	\$143,750	0	\$0	0
90EI0034	1999 - 2005	OH	Ohio Community Development Corporation Association	\$500,000	363	\$343,495	276
90EI0063	2000 - 2006	OH	WECO Fund, Inc.	\$280,000	177	\$134,657	30
90EI0095	2001 - 2007	OH	Stark County Out of Poverty Partnership, Inc.	\$113,000	17	\$14,317	14
90EI0203	2002 - 2008	OH	Ohio Community Development Corporation Association	\$1,000,000	616	\$633,391	221
90EI0274	2004 - 2010	OH	Economic and Community Development Institute	\$456,471	191	\$95,558	156
90EI0343	2005 - 2011	OH	Economic and Community Development Institute	\$1,000,000	404	\$180,056	235
90EI0410	2006 - 2011	OH	Northwestern Ohio Community Action Commission, Inc.	\$66,000	36	\$46,515	16
90EI0433	2006 - 2012	OH	Ohio Community Development Corporation Association	\$994,367	320	\$248,955	143

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90EI0492	2007 - 2012	OH	WECO Fund, Inc.	\$25,000	34	\$14,893	28
90EI0497	2007 - 2013	OH	Ohio Community Development Corporation Association	\$500,000	234	\$137,417	103
90EI0498	2007 - 2013	OH	Hancock Hardin Wyandot Putnam Community Action Commission	\$82,352	49	\$62,490	28
90EI0535	2008 - 2014	OH	Ohio Community Development Corporation Association	\$725,000	145	\$143,234	61
90EI0568	2009 - 2012	OH	WECO Fund, Inc.	\$129,150	108	\$30,558	64
90EI0569	2009 - 2014	OH	College Now Greater Cleveland	\$375,000	62	\$39,728	49
90EI0612	2009 - 2014	OH	United Way of Wayne and Holmes Counties	\$20,500	5	\$7,460	2
90EI0652	2010 - 2012	OH	WECO Fund, Inc.	\$70,000	0	\$0	0
90EI0657	2010 - 2015	OH	Sensible Shelter	\$84,800	28	\$18,573	7
90EI0667	2010 - 2015	OH	Northwestern Ohio Community Action Commission, Inc.	\$66,000	43	\$60,290	15
90EI0668	2010 - 2015	OH	East Columbus Development Co., Inc.	\$235,295	26	\$10,000	10
90EI0682	2011 - 2016	OH	Economic and Community Development Institute	\$1,000,000	487	\$196,835	228
90EI0724	2011 - 2016	OH	Economic and Community Development Institute	\$934,458	446	\$207,932	273
90EI0778	2012 - 2017	OH	Ohio Community Development Corporation Association	\$300,000	21	\$11,340	3
90EI0814	2013 - 2018	OH	I Know I Can	\$999,998	98	\$26,791	17
90EI0869	2014 - 2019	OH	Northwestern Ohio Community Action Commission, Inc.	\$66,000	0	\$0	0
90EI0014	1999 - 2004	OK	Little Dixie Community Action Agency, Inc.	\$6,000	14	\$4,431	2
90EI0044	2000 - 2006	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$50,000	48	\$76,000	31
90EI0139	2001 - 2007	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$60,000	56	\$78,555	37
90EI0226	2003 - 2009	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$200,000	164	\$256,006	59
90EI0424	2006 - 2012	OK	Rural Enterprises of Oklahoma, Inc.	\$100,000	48	\$88,980	34
90EI0464	2007 - 2012	OK	OKC Compassion, Inc.	\$60,000	0	\$0	0
90EI0446	2007 - 2013	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$110,000	94	\$135,502	59
90EI0580	2009 - 2015	OK	Choctaw Nation of Oklahoma	\$800,000	465	\$739,282	328
90EI0615	2009 - 2015	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$75,000	86	\$100,526	45

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90EI0650	2010 - 2015	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$50,000	46	\$59,236	15
90EI0655	2010 - 2015	OK	Cherokee Nation	\$65,000	3	\$1,220	1
90EI0749	2012 - 2017	OK	Choctaw Nation of Oklahoma	\$800,000	157	\$176,588	46
90EI0771	2012 - 2017	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$70,000	43	\$49,447	17
90EI0880	2014 - 2019	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$60,000	0	\$0	0
90EI0022	1999 - 2002	OR	Portland Housing Center, Inc.	\$273,363	76	\$119,345	28
90EI0086	2001 - 2006	OR	Douglas Community Development Corporation	\$70,000	0	\$0	0
90EI0096	2001 - 2006	OR	Community and Shelter Assistance Corporation	\$188,253	119	\$124,848	82
90EI0097	2001 - 2006	OR	Hacienda Community Development Center	\$50,000	0	\$0	0
90EI0220	2002 - 2004	OR	Portland Housing Center, Inc.	\$102,419	0	\$0	0
90EI0193	2002 - 2007	OR	Community and Shelter Assistance Corporation	\$367,941	215	\$275,992	163
90EI0235	2003 - 2008	OR	Community and Shelter Assistance Corporation	\$117,646	78	\$96,193	64
90EI0299	2004 - 2009	OR	Community and Shelter Assistance Corporation	\$352,941	239	\$316,319	181
90EI0389	2006 - 2011	OR	Community and Shelter Assistance Corporation	\$235,294	168	\$262,800	113
90EI0451	2007 - 2012	OR	Community and Shelter Assistance Corporation	\$352,941	237	\$452,451	154
90EI0509	2008 - 2014	OR	Community and Shelter Assistance Corporation	\$470,588	326	\$582,114	242
90EI0515	2008 - 2014	OR	Lane MicroBusiness	\$82,300	45	\$71,192	39
90EI0529	2008 - 2014	OR	Umpqua Community Development Corporation	\$200,000	129	\$225,989	105
90EI0562	2008 - 2014	OR	Community and Shelter Assistance Corporation	\$529,000	350	\$639,557	262
90EI0591	2009 - 2014	OR	Umpqua Community Development Corporation	\$200,000	120	\$219,862	92
90EI0589	2009 - 2015	OR	Community and Shelter Assistance Corporation	\$1,000,000	652	\$894,271	242
90EI0594	2009 - 2015	OR	Mercy Corps Northwest	\$588,235	301	\$380,398	263
90EI0614	2009 - 2015	OR	Neighborhood Partnerships (formerly Neighborhood Partnership Fund)	\$300,000	154	\$325,216	93
90EI0632	2010 - 2015	OR	Umpqua Community Development Corporation	\$500,000	303	\$553,697	196
90EI0636	2010 - 2015	OR	Lane MicroBusiness	\$80,400	37	\$40,203	19

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90EI0651	2010 - 2015	OR	Community and Shelter Assistance Corporation	\$1,000,000	569	\$782,555	140
90EI0699	2011 - 2016	OR	Warm Springs Community Action Team	\$375,000	59	\$16,417	8
90EI0747	2012 - 2017	OR	Umpqua Community Development Corporation	\$300,000	96	\$138,937	17
90EI0753	2012 - 2017	OR	Community and Shelter Assistance Corporation	\$684,715	329	\$335,535	87
90EI0788	2012 - 2017	OR	Mercy Corps Northwest	\$375,000	189	\$227,137	45
90EI0807	2013 - 2018	OR	Neighborhood Partnerships (formerly Neighborhood Partnership Fund)	\$600,000	19	\$11,124	0
90EI0844	2013 - 2018	OR	Mercy Corps Northwest	\$412,500	7	\$3,206	0
90EI0849	2014 - 2019	OR	Community and Shelter Assistance Corporation	\$700,000	0	\$0	0
90EI0858	2014 - 2019	OR	Micro Enterprise Services of Oregon	\$100,000	0	\$0	0
90EI0027	1999 - 2004	PA	YWCA of Greater Pittsburgh	\$300,000	108	\$124,604	50
90EI0065	2000 - 2006	PA	Zion Non-Profit Charitable Trust	\$100,000	0	\$0	0
90EI0182	2002 - 2007	PA	People For People, Inc.	\$999,952	0	\$0	0
90EI0169	2002 - 2008	PA	United Way of Greater Philadelphia and Southern New Jersey	\$500,000	371	\$233,807	161
90EI0425	2006 - 2012	PA	Women's Opportunities Resource Center	\$266,176	226	\$249,657	90
90EI0444	2007 - 2013	PA	United Way of Greater Philadelphia and Southern New Jersey	\$500,000	387	\$323,988	171
90EI0488	2007 - 2013	PA	Community Action Committee of the Lehigh Valley	\$41,176	29	\$34,108	7
90EI0489	2007 - 2013	PA	Philadelphia Housing Authority	\$920,000	146	\$41,670	50
90EI0560	2008 - 2011	PA	Urban Affairs Coalition	\$100,000	4	\$927	0
90EI0513	2008 - 2014	PA	United Way of Lancaster County	\$117,500	95	\$112,660	36
90EI0680	2011 - 2016	PA	Women's Opportunities Resource Center	\$352,955	15	\$9,162	7
90EI0689	2011 - 2016	PA	ACTION-Housing, Inc.	\$25,000	35	\$20,289	1
90EI0719	2011 - 2016	PA	United Way of Greater Philadelphia and Southern New Jersey	\$500,000	183	\$157,905	94
90EI0720	2011 - 2016	PA	Central PA Community Action, Inc.	\$25,000	4	\$6,941	6
90EI0728	2011 - 2016	PA	Community Action Southwest (CAS)	\$200,000	113	\$118,827	19
90EI0741	2012 - 2017	PA	College Opportunity Resources for Education	\$634,715	146	\$61,485	85
90EI0785	2012 - 2017	PA	Greater Erie Community Action Committee	\$26,000	12	\$5,005	0
90EI0802	2013 - 2018	PA	United Way of the Capital Region	\$50,000	5	\$992	0
90EI0863	2014 - 2019	PA	Greater Erie Community Action Committee	\$12,000	0	\$0	0

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90EI0889	2014 - 2019	PA	Philadelphia Housing Authority	\$100,000	0	\$0	0
90EI0051	2000 - 2006	SC	South Carolina Association of Community Development Corporations, Inc.	\$500,000	628	\$227,636	108
90EI0132	2001 - 2006	SC	South Carolina Association of Community Development Corporations, Inc.	\$400,000	0	\$0	0
90EI0106	2001 - 2007	SC	Urban League of the Upstate, Inc.	\$59,000	165	\$82,011	44
90EI0441	2006 - 2012	SC	Urban League of the Upstate, Inc.	\$59,000	170	\$53,889	40
90EI0558	2008 - 2014	SC	South Carolina Association of Community Development Corporations, Inc.	\$300,000	677	\$347,859	187
90EI0613	2009 - 2014	SC	The Cooperative Ministry	\$298,731	22	\$3,037	3
90EI0639	2010 - 2015	SC	United Way of Greenville County	\$300,000	222	\$201,153	70
90EI0828	2013 - 2018	SC	South Carolina Association of Community Development Corporations, Inc.	\$75,000	100	\$63,513	15
90EI0843	2013 - 2018	SC	Catawba Indian Nation	\$98,057	3	\$1,075	0
90EI0881	2014 - 2019	SC	Southeastern Housing Foundation	\$100,000	0	\$0	0
90EI0885	2014 - 2019	SC	South Carolina Association of Community Development Corporations, Inc.	\$112,500	0	\$0	0
90EI0066	2001 - 2007	SD	Lakota Funds, Inc.	\$63,530	31	\$27,122	13
90EI0334	2005 - 2011	SD	Four Bands Community Fund, Inc.	\$47,647	53	\$44,094	32
90EI0354	2005 - 2011	SD	Lakota Funds, Inc.	\$42,353	27	\$42,898	20
90EI0536	2008 - 2013	SD	Four Bands Community Fund, Inc.	\$63,529	47	\$40,581	32
90EI0508	2008 - 2014	SD	GROW South Dakota DBA Northeast South Dakota Community Action Program	\$317,647	184	\$232,899	117
90EI0616	2009 - 2014	SD	Lakota Funds, Inc.	\$38,823	24	\$30,863	18
90EI0662	2010 - 2015	SD	Lakota Funds, Inc.	\$101,622	63	\$58,979	35
90EI0700	2011 - 2016	SD	Crow Creek Housing Authority	\$148,500	52	\$19,957	9
90EI0758	2012 - 2017	SD	Lakota Funds, Inc.	\$42,353	0	\$0	0
90EI0780	2012 - 2017	SD	Four Bands Community Fund, Inc.	\$127,500	46	\$26,964	16
90EI0847	2013 - 2018	SD	Oglala Sioux Tribe Partnership for Housing, Inc.	\$150,000	0	\$0	0
90EI0856	2014 - 2019	SD	GROW South Dakota DBA Northeast South Dakota Community Action	\$66,189	0	\$0	0

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			Program				
90EI0052	2000 - 2006	TN	Upper East Tennessee Human Development Agency, Inc.	\$61,225	57	\$84,992	16
90EI0154	2002 - 2008	TN	Upper East Tennessee Human Development Agency, Inc.	\$100,000	28	\$48,786	7
90EI0195	2002 - 2008	TN	Oasis Center, Inc.	\$112,940	56	\$27,734	34
90EI0265	2003 - 2008	TN	Advance Memphis	\$6,000	13	\$5,177	2
90EI0267	2003 - 2009	TN	Upper Cumberland Human Resource Agency	\$1,000,000	204	\$336,601	167
90EI0379	2006 - 2011	TN	Douglas-Cherokee Economic Authority, Inc.	\$18,571	22	\$6,125	19
90EI0402	2006 - 2012	TN	RISE Foundation, Inc.	\$58,825	61	\$28,200	16
90EI0436	2006 - 2012	TN	Upper East Tennessee Human Development Agency, Inc.	\$180,000	143	\$246,010	74
90EI0486	2007 - 2008	TN	Monroe Harding	\$120,000	0	\$0	0
90EI0447	2007 - 2013	TN	Bradley Initiative for Church and Community, Inc	\$25,000	67	\$60,823	47
90EI0554	2008 - 2013	TN	Upper Cumberland Human Resource Agency	\$750,000	0	\$0	0
90EI0516	2008 - 2014	TN	Church Koinonia Federal Credit Union	\$60,000	55	\$52,060	14
90EI0672	2011 - 2016	TN	Christian Community Services, Inc.	\$40,000	25	\$18,690	3
90EI0675	2011 - 2016	TN	New Level Community Development Corporation	\$56,000	29	\$30,999	7
90EI0676	2011 - 2016	TN	Dominion Financial Management, Inc.	\$36,176	12	\$6,640	2
90EI0696	2011 - 2016	TN	Southwest Human Resource Agency	\$117,647	0	\$0	0
90EI0759	2012 - 2017	TN	Upper East Tennessee Human Development Agency, Inc.	\$100,000	68	\$80,598	25
90EI0021	1999 - 2005	TX	Foundation Communities, Inc.	\$298,350	167	\$161,382	60
90EI0058	2000 - 2005	TX	El Puente Community Development Corporation	\$100,000	0	\$0	0
90EI0050	2000 - 2006	TX	Gulf Coast Community Services Association	\$80,000	140	\$82,505	56
90EI0060	2000 - 2006	TX	City of San Antonio	\$100,000	129	\$47,308	58
90EI0064	2000 - 2006	TX	United Way of the Texas Gulf Coast	\$262,800	353	\$357,768	121
90EI0080	2001 - 2006	TX	Catholic Family Service, Inc.	\$10,000	1	\$2,000	1
90EI0090	2001 - 2006	TX	United Community Centers, Inc.	\$23,131	13	\$11,437	5
90EI0094	2001 - 2006	TX	Neighborhood Housing Services of Fort Worth, Inc.	\$150,000	0	\$0	0
90EI0091	2001 - 2007	TX	Student Alternatives Program, Inc.	\$324,835	20	\$14,500	0
90EI0111	2001 - 2007	TX	El Paso Collaborative for Economic and Community Development	\$230,000	327	\$326,299	116
90EI0135	2001 - 2007	TX	City of San Antonio	\$900,000	609	\$475,904	533

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90EI0168	2002 - 2007	TX	El Paso County	\$250,000	19	\$35,678	11
90EI0201	2002 - 2007	TX	United Community Centers, Inc.	\$15,000	0	\$0	0
90EI0213	2002 - 2007	TX	Community Action Council of South Texas	\$67,058	41	\$21,000	35
90EI0166	2002 - 2008	TX	Foundation Communities, Inc.	\$103,500	69	\$102,422	46
90EI0250	2003 - 2008	TX	Housing Services of Texas	\$300,000	68	\$34,936	11
90EI0278	2004 - 2010	TX	Foundation Communities, Inc.	\$476,100	206	\$285,162	49
90EI0287	2004 - 2010	TX	Alliance for Multicultural Community Services	\$312,500	131	\$222,650	94
90EI0297	2004 - 2010	TX	Covenant Community Capital Corporation	\$600,000	629	\$1,435,732	184
90EI0308	2004 - 2010	TX	City of San Antonio	\$300,000	229	\$211,848	158
90EI0313	2004 - 2010	TX	Goodwill Industries of San Antonio	\$100,000	89	\$33,200	29
90EI0320	2004 - 2010	TX	Community Action Program, Inc. of Taylor County	\$100,000	49	\$55,100	44
90EI0352	2005 - 2011	TX	Community Action Program, Inc. of Taylor County	\$150,000	84	\$69,670	65
90EI0365	2005 - 2011	TX	El Paso Collaborative for Economic and Community Development	\$150,000	132	\$103,424	67
90EI0366	2005 - 2011	TX	City of San Antonio	\$500,000	351	\$216,200	99
90EI0373	2005 - 2011	TX	United Way of Southern Cameron County	\$237,294	41	\$75,348	18
90EI0439	2006 - 2011	TX	Community Action Program, Inc. of Taylor County	\$100,000	54	\$48,316	37
90EI0403	2006 - 2012	TX	Goodwill Industries of San Antonio	\$100,000	59	\$48,217	25
90EI0455	2007 - 2012	TX	Community Council of Southwest Texas	\$50,000	0	\$0	0
90EI0458	2007 - 2013	TX	Gulf Coast Community Services Association	\$90,000	142	\$102,154	27
90EI0517	2008 - 2011	TX	Community Action Program, Inc. of Taylor County	\$200,000	62	\$38,803	23
90EI0533	2008 - 2012	TX	City of San Antonio	\$250,000	76	\$69,538	47
90EI0503	2008 - 2014	TX	Foundation Communities, Inc.	\$87,059	76	\$72,708	45
90EI0541	2008 - 2014	TX	Covenant Community Capital Corporation	\$400,000	789	\$1,284,193	207
90EI0548	2008 - 2014	TX	Goodwill Industries of San Antonio	\$100,000	64	\$59,583	48
90EI0575	2009 - 2015	TX	Brazos Valley Community Action Agency	\$100,000	56	\$76,572	34
90EI0596	2009 - 2015	TX	Alliance for Multicultural Community Services	\$312,500	214	\$521,737	107
90EI0698	2010 - 2011	TX	United Way of Abilene, Inc.	\$61,149	11	\$0	10
90EI0697	2010 - 2013	TX	United Way of Abilene, Inc.	\$126,974	70	\$62,302	64
90EI0619	2010 - 2015	TX	El Paso Collaborative for Economic and Community Development	\$30,000	27	\$20,434	9

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90EI0631	2010 - 2015	TX	Young Women's Christian Association	\$191,500	118	\$136,419	53
90EI0677	2011 - 2016	TX	Foundation Communities, Inc.	\$250,000	122	\$112,906	19
90EI0693	2011 - 2016	TX	United Way of Abilene, Inc.	\$100,000	51	\$49,948	47
90EI0743	2012 - 2017	TX	City of Austin, Neighborhood Housing & Community Development Office	\$300,000	26	\$10,693	0
90EI0757	2012 - 2017	TX	Covenant Community Capital Corporation	\$300,000	243	\$205,596	4
90EI0765	2012 - 2017	TX	Goodwill Industries of San Antonio	\$100,000	64	\$36,697	16
90EI0768	2012 - 2017	TX	United Way of Abilene, Inc.	\$200,000	101	\$104,603	88
90EI0795	2012 - 2017	TX	Young Women's Christian Association	\$300,000	40	\$20,057	0
90EI0809	2013 - 2018	TX	YWCA Fort Worth & Tarrant County	\$100,000	1	\$50	0
90EI0818	2013 - 2018	TX	United Way of Abilene, Inc.	\$100,000	61	\$43,852	19
90EI0868	2014 - 2019	TX	Covenant Community Capital Corporation	\$260,000	0	\$0	0
90EI0884	2014 - 2019	TX	United Way of Central Texas	\$100,000	0	\$0	0
90EI0887	2014 - 2019	TX	Alliance for Multicultural Community Services	\$45,000	0	\$0	0
90EI0304	2004 - 2009	UT	Utah Issues Center for Poverty Research and Action	\$100,000	55	\$0	0
90EI0435	2006 - 2011	UT	AAA Fair Credit Foundation	\$350,000	261	\$259,079	202
90EI0501	2008 - 2009	UT	AAA Fair Credit Foundation	\$80,832	66	\$106,226	66
90EI0530	2008 - 2013	UT	AAA Fair Credit Foundation	\$350,000	212	\$275,817	189
90EI0592	2009 - 2015	UT	AAA Fair Credit Foundation	\$500,000	285	\$331,899	186
90EI0722	2011 - 2016	UT	AAA Fair Credit Foundation	\$500,000	153	\$94,858	0
90EI0851	2014 - 2019	UT	AAA Fair Credit Foundation	\$250,000	0	\$0	0
90EI0005	1999 - 2008	VT	Capstone Community Action, Inc.	\$71,825	202	\$117,600	122
90EI0176	2002 - 2008	VT	Capstone Community Action, Inc.	\$200,000	208	\$144,215	133
90EI0232	2003 - 2009	VT	Capstone Community Action, Inc.	\$147,080	180	\$134,471	107
90EI0281	2004 - 2010	VT	Capstone Community Action, Inc.	\$135,330	171	\$106,160	109
90EI0351	2005 - 2011	VT	Capstone Community Action, Inc.	\$88,300	99	\$74,272	68
90EI0421	2006 - 2011	VT	Capstone Community Action, Inc.	\$88,300	98	\$77,234	70
90EI0505	2008 - 2013	VT	Capstone Community Action, Inc.	\$82,500	85	\$84,575	70
90EI0566	2008 - 2013	VT	Capstone Community Action, Inc.	\$59,250	62	\$82,048	55

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90EI0602	2009 - 2014	VT	Capstone Community Action, Inc.	\$56,475	66	\$63,128	51
90EI0574	2009 - 2015	VT	Capstone Community Action, Inc.	\$88,300	58	\$80,482	26
90EI0644	2010 - 2015	VT	Capstone Community Action, Inc.	\$47,060	48	\$48,606	8
90EI0709	2011 - 2016	VT	Capstone Community Action, Inc.	\$41,180	53	\$28,470	2
90EI0784	2012 - 2017	VT	Capstone Community Action, Inc.	\$41,180	34	\$9,131	1
90EI0840	2013 - 2018	VT	Capstone Community Action, Inc.	\$41,180	28	\$7,131	0
90EI0870	2014 - 2019	VT	Capstone Community Action, Inc.	\$41,180	0	\$0	0
90EI0017	1999 - 2005	VA	People Incorporated of Southwest Virginia	\$133,000	48	\$60,451	25
90EI0087	2001 - 2006	VA	New Enterprise Fund, Inc.	\$45,000	33	\$27,128	16
90EI0128	2001 - 2006	VA	Prison Fellowship Ministries	\$1,000,000	0	\$0	0
90EI0215	2002 - 2007	VA	New Enterprise Fund, Inc.	\$155,000	54	\$43,761	23
90EI0216	2002 - 2007	VA	After School Music Program, Inc.	\$70,588	0	\$0	0
90EI0217	2002 - 2007	VA	New Visions, New Ventures, Inc.	\$10,000	7	\$9,159	7
90EI0157	2002 - 2008	VA	Total Action Against Poverty in Roanoke	\$122,500	71	\$53,959	43
90EI0316	2004 - 2009	VA	New Visions, New Ventures, Inc.	\$150,000	63	\$88,097	27
90EI0346	2005 - 2011	VA	Total Action Against Poverty in Roanoke	\$90,000	71	\$57,860	21
90EI0363	2005 - 2011	VA	Southeastern Tidewater Opportunity Project, Inc.	\$200,000	16	\$15,596	6
90EI0397	2006 - 2008	VA	Empowerment 2010, Inc.	\$150,000	0	\$0	0
90EI0404	2006 - 2011	VA	People Incorporated of Southwest Virginia	\$22,600	10	\$19,340	10
90EI0406	2006 - 2011	VA	Boat People SOS, Inc.	\$352,941	115	\$136,500	91
90EI0408	2006 - 2012	VA	Virginia Community Action Partnership	\$997,500	535	\$587,892	194
90EI0463	2007 - 2008	VA	Empowerment 2010, Inc.	\$100,000	0	\$0	0
90EI0643	2010 - 2012	VA	New Visions, New Ventures, Inc.	\$23,530	5	\$3,441	0
90EI0645	2010 - 2015	VA	Total Action Against Poverty in Roanoke	\$90,000	31	\$15,766	6
90EI0686	2011 - 2016	VA	Korean Community Service Center of Greater Washington	\$147,000	15	\$16,465	6
90EI0738	2011 - 2016	VA	Virginia Department of Housing and Community Development	\$934,452	194	\$141,896	17
90EI0113	2001 - 2007	WA	United Way of King County	\$720,000	130	\$21,556	97
90EI0153	2002 - 2007	WA	Spokane Neighborhood Action Programs	\$50,000	26	\$53,267	22
90EI0198	2002 - 2007	WA	United Way of King County	\$261,530	99	\$80,000	59

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0229	2003 - 2008	WA	Spokane Neighborhood Action Programs	\$100,000	64	\$135,914	0
90EI0238	2003 - 2008	WA	United Way of King County	\$196,706	105	\$122,725	44
90EI0275	2004 - 2009	WA	United Way of King County	\$494,130	231	\$454,892	132
90EI0279	2004 - 2010	WA	Spokane Neighborhood Action Programs	\$35,000	19	\$30,405	13
90EI0339	2005 - 2010	WA	Spokane Neighborhood Action Programs	\$100,000	55	\$61,304	22
90EI0341	2005 - 2010	WA	Snohomish County Workforce Development Council	\$117,647	46	\$38,558	14
90EI0386	2006 - 2011	WA	Seattle Business Assistance Center	\$240,000	15	\$25,328	8
90EI0419	2006 - 2011	WA	United Way of King County	\$505,882	285	\$414,982	0
90EI0407	2006 - 2012	WA	Housing Authority of the City of Tacoma	\$100,000	77	\$99,551	31
90EI0474	2007 - 2013	WA	Lower Columbia Community Action Council	\$450,000	255	\$331,661	114
90EI0493	2007 - 2013	WA	Neighborhood Assets	\$250,000	146	\$185,593	90
90EI0577	2009 - 2010	WA	Neighborhood Assets	\$21,127	6	\$12,114	6
90EI0578	2009 - 2010	WA	Neighborhood Assets	\$61,479	11	\$22,685	13
90EI0664	2010 - 2015	WA	Confederated Tribes of the Chehalis Reservation	\$200,000	2	\$5,575	1
90EI0679	2011 - 2016	WA	Washington Community Alliance for Self-Help	\$202,353	97	\$133,027	53
90EI0690	2011 - 2016	WA	Share	\$350,000	93	\$74,246	28
90EI0715	2011 - 2016	WA	Diocese of Olympia	\$18,400	21	\$32,912	13
90EI0774	2012 - 2017	WA	Taala Fund	\$247,059	13	\$5,050	4
90EI0821	2013 - 2018	WA	Newrizons Federal Credit Union	\$75,000	37	\$28,543	5
90EI0171	2002 - 2007	WV	Huntington City Mission, Inc.	\$24,000	0	\$0	0
90EI0617	2009 - 2015	WV	KISRA - Kanawha Institute for Social Research & Action	\$466,750	88	\$28,558	33
90EI0004	1999 - 2005	WI	Wisconsin Community Action Program Association, Inc.	\$433,323	625	\$491,207	408
90EI0032	1999 - 2008	WI	Wisconsin Women's Business Initiative Corporation	\$70,000	89	\$175,396	53
90EI0056	2000 - 2005	WI	CAP Services, Inc.	\$110,000	195	\$108,208	102
90EI0138	2001 - 2006	WI	Wisconsin Community Action Program Association, Inc.	\$58,180	126	\$98,488	52
90EI0118	2001 - 2007	WI	Catholic Charities of the Diocese of La Crosse, Inc.	\$150,000	55	\$33,511	20
90EI0133	2001 - 2007	WI	CAP Services, Inc.	\$172,500	315	\$233,303	133
90EI0146	2001 - 2007	WI	Wisconsin Women's Business Initiative Corporation	\$463,029	194	\$206,662	104
90EI0243	2003 - 2009	WI	Wisconsin Women's Business Initiative Corporation	\$647,060	327	\$333,948	89

\*For details about the grants administered by the two state AFI projects, please see Section 7: Special State AFI Projects in Indiana and Pennsylvania.

## Appendix Table 1: Project Details and Highlights by Grant State

*Grants are sorted first by state and then by award date.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0261	2003 - 2009	WI	Boys and Girls Club of Greater Milwaukee	\$1,000,000	467	\$471,053	306
90EI0318	2004 - 2009	WI	Lao Family Community, Inc.	\$1,000,000	0	\$0	0
90EI0315	2004 - 2010	WI	YWCA of Greater Milwaukee	\$1,000,000	39	\$18,751	16
90EI0342	2005 - 2011	WI	Wisconsin Women's Business Initiative Corporation	\$352,940	155	\$235,050	69
90EI0349	2005 - 2011	WI	Christian Faith Fellowship Church, Inc.	\$1,000,000	6	\$4,825	2
90EI0431	2006 - 2012	WI	City of Racine	\$120,000	81	\$91,535	29
90EI0469	2007 - 2013	WI	Boys and Girls Club of Greater Milwaukee	\$1,000,000	466	\$324,156	343
90EI0539	2008 - 2014	WI	Wisconsin Women's Business Initiative Corporation	\$447,059	365	\$334,471	43
90EI0629	2010 - 2015	WI	Wisconsin Women's Business Initiative Corporation	\$176,470	105	\$79,043	12
90EI0731	2011 - 2016	WI	City of Racine	\$28,750	24	\$20,991	11
90EI0748	2012 - 2017	WI	Boys and Girls Club of Greater Milwaukee	\$500,000	227	\$99,080	104
90EI0872	2014 - 2019	WI	Boys and Girls Club of Greater Milwaukee	\$500,000	0	\$0	0

\*For details about the grants administered by the two state AFI projects, please see Section 7: Special State AFI Projects in Indiana and Pennsylvania.

## Appendix Table 2: Project Details and Highlights by Grant Start Date

Grants are sorted first by grant period and then by grant number.

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
<b>1999</b>							
90EI0022	1999 - 2002	OR	Portland Housing Center, Inc.	\$273,363	76	\$119,345	28
90EI0001	1999 - 2004	CA	Peninsula Community Foundation	\$250,000	190	\$203,578	126
90EI0007	1999 - 2004	CA	CHARO Community Development Corporation	\$100,000	0	\$0	0
90EI0010	1999 - 2004	IL	Women's Self Employment Project	\$315,000	497	\$144,243	221
90EI0011	1999 - 2004	HI	Hawaii Alliance for Community Based Economic Development	\$116,022	76	\$73,007	40
90EI0012	1999 - 2004	MO	United Way of Greater St. Louis	\$325,270	292	\$198,950	150
90EI0014	1999 - 2004	OK	Little Dixie Community Action Agency, Inc.	\$6,000	14	\$4,431	2
90EI0018	1999 - 2004	NV	Economic Opportunity Board of Clark County	\$90,000	52	\$67,964	32
90EI0027	1999 - 2004	PA	YWCA of Greater Pittsburgh	\$300,000	108	\$124,604	50
90EI0030	1999 - 2004	MN	Ramsey Action Programs, Inc.	\$495,797	748	\$566,869	335
90EI0037	1999 - 2004	AZ	Kentucky River Foothills Development Council, Inc.	\$39,950	25	\$16,183	10
90EI0004	1999 - 2005	WI	Wisconsin Community Action Program Association, Inc.	\$433,323	625	\$491,207	408
90EI0006	1999 - 2005	MD	Southern Maryland Tri-County Community Action Committee	\$175,000	151	\$30,522	23
90EI0008	1999 - 2005	IA	ISED Ventures (Iowans for Social and Economic Development)	\$500,000	485	\$1,417,469	282
90EI0015	1999 - 2005	MA	Allston Brighton Community Development Corporation	\$90,050	96	\$103,402	69
90EI0016	1999 - 2005	ME	Penquis Community Action Program, Inc.	\$117,000	151	\$176,348	78
90EI0017	1999 - 2005	VA	People Incorporated of Southwest Virginia	\$133,000	48	\$60,451	25
90EI0019	1999 - 2005	NC	North Carolina Department of Labor	\$331,785	760	\$811,179	191
90EI0021	1999 - 2005	TX	Foundation Communities, Inc.	\$298,350	167	\$161,382	60
90EI0023	1999 - 2005	HI	ALU LIKE, Inc.	\$500,000	408	\$410,319	131
90EI0024	1999 - 2005	CA	East Bay Asian Local Development Corporation	\$260,773	281	\$611,500	150
90EI0025	1999 - 2005	NY	Affordable Housing Partnership of Albany County, Inc.	\$52,500	45	\$18,017	17
90EI0028	1999 - 2005	MI	FiveCAP, Inc.	\$270,000	121	\$105,724	33
90EI0029	1999 - 2005	MI	Michigan Neighborhood Partnership	\$114,915	248	\$169,523	82
90EI0031	1999 - 2005	KS	The Family Conservancy, Inc.	\$298,344	379	\$238,177	155
90EI0033	1999 - 2005	NV	Community Services Agency and Development Corporation	\$70,719	81	\$71,209	0
90EI0034	1999 - 2005	OH	Ohio Community Development Corporation Association	\$500,000	363	\$343,495	276
90EI0038	1999 - 2005	ME	Coastal Enterprises, Inc.	\$109,500	181	\$461,695	92

\*For details about the grants administered by the two state AFI projects, please see Section 7: Special State AFI Projects in Indiana and Pennsylvania.

## Appendix Table 2: Project Details and Highlights by Grant Start Date

Grants are sorted first by grant period and then by grant number.

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0039	1999 - 2005	CA	Fresno County Economic Opportunities Commission	\$86,879	70	\$94,168	34
90EI0040	1999 - 2005	CA	Community Action Partnership of Riverside County	\$57,500	219	\$199,226	42
90EI0002	1999 - 2008	CT	CTE, Inc.	\$215,000	78	\$358,140	68
90EI0003	1999 - 2008	DC	Capital Area Asset Building Corporation	\$379,720	276	\$226,721	145
90EI0005	1999 - 2008	VT	Capstone Community Action, Inc.	\$71,825	202	\$117,600	122
90EI0009	1999 - 2008	KY	The Center for Women and Families	\$82,873	97	\$119,367	57
90EI0013	1999 - 2008	CA	Mercy Housing California	\$79,500	88	\$50,178	26
90EI0020	1999 - 2008	NY	Mount Hope Housing Company, Inc.	\$137,569	0	\$0	0
90EI0026	1999 - 2008	CO	Mile High United Way	\$150,000	260	\$203,148	103
90EI0032	1999 - 2008	WI	Wisconsin Women's Business Initiative Corporation	\$70,000	89	\$175,396	53
<b>2000</b>							
90EI0041	2000 - 2005	KY	Mountain Association for Community Economic Development	\$4,000	0	\$0	0
90EI0042	2000 - 2005	FL	Western Perrine Community Development Corporation	\$100,000	0	\$0	0
90EI0043	2000 - 2005	MA	Employment Resources, Inc.	\$40,000	14	\$24,750	12
90EI0053	2000 - 2005	CA	West Enterprise Center	\$53,038	44	\$32,370	41
90EI0054	2000 - 2005	LA	Administrators of the Tulane Education Fund	\$155,000	114	\$130,543	57
90EI0055	2000 - 2005	CA	Community Action Partnership of Sonoma County	\$50,000	27	\$29,799	20
90EI0056	2000 - 2005	WI	CAP Services, Inc.	\$110,000	195	\$108,208	102
90EI0057	2000 - 2005	CT	Family Services Woodfield, Inc.	\$130,000	50	\$25,687	21
90EI0058	2000 - 2005	TX	El Puente Community Development Corporation	\$100,000	0	\$0	0
90EI0044	2000 - 2006	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$50,000	48	\$76,000	31
90EI0045	2000 - 2006	IL	Illinois Community Action Association	\$159,576	232	\$225,925	82
90EI0046	2000 - 2006	AR	Southern Bancorp Community Partners	\$125,000	183	\$125,197	93
90EI0047	2000 - 2006	GA	United Way of Metropolitan Atlanta	\$387,340	408	\$394,800	329
90EI0048	2000 - 2006	NY	Non-Profit Assistance Corporation	\$497,240	536	\$349,061	121
90EI0050	2000 - 2006	TX	Gulf Coast Community Services Association	\$80,000	140	\$82,505	56
90EI0051	2000 - 2006	SC	South Carolina Association of Community Development Corporations, Inc.	\$500,000	628	\$227,636	108

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## Appendix Table 2: Project Details and Highlights by Grant Start Date

*Grants are sorted first by grant period and then by grant number.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0052	2000 - 2006	TN	Upper East Tennessee Human Development Agency, Inc.	\$61,225	57	\$84,992	16
90EI0059	2000 - 2006	CT	Connecticut Department of Labor	\$400,000	237	\$307,330	107
90EI0060	2000 - 2006	TX	City of San Antonio	\$100,000	129	\$47,308	58
90EI0061	2000 - 2006	IL	Steans Family Foundation	\$386,741	207	\$208,381	131
90EI0062	2000 - 2006	IL	Bethel New Life, Inc.	\$60,000	65	\$143,335	34
90EI0063	2000 - 2006	OH	WECO Fund, Inc.	\$280,000	177	\$134,657	30
90EI0064	2000 - 2006	TX	United Way of the Texas Gulf Coast	\$262,800	353	\$357,768	121
90EI0065	2000 - 2006	PA	Zion Non-Profit Charitable Trust	\$100,000	0	\$0	0
90EI0049	2000 - 2008	MO	People's Community Development Corporation	\$250,000	126	\$80,475	38
<b>2001</b>							
90EI0117	2001 - 2003	CA	San Francisco Foundation Community Initiatives Fund	\$200,000	0	\$0	0
90EI0067	2001 - 2006	AR	Economic Opportunity Agency of Washington County, Inc.	\$11,500	10	\$6,667	10
90EI0071	2001 - 2006	CA	City of Los Angeles	\$500,000	306	\$257,659	191
90EI0073	2001 - 2006	DE	First State Community Loan Fund	\$500,000	508	\$494,016	181
90EI0074	2001 - 2006	FL	First Coast Workforce Development, Inc.	\$10,000	0	\$0	0
90EI0075	2001 - 2006	FL	Aid to Victims of Domestic Abuse, Inc.	\$50,000	3	\$5,705	1
90EI0076	2001 - 2006	IA	John Lewis Coffee Shop, Inc.	\$500,000	0	\$0	0
90EI0078	2001 - 2006	MA	International Institute of Boston	\$42,353	24	\$45,340	24
90EI0079	2001 - 2006	NY	Community Action of Greene County, Inc.	\$20,000	2	\$2,403	1
90EI0080	2001 - 2006	TX	Catholic Family Service, Inc.	\$10,000	1	\$2,000	1
90EI0081	2001 - 2006	MO	Redevelopment Opportunities for Women, Inc.	\$15,000	10	\$7,672	4
90EI0083	2001 - 2006	MS	Jackson County Civic Action Committee, Inc.	\$35,000	10	\$5,000	2
90EI0084	2001 - 2006	NY	Action for A Better Community, Inc.	\$60,000	15	\$9,947	0
90EI0086	2001 - 2006	OR	Douglas Community Development Corporation	\$70,000	0	\$0	0
90EI0087	2001 - 2006	VA	New Enterprise Fund, Inc.	\$45,000	33	\$27,128	16
90EI0089	2001 - 2006	NJ	Camden County Council on Economic Opportunity, Inc.	\$70,000	143	\$73,649	50
90EI0090	2001 - 2006	TX	United Community Centers, Inc.	\$23,131	13	\$11,437	5
90EI0092	2001 - 2006	NC	Western Carolina Community Action, Inc.	\$20,000	16	\$26,751	9
90EI0094	2001 - 2006	TX	Neighborhood Housing Services of Fort Worth, Inc.	\$150,000	0	\$0	0

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## Appendix Table 2: Project Details and Highlights by Grant Start Date

*Grants are sorted first by grant period and then by grant number.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0096	2001 - 2006	OR	Community and Shelter Assistance Corporation	\$188,253	119	\$124,848	82
90EI0097	2001 - 2006	OR	Hacienda Community Development Center	\$50,000	0	\$0	0
90EI0098	2001 - 2006	CA	AnewAmerica Community Corporation	\$107,965	75	\$114,143	52
90EI0102	2001 - 2006	NM	Northwest New Mexico Community Development Corporation	\$386,807	0	\$0	0
90EI0105	2001 - 2006	MD	Maryland Center for Community Development	\$367,590	0	\$0	0
90EI0107	2001 - 2006	MO	The Learning Exchange, Inc.	\$50,000	38	\$4,051	1
90EI0112	2001 - 2006	FL	North Dade Community Development Corporation	\$1,000,000	0	\$0	0
90EI0114	2001 - 2006	LA	Caleb Community Development Corporation	\$120,000	12	\$5,088	0
90EI0116	2001 - 2006	MA	Organization for a New Equality, Inc.	\$132,360	9	\$13,835	9
90EI0122	2001 - 2006	NM	Northwest New Mexico Community Development Corporation	\$386,807	187	\$112,764	45
90EI0126	2001 - 2006	LA	Northeast Louisiana Delta Community Development Corporation	\$10,837	1		0
90EI0127	2001 - 2006	MD	Institute for Responsible Fatherhood and Family	\$1,000,000	0	\$0	0
90EI0128	2001 - 2006	VA	Prison Fellowship Ministries	\$1,000,000	0	\$0	0
90EI0132	2001 - 2006	SC	South Carolina Association of Community Development Corporations, Inc.	\$400,000	0	\$0	0
90EI0134	2001 - 2006	CA	Mercy Housing California	\$115,500	42	\$24,161	6
90EI0136	2001 - 2006	CO	Mile High United Way	\$500,000	246	\$202,207	132
90EI0138	2001 - 2006	WI	Wisconsin Community Action Program Association, Inc.	\$58,180	126	\$98,488	52
90EI0143	2001 - 2006	ME	Penquis Community Action Program, Inc.	\$35,000	33	\$38,595	21
90EI0144	2001 - 2006	NY	Lower Eastside People's Federal Credit Union	\$52,500	109	\$104,750	92
90EI0145	2001 - 2006	LA	Administrators of the Tulane Education Fund	\$800,000	147	\$35,000	12
90EI0148	2001 - 2006	CA	Northeast Community Federal Credit Union	\$25,000	12	\$22,422	10
90EI0066	2001 - 2007	SD	Lakota Funds, Inc.	\$63,530	31	\$27,122	13
90EI0068	2001 - 2007	AZ	City of Tucson	\$45,000	76	\$68,883	44
90EI0069	2001 - 2007	AZ	Mesa Community Action Network, Inc.	\$155,000	202	\$335,567	58
90EI0070	2001 - 2007	CA	United Way of Greater Los Angeles	\$499,059	376	\$477,602	163
90EI0072	2001 - 2007	CT	Co-Opportunity, Inc.	\$40,000	44	\$61,315	22
90EI0077	2001 - 2007	KY	Owsley County Action Team, Inc.	\$9,870	12	\$4,320	9
90EI0082	2001 - 2007	NH	New Hampshire Community Loan Fund	\$590,000	456	\$771,332	261

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0085	2001 - 2007	NY	YWCA of Rochester and Monroe County	\$133,412	93	\$29,329	21
90EI0088	2001 - 2007	NC	United Way of Forsyth County	\$500,000	814	\$279,177	171
90EI0091	2001 - 2007	TX	Student Alternatives Program, Inc.	\$324,835	20	\$14,500	0
90EI0093	2001 - 2007	MI	United Way for Southeastern Michigan	\$450,000	185	\$137,611	184
90EI0095	2001 - 2007	OH	Stark County Out of Poverty Partnership, Inc.	\$113,000	17	\$14,317	14
90EI0099	2001 - 2007	NY	Suffolk Community Development Corporation	\$58,850	27	\$35,265	3
90EI0106	2001 - 2007	SC	Urban League of the Upstate, Inc.	\$59,000	165	\$82,011	44
90EI0108	2001 - 2007	MI	Community Action Agency of Jackson	\$470,588	349	\$318,557	101
90EI0109	2001 - 2007	MO	Missouri Association for Community Action	\$1,000,000	178	\$181,840	61
90EI0110	2001 - 2007	NE	New Community Development Corporation	\$30,000	22	\$26,400	22
90EI0111	2001 - 2007	TX	El Paso Collaborative for Economic and Community Development	\$230,000	327	\$326,299	116
90EI0113	2001 - 2007	WA	United Way of King County	\$720,000	130	\$21,556	97
90EI0115	2001 - 2007	NY	Fifth Avenue Committee, Inc.	\$89,412	55	\$35,334	15
90EI0118	2001 - 2007	WI	Catholic Charities of the Diocese of La Crosse, Inc.	\$150,000	55	\$33,511	20
90EI0119	2001 - 2007	NY	Community Capital New York dba Westchester Housing Fund	\$21,800	38	\$21,228	15
90EI0120	2001 - 2007	CA	Community Action Commission of Santa Barbara County	\$10,000	5	\$11,777	5
90EI0121	2001 - 2007	NY	Alternatives Federal Credit Union	\$58,832	78	\$67,452	53
90EI0123	2001 - 2007	NJ	New Jersey Department of Community Affairs	\$200,000	134	\$162,507	61
90EI0124	2001 - 2007	MI	City Vision, Inc.	\$469,567	565	\$423,033	174
90EI0125	2001 - 2007	MI	Oakland Livingston Human Services Agency	\$470,000	248	\$198,267	131
90EI0129	2001 - 2007	KS	The Family Conservancy, Inc.	\$470,588	666	\$364,644	257
90EI0130	2001 - 2007	CT	CTE, Inc.	\$139,000	45	\$159,162	40
90EI0131	2001 - 2007	MI	Michigan Neighborhood Partnership	\$500,000	291	\$650,290	91
90EI0133	2001 - 2007	WI	CAP Services, Inc.	\$172,500	315	\$233,303	133
90EI0135	2001 - 2007	TX	City of San Antonio	\$900,000	609	\$475,904	533
90EI0137	2001 - 2007	NC	North Carolina Department of Labor	\$668,215	1285	\$943,246	218
90EI0139	2001 - 2007	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$60,000	56	\$78,555	37
90EI0140	2001 - 2007	GA	United Way of Metropolitan Atlanta	\$295,294	120	\$99,824	94

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Grants are sorted first by grant period and then by grant number.

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0141	2001 - 2007	MA	Allston Brighton Community Development Corporation	\$59,373	40	\$57,900	34
90EI0142	2001 - 2007	CT	Connecticut Department of Labor	\$100,000	57	\$48,152	13
90EI0146	2001 - 2007	WI	Wisconsin Women's Business Initiative Corporation	\$463,029	194	\$206,662	104
90EI0147	2001 - 2007	CA	Community Action Partnership of Sonoma County	\$50,000	3	\$6,148	3
90EI0149	2001 - 2007	KY	The Center for Women and Families	\$103,500	88	\$68,011	41
90EI0150	2001 - 2007	CA	Community Action Partnership of Riverside County	\$250,000	121	\$187,096	52
90EI0151	2001 - 2007	ME	Coastal Enterprises, Inc.	\$437,644	13	\$19,099	6
<b>2002</b>							
90EI0192	2002 - 2003	CA	San Francisco Foundation Community Initiatives Fund	\$800,000	0	\$0	0
90EI0220	2002 - 2004	OR	Portland Housing Center, Inc.	\$102,419	0	\$0	0
90EI0152	2002 - 2007	LA	Caleb Community Development Corporation	\$200,000	0	\$0	0
90EI0153	2002 - 2007	WA	Spokane Neighborhood Action Programs	\$50,000	26	\$53,267	22
90EI0168	2002 - 2007	TX	El Paso County	\$250,000	19	\$35,678	11
90EI0171	2002 - 2007	WV	Huntington City Mission, Inc.	\$24,000	0	\$0	0
90EI0175	2002 - 2007	MI	Northwest Michigan Community Action Agency, Inc.	\$58,823	93	\$59,586	36
90EI0179	2002 - 2007	IL	Steans Family Foundation	\$408,011	195	\$177,533	67
90EI0180	2002 - 2007	NJ	Newark Preschool Council, Inc.	\$50,000	0	\$0	0
90EI0182	2002 - 2007	PA	People For People, Inc.	\$999,952	0	\$0	0
90EI0187	2002 - 2007	CA	Northeast Community Federal Credit Union	\$47,060	14	\$29,928	9
90EI0190	2002 - 2007	NY	Concord Community Development Corporation	\$25,000	0	\$0	0
90EI0193	2002 - 2007	OR	Community and Shelter Assistance Corporation	\$367,941	215	\$275,992	163
90EI0198	2002 - 2007	WA	United Way of King County	\$261,530	99	\$80,000	59
90EI0200	2002 - 2007	IL	Illinois Community Action Association	\$239,000	115	\$103,576	46
90EI0201	2002 - 2007	TX	United Community Centers, Inc.	\$15,000	0	\$0	0
90EI0205	2002 - 2007	NY	Banana Kelly Community Improvement Association, Inc.	\$52,941	0	\$0	0
90EI0210	2002 - 2007	MD	Mission of Mercy Empowerment Center, Inc.	\$75,000	0	\$0	0
90EI0213	2002 - 2007	TX	Community Action Council of South Texas	\$67,058	41	\$21,000	35
90EI0215	2002 - 2007	VA	New Enterprise Fund, Inc.	\$155,000	54	\$43,761	23
90EI0216	2002 - 2007	VA	After School Music Program, Inc.	\$70,588	0	\$0	0

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*Grants are sorted first by grant period and then by grant number.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0217	2002 - 2007	VA	New Visions, New Ventures, Inc.	\$10,000	7	\$9,159	7
90EI0219	2002 - 2007	MO	St. Martin's Child Center, Inc.	\$273,240	0	\$0	0
90EI0154	2002 - 2008	TN	Upper East Tennessee Human Development Agency, Inc.	\$100,000	28	\$48,786	7
90EI0155	2002 - 2008	NY	Alternatives Federal Credit Union	\$58,824	77	\$64,298	55
90EI0156	2002 - 2008	CT	Co-Opportunity, Inc.	\$49,412	37	\$34,019	11
90EI0157	2002 - 2008	VA	Total Action Against Poverty in Roanoke	\$122,500	71	\$53,959	43
90EI0158	2002 - 2008	AR	Economic Opportunity Agency of Washington County, Inc.	\$50,000	16	\$9,675	11
90EI0159	2002 - 2008	MA	Montachusett Opportunity Council, Inc.	\$211,766	132	\$120,826	86
90EI0160	2002 - 2008	AR	South Arkansas Community Development	\$22,770	48	\$17,086	20
90EI0161	2002 - 2008	MT	District 7 Human Resources Development Council	\$147,500	60	\$118,938	35
90EI0163	2002 - 2008	ME	Penquis Community Action Program, Inc.	\$400,000	116	\$106,945	61
90EI0164	2002 - 2008	CT	Connecticut Department of Labor	\$207,500	102	\$107,691	42
90EI0165	2002 - 2008	AL	Tuscaloosa Housing Authority	\$25,000	18	\$4,125	0
90EI0166	2002 - 2008	TX	Foundation Communities, Inc.	\$103,500	69	\$102,422	46
90EI0167	2002 - 2008	CA	AnewAmerica Community Corporation	\$96,353	58	\$137,497	48
90EI0169	2002 - 2008	PA	United Way of Greater Philadelphia and Southern New Jersey	\$500,000	371	\$233,807	161
90EI0170	2002 - 2008	MA	YouthBuild USA	\$110,294	54	\$20,743	20
90EI0172	2002 - 2008	MO	Great Rivers Community Trust	\$235,000	248	\$233,019	127
90EI0173	2002 - 2008	IA	ISED Ventures (Iowans for Social and Economic Development)	\$500,000	479	\$695,184	302
90EI0174	2002 - 2008	NY	Mount Hope Housing Company, Inc.	\$352,941	210	\$310,125	135
90EI0176	2002 - 2008	VT	Capstone Community Action, Inc.	\$200,000	208	\$144,215	133
90EI0177	2002 - 2008	KY	The Center for Women and Families	\$176,470	125	\$107,207	7
90EI0178	2002 - 2008	CA	Community Action Commission of Santa Barbara County	\$34,000	29	\$11,223	6
90EI0181	2002 - 2008	AZ	City of Tucson	\$100,000	121	\$95,199	0
90EI0183	2002 - 2008	CA	Jefferson Economic Development Institute	\$150,600	61	\$53,248	51
90EI0184	2002 - 2008	MO	Redevelopment Opportunities for Women, Inc.	\$25,000	4	\$7,524	4
90EI0185	2002 - 2008	NJ	Camden County Council on Economic Opportunity, Inc.	\$249,000	113	\$194,000	79
90EI0186	2002 - 2008	CA	Fresno County Economic Opportunities Commission	\$80,000	39	\$46,532	20
90EI0188	2002 - 2008	MA	Allston Brighton Community Development Corporation	\$333,762	84	\$109,707	0

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0189	2002 - 2008	DC	Capital Area Asset Building Corporation	\$500,000	328	\$259,897	141
90EI0191	2002 - 2008	ND	Southeastern North Dakota Community Action Agency	\$32,000	25	\$29,643	13
90EI0194	2002 - 2008	MO	United Way of Greater St. Louis	\$220,494	217	\$221,368	120
90EI0195	2002 - 2008	TN	Oasis Center, Inc.	\$112,940	56	\$27,734	34
90EI0196	2002 - 2008	MO	People's Community Development Corporation	\$250,000	193	\$127,986	193
90EI0197	2002 - 2008	CO	Mile High United Way	\$1,000,000	93	\$89,970	74
90EI0199	2002 - 2008	CA	United Way of Greater Los Angeles	\$1,000,000	905	\$1,190,851	322
90EI0202	2002 - 2008	IL	Partnership Accounts for Individual Development	\$100,000	71	\$104,714	42
90EI0203	2002 - 2008	OH	Ohio Community Development Corporation Association	\$1,000,000	616	\$633,391	221
90EI0204	2002 - 2008	CA	East Bay Asian Local Development Corporation	\$230,590	31	\$40,299	15
90EI0206	2002 - 2008	AR	Southern Bancorp Community Partners	\$250,000	232	\$107,523	59
90EI0207	2002 - 2008	MA	Community Service Network, Inc.	\$57,500	24	\$82,363	10
90EI0208	2002 - 2008	GA	Atlanta Cooperative Development Corporation	\$1,000,000	30	\$10,991	0
90EI0209	2002 - 2008	FL	Fresh Ministries, Inc.	\$1,000,000	289	\$193,179	44
90EI0211	2002 - 2008	GA	Economic Opportunity for Savannah Chatham County Area	\$50,000	46	\$17,851	6
90EI0212	2002 - 2008	MO	Opportunities Industrialization Center of the Midwest	\$500,000	289	\$334,200	46
90EI0214	2002 - 2008	DC	Second District Religious, Educational and Charitable Development Projects, Inc.	\$200,000	6	\$4,400	0
90EI0218	2002 - 2008	NY	Local Development Corporation of East New York	\$110,000	32	\$34,938	10
<b>2003</b>							
90EI0222	2003 - 2007	CA	Earned Assets Resource Network	\$461,800	308	\$464,670	149
90EI0221	2003 - 2008	CA	Earned Assets Resource Network	\$800,000	423	\$635,199	180
90EI0223	2003 - 2008	CA	Opportunity Fund	\$188,250	118	\$184,483	104
90EI0224	2003 - 2008	CA	West Enterprise Center	\$47,058	10	\$10,049	7
90EI0225	2003 - 2008	MO	Assemblies of God Financial Services	\$1,000,000	15	\$20,994	0
90EI0227	2003 - 2008	NV	Community Services Agency and Development Corporation	\$150,000	108	\$54,805	28
90EI0229	2003 - 2008	WA	Spokane Neighborhood Action Programs	\$100,000	64	\$135,914	0
90EI0231	2003 - 2008	AR	Economic Opportunity Agency of Washington County, Inc.	\$20,000	17	\$10,667	12
90EI0235	2003 - 2008	OR	Community and Shelter Assistance Corporation	\$117,646	78	\$96,193	64

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90EI0238	2003 - 2008	WA	United Way of King County	\$196,706	105	\$122,725	44
90EI0239	2003 - 2008	IL	Fellowship Missionary Baptist Church	\$1,000,000	0	\$0	0
90EI0242	2003 - 2008	IL	Goodcity NFP	\$16,941	0	\$0	0
90EI0244	2003 - 2008	LA	Total Community Action, Inc.	\$100,000	218	\$260,711	40
90EI0250	2003 - 2008	TX	Housing Services of Texas	\$300,000	68	\$34,936	11
90EI0251	2003 - 2008	MI	Christian Business Network	\$1,000,000	0	\$0	0
90EI0253	2003 - 2008	GA	Core Neighborhood Revitalization, Inc.	\$37,750	22	\$13,250	0
90EI0255	2003 - 2008	HI	Pacific Gateway Center	\$115,000	45	\$51,568	45
90EI0257	2003 - 2008	GA	New Birth Missionary Baptist Church	\$1,000,000	0	\$0	0
90EI0259	2003 - 2008	AR	South Arkansas Community Development	\$23,000	0	\$0	0
90EI0260	2003 - 2008	IL	Central Advisory Council, Inc.	\$200,000	0	\$0	0
90EI0263	2003 - 2008	CA	Community Action Commission of Santa Barbara County	\$42,000	0	\$0	0
90EI0265	2003 - 2008	TN	Advance Memphis	\$6,000	13	\$5,177	2
90EI0266	2003 - 2008	MD	Collective Banking Group of PG County & Vicinity	\$200,000	0	\$0	0
90EI0268	2003 - 2008	CA	Alliance for African Assistance	\$125,000	25	\$31,103	14
90EI0226	2003 - 2009	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$200,000	164	\$256,006	59
90EI0228	2003 - 2009	MN	West Central Minnesota Communities Action, Inc.	\$1,000,000	1124	\$813,481	692
90EI0230	2003 - 2009	NC	Western Carolina Community Action, Inc.	\$20,000	22	\$26,748	9
90EI0232	2003 - 2009	VT	Capstone Community Action, Inc.	\$147,080	180	\$134,471	107
90EI0233	2003 - 2009	MI	Northwest Michigan Community Action Agency, Inc.	\$176,470	246	\$102,142	113
90EI0234	2003 - 2009	IL	Neighborhood Housing Development Corporation	\$50,588	2	\$1,075	2
90EI0236	2003 - 2009	CT	Co-Opportunity, Inc.	\$90,000	38	\$43,120	13
90EI0237	2003 - 2009	CA	Community Action Partnership of Sonoma County	\$50,000	13	\$17,797	11
90EI0240	2003 - 2009	NY	Community Capital New York dba Westchester Housing Fund	\$20,000	15	\$6,834	9
90EI0241	2003 - 2009	NH	New Hampshire Community Loan Fund	\$590,000	344	\$538,562	127
90EI0243	2003 - 2009	WI	Wisconsin Women's Business Initiative Corporation	\$647,060	327	\$333,948	89
90EI0245	2003 - 2009	MA	Allston Brighton Community Development Corporation	\$50,588	13	\$22,000	11
90EI0246	2003 - 2009	ND	Southeastern North Dakota Community Action Agency	\$22,000	11	\$16,326	9

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90EI0247	2003 - 2009	AZ	Mesa Community Action Network, Inc.	\$540,000	396	\$501,748	173
90EI0248	2003 - 2009	IN	John H. Boner Community Center	\$64,400	67	\$49,297	58
90EI0249	2003 - 2009	MD	Allegany County Human Resources Development Commission, Inc.	\$155,000	77	\$45,348	21
90EI0252	2003 - 2009	CA	Community Action Partnership of Riverside County	\$300,000	220	\$282,582	69
90EI0254	2003 - 2009	MI	United Way for Southeastern Michigan	\$117,647	125	\$55,625	49
90EI0256	2003 - 2009	AK	Cook Inlet Tribal Council, Inc.	\$625,000	246	\$189,468	31
90EI0258	2003 - 2009	FL	Capital Area Community Action Agency	\$35,000	14	\$7,554	3
90EI0261	2003 - 2009	WI	Boys and Girls Club of Greater Milwaukee	\$1,000,000	467	\$471,053	306
90EI0262	2003 - 2009	FL	Partners for Self Employment, Inc.	\$679,500	629	\$660,551	223
90EI0264	2003 - 2009	MS	AJFC Community Action Agency, Inc.	\$500,000	154	\$58,798	19
90EI0267	2003 - 2009	TN	Upper Cumberland Human Resource Agency	\$1,000,000	204	\$336,601	167
<b>2004</b>							
90EI0269	2004 - 2009	AL	Family Services Center	\$88,940	14	\$8,803	2
90EI0272	2004 - 2009	AR	Crowley's Ridge Development Council, Inc.	\$52,942	33	\$19,988	8
90EI0275	2004 - 2009	WA	United Way of King County	\$494,130	231	\$454,892	132
90EI0284	2004 - 2009	KY	Kentucky Domestic Violence Association, Inc.	\$115,700	88	\$99,924	59
90EI0286	2004 - 2009	NY	Food Bank for New York City	\$69,000	155	\$1,600	0
90EI0299	2004 - 2009	OR	Community and Shelter Assistance Corporation	\$352,941	239	\$316,319	181
90EI0301	2004 - 2009	MT	Poverello Center, Inc.	\$59,280	0	\$0	0
90EI0304	2004 - 2009	UT	Utah Issues Center for Poverty Research and Action	\$100,000	55	\$0	0
90EI0305	2004 - 2009	NM	Women's Economic Self-Sufficiency Team	\$146,500	209	\$100,353	128
90EI0307	2004 - 2009	MA	Community Service Network, Inc.	\$75,997	0	\$0	0
90EI0311	2004 - 2009	CT	Empower New Haven, Inc.	\$475,000	75	\$74,344	27
90EI0312	2004 - 2009	IL	South Side Community Federal Credit Union	\$460,000	0	\$0	0
90EI0316	2004 - 2009	VA	New Visions, New Ventures, Inc.	\$150,000	63	\$88,097	27
90EI0317	2004 - 2009	MI	Legal Services of Eastern Michigan	\$100,000	226	\$76,686	71
90EI0318	2004 - 2009	WI	Lao Family Community, Inc.	\$1,000,000	0	\$0	0
90EI0322	2004 - 2009	CA	Valley Small Business Development Corporation	\$160,640	0	\$0	0
90EI0324	2004 - 2009	NE	Family Housing Advisory Services, Inc.	\$15,000	10	\$10,200	0

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90EI0327	2004 - 2009	MO	Opportunities Industrialization Center of the Midwest	\$500,000	28	\$29,400	1
90EI0328	2004 - 2009	FL	Dream Builders of Tallahassee, Inc.	\$421,670	30	\$13,000	9
90EI0329	2004 - 2009	AZ	Southeastern Arizona Community Action Program, Inc.	\$300,000	0	\$0	0
90EI0330	2004 - 2009	DC	District of Columbia, Department of Mental Health	\$200,000	0	\$0	0
90EI0270	2004 - 2010	CA	United Way of Greater Los Angeles	\$588,824	567	\$530,000	364
90EI0271	2004 - 2010	HI	ALU LIKE, Inc.	\$142,500	89	\$116,689	50
90EI0273	2004 - 2010	CO	Pikes Peak Community Action Agency, Inc.	\$200,000	151	\$111,418	111
90EI0274	2004 - 2010	OH	Economic and Community Development Institute	\$456,471	191	\$95,558	156
90EI0276	2004 - 2010	NY	Fifth Avenue Committee, Inc.	\$45,294	37	\$20,000	6
90EI0277	2004 - 2010	CA	Earned Assets Resource Network	\$1,000,000	583	\$878,494	275
90EI0278	2004 - 2010	TX	Foundation Communities, Inc.	\$476,100	206	\$285,162	49
90EI0279	2004 - 2010	WA	Spokane Neighborhood Action Programs	\$35,000	19	\$30,405	13
90EI0280	2004 - 2010	FL	United Way of Palm Beach County	\$353,000	503	\$512,340	92
90EI0281	2004 - 2010	VT	Capstone Community Action, Inc.	\$135,330	171	\$106,160	109
90EI0282	2004 - 2010	CT	Connecticut Department of Labor	\$200,000	186	\$150,439	80
90EI0283	2004 - 2010	MN	Lutheran Social Service of Minnesota	\$705,882	0	\$469,491	335
90EI0285	2004 - 2010	MA	YouthBuild USA	\$705,883	207	\$121,728	52
90EI0287	2004 - 2010	TX	Alliance for Multicultural Community Services	\$312,500	131	\$222,650	94
90EI0288	2004 - 2010	NM	Prosperity Works	\$1,000,000	620	\$544,281	448
90EI0289	2004 - 2010	DE	First State Community Loan Fund	\$195,000	339	\$336,549	145
90EI0290	2004 - 2010	NY	Mount Hope Housing Company, Inc.	\$75,000	48	\$66,000	22
90EI0291	2004 - 2010	MN	West Central Minnesota Communities Action, Inc.	\$359,152	445	\$342,528	240
90EI0292	2004 - 2010	AZ	Chicanos por la Causa	\$70,000	44	\$47,272	10
90EI0293	2004 - 2010	CA	Community Housing Development Corporation	\$105,000	31	\$32,752	13
90EI0294	2004 - 2010	MI	Michigan State University	\$87,500	23	\$21,575	20
90EI0295	2004 - 2010	KS	The Family Conservancy, Inc.	\$205,882	70	\$91,610	22
90EI0296	2004 - 2010	CT	Co-Opportunity, Inc.	\$45,000	26	\$27,757	9
90EI0297	2004 - 2010	TX	Covenant Community Capital Corporation	\$600,000	629	\$1,435,732	184
90EI0298	2004 - 2010	CA	Cabrillo Economic Development Corporation	\$162,350	20	\$9,965	19

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90EI0300	2004 - 2010	NJ	Camden County Council on Economic Opportunity, Inc.	\$75,000	39	\$47,500	8
90EI0302	2004 - 2010	MA	Springfield Partners for Community Action	\$411,765	181	\$176,424	75
90EI0303	2004 - 2010	CA	AnewAmerica Community Corporation	\$255,873	19	\$40,401	17
90EI0306	2004 - 2010	FL	Broward County Board of County Commissioners	\$130,000	90	\$162,393	58
90EI0308	2004 - 2010	TX	City of San Antonio	\$300,000	229	\$211,848	158
90EI0309	2004 - 2010	NC	United Way of Forsyth County	\$250,000	165	\$393,691	103
90EI0310	2004 - 2010	AZ	Mesa Community Action Network, Inc.	\$307,060	78	\$70,172	27
90EI0313	2004 - 2010	TX	Goodwill Industries of San Antonio	\$100,000	89	\$33,200	29
90EI0314	2004 - 2010	IL	Goodcity NFP	\$470,588	103	\$124,300	18
90EI0315	2004 - 2010	WI	YWCA of Greater Milwaukee	\$1,000,000	39	\$18,751	16
90EI0319	2004 - 2010	DC	NCB Capital Impact	\$150,000	31	\$31,623	14
90EI0320	2004 - 2010	TX	Community Action Program, Inc. of Taylor County	\$100,000	49	\$55,100	44
90EI0321	2004 - 2010	LA	Total Community Action, Inc.	\$300,000	156	\$185,336	47
90EI0326	2004 - 2010	GA	Economic Opportunity for Savannah Chatham County Area	\$250,000	136		33
<b>2005</b>							
90EI0331	2005 - 2010	CA	Sacramento Mutual Housing Association	\$211,765	0	\$0	0
90EI0339	2005 - 2010	WA	Spokane Neighborhood Action Programs	\$100,000	55	\$61,304	22
90EI0341	2005 - 2010	WA	Snohomish County Workforce Development Council	\$117,647	46	\$38,558	14
90EI0344	2005 - 2010	NH	Rockingham Community Action	\$235,311	0	\$0	0
90EI0348	2005 - 2010	GA	Antioch Urban Ministries, Inc.	\$1,000,000	0	\$0	0
90EI0358	2005 - 2010	IN	LaCasa of Goshen, Inc.	\$94,000	20	\$33,477	20
90EI0364	2005 - 2010	NE	Lincoln Action Program	\$30,000	19	\$29,779	14
90EI0369	2005 - 2010	GA	Zion Hill Community Development Corporation	\$10,000	15	\$11,645	8
90EI0370	2005 - 2010	NE	Family Housing Advisory Services, Inc.	\$51,360	26	\$26,000	0
90EI0374	2005 - 2010	LA	Word of Faith Church International	\$1,000,000	0	\$0	0
90EI0332	2005 - 2011	NY	Belmont Housing Resources for WNY	\$46,000	30	\$51,219	20
90EI0333	2005 - 2011	FL	United Way of Palm Beach County	\$235,300	55	\$50,667	19
90EI0334	2005 - 2011	SD	Four Bands Community Fund, Inc.	\$47,647	53	\$44,094	32
90EI0335	2005 - 2011	CA	Associated Community Action Program	\$500,000	409	\$154,017	39

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90EI0336	2005 - 2011	ID	United Way of Treasure Valley	\$500,000	165	\$202,603	76
90EI0337	2005 - 2011	AR	Central Arkansas Development Council	\$40,080	71	\$32,153	31
90EI0338	2005 - 2011	NC	Durham Regional Community Development Group	\$80,000	178	\$80,055	20
90EI0340	2005 - 2011	AR	Crawford-Sebastian Community Development Council	\$216,715	334	\$191,405	95
90EI0342	2005 - 2011	WI	Wisconsin Women's Business Initiative Corporation	\$352,940	155	\$235,050	69
90EI0343	2005 - 2011	OH	Economic and Community Development Institute	\$1,000,000	404	\$180,056	235
90EI0345	2005 - 2011	IL	Bethel New Life, Inc.	\$1,000,000	883	\$923,441	133
90EI0346	2005 - 2011	VA	Total Action Against Poverty in Roanoke	\$90,000	71	\$57,860	21
90EI0347	2005 - 2011	FL	YWCA of Greater Miami, Inc.	\$260,000	71	\$78,377	23
90EI0349	2005 - 2011	WI	Christian Faith Fellowship Church, Inc.	\$1,000,000	6	\$4,825	2
90EI0350	2005 - 2011	AZ	Mesa Community Action Network, Inc.	\$571,000	242	\$206,484	130
90EI0351	2005 - 2011	VT	Capstone Community Action, Inc.	\$88,300	99	\$74,272	68
90EI0352	2005 - 2011	TX	Community Action Program, Inc. of Taylor County	\$150,000	84	\$69,670	65
90EI0353	2005 - 2011	CO	Mile High United Way	\$849,409	309	\$281,540	222
90EI0354	2005 - 2011	SD	Lakota Funds, Inc.	\$42,353	27	\$42,898	20
90EI0355	2005 - 2011	MO	United Way of Greater St. Louis	\$211,765	173	\$193,863	96
90EI0356	2005 - 2011	ND	Red River Valley Community Action	\$10,000	5	\$4,606	5
90EI0357	2005 - 2011	MO	East Missouri Action Agency, Inc.	\$60,000	25	\$31,964	8
90EI0359	2005 - 2011	CA	Earned Assets Resource Network	\$1,000,000	597	\$905,533	314
90EI0360	2005 - 2011	AL	United Way of Central Alabama	\$201,529	132	\$183,713	62
90EI0361	2005 - 2011	MA	United Way of Massachusetts Bay, Inc.	\$500,000	218	\$322,834	126
90EI0362	2005 - 2011	FL	Central Community Redevelopment Agency	\$176,500	4	\$1,349	0
90EI0363	2005 - 2011	VA	Southeastern Tidewater Opportunity Project, Inc.	\$200,000	16	\$15,596	6
90EI0365	2005 - 2011	TX	El Paso Collaborative for Economic and Community Development	\$150,000	132	\$103,424	67
90EI0366	2005 - 2011	TX	City of San Antonio	\$500,000	351	\$216,200	99
90EI0367	2005 - 2011	CT	Co-Opportunity, Inc.	\$45,000	14	\$24,387	10
90EI0372	2005 - 2011	NJ	Allies, Inc.	\$23,000	7	\$8,356	4
90EI0373	2005 - 2011	TX	United Way of Southern Cameron County	\$237,294	41	\$75,348	18
<b>2006</b>							

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90EI0397	2006 - 2008	VA	Empowerment 2010, Inc.	\$150,000	0	\$0	0
90EI0379	2006 - 2011	TN	Douglas-Cherokee Economic Authority, Inc.	\$18,571	22	\$6,125	19
90EI0380	2006 - 2011	CA	Northeast Community Federal Credit Union	\$40,000	0	\$0	0
90EI0382	2006 - 2011	CA	Opportunity Fund	\$500,000	316	\$538,482	302
90EI0384	2006 - 2011	MS	Mississippi Association of Community Action Agencies	\$250,000	0	\$0	0
90EI0386	2006 - 2011	WA	Seattle Business Assistance Center	\$240,000	15	\$25,328	8
90EI0389	2006 - 2011	OR	Community and Shelter Assistance Corporation	\$235,294	168	\$262,800	113
90EI0390	2006 - 2011	CT	CTE, Inc.	\$150,000	36	\$65,760	14
90EI0394	2006 - 2011	CA	RISE Financial Pathway (formerly LA Community Financial Resource Center)	\$200,000	0	\$0	0
90EI0399	2006 - 2011	CA	City of Los Angeles	\$500,000	0	\$0	0
90EI0401	2006 - 2011	GA	United Way of Metropolitan Atlanta	\$138,000	83	\$45,870	31
90EI0404	2006 - 2011	VA	People Incorporated of Southwest Virginia	\$22,600	10	\$19,340	10
90EI0406	2006 - 2011	VA	Boat People SOS, Inc.	\$352,941	115	\$136,500	91
90EI0410	2006 - 2011	OH	Northwestern Ohio Community Action Commission, Inc.	\$66,000	36	\$46,515	16
90EI0415	2006 - 2011	NM	Women's Economic Self-Sufficiency Team	\$177,500	177	\$89,256	126
90EI0416	2006 - 2011	FL	Miami-Dade County	\$1,000,000	0	\$0	0
90EI0417	2006 - 2011	DC	National Credit Union Foundation	\$415,725	213	\$303,879	33
90EI0418	2006 - 2011	MI	Community Action Agency of Jackson	\$176,500	193	\$173,896	121
90EI0419	2006 - 2011	WA	United Way of King County	\$505,882	285	\$414,982	0
90EI0421	2006 - 2011	VT	Capstone Community Action, Inc.	\$88,300	98	\$77,234	70
90EI0430	2006 - 2011	MO	Great Rivers Community Trust	\$300,000	147	\$178,002	118
90EI0435	2006 - 2011	UT	AAA Fair Credit Foundation	\$350,000	261	\$259,079	202
90EI0439	2006 - 2011	TX	Community Action Program, Inc. of Taylor County	\$100,000	54	\$48,316	37
90EI0440	2006 - 2011	IN	John H. Boner Community Center	\$129,000	69	\$50,107	44
90EI0442	2006 - 2011	MI	Michigan Neighborhood Partnership	\$511,871	127	\$75,007	0
90EI0375	2006 - 2012	MN	West Central Minnesota Communities Action, Inc.	\$230,000	255	\$200,516	162
90EI0376	2006 - 2012	MT	Montana Credit Unions for Community Development	\$52,000	44	\$19,838	38
90EI0377	2006 - 2012	FL	Broward County Board of County Commissioners	\$505,702	304	\$384,340	153

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## Appendix Table 2: Project Details and Highlights by Grant Start Date

*Grants are sorted first by grant period and then by grant number.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0378	2006 - 2012	KY	Kentucky Domestic Violence Association, Inc.	\$300,000	341	\$320,859	156
90EI0381	2006 - 2012	DE	First State Community Loan Fund	\$250,000	295	\$219,669	34
90EI0383	2006 - 2012	KY	The Center for Women and Families	\$195,500	0	\$0	0
90EI0385	2006 - 2012	MI	Ojibwa Housing Authority and Ojibwa Community College	\$64,702	37	\$30,024	32
90EI0387	2006 - 2012	IL	Illinois Department of Human Services	\$1,000,000	165	\$0	193
90EI0388	2006 - 2012	FL	Northeast Florida Community Action Agency, Inc.	\$250,000	51	\$42,400	11
90EI0391	2006 - 2012	NC	North Carolina Department of Labor	\$88,500	155	\$67,230	57
90EI0392	2006 - 2012	CA	California Coalition for Rural Housing	\$290,000	72	\$85,971	17
90EI0393	2006 - 2012	NY	Chinatown Manpower Project	\$525,000	39	\$98,774	31
90EI0395	2006 - 2012	NY	Housing Trust Fund Corporation	\$1,000,000	97	\$133,445	45
90EI0396	2006 - 2012	MO	Hi-Tech Charities	\$900,000	345	\$463,274	319
90EI0398	2006 - 2012	KY	The Race For Education, Inc.	\$164,706	72	\$50,483	72
90EI0402	2006 - 2012	TN	RISE Foundation, Inc.	\$58,825	61	\$28,200	16
90EI0403	2006 - 2012	TX	Goodwill Industries of San Antonio	\$100,000	59	\$48,217	25
90EI0405	2006 - 2012	AL	United Way of Central Alabama	\$655,000	392	\$424,378	135
90EI0407	2006 - 2012	WA	Housing Authority of the City of Tacoma	\$100,000	77	\$99,551	31
90EI0408	2006 - 2012	VA	Virginia Community Action Partnership	\$997,500	535	\$587,892	194
90EI0409	2006 - 2012	MT	Neighborhood Housing Services, Inc. of Great Falls	\$130,000	74	\$67,477	53
90EI0411	2006 - 2012	MO	Missouri Association for Community Action	\$400,000	63	\$90,080	39
90EI0412	2006 - 2012	CO	Foothills United Way	\$100,000	75	\$52,459	73
90EI0413	2006 - 2012	AZ	Nogales Community Development Corporation	\$280,001	146	\$206,086	90
90EI0414	2006 - 2012	CA	Community Action Partnership of Riverside County	\$352,000	228	\$278,184	76
90EI0420	2006 - 2012	MI	Oakland Livingston Human Services Agency	\$172,500	174	\$169,645	87
90EI0422	2006 - 2012	AZ	City of Tucson	\$110,000	68	\$45,000	45
90EI0423	2006 - 2012	MN	West Central Minnesota Communities Action, Inc.	\$1,000,000	1011	\$733,696	592
90EI0424	2006 - 2012	OK	Rural Enterprises of Oklahoma, Inc.	\$100,000	48	\$88,980	34
90EI0425	2006 - 2012	PA	Women's Opportunities Resource Center	\$266,176	226	\$249,657	90
90EI0426	2006 - 2012	MI	United Way for Southeastern Michigan	\$176,400	236	\$141,527	83
90EI0427	2006 - 2012	MI	Northwest Michigan Community Action Agency, Inc.	\$176,400	164	\$139,134	93

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Grants are sorted first by grant period and then by grant number.

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90EI0428	2006 - 2012	NC	City of Gastonia	\$70,588	20	\$12,912	8
90EI0429	2006 - 2012	AZ	BOTHANDS, Inc.	\$75,900	43	\$37,784	3
90EI0431	2006 - 2012	WI	City of Racine	\$120,000	81	\$91,535	29
90EI0432	2006 - 2012	KY	New Directions Housing Corporation	\$100,000	76	\$52,681	13
90EI0433	2006 - 2012	OH	Ohio Community Development Corporation Association	\$994,367	320	\$248,955	143
90EI0436	2006 - 2012	TN	Upper East Tennessee Human Development Agency, Inc.	\$180,000	143	\$246,010	74
90EI0437	2006 - 2012	CA	Developmental Services Support Foundation for Kern, Inyo and Mono Counties	\$105,000	51	\$55,258	28
90EI0438	2006 - 2012	FL	Osceola County Council on Aging, Inc.	\$47,400	33	\$13,825	16
90EI0441	2006 - 2012	SC	Urban League of the Upstate, Inc.	\$59,000	170	\$53,889	40
90EI0443	2006 - 2012	LA	United Way of Southeast Louisiana	\$1,000,000	351	\$509,004	146
<b>2007</b>							
90EI0457	2007 - 2008	NJ	New Jersey Department of Community Affairs	\$1,000,000	0	\$0	0
90EI0463	2007 - 2008	VA	Empowerment 2010, Inc.	\$100,000	0	\$0	0
90EI0480	2007 - 2008	CA	Orange County United Way	\$470,588	0	\$0	0
90EI0486	2007 - 2008	TN	Monroe Harding	\$120,000	0	\$0	0
90EI0450	2007 - 2012	NY	Belmont Housing Resources for WNY	\$30,000	15	\$14,463	13
90EI0451	2007 - 2012	OR	Community and Shelter Assistance Corporation	\$352,941	237	\$452,451	154
90EI0452	2007 - 2012	ME	Penquis Community Action Program, Inc.	\$50,000	28	\$39,760	22
90EI0455	2007 - 2012	TX	Community Council of Southwest Texas	\$50,000	0	\$0	0
90EI0460	2007 - 2012	CA	Weingart Center Association	\$656,251	0	\$0	0
90EI0462	2007 - 2012	KS	El Centro, Inc.	\$45,000	28	\$30,100	9
90EI0464	2007 - 2012	OK	OKC Compassion, Inc.	\$60,000	0	\$0	0
90EI0465	2007 - 2012	CT	Neighborhood Housing Services of New Haven	\$58,824	16	\$23,089	0
90EI0466	2007 - 2012	AK	Alaska Business Development Center, Inc.	\$129,412	6	\$2,965	0
90EI0468	2007 - 2012	MA	Allston Brighton Community Development Corporation	\$34,588	25	\$23,758	12
90EI0475	2007 - 2012	MN	Lutheran Social Service of Minnesota	\$470,588	249	\$297,486	203
90EI0483	2007 - 2012	FL	United Way of Palm Beach County	\$235,300	50	\$114,656	19
90EI0484	2007 - 2012	CA	United Way of Greater Los Angeles	\$1,000,000	330	\$603,296	224

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Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0485	2007 - 2012	NY	Alternatives Federal Credit Union	\$58,824	57	\$60,655	52
90EI0487	2007 - 2012	CA	Community Action Partnership of San Bernardino County	\$253,256	228	\$285,000	52
90EI0490	2007 - 2012	MA	Community Teamwork	\$90,000	61	\$109,953	36
90EI0491	2007 - 2012	CA	Opportunity Fund	\$1,000,000	544	\$898,049	489
90EI0492	2007 - 2012	OH	WECO Fund, Inc.	\$25,000	34	\$14,893	28
90EI0494	2007 - 2012	AR	Southern Bancorp Community Partners	\$160,000	313	\$179,304	114
90EI0495	2007 - 2012	CO	Del Norte Neighborhood Development Corporation	\$45,000	0	\$0	24
90EI0444	2007 - 2013	PA	United Way of Greater Philadelphia and Southern New Jersey	\$500,000	387	\$323,988	171
90EI0446	2007 - 2013	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$110,000	94	\$135,502	59
90EI0447	2007 - 2013	TN	Bradley Initiative for Church and Community, Inc	\$25,000	67	\$60,823	47
90EI0448	2007 - 2013	MI	Inner City Christian Federation	\$176,400	176	\$154,875	117
90EI0449	2007 - 2013	GA	CSRA Economic Opportunity Authority, Inc.	\$92,000	18	\$16,337	4
90EI0454	2007 - 2013	GA	City of Hinesville	\$50,000	24	\$21,141	8
90EI0456	2007 - 2013	NM	HELP-New Mexico, Inc.	\$1,000,000	157	\$119,191	99
90EI0458	2007 - 2013	TX	Gulf Coast Community Services Association	\$90,000	142	\$102,154	27
90EI0459	2007 - 2013	DC	Capital Area Asset Building Corporation	\$1,000,000	697	\$480,071	304
90EI0461	2007 - 2013	CA	Fresno County Economic Opportunities Commission	\$500,000	241	\$428,577	212
90EI0467	2007 - 2013	AZ	Mesa Community Action Network, Inc.	\$250,000	248	\$321,677	121
90EI0469	2007 - 2013	WI	Boys and Girls Club of Greater Milwaukee	\$1,000,000	466	\$324,156	343
90EI0470	2007 - 2013	CA	City of Oakland	\$250,000	157	\$263,302	102
90EI0471	2007 - 2013	MI	Community Action Agency of Jackson	\$35,294	42	\$43,232	6
90EI0472	2007 - 2013	MT	District 7 Human Resources Development Council	\$70,000	47	\$68,266	24
90EI0474	2007 - 2013	WA	Lower Columbia Community Action Council	\$450,000	255	\$331,661	114
90EI0476	2007 - 2013	MA	Massachusetts Association for Community Action	\$425,882	190	\$280,573	103
90EI0477	2007 - 2013	MT	Montana Credit Unions for Community Development	\$20,000	20	\$13,954	15
90EI0478	2007 - 2013	NH	New Hampshire Community Loan Fund	\$294,118	236	\$459,830	134
90EI0479	2007 - 2013	NY	New York City Administration for Children's Services	\$176,470	7	\$5,945	7
90EI0481	2007 - 2013	ND	Red River Valley Community Action	\$115,000	79	\$114,429	54

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90EI0482	2007 - 2013	CA	San Diego Housing Commission	\$100,000	99	\$120,137	56
90EI0488	2007 - 2013	PA	Community Action Committee of the Lehigh Valley	\$41,176	29	\$34,108	7
90EI0489	2007 - 2013	PA	Philadelphia Housing Authority	\$920,000	146	\$41,670	50
90EI0493	2007 - 2013	WA	Neighborhood Assets	\$250,000	146	\$185,593	90
90EI0496	2007 - 2013	AL	United Way of Central Alabama	\$115,000	75	\$91,856	41
90EI0497	2007 - 2013	OH	Ohio Community Development Corporation Association	\$500,000	234	\$137,417	103
90EI0498	2007 - 2013	OH	Hancock Hardin Wyandot Putnam Community Action Commission	\$82,352	49	\$62,490	28
90EI0500	2007 - 2013	NY	The Salvation Army - West Nyack, NY	\$50,000	43	\$48,392	11
<b>2008</b>							
90EI0542	2008 - 2008	MD	Advocates for Homeless Families, Inc.	\$50,000	0	\$0	0
90EI0501	2008 - 2009	UT	AAA Fair Credit Foundation	\$80,832	66	\$106,226	66
90EI0531	2008 - 2009	IA	United Way and Community Foundation of Northwest Iowa	\$87,400	0	\$0	0
90EI0517	2008 - 2011	TX	Community Action Program, Inc. of Taylor County	\$200,000	62	\$38,803	23
90EI0560	2008 - 2011	PA	Urban Affairs Coalition	\$100,000	4	\$927	0
90EI0507	2008 - 2012	NE	The Residential Care Consortium	\$207,059	11	\$1,200	0
90EI0533	2008 - 2012	TX	City of San Antonio	\$250,000	76	\$69,538	47
90EI0505	2008 - 2013	VT	Capstone Community Action, Inc.	\$82,500	85	\$84,575	70
90EI0520	2008 - 2013	IA	ISED Ventures (Iowans for Social and Economic Development)	\$558,825	472	\$766,923	454
90EI0522	2008 - 2013	CA	Earned Assets Resource Network	\$1,000,000	446	\$779,824	296
90EI0528	2008 - 2013	NC	City of High Point	\$47,000	5	\$1,000	2
90EI0530	2008 - 2013	UT	AAA Fair Credit Foundation	\$350,000	212	\$275,817	189
90EI0536	2008 - 2013	SD	Four Bands Community Fund, Inc.	\$63,529	47	\$40,581	32
90EI0540	2008 - 2013	CA	Santa Cruz Community Credit Union	\$75,000	58	\$131,204	54
90EI0543	2008 - 2013	MD	Washington County Community Action Council	\$30,000	1	\$2,040	0
90EI0546	2008 - 2013	NC	Choanoke Area Development Association of NC, Inc.	\$125,000	158	\$87,527	34
90EI0552	2008 - 2013	GA	Columbus Housing Initiative, Inc. dba NeighborWorks Columbus	\$160,000	139	\$52,989	30
90EI0554	2008 - 2013	TN	Upper Cumberland Human Resource Agency	\$750,000	0	\$0	0
90EI0559	2008 - 2013	ND	Red River Valley Community Action	\$6,600	4	\$6,089	3
90EI0561	2008 - 2013	DE	First State Community Loan Fund	\$250,000	162	\$189,332	61

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90EI0563	2008 - 2013	IL	Community Action Partnership of Lake County	\$100,000	26	\$5,904	6
90EI0566	2008 - 2013	VT	Capstone Community Action, Inc.	\$59,250	62	\$82,048	55
90EI0502	2008 - 2014	ME	Penquis Community Action Program, Inc.	\$125,000	84	\$89,138	70
90EI0503	2008 - 2014	TX	Foundation Communities, Inc.	\$87,059	76	\$72,708	45
90EI0504	2008 - 2014	NM	Prosperity Works	\$1,000,000	581	\$548,130	428
90EI0506	2008 - 2014	MT	Montana Credit Unions for Community Development	\$20,000	17	\$20,603	11
90EI0508	2008 - 2014	SD	GROW South Dakota DBA Northeast South Dakota Community Action Program	\$317,647	184	\$232,899	117
90EI0509	2008 - 2014	OR	Community and Shelter Assistance Corporation	\$470,588	326	\$582,114	242
90EI0510	2008 - 2014	IA	Iowa Credit Union Foundation	\$342,080	300	\$411,310	142
90EI0512	2008 - 2014	MO	Beyond Housing	\$230,100	169	\$127,258	112
90EI0513	2008 - 2014	PA	United Way of Lancaster County	\$117,500	95	\$112,660	36
90EI0514	2008 - 2014	MA	Citizens for Citizens, Inc.	\$23,530	10	\$24,339	9
90EI0515	2008 - 2014	OR	Lane MicroBusiness	\$82,300	45	\$71,192	39
90EI0516	2008 - 2014	TN	Church Koinonia Federal Credit Union	\$60,000	55	\$52,060	14
90EI0518	2008 - 2014	NC	Monroe-Union County Community Development Corporation	\$72,000	68	\$49,493	25
90EI0519	2008 - 2014	KY	Kentucky Domestic Violence Association, Inc.	\$300,000	289	\$287,332	141
90EI0521	2008 - 2014	CA	San Diego Housing Commission	\$150,000	178	\$140,320	46
90EI0523	2008 - 2014	CA	United Way of Kern County, Inc.	\$152,900	99	\$133,221	62
90EI0524	2008 - 2014	MT	Montana Home Ownership Network	\$250,000	119	\$134,184	72
90EI0525	2008 - 2014	NY	New York State Office of People with Developmental Disabilities	\$1,000,000	100	\$79,979	35
90EI0526	2008 - 2014	GA	The Center for Working Families	\$250,000	148	\$59,670	107
90EI0527	2008 - 2014	NY	Belmont Housing Resources for WNY	\$148,650	115	\$86,541	44
90EI0529	2008 - 2014	OR	Umpqua Community Development Corporation	\$200,000	129	\$225,989	105
90EI0532	2008 - 2014	FL	Broward County Board of County Commissioners	\$222,500	128	\$119,242	84
90EI0534	2008 - 2014	CA	Community Housing Development Corporation	\$69,000	31	\$43,188	14
90EI0535	2008 - 2014	OH	Ohio Community Development Corporation Association	\$725,000	145	\$143,234	61
90EI0538	2008 - 2014	MS	Mercy Housing and Human Development, Inc.	\$380,000	207	\$174,826	64
90EI0539	2008 - 2014	WI	Wisconsin Women's Business Initiative Corporation	\$447,059	365	\$334,471	43

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90EI0541	2008 - 2014	TX	Covenant Community Capital Corporation	\$400,000	789	\$1,284,193	207
90EI0544	2008 - 2014	FL	United Way Suncoast	\$350,000	104	\$122,867	42
90EI0545	2008 - 2014	MI	Oakland Livingston Human Services Agency	\$132,352	74	\$58,943	42
90EI0547	2008 - 2014	AK	Cook Inlet Lending Center, Inc.	\$233,000	200	\$187,340	96
90EI0548	2008 - 2014	TX	Goodwill Industries of San Antonio	\$100,000	64	\$59,583	48
90EI0549	2008 - 2014	FL	Partners for Self Employment, Inc.	\$317,000	249	\$510,380	150
90EI0550	2008 - 2014	NC	North Carolina Department of Labor	\$287,500	176	\$133,623	45
90EI0553	2008 - 2014	NC	United Way of Forsyth County	\$400,000	404	\$160,909	106
90EI0555	2008 - 2014	IN	United Way of Greater Lafayette and Tippecanoe County	\$128,750	34	\$53,716	22
90EI0556	2008 - 2014	AL	Tuscaloosa Housing Authority	\$25,000	0	\$0	0
90EI0557	2008 - 2014	KY	The Race For Education, Inc.	\$470,368	157	\$77,176	144
90EI0558	2008 - 2014	SC	South Carolina Association of Community Development Corporations, Inc.	\$300,000	677	\$347,859	187
90EI0562	2008 - 2014	OR	Community and Shelter Assistance Corporation	\$529,000	350	\$639,557	262
90EI0564	2008 - 2014	MI	Community Action Agency of Jackson	\$218,824	160	\$168,636	85
90EI0565	2008 - 2014	NJ	Collaborative Support Programs of New Jersey	\$117,647	33	\$40,800	8
90EI0567	2008 - 2014	CA	Arcata Economic Development Corporation	\$136,500	83	\$73,636	67
<b>2009</b>							
90EI0577	2009 - 2010	WA	Neighborhood Assets	\$21,127	6	\$12,114	6
90EI0578	2009 - 2010	WA	Neighborhood Assets	\$61,479	11	\$22,685	13
90EI0568	2009 - 2012	OH	WECO Fund, Inc.	\$129,150	108	\$30,558	64
90EI0569	2009 - 2014	OH	College Now Greater Cleveland	\$375,000	62	\$39,728	49
90EI0571	2009 - 2014	NJ	Newark Now, Inc.	\$100,000	8	\$5,319	0
90EI0576	2009 - 2014	AR	Southern Bancorp Community Partners	\$176,471	321	\$167,568	123
90EI0588	2009 - 2014	LA	Southern University at Shreveport	\$200,000	72	\$36,478	25
90EI0590	2009 - 2014	AK	Urban League of Anchorage Alaska	\$106,000	37	\$34,605	11
90EI0591	2009 - 2014	OR	Umpqua Community Development Corporation	\$200,000	120	\$219,862	92
90EI0595	2009 - 2014	KY	Jewish Family & Career Services of Louisville	\$46,999	45	\$98,794	37
90EI0600	2009 - 2014	ND	Red River Valley Community Action	\$143,750	93	\$152,508	70

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90EI0602	2009 - 2014	VT	Capstone Community Action, Inc.	\$56,475	66	\$63,128	51
90EI0603	2009 - 2014	IA	Iowa Credit Union Foundation	\$257,920	200	\$252,518	45
90EI0605	2009 - 2014	NY	Alternatives Federal Credit Union	\$58,824	56	\$60,062	53
90EI0606	2009 - 2014	MO	Urban Strategies	\$117,647	42	\$6,506	8
90EI0607	2009 - 2014	GA	United Way of Metropolitan Atlanta	\$160,000	66	\$70,420	60
90EI0610	2009 - 2014	CO	Mile High United Way	\$352,941	193	\$180,279	144
90EI0612	2009 - 2014	OH	United Way of Wayne and Holmes Counties	\$20,500	5	\$7,460	2
90EI0613	2009 - 2014	SC	The Cooperative Ministry	\$298,731	22	\$3,037	3
90EI0616	2009 - 2014	SD	Lakota Funds, Inc.	\$38,823	24	\$30,863	18
90EI0570	2009 - 2015	FL	United Way of Volusia - Flagler Counties, Inc.	\$150,000	40	\$45,635	29
90EI0573	2009 - 2015	FL	Family Foundations of Northeast Florida, Inc.	\$287,500	245	\$183,079	53
90EI0574	2009 - 2015	VT	Capstone Community Action, Inc.	\$88,300	58	\$80,482	26
90EI0575	2009 - 2015	TX	Brazos Valley Community Action Agency	\$100,000	56	\$76,572	34
90EI0579	2009 - 2015	NM	Prosperity Works	\$1,000,000	334	\$270,088	127
90EI0580	2009 - 2015	OK	Choctaw Nation of Oklahoma	\$800,000	465	\$739,282	328
90EI0581	2009 - 2015	FL	Catholic Charities of Northwest Florida	\$60,000	11	\$17,928	8
90EI0582	2009 - 2015	CA	California Coalition for Rural Housing	\$335,300	39	\$50,257	25
90EI0583	2009 - 2015	NH	New Hampshire Community Loan Fund	\$294,118	158	\$263,094	74
90EI0584	2009 - 2015	CA	Community Action Partnership of Riverside County	\$352,000	302	\$204,029	83
90EI0585	2009 - 2015	AL	United Way of Central Alabama	\$186,765	151	\$143,434	44
90EI0586	2009 - 2015	ME	Penquis Community Action Program, Inc.	\$100,000	50	\$41,230	42
90EI0587	2009 - 2015	MI	Keweenaw Bay Ojibwa Housing and Community Development Corporation	\$64,702	30	\$21,779	18
90EI0589	2009 - 2015	OR	Community and Shelter Assistance Corporation	\$1,000,000	652	\$894,271	242
90EI0592	2009 - 2015	UT	AAA Fair Credit Foundation	\$500,000	285	\$331,899	186
90EI0593	2009 - 2015	CA	Community Action Partnership of Sonoma County	\$50,000	52	\$71,630	38
90EI0594	2009 - 2015	OR	Mercy Corps Northwest	\$588,235	301	\$380,398	263
90EI0596	2009 - 2015	TX	Alliance for Multicultural Community Services	\$312,500	214	\$521,737	107
90EI0597	2009 - 2015	NJ	United Way of Essex and West Hudson	\$439,900	83	\$46,244	24

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*Grants are sorted first by grant period and then by grant number.*

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90EI0598	2009 - 2015	ME	Penquis Community Action Program, Inc.	\$50,000	28	\$37,041	16
90EI0599	2009 - 2015	NY	Ifetayo Cultural Arts Academy	\$35,294	37	\$44,994	26
90EI0601	2009 - 2015	MA	Massachusetts Association for Community Action	\$145,882	42	\$51,961	17
90EI0604	2009 - 2015	MA	The MIDAS Collaborative	\$202,000	162	\$200,133	123
90EI0608	2009 - 2015	CA	Santa Cruz Community Credit Union	\$28,000	20	\$30,047	13
90EI0609	2009 - 2015	NM	Women's Economic Self-Sufficiency Team	\$400,000	181	\$219,101	128
90EI0611	2009 - 2015	KS	Interfaith Housing Services	\$350,000	234	\$473,065	162
90EI0614	2009 - 2015	OR	Neighborhood Partnerships (formerly Neighborhood Partnership Fund)	\$300,000	154	\$325,216	93
90EI0615	2009 - 2015	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$75,000	86	\$100,526	45
90EI0617	2009 - 2015	WV	KISRA - Kanawha Institute for Social Research & Action	\$466,750	88	\$28,558	33
90EI0618	2009 - 2015	NC	North Carolina Department of Labor	\$150,000	97	\$72,013	21
<b>2010</b>							
90EI0698	2010 - 2011	TX	United Way of Abilene, Inc.	\$61,149	11	\$0	10
90EI0637	2010 - 2012	LA	Iberia Comprehensive Community Health Center, Inc.	\$50,000	0	\$0	0
90EI0638	2010 - 2012	MO	Ozarks Area Community Action Corporation	\$32,200	3	\$40	0
90EI0643	2010 - 2012	VA	New Visions, New Ventures, Inc.	\$23,530	5	\$3,441	0
90EI0652	2010 - 2012	OH	WECO Fund, Inc.	\$70,000	0	\$0	0
90EI0697	2010 - 2013	TX	United Way of Abilene, Inc.	\$126,974	70	\$62,302	64
90EI0619	2010 - 2015	TX	El Paso Collaborative for Economic and Community Development	\$30,000	27	\$20,434	9
90EI0620	2010 - 2015	MI	Community Action Agency of Jackson	\$88,235	86	\$67,383	18
90EI0621	2010 - 2015	MI	United Way for Southeastern Michigan	\$88,235	57	\$59,711	19
90EI0622	2010 - 2015	CA	Juma Ventures	\$142,369	197	\$168,922	120
90EI0623	2010 - 2015	MI	Inner City Christian Federation	\$138,941	116	\$105,292	86
90EI0624	2010 - 2015	NE	Community Action of Nebraska, Inc.	\$172,500	84	\$47,584	27
90EI0626	2010 - 2015	MI	Oakland Livingston Human Services Agency	\$88,235	69	\$66,202	23
90EI0627	2010 - 2015	MI	Northwest Michigan Community Action Agency, Inc.	\$111,176	84	\$81,957	35
90EI0628	2010 - 2015	CT	Co-Opportunity, Inc.	\$47,059	17	\$22,231	8

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90EI0629	2010 - 2015	WI	Wisconsin Women's Business Initiative Corporation	\$176,470	105	\$79,043	12
90EI0630	2010 - 2015	FL	Catholic Charities Bureau, Inc	\$100,000	0	\$0	0
90EI0631	2010 - 2015	TX	Young Women's Christian Association	\$191,500	118	\$136,419	53
90EI0632	2010 - 2015	OR	Umpqua Community Development Corporation	\$500,000	303	\$553,697	196
90EI0633	2010 - 2015	MO	United Way of Greater Kansas City	\$223,529	83	\$35,275	37
90EI0634	2010 - 2015	AK	Cook Inlet Lending Center, Inc.	\$174,118	140	\$75,776	0
90EI0635	2010 - 2015	IN	Community Action of Southern Indiana, Inc.	\$300,000	32	\$35,753	9
90EI0636	2010 - 2015	OR	Lane MicroBusiness	\$80,400	37	\$40,203	19
90EI0639	2010 - 2015	SC	United Way of Greenville County	\$300,000	222	\$201,153	70
90EI0640	2010 - 2015	CA	Opportunity Fund	\$1,000,000	560	\$910,736	446
90EI0641	2010 - 2015	AZ	Mesa Community Action Network, Inc.	\$250,000	332	\$207,000	206
90EI0642	2010 - 2015	KY	The Center for Women and Families	\$133,000	102	\$125,784	53
90EI0644	2010 - 2015	VT	Capstone Community Action, Inc.	\$47,060	48	\$48,606	8
90EI0645	2010 - 2015	VA	Total Action Against Poverty in Roanoke	\$90,000	31	\$15,766	6
90EI0646	2010 - 2015	ME	Penquis Community Action Program, Inc.	\$50,000	26	\$31,744	1
90EI0647	2010 - 2015	CT	TEAM - Training, Education, and Manpower, Inc.	\$35,000	15	\$12,216	2
90EI0648	2010 - 2015	CA	Earned Assets Resource Network	\$1,000,000	336	\$571,275	217
90EI0649	2010 - 2015	KY	Hazel Joyce Wiley Career & Financial Literacy Institute, Inc	\$56,500	0	\$0	0
90EI0650	2010 - 2015	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$50,000	46	\$59,236	15
90EI0651	2010 - 2015	OR	Community and Shelter Assistance Corporation	\$1,000,000	569	\$782,555	140
90EI0653	2010 - 2015	ID	United Way of Treasure Valley	\$118,000	17	\$23,985	5
90EI0654	2010 - 2015	MT	Montana Credit Unions for Community Development	\$117,600	64	\$26,518	45
90EI0655	2010 - 2015	OK	Cherokee Nation	\$65,000	3	\$1,220	1
90EI0656	2010 - 2015	IN	LaCasa of Goshen, Inc.	\$104,000	26	\$53,566	20
90EI0657	2010 - 2015	OH	Sensible Shelter	\$84,800	28	\$18,573	7
90EI0658	2010 - 2015	AZ	International Rescue Committee, Inc. - Phoenix, AZ	\$572,991	111	\$300,752	16
90EI0659	2010 - 2015	KY	United Way of the Bluegrass	\$1,000,000	390	\$388,020	145
90EI0660	2010 - 2015	MS	United Way of Southeast Mississippi	\$116,500	37	\$18,527	21

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90EI0661	2010 - 2015	CT	Human Resources Agency of New Britain, Inc.	\$150,588	41	\$9,464	14
90EI0662	2010 - 2015	SD	Lakota Funds, Inc.	\$101,622	63	\$58,979	35
90EI0663	2010 - 2015	ID	Southeastern Idaho Community Action Agency	\$25,000	17	\$12,732	5
90EI0664	2010 - 2015	WA	Confederated Tribes of the Chehalis Reservation	\$200,000	2	\$5,575	1
90EI0665	2010 - 2015	MT	Neighborhood Housing Services, Inc. of Great Falls	\$130,000	60	\$46,679	26
90EI0666	2010 - 2015	MO	East Missouri Action Agency, Inc.	\$30,000	16	\$11,709	1
90EI0667	2010 - 2015	OH	Northwestern Ohio Community Action Commission, Inc.	\$66,000	43	\$60,290	15
90EI0668	2010 - 2015	OH	East Columbus Development Co., Inc.	\$235,295	26	\$10,000	10
90EI0669	2010 - 2015	CA	Human Response Network	\$23,000	7	\$12,007	0
90EI0670	2010 - 2015	MT	District 7 Human Resources Development Council	\$97,500	60	\$49,590	24
90EI0671	2010 - 2015	IN	John H. Boner Community Center	\$112,500	85	\$95,500	81
<b>2011</b>							
90EI0672	2011 - 2016	TN	Christian Community Services, Inc.	\$40,000	25	\$18,690	3
90EI0673	2011 - 2016	CA	RISE Financial Pathway (formerly LA Community Financial Resource Center)	\$494,706	118	\$96,758	5
90EI0674	2011 - 2016	ME	Penquis Community Action Program, Inc.	\$50,000	21	\$28,036	0
90EI0675	2011 - 2016	TN	New Level Community Development Corporation	\$56,000	29	\$30,999	7
90EI0676	2011 - 2016	TN	Dominion Financial Management, Inc.	\$36,176	12	\$6,640	2
90EI0677	2011 - 2016	TX	Foundation Communities, Inc.	\$250,000	122	\$112,906	19
90EI0679	2011 - 2016	WA	Washington Community Alliance for Self-Help	\$202,353	97	\$133,027	53
90EI0680	2011 - 2016	PA	Women's Opportunities Resource Center	\$352,955	15	\$9,162	7
90EI0681	2011 - 2016	MA	Springfield Partners for Community Action	\$350,590	179	\$175,309	39
90EI0682	2011 - 2016	OH	Economic and Community Development Institute	\$1,000,000	487	\$196,835	228
90EI0683	2011 - 2016	FL	Osceola County Council on Aging, Inc.	\$28,230	4	\$1,650	3
90EI0684	2011 - 2016	CA	Arcata Economic Development Corporation	\$91,096	36	\$40,314	36
90EI0685	2011 - 2016	AZ	Catholic Community Services of Southern AZ, Inc.	\$400,000	87	\$162,827	47
90EI0686	2011 - 2016	VA	Korean Community Service Center of Greater Washington	\$147,000	15	\$16,465	6
90EI0687	2011 - 2016	CA	Renaissance Entrepreneurship Center	\$287,500	23	\$28,224	9
90EI0688	2011 - 2016	MT	Rural Dynamics Incorporated	\$150,000	2	\$75	0

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90EI0689	2011 - 2016	PA	ACTION-Housing, Inc.	\$25,000	35	\$20,289	1
90EI0690	2011 - 2016	WA	Share	\$350,000	93	\$74,246	28
90EI0691	2011 - 2016	MD	Community Action Council of Howard County MD	\$30,000	16	\$8,984	1
90EI0692	2011 - 2016	CA	California State University	\$150,000	96	\$28,967	0
90EI0693	2011 - 2016	TX	United Way of Abilene, Inc.	\$100,000	51	\$49,948	47
90EI0694	2011 - 2016	CA	Community Action Partnership of San Bernardino County	\$300,000	99	\$108,000	26
90EI0695	2011 - 2016	MS	Delta State University	\$59,000	4	\$525	0
90EI0696	2011 - 2016	TN	Southwest Human Resource Agency	\$117,647	0	\$0	0
90EI0699	2011 - 2016	OR	Warm Springs Community Action Team	\$375,000	59	\$16,417	8
90EI0700	2011 - 2016	SD	Crow Creek Housing Authority	\$148,500	52	\$19,957	9
90EI0701	2011 - 2016	HI	Wai'anae Community Re-Development Corporation	\$258,829	52	\$21,000	11
90EI0702	2011 - 2016	MN	American Indian Community Development Organization	\$255,000	42	\$33,744	6
90EI0703	2011 - 2016	MT	The Peoples Partner for Community Development	\$100,000	16	\$6,689	3
90EI0704	2011 - 2016	CA	San Diego Housing Commission	\$150,000	34	\$14,559	2
90EI0705	2011 - 2016	CO	Mile High United Way	\$352,941	153	\$132,655	80
90EI0706	2011 - 2016	MI	Oakland Livingston Human Services Agency	\$88,235	65	\$53,525	16
90EI0707	2011 - 2016	MI	Northwest Michigan Community Action Agency, Inc.	\$88,235	49	\$35,223	3
90EI0708	2011 - 2016	ND	Red River Valley Community Action	\$143,750	86	\$113,832	34
90EI0709	2011 - 2016	VT	Capstone Community Action, Inc.	\$41,180	53	\$28,470	2
90EI0710	2011 - 2016	NH	New Hampshire Community Loan Fund	\$294,118	113	\$118,804	13
90EI0711	2011 - 2016	MN	West Central Minnesota Communities Action, Inc.	\$934,458	589	\$250,694	82
90EI0712	2011 - 2016	CT	Co-Opportunity, Inc.	\$23,600	6	\$2,559	0
90EI0713	2011 - 2016	NY	Syracuse Cooperative Federal Credit Union	\$47,055	31	\$49,235	14
90EI0714	2011 - 2016	CA	Juma Ventures	\$164,706	157	\$91,655	16
90EI0715	2011 - 2016	WA	Diocese of Olympia	\$18,400	21	\$32,912	13
90EI0716	2011 - 2016	AR	Southern Bancorp Community Partners	\$352,941	141	\$61,581	16
90EI0717	2011 - 2016	CA	Community Housing Development Corporation	\$120,000	45	\$36,584	4
90EI0718	2011 - 2016	NJ	Catholic Charities, Diocese of Camden, Inc.	\$10,000	5	\$6,200	3
90EI0719	2011 - 2016	PA	United Way of Greater Philadelphia and Southern New Jersey	\$500,000	183	\$157,905	94

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90EI0720	2011 - 2016	PA	Central PA Community Action, Inc.	\$25,000	4	\$6,941	6
90EI0721	2011 - 2016	IA	Practical Farmers of Iowa	\$128,000	24	\$33,460	7
90EI0722	2011 - 2016	UT	AAA Fair Credit Foundation	\$500,000	153	\$94,858	0
90EI0723	2011 - 2016	MI	Community Action Agency of Jackson	\$114,706	42	\$26,812	9
90EI0724	2011 - 2016	OH	Economic and Community Development Institute	\$934,458	446	\$207,932	273
90EI0726	2011 - 2016	MO	United Way of Greater St. Louis	\$211,764	104	\$94,321	38
90EI0727	2011 - 2016	CA	Pacific Asian Consortium in Employment	\$199,411	59	\$35,187	16
90EI0728	2011 - 2016	PA	Community Action Southwest (CAS)	\$200,000	113	\$118,827	19
90EI0729	2011 - 2016	NY	Belmont Housing Resources for WNY	\$60,000	5	\$466	0
90EI0730	2011 - 2016	NV	Financial Guidance Center	\$167,500	22	\$13,683	1
90EI0731	2011 - 2016	WI	City of Racine	\$28,750	24	\$20,991	11
90EI0732	2011 - 2016	DE	First State Community Loan Fund	\$105,000	6	\$9,340	3
90EI0733	2011 - 2016	MI	Inner City Christian Federation	\$100,000	88	\$66,600	8
90EI0734	2011 - 2016	CA	Ventura County Community Development Corporation	\$184,000	29	\$7,210	26
90EI0735	2011 - 2016	DC	Capital Area Asset Building Corporation	\$617,500	225	\$94,966	35
90EI0736	2011 - 2016	MI	United Way for Southeastern Michigan	\$88,235	45	\$30,174	3
90EI0737	2011 - 2016	AL	United Way of Central Alabama	\$128,853	63	\$82,862	24
90EI0738	2011 - 2016	VA	Virginia Department of Housing and Community Development	\$934,452	194	\$141,896	17
<b>2012</b>							
90EI0739	2012 - 2017	AZ	Arizona State University	\$250,000	99	\$44,059	74
90EI0740	2012 - 2017	ME	Penquis Community Action Program, Inc.	\$50,000	23	\$15,929	16
90EI0741	2012 - 2017	PA	College Opportunity Resources for Education	\$634,715	146	\$61,485	85
90EI0742	2012 - 2017	NE	Community Action of Nebraska, Inc.	\$37,500	0	\$0	0
90EI0743	2012 - 2017	TX	City of Austin, Neighborhood Housing & Comm. Development Office	\$300,000	26	\$10,693	0
90EI0744	2012 - 2017	CA	Consumer Credit Counseling Service of Ventura County DBA Sur	\$25,000	0	\$0	0
90EI0745	2012 - 2017	MT	Montana Credit Unions for Community Development	\$180,000	27	\$8,842	8
90EI0746	2012 - 2017	KY	Kentucky Domestic Violence Association, Inc.	\$218,200	167	\$61,665	18
90EI0747	2012 - 2017	OR	Umpqua Community Development Corporation	\$300,000	96	\$138,937	17
90EI0748	2012 - 2017	WI	Boys and Girls Club of Greater Milwaukee	\$500,000	227	\$99,080	104

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90EI0749	2012 - 2017	OK	Choctaw Nation of Oklahoma	\$800,000	157	\$176,588	46
90EI0750	2012 - 2017	MI	Legal Services of Eastern Michigan	\$100,000	409	\$242,562	5
90EI0752	2012 - 2017	CO	Foothills United Way	\$89,000	39	\$31,639	13
90EI0753	2012 - 2017	OR	Community and Shelter Assistance Corporation	\$684,715	329	\$335,535	87
90EI0754	2012 - 2017	IL	Catholic Charities of the Archdiocese of Chicago	\$35,000	16	\$9,850	2
90EI0755	2012 - 2017	NM	Community Action Agency of Southern New Mexico	\$50,000	24	\$15,727	11
90EI0756	2012 - 2017	FL	Housing Partnership, Inc.	\$50,000	30	\$46,989	12
90EI0757	2012 - 2017	TX	Covenant Community Capital Corporation	\$300,000	243	\$205,596	4
90EI0758	2012 - 2017	SD	Lakota Funds, Inc.	\$42,353	0	\$0	0
90EI0759	2012 - 2017	TN	Upper East Tennessee Human Development Agency, Inc.	\$100,000	68	\$80,598	25
90EI0760	2012 - 2017	AR	Crawford-Sebastian Community Development Council	\$137,000	20	\$14,924	6
90EI0762	2012 - 2017	MA	The MIDAS Collaborative	\$426,823	242	\$278,999	57
90EI0763	2012 - 2017	MT	Montana Credit Unions for Community Development	\$95,000	59	\$24,274	30
90EI0764	2012 - 2017	AZ	Arizona Board of Regents, University of Arizona	\$1,000,000	167	\$76,321	120
90EI0765	2012 - 2017	TX	Goodwill Industries of San Antonio	\$100,000	64	\$36,697	16
90EI0766	2012 - 2017	NY	Alternatives Federal Credit Union	\$64,706	58	\$31,865	9
90EI0767	2012 - 2017	DE	YWCA Delaware	\$19,411	14	\$9,093	1
90EI0768	2012 - 2017	TX	United Way of Abilene, Inc.	\$200,000	101	\$104,603	88
90EI0769	2012 - 2017	KS	The Family Conservancy, Inc.	\$141,176	63	\$57,014	8
90EI0770	2012 - 2017	CA	Juma Ventures	\$420,000	112	\$46,050	0
90EI0771	2012 - 2017	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$70,000	43	\$49,447	17
90EI0772	2012 - 2017	KY	The Race For Education, Inc.	\$537,446	30	\$11,320	12
90EI0773	2012 - 2017	CA	Dry Creek Rancheria Band of Pomo Indians	\$50,000	9	\$12,358	2
90EI0774	2012 - 2017	WA	Taala Fund	\$247,059	13	\$5,050	4
90EI0776	2012 - 2017	MI	Oakland Livingston Human Services Agency	\$88,235	42	\$10,673	1
90EI0777	2012 - 2017	AZ	Mesa Community Action Network, Inc.	\$100,000	91	\$30,800	20
90EI0778	2012 - 2017	OH	Ohio Community Development Corporation Association	\$300,000	21	\$11,340	3
90EI0779	2012 - 2017	NE	Omaha Nation Community Response Team	\$176,470	0	\$0	0

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90EI0780	2012 - 2017	SD	Four Bands Community Fund, Inc.	\$127,500	46	\$26,964	16
90EI0781	2012 - 2017	CO	Pikes Peak Community Action Agency, Inc.	\$235,000	31	\$26,206	18
90EI0782	2012 - 2017	MO	Missouri Association for Community Action	\$150,000	21	\$10,062	5
90EI0783	2012 - 2017	MI	Northwest Michigan Community Action Agency, Inc.	\$88,235	19	\$15,143	0
90EI0784	2012 - 2017	VT	Capstone Community Action, Inc.	\$41,180	34	\$9,131	1
90EI0785	2012 - 2017	PA	Greater Erie Community Action Committee	\$26,000	12	\$5,005	0
90EI0786	2012 - 2017	MI	Community Action Agency of Jackson	\$88,235	15	\$5,749	1
90EI0787	2012 - 2017	MI	Inner City Christian Federation	\$86,250	56	\$21,887	0
90EI0788	2012 - 2017	OR	Mercy Corps Northwest	\$375,000	189	\$227,137	45
90EI0789	2012 - 2017	CA	Community Action Partnership of Sonoma County	\$50,000	0	\$0	0
90EI0790	2012 - 2017	MD	Garrett County Community Action Committee, Inc	\$81,000	1	\$826	0
90EI0791	2012 - 2017	NH	New Hampshire Community Loan Fund	\$176,471	0	\$0	0
90EI0792	2012 - 2017	FL	Broward County Board of County Commissioners	\$267,279	56	\$26,832	3
90EI0793	2012 - 2017	NY	Community Action Organization of Erie County, Inc.	\$26,000	4	\$541	0
90EI0794	2012 - 2017	AZ	ABOR for and on behalf of Northern Arizona University	\$300,000	59	\$23,658	38
90EI0795	2012 - 2017	TX	Young Women's Christian Association	\$300,000	40	\$20,057	0
90EI0796	2012 - 2017	NY	Albany Community Action Partnership	\$100,000	24	\$5,362	5
90EI0797	2012 - 2017	CA	Developmental Services Support Foundation for Kern, Inyo and Mono Counties	\$80,500	8	\$1,515	0
90EI0798	2012 - 2017	CA	Time for Change Foundation	\$126,000	0	\$0	0
90EI0799	2012 - 2017	GA	CSRA Economic Opportunity Authority, Inc.	\$26,000	19	\$16,323	2
90EI0800	2012 - 2017	KS	Interfaith Housing Services	\$350,000	136	\$110,264	9
<b>2013</b>							
90EI0801	2013 - 2018	NJ	New Jersey Academy for Aquatic Sciences	\$12,500	0	\$0	0
90EI0802	2013 - 2018	PA	United Way of the Capital Region	\$50,000	5	\$992	0
90EI0803	2013 - 2018	NJ	Catholic Charities, Diocese of Camden, Inc.	\$127,000	23	\$21,613	6
90EI0804	2013 - 2018	AL	United Way of Central Alabama	\$300,000	52	\$27,797	0
90EI0805	2013 - 2018	FL	United Way Suncoast	\$100,000	42	\$14,333	0
90EI0806	2013 - 2018	FL	Housing Partnership, Inc.	\$50,000	21	\$14,886	1

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90EI0807	2013 - 2018	OR	Neighborhood Partnerships (formerly Neighborhood Partnership Fund)	\$600,000	19	\$11,124	0
90EI0808	2013 - 2018	AZ	Arizona State University	\$1,000,000	14	\$7,829	10
90EI0809	2013 - 2018	TX	YWCA Fort Worth & Tarrant County	\$100,000	1	\$50	0
90EI0810	2013 - 2018	CA	Poverty Solutions, Inc.	\$500,000	25	\$1,275	0
90EI0811	2013 - 2018	NJ	All Saints Community Service and Development Corporation	\$44,118	0	\$0	0
90EI0813	2013 - 2018	MA	Community Teamwork	\$90,000	13	\$17,918	1
90EI0814	2013 - 2018	OH	I Know I Can	\$999,998	98	\$26,791	17
90EI0815	2013 - 2018	ME	Penquis Community Action Program, Inc.	\$100,000	23	\$11,391	0
90EI0816	2013 - 2018	LA	United Way of Southeast Louisiana	\$250,000	27	\$14,064	0
90EI0817	2013 - 2018	AZ	Mesa Community Action Network, Inc.	\$100,000	48	\$14,458	1
90EI0818	2013 - 2018	TX	United Way of Abilene, Inc.	\$100,000	61	\$43,852	19
90EI0819	2013 - 2018	FL	Miciah Deleston Foundation for Families	\$50,000	15	\$8,650	0
90EI0820	2013 - 2018	AZ	Arizona Board of Regents, University of Arizona	\$585,504	61	\$24,260	39
90EI0821	2013 - 2018	WA	Newrizons Federal Credit Union	\$75,000	37	\$28,543	5
90EI0822	2013 - 2018	CA	Community Action Partnership of Riverside County	\$115,000	37	\$28,724	0
90EI0823	2013 - 2018	MN	Inver Hills Community College	\$999,980	33	\$2,816	0
90EI0824	2013 - 2018	NY	Monroe Community College	\$200,000	30	\$2,628	0
90EI0825	2013 - 2018	NV	Housing for Nevada	\$200,000	0	\$0	0
90EI0826	2013 - 2018	CA	Shield of Faith Christian Center	\$400,000	93	\$20,812	2
90EI0827	2013 - 2018	AZ	ABOR for and on behalf of Northern Arizona University	\$335,504	7	\$3,287	6
90EI0828	2013 - 2018	SC	South Carolina Association of Community Development Corporations, Inc.	\$75,000	100	\$63,513	15
90EI0829	2013 - 2018	KY	Jewish Family & Career Services of Louisville	\$429,000	34	\$7,658	1
90EI0830	2013 - 2018	MI	Eastern Michigan University	\$35,000	6	\$1,150	0
90EI0831	2013 - 2018	NJ	HOPES CAP, Inc	\$100,000	0	\$0	0
90EI0832	2013 - 2018	CA	West Angeles Community Development Corporation	\$625,000	25	\$2,850	0
90EI0833	2013 - 2018	CA	Youth Policy Institute	\$581,941	0	\$0	0
90EI0834	2013 - 2018	MI	Wayne Metropolitan Community Action Agency	\$88,235	2	\$232	0

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## Appendix Table 2: Project Details and Highlights by Grant Start Date

Grants are sorted first by grant period and then by grant number.

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0835	2013 - 2018	CA	Operation Jump Start	\$185,750	0	\$0	0
90EI0836	2013 - 2018	CT	Community Action Agency of New Haven	\$58,825	0	\$0	0
90EI0837	2013 - 2018	IL	Two Rivers Regional Council	\$22,235	4	\$612	0
90EI0840	2013 - 2018	VT	Capstone Community Action, Inc.	\$41,180	28	\$7,131	0
90EI0841	2013 - 2018	CA	Opportunity Fund	\$1,000,000	222	\$154,193	54
90EI0842	2013 - 2018	NY	Sapna NYC	\$33,036	8	\$1,040	0
90EI0843	2013 - 2018	SC	Catawba Indian Nation	\$98,057	3	\$1,075	0
90EI0844	2013 - 2018	OR	Mercy Corps Northwest	\$412,500	7	\$3,206	0
90EI0845	2013 - 2018	MI	Oakland Livingston Human Services Agency	\$100,000	1	\$20	0
90EI0846	2013 - 2018	NE	First Ponca Financial	\$180,000	2	\$375	0
90EI0847	2013 - 2018	SD	Oglala Sioux Tribe Partnership for Housing, Inc.	\$150,000	0	\$0	0
<b>2014</b>							
90EI0848	2014 - 2019	KY	Kentucky Domestic Violence Association, Inc.	\$352,941	0	\$0	0
90EI0849	2014 - 2019	OR	Community and Shelter Assistance Corporation	\$700,000	0	\$0	0
90EI0850	2014 - 2019	NJ	Camden County Council on Economic Opportunity, Inc.	\$50,000	0	\$0	0
90EI0851	2014 - 2019	UT	AAA Fair Credit Foundation	\$250,000	0	\$0	0
90EI0852	2014 - 2019	ND	Red River Valley Community Action	\$143,750	0	\$0	0
90EI0853	2014 - 2019	CA	Citadel Community Development Corporation	\$300,000	0	\$0	0
90EI0854	2014 - 2019	NY	Pro Action of Steuben and Yates, Inc.	\$28,750	0	\$0	0
90EI0855	2014 - 2019	MI	Northwest Michigan Community Action Agency, Inc.	\$118,235	0	\$0	0
90EI0856	2014 - 2019	SD	GROW South Dakota DBA Northeast South Dakota Community Action Program	\$66,189	0	\$0	0
90EI0857	2014 - 2019	CO	Foothills United Way	\$100,000	0	\$0	0
90EI0858	2014 - 2019	OR	Micro Enterprise Services of Oregon	\$100,000	0	\$0	0
90EI0859	2014 - 2019	IN	LaCasa of Goshen, Inc.	\$230,000	0	\$0	0
90EI0861	2014 - 2019	MA	The MIDAS Collaborative	\$300,000	0	\$0	0
90EI0862	2014 - 2019	MI	Inner City Christian Federation	\$88,235	0	\$0	0
90EI0863	2014 - 2019	PA	Greater Erie Community Action Committee	\$12,000	0	\$0	0
90EI0864	2014 - 2019	AR	Central Arkansas Development Council	\$58,824	0	\$0	0

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*Grants are sorted first by grant period and then by grant number.*

Grant Number	Grant Period	State	Grantee Name	Grant Amount	Number of IDAs Opened	Cumulative Amount of IDA Deposits	Participants Who Have Purchased an Asset
90EI0865	2014 - 2019	MT	Montana Home Ownership Network	\$131,690	0	\$0	0
90EI0866	2014 - 2019	MI	Community Action Agency of Jackson	\$88,235	0	\$0	0
90EI0867	2014 - 2019	CA	AnewAmerica Community Corporation	\$176,471	0	\$0	0
90EI0868	2014 - 2019	TX	Covenant Community Capital Corporation	\$260,000	0	\$0	0
90EI0869	2014 - 2019	OH	Northwestern Ohio Community Action Commission, Inc.	\$66,000	0	\$0	0
90EI0870	2014 - 2019	VT	Capstone Community Action, Inc.	\$41,180	0	\$0	0
90EI0871	2014 - 2019	AZ	Arizona Board of Regents, University of Arizona	\$1,000,000	0	\$0	0
90EI0872	2014 - 2019	WI	Boys and Girls Club of Greater Milwaukee	\$500,000	0	\$0	0
90EI0873	2014 - 2019	AZ	ABOR for and on behalf of Northern Arizona University	\$500,000	0	\$0	0
90EI0874	2014 - 2019	NY	Alternatives Federal Credit Union	\$88,235	0	\$0	0
90EI0875	2014 - 2019	NC	United Way of Forsyth County	\$200,000	0	\$0	0
90EI0876	2014 - 2019	FL	Broward County Board of County Commissioners	\$185,000	0	\$0	0
90EI0877	2014 - 2019	MT	District 7 Human Resources Development Council	\$125,000	0	\$0	0
90EI0878	2014 - 2019	AZ	Arizona State University	\$1,000,000	0	\$0	0
90EI0879	2014 - 2019	KS	Interfaith Housing Services	\$130,000	0	\$0	0
90EI0880	2014 - 2019	OK	Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, Inc.	\$60,000	0	\$0	0
90EI0881	2014 - 2019	SC	Southeastern Housing Foundation	\$100,000	0	\$0	0
90EI0882	2014 - 2019	MI	Telamon Corporation	\$58,824	0	\$0	0
90EI0883	2014 - 2019	KY	Jewish Family & Career Services of Louisville	\$34,150	0	\$0	0
90EI0884	2014 - 2019	TX	United Way of Central Texas	\$100,000	0	\$0	0
90EI0885	2014 - 2019	SC	South Carolina Association of Community Development Corporations, Inc.	\$112,500	0	\$0	0
90EI0886	2014 - 2019	MD	United Way of Frederick County	\$200,000	0	\$0	0
90EI0887	2014 - 2019	TX	Alliance for Multicultural Community Services	\$45,000	0	\$0	0
90EI0888	2014 - 2019	NM	Prosperity Works	\$500,000	0	\$0	0
90EI0889	2014 - 2019	PA	Philadelphia Housing Authority	\$100,000	0	\$0	0
90EI0890	2014 - 2019	MN	MIGIZI Communications, Inc.	\$97,463	0	\$0	0
90EI0891	2014 - 2019	HI	Institute for Native Pacific Education & Culture (INPEACE)	\$175,000	0	\$0	0

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