

ATTACHMENT A - PLAN

Act 41 of 2010

20-945

NAME OF CONTRACTING PARTY:
United Way for the Greater New Orleans Area

NAME AND BRIEF NARRATIVE OF PROGRAM:
Individual Development Accounts (IDA) Program

Program Goals, Objectives, Expected Outcomes/Results Activities and Related Performance Measures (Duplicate pages as needed for each goal identified). What are the goals, objective(s), expected outcomes/results for this program: Indicate the goals/objectives for this program. Indicate the expected outcomes/results for each goal. Explain how each goal, objective, outcome/result is measured. Identify activities that will be implemented to achieve expected outcomes, the person(s) responsible for implementing the activity, and the expected completion date.

1. Program Goal (*Goals are the intended broad, long-term results. Goals are clear statements of the general end purposes toward which efforts are directed.*)
To provide opportunities for low-income individuals and families in a seven (7) parish Greater New Orleans Area (Orleans, Jefferson, St. Bernard, Plaquemines, St. Tammany, Tangipahoa and Washington Parishes) to become more financially stable and self sufficient through the United Way sponsored Individual Development Accounts (IDA) Program, in which United Way's staff will prepare, manage and supervise IDA participants to acquire knowledge and skills to promote financial stability and self-sufficiency.

2. Program Objective(s) (*Objectives are intermediate outcomes--specific, measurable steps towards accomplishing the goal, that identify the expected outcomes and results. The program objective must include a percentage, a specific dollar amount or a number.*)

1. Prepare ten (10) IDA participants to participate in 12 hours of financial training classes in the Greater New Orleans Area by June 30, 2011.
2. Prepare nine (9) IDA participants to participate in 12 hours of home buying training classes in the Greater New Orleans Area by June 30, 2011.
3. Prepare one (1) IDA participant to participate in 25-30 hours of business development training classes and on-going management services in the Greater New Orleans Area by June 30, 2011.

3. Relevant Activity (Activities) (*An activity is a distinct subset of functions or services within a program to meet the Program Objective.*)

1. Pay the partial salary of \$3,060 for 12 months for one (1) IDA case manager to manage and supervise five (5) IDA project participants in the Greater New Orleans Area.
2. Pay the partial salary of \$2,940 for 12 months for one (1) IDA case manager to manage and supervise five (5) IDA project participants in the Greater New Orleans Area.

4. Performance Measure(s) (*Measure the amount of products or services provided or number of customers served. Specific quantifiable measures of progress, results actually achieved and assess program impact and effectiveness. A Performance Measure must be designated as a percentage, a specific dollar amount or a number.*)

- 1.. Number of IDA participants that participated in 12 hours of financial training classes in the Greater New Orleans Area.
2. Number of IDA participants that participated in 12 hours of home buying training classes in the Greater New Orleans Area.
3. Number of IDA participants that participated in 25-30 hours of business development training classes and on-going management services in the Greater New Orleans Area.

ATTACHMENT B
 Page 1
Project Budget (2010-2011)
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20-945

United Way for the Greater New Orleans Area

Anticipated Income or Revenue

| <u>Sources</u> <i>(list all sources of revenue)</i> | <u>Amounts</u> |
|---|----------------|
| 1. Act 41 of 2010 Funding | \$6,000 |
| 2. | \$ |
| 3. | \$ |
| Total all sources | <u>\$6,000</u> |

Anticipated Expenses

| <u>Expense Categories</u> | <u>Total Amount</u> | <u>Amount Line Item</u> |
|--|-------------------------------|-------------------------------|
| | <i>(see footnote 1 below)</i> | <u>Appropriation</u> |
| | | <i>(see footnote 2 below)</i> |
| Gross Salaries(See Attachment B, page 2) | \$71,400.24 | \$6,000 |
| Related Benefits (employer share) | \$ | \$ |
| Travel | \$ | \$ |
| Operating Services: | | |
| Advertising | \$ | \$ |
| Printing | \$ | \$ |
| Insurance | \$ | \$ |
| Maintenance of auto, movable property | \$ | \$ |
| Maintenance of building and grounds | \$ | \$ |
| Rentals | \$ | \$ |
| Software licensing | \$ | \$ |
| Dues and Subscriptions | \$ | \$ |
| Telephones and Internet Service | \$ | \$ |
| Postage | \$ | \$ |
| Utilities | \$ | \$ |
| Other | \$ | \$ |
| Office Supplies | \$ | \$ |
| Professional & Contract Services | \$ | \$ |
| (See Attachment B, page 3) | | |
| Other Charges (See Attachment B, Page 4) | \$ | \$ |
| Acquisitions & Major Repairs | \$ | \$ |
| Total Use of the Appropriation | <u>\$74,400.24</u> | <u>\$6,000</u> |

(Budget categories listed above reflect a typical budget and may be adjusted by the agency and recipient to reflect actual categories necessary for each individual program. Salaries and Professional & Other Contract Services and Other Charges shall be detailed using pages 2, 3 and 4 of Attachment B).

All numbers must be rounded to the nearest dollar.

Footnote (1) This column represents expenditures by category and **MUST** equal total sources listed above.

Footnote (2) This column represents the portion of expenditures by category funded by the state appropriation provided by this Cooperative Endeavor Agreement.

ATTACHMENT B

Page 2

Staffing Chart

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Name of Contracting Party: United Way for the Greater New Orleans Area

Name of Program: Individual Development Accounts (IDA) Program

| Name | Title | Total Annual Salary Amount | Total Salary Paid by Appropriation Amount | Percentage | Related Benefits | Full time or Part Time # of months |
|----------------|-------------|----------------------------|---|------------|------------------|------------------------------------|
| Michelle Green | IDA Manager | Case \$36,400.08 | \$3,060.00 | 8.41% | 0 | 12 Months Full Time 40 Hours |
| Angela Isla | IDA Manager | Case \$35,000.16 | \$2,940.00 | 8.40% | 0 | 12 Months Full Time 40 Hours |

Totals

\$71,400.24

\$6,000.00