

# Assets for Independence Grantee Satisfaction Survey AFI Grantees

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## Introduction

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Assets for Independence (AFI) is a Federal program administered by the Office for Community Services. AFI provides grants to enable community-based nonprofits and State, Local, and Tribal government agencies to implement Individual Development Account (IDA) projects that demonstrate an asset-based approach for offering low-income families help out of poverty.

The AFI Program staff within the Office for Community Services (OCS) would like to hear from its partners – the grantees who administer AFI projects throughout the nation – to understand how AFI staff can better work with you to most effectively operate the program. We ask for your participation in this survey to help improve the AFI staff's effectiveness as your partner and service provider.

This anonymous survey will take approximately 15 - 20 minutes to complete. Your response is confidential. CFI Group, a third party research and consulting firm, is administering the survey. This survey is authorized by Office of Management and Budget Control No. 1090-0007 and your participation is voluntary.

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## Outreach and Application Process NOTE: Q1-12 should only be asked of grantees

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Please think about the application process when you applied (either directly or indirectly) for your most recent grant for an Asset for Independence IDA Project.

Using a scale from 1 to 10, where 1 is poor and 10 is excellent; please rate the application process on the following. If a question does not apply to you, please select: "I don't know. I wasn't involved in the application process."

- Q1. Clarity of written guidelines and instructions on applying
- Q2. Clarity of verbal communications regarding the application process
- Q3. Timeliness of receiving information and instructions about the application process
- Q4. Ease of preparing the application to apply for IDA project funds
- Q5. How can AFI improve the application process? (Open End)
- Q6. Did you participate in any program overview sessions or conference calls about the AFI Program during the application process?
  - 1. Yes
  - 2. No
  - 3. Don't Know
- Q6a. If respondent says "no" ask, Why?
- Q7. Did you visit the AFI website ([www.acf.hhs.gov/assetbuilding](http://www.acf.hhs.gov/assetbuilding)) or the AFI Resource Center website ([www.IDAresources.org](http://www.IDAresources.org)) to obtain information about the application process?
  - 1. Yes
  - 2. No
  - 3. Don't Know
- Q8. Did you visit the grants.gov website?
  - 1. Yes
  - 2. No
  - 3. Don't Know
- Q9. How did you find out about the AFI Program?

1. Another grantee or subgrantee
2. A subscription service
3. Federal Register
4. Other

Please rate the following based on information you received from AFI during the past year. Use a scale from 1 to 10, where 1 means poor and 10 means excellent. If a question does not apply, please select "I don't know"

Q10. Usefulness of the AFI Program overview sessions, such as conference calls, web-based presentations, and in-person presentations.

Q11. Usefulness of information about the application requirements and procedures on the AFI website ([acf.hhs.gov/asset building](http://acf.hhs.gov/asset%20building)) or the AFI Resource Center website ([www.IDAresources.org](http://www.IDAresources.org))

Q12. Usefulness of information about the application requirements and procedures on the grants.gov website

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#### Accessing Grant Funds Note: Only ask these questions of grantees

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Now think about the process for accessing or "drawing down" the federal AFI grant funds during the past year. Using a scale from 1 to 10, where 1 means poor and 10 means excellent, please rate the following. If a question does not apply, please select "N/A." (Don't know)

Q13. Clarity of requirements and process for accessing AFI grant funds

Q14. Timeliness of funds being available after a request is submitted

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#### Training and Technical Assistance

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Q15. In which areas have you received training or technical assistance from AFI staff or the AFI Resource Center during the past year (Select all that apply)?

1. How to recruit individuals/program participants
2. Partnership building
3. Data collection and using data for improving your AFI project
4. Using the AFI<sup>2</sup> System
5. Project design
6. How to get nonfederal cash contributions for your AFI project
7. How to provide effective financial literacy training
8. How to provide effective services to participants who are saving for a home
9. How to provide effective services to participants who are saving for an education
10. How to provide effective services to participants who are saving for a business capitalization
11. Report requirements
12. The role of asset building strategies, (e.g. IDAs, tax credits, Bank-On strategies) in ending poverty.

Think about the training (conferences, academies, and conference calls) available for the AFI Program that you have taken during the past year. Please rate the following using a scale from 1 to 10, where 1 means poor and 10 means excellent. If a question does not apply, please select "N/A."

Q16. Ease of accessing training/convenience of times

Q17. Frequency of training opportunities

Q18. Usefulness of information in meeting your needs

Q19. Trainers being knowledgeable about subject area

Q20. How can AFI improve its training and technical assistance? (Open End)

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#### Customer Service - AFI Staff

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Think about all of the interactions you had with the AFI staff or the AFI Resource Center involved your AFI grant during the past year. Please rate them on the following using a scale from 1 to 10, where 1 is poor and 10 is excellent. If a question does not apply, please select "N/A."

- Q21. Ease of access to staff and assistance
- Q22. Courtesy and professionalism of staff
- Q23. Knowledge and ability to answer your questions
- Q24. Timeliness of response
- Q25. Thoroughness of follow up provided
- Q26. Accuracy of response
- Q27. Consistency of responses
- Q28. Clarity about who to contact for specific types of assistance
- Q29. Knowledge about resources and referrals for asset building services for the following: non-custodial parents, parents with young children, refugees, Native Americans or persons with disabilities.
- Q30. Are you experiencing difficulty actually using our AFI grant because you are not able to raise the required nonfederal cash contribution or match?)
  1. Yes
  2. No
  3. Don't Know

IF Q30 = 1. Yes ASK Q31

- Q31. Please rate the ability of AFI staff and the AFI Resource Center to provide guidance and assistance with developing strategies to raise the nonfederal funds. Please use a scale from 1 to 10, where 1 means poor and 10 means excellent.

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### Administration for Children and Families

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The following questions ask about ACF (Administration for Children and Families) Staff, other than AFI staff. Based on your interactions during the past year, please rate the ACF Staff on the following using a scale from 1 to 10, where 1 is poor and 10 is excellent. If a question does not apply, please select "N/A."

- Q32. Knowledge and assistance regarding asset-building policies and strategies

How well does ACF provide strategies to you for informing clients about the following...

- Q33. Tax credits such as EITC (Earned Income Tax Credit) and CTC (Child Tax Credit)
- Q34. The importance of tax preparation
- Q35. Accessing other federal benefits

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### Reporting Process – Annual Data Report

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Think about the reporting process used for the Annual Data Report as required by AFI. Please rate them on the following using a scale from 1 to 10, where 1 is poor and 10 is excellent. If a question does not apply, please select "N/A."

- Q36. Guidance available from AFI on reporting
- Q37. Clarity of report forms
- Q38. Instructions being easy to understand
- Q39. Usefulness of the reports for you in managing
- Q40. Ease of using electronic data report
- Q41. Value of feedback on report

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**AFI<sup>2</sup>**

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Think about the online AFI<sup>2</sup> tool and how you used it to manage your grant during the past year. Please rate it on the following using a scale from 1 to 10, where 1 is poor and 10 is excellent. If a question does not apply, please select "N/A."

- Q42. Ease of use
- Q43. Helping you screen/select participants for the programs
- Q44. Helping you manage matching funds
- Q45. Helping you keep track of participants' savings
- Q46. Maintaining information about participants
- Q47. Managing your grant
- Q48. Staff responsiveness when you have AFI<sup>2</sup> questions and issues
  
- Q49. How would you improve AFI<sup>2</sup>? (Open-ended question)

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**Satisfaction**

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Think about all of your experiences with the AFI Program over the past year.

- Q50. Using a scale from 1 to 10, where 1 means very dissatisfied and 10 means very satisfied, please rate your overall satisfaction with the Assets for Independence program.
  
- Q51. Now, think about your expectations for the AFI Program and how well it met your expectations. Please rate how well the AFI Program met your expectations using a scale from 1 to 10, where 1 means falls short of your expectations and 10 means exceeds your expectations.
  
- Q52. Now, forget about the AFI Program for a minute and think about the ideal grant providing organization. How well does the AFI Program compare to that ideal? Please use a scale from 1 to 10, where 1 means very far from the ideal and 10 means very close to the ideal.
  
- Q52a. NOTE IF ANY OF ABOVE SCORES ARE LESS THAN 5, "What was the reason for your rating?"

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**Outcome Behaviors**

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- Q53. How likely are you to apply for a grant from the AFI Program in the future? Please indicate how likely you are on a scale from 1 to 10, where 1 means not very likely and 10 means very likely? If less than 5, ask "why not?"
  
- Q54. How confident are you that the AFI Program is fulfilling its mission of demonstrating the value of IDAs (Individual Development Accounts) in helping individuals out of poverty? Please use a scale from 1 to 10, where 1 means not very confident and 10 means very confident.
  
- Q55. How willing would you be to recommend other organizations apply for funds from AFI to implement an IDA project if you were asked to? Please use a scale from 1 to 10, where 1 means not very willing and 10 means very willing.
  
- Q56. Please share any final feedback you have regarding the AFI Program. (Open End)