

FY2021 Buncombe County Early Childhood Grant Report

Organization Name:	OnTrack Financial Education & Counseling	
Project Name:	SECURE Matched Savings for Buncombe County Childcare Workers	
Reporting Quarter: (Check one)		Quarter 1 (July 1, 2020 - September 30, 2020)
	x	Quarter 2 (October 1, 2020 - December 31, 2020)
		Quarter 3 (January 1, 2021 - March 31, 2021)
		Quarter 4 (April 1, 2021 - June 30, 2021)

Narrative summary of grant related activities

Overall project updates:	SECURE Matched Savings for Buncombe County Childcare Workers will begin in January with networking and relationship building with childcare providers with a special focus on other CEC grant recipients. On November 13th Amanda Hunsucker (OnTrack's matched savings program coordinator) and Celeste Collins (OnTrack's executive director) hosted a virtual site visit for members of the CEC committee.
COVID-19 impacts:	Our staff continues to work remotely because COVID-19 infection rates continue to increase. Thankfully the major redesign of our client intake/screening system, the move to zoom-based counseling appointments, development of new service types focused on crisis, and providing new education content in webinars has allowed us to continue serve people who are dealing with COVID-19 job loss, income reduction and fear about meeting basic needs. In 2Q we gradually brought other service types back after we figured out how to shift to virtual/remote service delivery and ensure we had appropriate safeguards to protect client data and information. It was especially challenging to figure out how to handle credit reports for clients interested in Credit Builder appointments.
Activities related to increasing equity, diversity and inclusion:	The Tzedek Foundation selected OnTrack (along with two other agencies) to receive a racial equity audit. The kickoff meeting for the directors of the agencies is February 2nd; following that each agency will have its own launch meeting. Tzedek contracts with The Adaway Group to conduct the audits. We are thrilled to have this opportunity and look forward to discovering opportunities to improve. Racial Equity Consultant, Marsha Davis, has been working with our leadership team to identify where "white supremacy culture" shows up at OnTrack and develop ways to create a more welcoming, diverse, inclusive, and equitable environment for clients, staff and volunteers. We were hoping to hire an Equity Director in FY22, but at this time our budget is too tight; we hope to secure funding for that position in FY23.
Activities related to increasing operational excellence:	The conversion of our current education offerings (e.g. budgeting, credit, savings, etc.) to a web format will be a dramatic increase in our operational excellence. This will dramatic increase flexibility and availability of OnTrack's education. Our plan is for seven education modules to be available 24/7 through our website. This allows clients to access the materials at a time convenient to them and complete the modules at a self-paced approach. We have seen some previews and have been impressed that the combination of video segments and interactive online material. This method of delivering education also helps so we gain program capacity and efficiency and increased accessibility for clients. These education modules will be important resource for childcare worker who participate in the SECURE Program, especially if the periods of remote working extend for more months.

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Progress toward annual goals

Measure	Annual Goal	Actual Results (Enter Data) Please only include new data for the specific quarter				Progress toward Annual Goal
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	
# of participants enrolled in the SECURE program	75	0	0			0
# of participants that complete money management education	75	0	0			0
# of participants that receive at least two 1.5 hour sessions of individual financial counseling	62	0	0			0
# of participants that save \$210 and meet program requirements to graduate and receive a \$840 match	53	0	0			0
# of participants that elect to receive a free tri-merge credit report with scores at their second financial counseling appointment to pursue credit-related goals	27	0	0			0

Comments:

Grant activities will begin in January – March 2021, with networking and information sharing with Buncombe County Partnership for Children and other ECE grant recipients to cultivate relationships with large childcare providers and to organize email program announcement/invitation to all childcare workers.

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Use of funds to date and any budget considerations

Spending Category	Starting Budget	Total Spending (Enter Data)				Amount Remaining
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	
Personnel	\$ 27,740	\$ -	\$ -			\$ 27,740
Travel/Training	\$ 175	\$ -	\$ -			\$ 175
Technology	\$ 3,450	\$ -	\$ -			\$ 3,450
Curriculum/Assessments						\$ -
Licensing/Dues						\$ -
Nutrition						\$ -
Transportation						\$ -
Supplies/Materials	\$ 280	\$ -	\$ -			\$ 280
Building Maintenance/Repair	\$ 2,230	\$ -	\$ -			\$ 2,230
Rent/Occupancy/Utilities						\$ -
Furniture						\$ -
Playground/Outdoor space						\$ -
Printing/Marketing/Website/Postage						\$ -
Admin Expenses (Legal, Accounting, Insurance,						\$ -
Client Savings Matches & Incentives, Credit Reports	\$ 45,125	\$ -				\$ 45,125
Total	\$ 79,000	\$ -	\$ -	\$ -	\$ -	\$ 79,000

Comments:

Program activities will begin in January/February 2021.
 No expenses were charged to the grant in 1Q July - September 2020.
 No expenses were charged to the grant in 2Q October - December 2020.