



REAL ECONOMIC IMPACT NETWORK:

RESOURCE MAPPING: ENHANCING FINANCIAL CAPABILITY OUTCOMES

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Washington, DC

Moderator/Presenter



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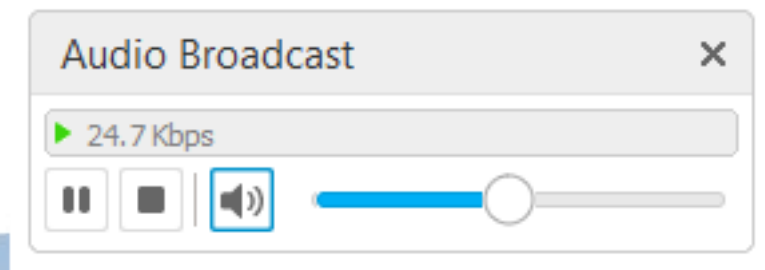


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For Q&A: Please use the chat box or Q&A box to send any questions you have during the webinar to **Michael Roush** or **Nakia Matthews** and we will direct the questions accordingly during the Q&A portion.

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Please note: This webinar is being recorded and the materials will be placed on the National Disability Institute website at www.realeconomicimpact.org

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National Disability Institute

The mission of National Disability Institute is to drive social impact to build a better economic future for people with disabilities and their families.





NDI's Real Economic Impact Network

- An alliance of organizations & individuals dedicated to advancing the economic empowerment of people with disabilities.
- Consists of more than 4,500 members located throughout the United States.
- Includes non-profits, community tax coalitions, asset development organizations, financial education initiatives, corporations & private-sector businesses, federal/state/local governments & agencies, and individuals & families with disabilities.
- All partners join forces to embrace, promote & pursue access to & inclusion of people with disabilities in the economic mainstream.

Learn more about the REI Network at

www.realeconomicimpact.org/REI-Network.aspx

Webinar Objectives

- Define resource mapping;
- View the larger picture of supports and resources that are available to help individuals improve their financial well-being; and
- Provide tools to help you identify key resources for completing a resource map specific to your community.

Resource Mapping

- Resource mapping offers a strategy that can help leverage a community and organization's capacity to serve individuals.

Resource Mapping

Importance of Resource Mapping

- Enhances cross collaboration between agencies working towards the same goal of economic self-sufficiency.
- Enhances referrals to other organizations that can assist an individual in achieving their goals.
- Creates an opportunity for soft referrals vs. hard referrals

Soft Referral vs. Hard Referral

- **Soft referral** (soft hand off) – a referral with another organization that the counselor, case manager, or employment specialist has a key contact with at another organization to refer the individual to.
- **Hard referral** – a referral with another organization that the counselor, case manager or employment specialist has no contact with or relationship with when referring the individual.

Resource Mapping

Importance of Resource Mapping

- Important strategy in integrated services.
- Provides an opportunity for the blending and braiding of resources amongst a variety of organizations.
- Assists in identifying the gaps within the community to assist individuals build their financial well-being.

Resource Mapping

- Who should be engaged to complete a resource map?
 - Case Managers, Employment Specialist, Financial Coaches
 - Specific departments within an organization
 - Organizations
 - Coalitions/Workgroups

HOW DO WE GET STARTED TO DO RESOURCE MAPPING

Resource Mapping

- NDI has created a handout that assists organizations to complete a resource map for their areas.
- The handout will be distributed after the webinar with the recording and PowerPoint Presentation.

5 Key Strategies to Financial Stability



Resource Mapping Handout



Creating a Resource Map for Your Community

National Disability Institute focuses on 5 key strategies that are essential to building the financial well-being of persons with disabilities. The 5 key strategies are: Public Benefits and Work Supports, Employment, Free Tax Preparation & EITC, Financial Literacy & Coaching, and Asset Development.



There are a variety of resources and tools available for each of these 5 strategies. As practitioners, it is important that we identify resources and tools that support individuals and their financial well-being. Creating a Resource Map for your community will enhance those opportunities. To create a Resource Map for your community, follow the steps identified on the next pages.

Step One: In the boxes below list resources and tools for each strategy.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|-----------------------------------|------------|-------------------------------|--|-------------------|
| | | | | |

Step 1:

Identify resources and tools for each of the following strategies.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|-----------------------------------|------------|-------------------------------|--|-------------------|
| | | | | |

Step 1:

Identify resources and tools for each of the following strategies.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|-----------------------------------|---|-------------------------------|---|-----------------------|
| SSI SSDI SNAP | American Job Centers Vocational Rehabilitation | VITA MFT | Better Money Habits FDIC Money Smart University Extension | IDA Home ownership |

Step 2:

- Identify the resources and tools for each strategy that are currently offered by your organization.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|-----------------------------------|------------|-------------------------------|--|-------------------|
| | | | | |

Step 2:

- Identify the resources and tools for each strategy that are currently offered by your organization.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|-----------------------------------|------------------|-------------------------------|--|-------------------|
| Ex. Benefits Counseling | Ex. Job Coaching | | Ex. Better Money Habits | |

Step 3:

- In the boxes below, identify providers in your community that support each strategy not supported by your organization.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|-----------------------------------|------------|-------------------------------|--|-------------------|
| | | | | |

Step 3:

- In the boxes below, identify providers in your community that support each strategy not supported by your organization.

| Public Benefits and Work Supports | Employment | Free Tax Preparation and EITC | Financial Education and Financial Coaching | Asset Development |
|------------------------------------|-----------------------|-------------------------------|--|-------------------|
| Ex. Service Source – WIPA Services | CareerSource Pinellas | United Way | Bank of America BMH | United Way |

Final Step

- Analyze the gaps and begin to create a strategy to learn more about those organizations that you may not be familiar with.

Resource Mapping Tips

- It is important to do the resource mapping activity with your colleagues and/or other coalition members. This will provide diverse responses and identify other resources you may not be familiar with.
- Resource mapping takes time and is a work in progress to build the new relationships
- Creating new relationships is key and allows for soft referrals and the blending and braiding of resources.

Presenter



Laurie Schaller

**Manager, Financial
Empowerment**

National Disability Institute

EXAMPLE OF A RESOURCE MAP

North Carolina

- The Collaborative is a statewide non-profit to promote strategies to build economic security for North Carolina families.
- In 2015, The Collaborative created with support from the North Carolina Council on Developmental Disabilities and National Disability Institute created a Resource Mapping Guide for North Carolina. This guide focuses on asset building resources that are available at the local, state and national level.

North Carolina

- To view the Resource Mapping Guide, go to:
www.cultureofsavings.org



QUESTIONS?



Join the Movement!

NDI's Real Economic Impact Network

Sign-up at bit.ly/NDI-sign-me-up

If you have questions on strategies to build the financial wellness of persons with disabilities, you can send your question to ask@ndi-inc.org.



Join us for our next webinar:

Tuesday, July 26, 2016 at 2 pm ET

***INTEGRATING FINANCIAL EDUCATION INTO THE
AMERICAN JOB CENTERS***

*More information about this webinar will be sent out the the
REI Network list via email in the coming weeks.*

Check out future webinars and archived webinars (such as
today's recording), www.realeconomicimpact.org



Wrap-Up & Thank You

Join us for our next webinar:

Wednesday, August 10, 2016 at 3 pm ET

EXPLORING ALTERNATIVE CREDIT REPORTING OPTIONS

Presenters: Credit Builders Alliance

More information about this webinar will be sent out to the REI Network list via email in the coming weeks.

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