FPP 2020
Regional Roundtable:
Northeast Florida

“Introduction of the
Financial Navigator Initiative”
A Thank You to FPP’s Funders

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“Community Conversations” Format

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Community Conversations

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2019 Final VITA Tax Results

Steve Norris
Tax Program Manager
Final Results

• 11,213 returns prepared, 91% of our IRS established goal When the shutdown began, we were at 71% of our goal.

We were one of a handful of programs nationwide that re-opened.

• During Tax Blitz 2020, we prepared over 2,200 returns at 8 sites using the “drop-off” method.
Program Impact

- $17+ million in total refunds
- $4.9 million in EITC refunds
- 24.1% of our filers were EITC recipients
- $2+ million in taxpayer savings
Today’s Guest Experts/Panelists

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Roundtable Agenda

1) Why? Expressed Needs
2) Solutions Designed
3) Partnership and Collaboration
4) Model Practices and Lessons Learned
5) Interplay With 2-1-1
6) Encouraging “Ownership” in Each of Our Financial Stories
In 2020, what specific needs have those you serve expressed that are markedly different than in past years?

Similar or the same?
Community Conversation Starter #2

What new solutions have been designed to address these expressed needs?
What is the Financial Navigator Program?

- This service has been created to assist all low-to-moderate income individuals and families who have been adversely affected by the COVID-19 pandemic.

- This pandemic has impacted us all in many facets of life, but those who have been furloughed or have suffered reduction in hours or job loss could lose their home, whether they are renting property or are homebuyers who’ve fallen behind in their mortgage; others may be unable to pay their utilities and are in jeopardy of interruption of service.
Financial Navigator’s Role

- The Financial Navigator helps clients address their concerns about the following:
  - Paying for Daily Living Expenses
  - Loss of Job and/or Needs to Supplement Income
  - Paying Back Money They Owe or Will Owe
  - Has Been or is Worried About Being Scammed
  - Wants to Know About Special Services and Resources
  - Staying Well and Planning Ahead
Interest Form (The Referral Process)

- Self-Submission
  - FN Interest Form

- Contact 630-CITY or
  - (904) 630-2489

- United Way 2-1-1
  - 2-1-1 or (904) 632-0600
Program Status

- On October 1, 2020, the program entered into a “Soft Launch” phase supported by
  - United Way’s Full Service Schools sites
  - United Way’s 2-1-1 service

- To date, we have received 50+ referrals
The Call

- Once the Interest Form is submitted, the client is placed in queue.
- Financial Navigator calls the client within 48 business hours.
- If connected with the client, the system timer begins and runs until the call is completed.
- If they cannot be reached, the client file is updated to show the number of attempts made (there is a maximum of four attempts made before the file is updated to “unreachable”).
- There are no limits to the number of times a client can be referred, but the session length is 30 minutes.
Desired Outcomes

- The overall desired outcome is to have clients take ownership of their financial stability
  - Upon completion of a FN session, clients receive a call summary, called the service plan
    - The Service Plan includes pertinent contact information of agencies, services and businesses from which they can seek direct assistance for the areas of concern expressed during the session

Through this program, we want to return ownership of the client’s financial issues and solutions to the client. They will be responsible for connecting with the service providers that will ultimately help them to help themselves.
How has partnership and collaboration across different entities helped to bring this new initiative to life?
In what ways does this newly released initiative interplay with 2-1-1?
Community Conversation Starter #5

What is the value of designing our programs and services to serve low- to moderate-income community members and households that encourages them to assume greater ownership for their own “financial story?”

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