

# **The Assets Alliance**

**Advancing Assets, Opening Opportunities**

## **To learn more about the Alliance, please contact:**

Inger Giuffrida  
Assets Alliance Co-Director  
405.364.4462 or [ingergiuffrida@hotmail.com](mailto:ingergiuffrida@hotmail.com)

Tiffany Eng  
Assets Alliance Website Coordinator  
[tiffanyeng@sbcglobal.net](mailto:tiffanyeng@sbcglobal.net)

## **Assets Alliance—A Brief Description**

The Assets Alliance is a membership organization of experienced professionals from the Individual Development Account (IDA) and asset-building fields. Ranging from all regions of the United States, Alliance members have direct practice experience, deliver training and technical assistance at local, state, regional, and national levels and are dedicated to growing the asset development field.

## **Assets Alliance Mission and Goals**

The Assets Alliance is dedicated to expanding the number of individuals and families participating in Individual Development Accounts (IDAs) and asset-building opportunities. The Alliance's goals for accomplishing this mission are two-fold:

1. To assist the IDA and asset building field by sharing up-to-date effective practices, resources and tools gleaned from the provision of technical assistance and training; and
2. To strengthen the caliber of IDA technical assistance and training provision by developing a highly qualified team of member consultants through the provision of ongoing learning, networking, and communication.

## **Assets Alliance Initiatives**

Even though the Assets Alliance is a new organization, it has several key initiatives including:

- **IDA Training Institute:** Developing and delivering the IDA Training Institute (IDA Effective Practices Training formerly owned by CFED).
- **Professional Development:** Providing services to members through bi-monthly peer-to-peer conference calls, listserve, bi-monthly business meetings, and annual membership convenings.
- **Resource Development:** Cultivating new funding sources for training and technical assistance services to the IDA and asset-building fields.

- **Connecting the Market:** Increasing access to technical assistance providers and trainers through a central point of access and an online searchable database.
- **Knowledge Creation:** Publishing a white paper series on topical issues of practice and tools based on technical assistance engagements and training provision.
- **Awareness Building:** Informing practitioners, funders and policymakers of the role of technical assistance provision in supporting effective program outcomes.
- **Training Development:** Designing and delivering the *Asset Building Training Institute* and *Delivering Highly Effective and Engaging Financial Education* (a training for trainers).
- **Partnerships to Provide Technical Assistance and Training:** Provided technical assistance consultants and trainers to CFED and ISED so they could respectively fulfill their contracts to Office of Community Services (OCS) AFI Program; providing technical assistance and training through the Office of Community Services (OCS) to Community Action Agencies throughout the U.S.

### **Assets Alliance Website—A New Resource for the Field**

A tool to help the Alliance realize its mission and goal, the Assets Alliance website, which will be fully operational during the summer of 2006, is:

- A central point of access for those seeking technical assistance providers. Organizations will be able to search the website for the provider that most closely fits their needs.
- A mechanism to help technical assistance providers communicate among one another, share information and resources, and collaborate on projects.
- A repository for effective practice information gleaned from the technical assistance provision process that can be stored and shared among technical assistance providers and organizations considering, planning, or implementing asset development initiatives including IDAs, financial education, free tax preparation, and others.

The website contains profiles of qualified member technical assistance providers and trainers that:

- Have been engaged in providing direct service to clients of community based nonprofits.
- Have had direct experience setting up, staffing, and/or managing an IDA program and other asset building programs.
- Are available on a timely basis.
- Have past technical assistance and consulting experience with IDA programs and/or other asset-building initiatives, such as microenterprise development organizations, housing organizations, and job training organizations.

### **Protecting Investments in the IDA and Asset-Building Fields**

The technical assistance providers and trainers that comprise the Alliance have direct practice experience, consulting experience, been trained in providing high quality consulting and technical assistance services, and the advantage of a network of other professionals that they can tap for purposes of collaboration, referral or to address

complex programmatic and organizational problems. Using a qualified technical assistance provider or trainer to help practitioner organizations and others operating asset-building initiatives, funders and other organizations or individuals can protect the investments they have made in the IDA or asset- building field.

### **Why did the Assets Alliance form?**

The Assets Alliance formed to address the following problems:

- Short supply of experienced technical assistance providers and trainers to the IDA and asset-building fields.
- Limited technical assistance and training provision skills of many consultants in the field where consultants did exist.
- Difficulty accessing technical assistance providers and trainers – consultants did not have access to one another for collaboration and referral purposes and those seeking technical assistance did not have an efficient or effective way of finding technical assistance providers and trainers.
- Loss of the key learnings and effective practice information resulting from technical assistance and training provision– technical assistance providers and trainers had no mechanism for sharing the information gleaned from providing technical assistance and training.

### **How is the Assets Alliance different from other organizations in the IDA and asset-building fields?**

The Assets Alliance is different from other organizations in the IDA and asset-building fields in the following ways:

- It is an unprecedented resource for the field – an alliance of trained technical assistance providers and trainers all with direct IDA and asset-building program experience that can help build and strengthen local, regional or national asset-building initiatives.
- It is a collaborative association of individuals who contribute to the Alliance by volunteering their time to staff working groups and participate in membership meetings, developing resources and tools for the benefit of the membership and the field, and paying membership dues.
- It is run by a small group of member consultants on a part-time basis. This group is called the Coordinating Group. Each member of the Coordinating Group also runs her/his own consulting practice in addition to staffing the Alliance to ensure the leadership is connected to the field it serves.
- Because of its structure, it has very little overhead or operational costs.

**The Assets Alliance is funded by the Annie E. Casey and operates under the fiscal sponsorship of Community Action Project of Tulsa County (CAPTC).**

### **Current Membership of the Assets Alliance**

Fred Abrams – Harrisburg, Pennsylvania

Eric Muschler – Livonia, Michigan

Ana Acosta – Portland, Oregon

Pam Salsedo – Oakland, California

Rita Bowen – Queens, New York  
Theresa Chelikowsky – Columbus, Ohio  
Karen Dabson – Columbia, Missouri  
Tiffany Eng – Oakland, California  
Connie Evans – Chicago, Illinois  
Inger Giuffrida – Norman, Oklahoma  
Neill Goslin – New Orleans, Louisiana  
Marie Hawe – Stamford, Connecticut  
Glen Hayase – Kapolei, Hawaii  
Sharon Henderson – Gallup, New Mexico  
Alisa Larson – Philomath, Oregon  
Ramona McKinney – Pine Bluff, Arkansas

Amy Shir – Louisville, Kentucky  
Susie Smith – Oakland, California  
Anne Stuhldreher – San Francisco, California  
Jennifer Tescher – Chicago, Illinois  
Yanki Tshering – New York, New York  
Woody Widrow – Austin, Texas  
Janet Wills – Springdale, Arkansas  
Anne Yeoman – Rockville, Maryland  
Kimberly Zimmerman Rand – Boston, MA