# **“Access for All: Expanding CDFI Impact in the Disability Community”** *Expanding the Capacity of CDFIs to Serve People with Disabilities*

# **Training Schedule** November 6-7, 2019 • New Orleans, LA

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| **DAY 1** | | |
| 8:30 am – 9:30 am | **Welcome / Orientation / Introductions**  *Michael Swack and Tobey Davies*  After a welcome, logistics, and a basic orientation on the purpose and substance of the training, facilitators will open things up for participant introductions, followed by introductions of trainers. | Participants are prepared for the day. |
| 9:30 am – 10:00 am | **Why Not CDFIs Before Now?**  *Charlie Hammerman*  The non-profit sector is largely bifurcated based on target populations. CDFI innovation in this market requires new partnerships and content expertise. | Baseline needs assessment of CDFI sector in serving the disability market. |
| 10:00 am – 10:45 am | **History of Disability in the United States and Effects on Socio-Economic Status, Self Determination, Choice and Control**  *Tobey Davies and TBD*  Participants will gain insights into historical oppression of people with disabilities related to social constructions. The discussion shall include a brief review of institutionalization, segregated education, employment discrimination, stigma, lack of access to public facilities, transportation systems and limits of health insurance and long-term care policy which have at the very least limited the self-determination of people with disabilities.  ***In-class Activity***  Watch: *Lives Worth Living* (film segments) | Cultural relevance of disability history, values/principles, implications for the CDFI industry and importance of engaging self-advocates and disability leaders in the design and usability testing for fostering self-determination. |
| 11:00 am – 12:00 pm | **Core Issues in Financing Projects for People with Disabilities**  *Susan Tachau and Danny Housley*  What are some of the unique needs of people with disabilities? What are recommended marketing strategies to people with disabilities and vendors they purchase from? How can a CDFI have a positive impact in the disability community? | Establish development framework for CDFIs in serving the disability market. |
| **LUNCH BREAK** | | |
| 1:00 pm – 2:00 pm | **Disability Policy: The Legal and Funding Context**  *Tobey Davies and Danny Housley*  This session will provide an overview of the disability policy framework, highlighting services and funding resources CDFIs may leverage in the formulation of new products. Case studies will illustrate the intersection of policies, sources and uses of funds, and how these play out in purchasing power. | Values, principles and laws of contemporary disability policy framework.  Knowledge of how various policies intersect to help or hinder development.  Participants will be oriented to resource mapping and network inventory of disability partners and begin drafting a local resource map. |
| 2:00 pm – 2:45 pm | **Financial Products and Services for Serving People with Disabilities – the demand and opportunities**  *Charlie Hammerman, Jack Brummel and Susan Tachau*  Overview of the current state of the CDFI field re: products and services offered by CDFIs from housing to asset development, business development and assistive technology. Discussion of performance benchmarks (i.e. individual CDFIs and as an industry).  ***In-class Activity***  Review national inventory of CDFI models that serve the disability market. | Participants have environmental scan of national prototypes and lessons learned.  Participants articulate local and national aims for impact. |
| **BREAK** | | |
| 3:00 pm – 4:00 pm | **Formulating the Problem Statement: Quantitative and Qualitative Methods for Assessing the Disability Market**  *Tobey Davies*  This session will showcase methods for quantifying and qualifying the potential market for CDFIs. | Participants query publicly available data sources and map information data gathering needs. |
| 4:00 pm – 5:00 pm | **Consecutive Sessions**  Sectors and products for financing. Each session will have real examples shared about how products were developed (e.g., The process from idea stage to product development to implementation and then to scale as well as the underwriting for each product). Case studies will be presented in each session – profiling a person and his/her situation and resource mix as well as the players involved.    The 4 consecutive sessions:  A. **Asset Development and Financial Capability Supports** – *Tobey Davies*  B. **Assistive Technology** – *Susan Tachau and David Beck*  C. **Financing Affordable, Accessible Housing and Community Facilities** *– Charlie Hammerman*  D. **Business and Employment Opportunities including Vocational Rehabilitation** – *Jack Brummel and Gregory Pickett* | Participants gain in-depth insight into CDFI products and services.  The sessions reinforce all prior sections and prepare participants for developing their own plans. |
| **DAY 2** | | |
| 8:30 am – 12:00 pm | **Consecutive Sessions Continued (each session will run for 60 minutes with 15-minute break in between sessions)**  Sectors and products for financing. Each session will have real examples shared about how products were developed (e.g., The process from idea stage to product development to implementation and then to scale as well as the underwriting for each product). Case studies will be presented in each session – profiling a person and his/her situation and resource mix as well as the players involved.  The 4 consecutive sessions:  A. **Asset Development and financial capability supports** – *Tobey Davies*  B. **Assistive Technology** – *Susan Tachau and David Beck*  C. **Financing Affordable, Accessible Housing and Community Facilities** *– Charlie Hammerman*  D. **Business and Employment Opportunities including Vocational Rehabilitation** – *Jack Brummel and Gregory Pickett* | Participants gain in-depth insight into real products documented in the same format. Participants will be asked to document their strategic and implementation plans.  The sessions reinforce all prior sections and prepare participants for developing their own plans. |
| **LUNCH BREAK** | | |
| 1:00 pm – 1:15 pm | **Introduction to Strategy Development and Group Breakout**  *Michael Swack and Charlie Hammerman*  What are potential investable opportunities? What staffing and partnerships are needed? How will PWD be engaged? | Participants reinforce intentions and/or unanswered questions. Based on participant aims, cohort is broken out into product affinity or regional groups for next session. |
| 1:15 pm – 3:00 pm | **Strategy Development**  *Roaming Faculty*  Based on understandings from prior session, participants breakout into small groups (by topic or region).  With facilitation by roaming faculty, teams begin to lay out sequenced steps for investment strategies and partnership development. Breakouts may be structured according to the 4 products defined in the earlier sessions.  ***In-class Activity***  A resource map will be provided in the manual that participants can customize to their location. | Teams identify data methods to inform problem statement; draft product evaluation criteria; develop strategies for engaging PWD in planning and implementation; continue resource mapping to determine partners and core implementation components.  Helps participants apply the model in anticipation of using the process within their own CDFI and submit for feedback at the end of the training series. |
| 3:00 pm – 4:00 pm | **Large Group Sharing**  Teams share strategic and implementation plans with larger group, identify next steps, request technical support needs from trainers and Community of Practice. | Inform next steps for CoP and TA needs; participants aware of timelines and submission deadlines.  Next steps documented. |
| 4:00 pm – 4:30 pm | **Wrap-up and Depart** |  |