

PUBLIC INTEREST TECHNOLOGY

Putting your cash assistance program strategy in place

When you're ready to move forward with setting up a cash assistance program, we suggest that you and your partner CBO come together for a kick off meeting. Now is the time for you to document your program strategy so that the team has a north star around which to align. Having your program strategy written down will also help you communicate about your project with stakeholders such as payment facilitators, mayors funds, and technology vendors, if you decide to bring them into your work. We recommend that all those who will be involved in developing the program strategy get together and align about key elements of the work ahead.

Here's how to get started:

Schedule a 90 minute meeting with the program's key stakeholders

Assign one person to lead the meeting who comes from the city team. This person will steer the conversation with the goal of addressing all of the key issues before the end of the meeting.

Sample Schedule

10 min**Introductions****15 min****Identify your team members + and how you'll communicate to stay in sync****45 min****Go through the rest of the items we've listed****20 min****Closing out:**

- Review what you've agreed upon, what you still have remaining.
- Set next steps for making any decisions that you were not able to address during the session.
- Discuss how that session worked for you all and how you might improve meetings like this in the future.

Setting the vision:

Our cash assistance program will _____
(write your program objective)

Our recipients manage money _____
(are they banked or unbanked? Are there any other payment preferences that you know of?)

Setting up the core team

The city program owner is _____
[working hours]

The city f/t program coordinator is _____
[working hours]

The CBO f/t team member is _____
[working hours]

We have additional team members:

Communication

[Write down the ways that you will communicate regularly. Some options include having a morning stand up, a weekly team meeting, and bi-weekly retrospectives to identify ways of improving the ways that you're working]

Funding Strategy

Will we rely on private funds?

Philanthropy: _____

Social media campaign: _____

Other: _____

Will you rely on public funds?

Any details? _____

Storing your funds

Does our city have a mayors fund?

Does our city have a community foundation?

Is there a CBO option for us to explore?

Where will you store your funds?

What are your next steps?

Open versus a closed application

We want to use an open application process because _____

We want to use a closed application process because _____

Working with payment facilitators

We're interested in working with a Payment facilitator: **Y / N**

If Y, circle the ones that you want to follow up with:

FII	Alia Cares	GiveDirectly	Hyperwallet
Usio	GreenDot	Stripe	Mastercard/Visa

Who will do the follow up?

Types of payment

Circle which option you think will best meet the needs of your program's recipients and explain why:

Prepaid debit cards	Venmo/Paypal
In person check delivery	Wired money

Why: