

CFED IDA Program Design Handbook

<http://www.cfed.org/focus.m?parentid=374&siteid=374&id=391>

These resources come from IDA programs across the country and CFED's "[IDA Program Design Handbook](#): A Step by Step Guide to Designing an IDA Program." The fourth edition of this handbook includes useful resources and effective practices based on the experience of thirteen IDA programs involved in the American Dream Demonstration. Click on the link above to order a complete handbook on CD-ROM.

Program Planning

- [Advisory Board Policy/Job Description](#) Kitsap IDA
- [Feasibility Assessment Worksheet](#) IDA Program Design Handbook
- [How to Conduct a Focus Group](#) IDA Program Design Handbook
- [Program Design Checklists](#) IDA Program Design Handbook
- [Program Design Focus Group Questions](#) IDA Program Design Handbook

Program Administration

- [Operating Budget Spreadsheet](#) IDA Program Design Handbook
- [Match Structure Spreadsheet](#) IDA Program Design Handbook
- [Projected Match Budget Spreadsheet](#) IDA Program Design Handbook
- [IDA Program Accounting and Auditing Guide](#) Walter O. Baggett, Ph. D., Manhattan College
- [MIS IDA: Database Application for IDA Programs](#) Center for Social Development
- [IDA Program Evaluation Survey Tool](#) New Hampshire Community Loan Fund

Population Specific

- [Asking About Disability: A Guide for IDA Administrators](#) World Institute on Disability
- [Integrating Universal Design Principles In Asset Building Programs](#) World Institute on Disability
- [Employer IDA Initiatives: A Background Paper](#) CFED
- [IDA's for Youth](#) (pdf format, 27 MB)

Accountholder Communications

NEW! - [Participant Handbook, Indiana Housing & Community Development Authority](#)

- [Account Information Release Form](#) East Bay Asian Local Development Corp
- [Asset Cost Research Worksheet](#) IDA Program Design Handbook
- [Budget Workplan for Savings](#) Cook Inlet Tribal Council, Inc.
- [IDA-Account Holder Agreement](#) United Way of Metropolitan Atlanta
- [IDA Opening Instructions for Account Holders](#) IDA Program Design Handbook
- [IDA Prep Guide](#) Central Texas Mutual Housing Association

- [IDA Savings Plan Agreement](#): Collaborative Model Portland Regional IDA Collaborative
- [Letter to Denied Applicants](#) Charlotte-Mecklenburg IDA Consortium
- [Missed Monthly Deposit Letter](#) IDA Program Design Handbook
- [Missed Monthly Letter](#) Cook Inlet Tribal Council, Inc.
- [Monthly Deposit Reminder Postcard](#) Community Action Project of Tulsa County
- [Monthly Saver Update](#) Central Vermont Community Action Council
- [Notice of Missing Application Materials](#) Community Action Project of Tulsa County
- [Participant Handbook](#) Cook Inlet Tribal Council, Inc.
- [Release of Information Form](#) Cook Inlet Tribal Council, Inc.
- [Saver\\$ Exchange Newsletter](#) Family Savings Account Program of Lancaster, PA
- [Saving Up Newsletter](#) Shorebank Neighborhood Institute
- [Savings & Match Accumulation Handout](#) IDA Program Design Handbook
- [Savings Agreement](#) Cook Inlet Tribal Council, Inc.
- [Workshop Evaluation Form](#) IDA Program Design Handbook

Creating Partnerships

- [Collaborative Building Toolkit](#) and [Data Form](#) Assets for All Alliance
- [Account Holder - Financial Institution Release Form](#) IDA Program Design Handbook
- [Bank Participant Enrollment Form](#) Cook Inlet Tribal Council, Inc.
- [Financial Institution Partnership Agreement](#) IDA Program Design Handbook
- [IDA Opening Instructions for Financial Institutions](#) IDA Program Design Handbook
- [Memorandum of Understanding for Program Partners](#) Rocky Mountain Mutual Housing Association
- Money in the Bank [Part One](#) | [Part Two](#) ShoreBank and The Center for Law and Human Services (Report details how ShoreBank links tax preparation with savings products for low income filers.)
- [Community Resource Inventory Worksheet](#) IDA Program Design Handbook
- [Community Organization Partnership Agreement](#) IDA Program Design Handbook
- [Consumer Credit Counseling Service Referral](#) and [Credit Report Authorization](#) Cook Inlet Tribal Council, Inc.
- [Request for Proposal from Financial Institution](#) Central Texas Mutual Housing Association

Asset Acquisition Forms

- [Application for a Homeownership IDA](#) United Way of Metropolitan Atlanta
- [Authorized Withdrawal Form](#) Cook Inlet Tribal Council, Inc.
- [Business Plan Questionnaire for Existing Businesses](#) Lower East Side People Federal Credit Union
- [Education Plan for Account Holders](#) Central Vermont Community Action Council
- [Withdrawal Procedure for Purchasing, Building or Repairing a Home](#) Central Vermont Community Action Council
- [Withdrawal Procedure for Education Asset](#) Central Vermont Community Action Council

Policies and Procedures

- [Authorized Withdrawal Request Form](#) Alternatives Federal Credit Union
- [Beneficiary Designation](#) Cook Inlet Tribal Council, Inc.
- [Emergency Withdrawal Request Form](#) Central Vermont Community Action Council
- [Emergency or Unauthorized Withdrawal Form](#) Cook Inlet Tribal Council, Inc.
- [Exit Evaluation](#) Cook Inlet Tribal Council, Inc.
- [Instructions for Opening an IDA](#) Portland Regional IDA Collaborative
- [How to Request Matching Funds](#) Alternatives Federal Credit Union
- [Leave of Absence Policy](#) IDA Program Design Handbook
- [Qualified Withdrawal Policy and Procedures](#) IDA Program Design Handbook
- [Qualified Withdrawal Request Form](#) IDA Program Design Handbook
- [Qualified Withdrawal Notice to Financial Institution](#) IDA Program Design Handbook

Recruiting

- [Application for IDA Program](#) Alternatives Federal Credit Union
- [Application Form](#) and [Application Information](#) Cook Inlet Tribal Council, Inc.
- [Exit Survey for Account Holders](#) Central Vermont Community Action Council
- [Exit Survey for IDA Savers](#) City of Racine Weed and Seed IDA program
- [Financial Skills Questionnaire](#) Cook Inlet Tribal Council, Inc.
- [Income Verification Worksheet](#) IDA Program Design Handbook
- [Periodic Account Holder Update Form](#) IDA Program Design Handbook
- [Prospective Account Holder Questionnaire](#) IDA Program Design Handbook
- [Self-Evaluation Form for Prospective IDA Applicants](#) Alternatives Federal Credit Union

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