

## **Fiduciary Organizations**

- Map
- New Fiduciary Organizations

## **Current Organizations**

- **IDAs in the News**
- **Marketing Materials**
  - IDA Donor Info Sheet [pdf]
  - FO Newsletter Ad [pdf]
  - IDA Marketing Brochure, English [pdf]
  - IDA Marketing Brochure, Spanish [pdf]
- **Best Practices**
  - **Assistive Technology**
    - Financial Literacy for People with Developmental Disabilities [link]
    - Assistive Technology Sample Plan [pdf]
    - Competitive Employment Definition [doc]
    - FAQ for Assistive Technology [doc]
    - Equipment Technology Purchase Form [doc]
    - Contact Information for Assistive Technology [doc]
  - **Education Materials**
    - Student Loan Forgiveness for Public / Nonprofit Service [link]
  - **Enrollment Materials and Exit Forms**
    - Mercy Corps IDA Application [doc]
    - Mercy Corps Client Information Form [xls]
    - eDev Update Form [doc]
    - eDev Client Application [pdf]
    - eDev Client Intake Form [pdf]
    - eDev Savings Plan Agreement [pdf]
    - NAYA IDA Application [pdf]
    - CASA of Oregon VIDA Exit Form [pdf]
    - CASA of Oregon VIDA Application Packet [pdf]
    - Umpqua CDC Dream\$avers Exit Form [doc]
    - Umpqua CDC Dream\$avers Application [doc]
    - NAYA Conflict of Interest Policy [doc]
    - eDev's Savings Plan [doc]
    - IDA Welcome Letter [doc]
    - IDA Fact Sheet [doc]
    - Warm Springs Intake Form [doc]
    - CASA Microenterprise Preapplication [doc]
    - CASA Vehicle Purchase Fact Sheet [doc]
    - NAYA Savings Agreement [pdf]
    - CASA of Oregon VIDA Application Checklist [doc]
    - eDev Savings Plan Agreement [doc]
    - Portland Housing Center's IDA Program Application [doc]
    - Umpqua CDC Education / Job Training Workplan [doc]
    - Umpqua CDC Savings Plan Agreement [doc]
    - Umpqua CDC Savings and Budget Workplan [doc]
    - Portland Housing Center Savings Agreement [pdf]
  - **ESL Financial Literacy Resources**
    - Financial Literacy Lessons for ESL Specific Financial Literacy Programs [pdf]
    - Article on Talking About Money Across Cultures [pdf]

- **Home Repair Resources**
  - UCDC Rehabilitation Standards [doc]
  - CASA Habitability Guiding Principles [doc]
- **IDA Handbooks**
  - eDev Participant Handbook [pdf]
  - Indiana Housing CDA IDA Participant Handbook [pdf]
  - Umpqua CDC Dream\$avers Participant Handbook [pdf]
  - Umpqua CDC Partner Handbook [pdf]
  - Portland Housing Center IDA Participant Handbook [pdf]
- **Letter Templates for Partner Banks**
  - Portland Housing Center Bank Introduction Letter [pdf]
  - Portland Housing Center Bank Release Form [pdf]
- **Tools for Writing a Business Plan**
  - Online Personal Financial Management Classes [link]
  - Writing Your Own Business Plan Module 1 [doc]
  - Writing Your Own Business Plan Module 2 [doc]
  - Writing Your Own Business Plan Module 3 [doc]
  - Writing Your Own Business Plan Module 4 [doc]
  - Feasibility 101 Module 1 [doc]
  - Feasibility 101 Module 2 [doc]
  - Feasibility 101 Module 3 [doc]
  - Feasibility 101 Module 4 [doc]
  - Feasibility 101 Module 5 [doc]
  - Feasibility 101 Module 6 [doc]
- **Understanding Credit**
  - Understanding Your Credit Scores [pdf]
- **Waitlist Guidelines for Participants and Specialists**
  - CASA of Oregon Waitlist Guidelines [pdf]
  - CASA of Oregon Guidelines for VIDA Specialists [pdf]
- **IDA RFA 2010**
  - IDA RFA [doc]
  - Oregon IDA Review Criteria [doc]
  - Oregon IDA Workplan form [doc]
  - Population Distribution Data [xls]
- **Meeting Minutes**
  - Call Minutes 03.31.10 [pdf]
  - Call Minutes 07.09.09 [pdf]
  - Call Minutes 05.14.09 [pdf]
  - Call Minutes 04.07.09 [pdf]
  - Retreat Minutes 03.26.03 [pdf]
  - Call Minutes 02.11.09 [pdf]
  - Retreat Minutes 02.06.09 [pdf]
  - Call Minutes 01.08.09 [pdf]
  - Call Minutes 10.02.08 [pdf]
  - Call Minutes 09.04.08 [pdf]
  - Focus Groups' Minutes 07.28-30.08 [pdf]
  - Call Minutes 07.01.08 [pdf]
  - Call Minutes 06.10.08 [pdf]
- **Evaluation Reports and Data**
  - Outcome Tracker Presentation [pdf]

- IDA Survey Data II [pdf]
  - IDA Survey Data [pdf]
- **Message Boards** [Log-in to access]
- **Program Policy Documents** [Log-in to access]
  - Oregon IDA Income Limits for Determining Participant Eligibility [doc]
  - IDA Standard Operating Procedures [doc]
  - Fannie Mae Allowance Language for Homeownership IDAs [pdf]
  - IDA Data Dictionary for Outcome Tracker [doc]
  - IDA Data Entry Guide for Outcome Tracker [doc]
  - 2010 Budget Narrative, Neighborhood Partnerships [doc]
  - ORIDA Contribution Statistics 2007—2009 [doc]
  - IDA Tax Issues Chart [pdf]
  - IDA Info, Department of Revenue [pdf]
  - FO Staff List [doc]
  - 2009 IDA Referral Guide [doc]
  - IDA Data Entry Guide [doc]
  - SMART Goals Information [pdf]
  - IDA Department of Revenue [doc]
  - Microenterprise Purchasing Guidelines [doc]
  - Asset Building and Low Income Family Fact Sheet [doc]
  - Fiduciary Organization Governance Diagram [doc]
  - IDA Terms [doc]
  - IDAs and Federal Programs [pdf]
  - IDA Statutes [pdf]
  - IDA Rules [pdf]
  - Conflict of Interest Policy [doc]
  - Conflict of Interest Question [doc]
- **Quarterly Reports** [Log-in to access]
  - First Quarter Report 2010 [pdf]
  - Fourth Quarter Report 2009 [pdf]
  - Third Quarter Report 2009 [pdf]
  - Second Quarter Report 2009 [pdf]
  - First Quarter Report 2009 [pdf]
  - Fourth Quarter Report 2008 [pdf]
  - Third Quarter Report 2008 [pdf]
  - Second Quarter Report 2008 [pdf]
  - First Quarter Report 2008 [pdf]
- **Surveys and Quarterly Report Forms** [Log-in to access]
  - **Surveys**
    - **Survey Materials: English**
      - Exit Survey—Non-Completers [doc]
      - One Year Follow Up Survey [doc]
      - Exit Survey—Program Completers [doc]
    - **Survey Materials: Russian**
      - One Year Follow Up Survey [doc]
      - Exit Survey—Non-Completers [doc]
      - Exit Survey—Program Completers [doc]
    - **Survey Materials: Spanish**
      - Exit Survey—Non-Completers [doc]

- One Year Follow Up Survey [doc]
  - Exit Survey—Program Completers [doc]
  - **OR IDA Participant Exit Form**
    - Participant Exit Form Template—Spanish [doc]
    - Participant Exit Form Template—English [doc]
  - **Other Survey Materials**
    - Sample Text for Non-Completers Exit Survey Letter [doc]
    - Sample Text for One Year Follow Up Survey Letter [doc]
    - Distribution Procedures for FOs [doc]
    - Exit Survey Mailing Labels Avery 8660 labels [doc]
- **Quarterly Report Forms**
  - Quarterly Written Report Form Q1—Q3, 2010 [doc]
  - IDA Story Waiver—Spanish [doc]
  - IDA Story Waiver—English [doc]
  - Quarterly Written Report Form Q4, 2010 [doc]
  - Data Review Certification—2010 [doc]
  - Quarterly Budget Report Form—2010 [doc]