

Puzzle 1 – Individual Development Account

Mission: To assist low-income families save money in order to purchase a home, business, automobile or help pay for college tuition.

Identified Problem, Need, Situation	Service or Activity	Outcome	Outcome/Indicator	Measurement Tool	Data Source, Collection Procedure, Personnel	Frequency of Data Collection and Reporting
Low-income people lack the knowledge and skills to budget and accumulate assets.	Short Term ___ # of persons who participate in IDA or other savings account programs for FY 2004-05.	Short Term Demonstrates ability to maintain a budget. Opens IDA or other savings account.	Short Term ___ # & ___ % of persons who will: <input type="checkbox"/> Maintain a budget. <input type="checkbox"/> Open an IDA or other savings account.	Client case records. Automated client tracking system. Bank statement. Mortgage documents.	Data collected on CAA client software at time of interview by intake staff at central or satellite offices Review bank statements quarterly.	Data collected weekly and reported to supervisor quarterly. Follow-up data collected monthly.
	Intermediate Term ___ # of persons who deposit money into an IDA savings account on a regular basis in FY 2004-05.	Intermediate Term Demonstrates ability to save money for at least four months.	Intermediate Term ___ # & ___ % of persons who will make deposits into a savings account over a three month period.	Auto loan statements. College enrollment forms.	Data collected by program staff and reviewed by program manager. Review agency records quarterly.	Quarterly report prepared for agency manager's and state office.
	Long Term ___ # of persons who make purchases from their IDA savings account.	Long Term Uses savings to make allowable purchases or services.	Long Term ___ # & ___ % Purchase home. ___ # & ___ % Start business. ___ # & ___ % Purchase automobile ___ # & ___ % Enroll in college.		Sources: banks, auto dealers, colleges, businesses.	