

# CDFI 101 Toolkit: Onboarding Guidance

Need some ideas on how to incorporate the information in the CDFI 101 toolkit into onboarding for your staff? Here are some suggestions, based on topic areas:

Topic Area	Onboarding Suggestions
What are CDFIs?	<ul style="list-style-type: none"> <li>CDFI 101 Toolkit: focus on pp.4-5 and pp.8-10</li> <li>Check out the <a href="#">CDFI Fund's searchable database</a>.</li> </ul>
CDFI Business Model	<ul style="list-style-type: none"> <li>CDFI 101 Toolkit: focus on pp.8-10</li> <li>YouTube/ Video Playlist: "OFN Conference Speeches &amp; Plenaries" videos</li> <li>Read <a href="#">Chuck Matthei's 1985 Speech from the First OFN Conference</a></li> </ul>
CDFI Industry Impact	<ul style="list-style-type: none"> <li>CDFI 101 Toolkit: focus on pp. 15-19</li> <li>History of the CDFI Industry: focus on p.9, pp.17-18, pp. 20-22, pp.26-27</li> <li>YouTube/Video Playlist: "CDFI Impact" &amp; "Native CDFIs" videos</li> <li>Read: <a href="#">Opportunity Finance Institutions: Side by Side, FY 2021 24th Edition</a>, OFN and <a href="#">2021 Inside the Membership: Statistical Highlights from OFN Membership</a>, OFN</li> <li>Read: <a href="#">CDFIs Emerge as Key Partners in Improving Community Health</a>, IFF; <a href="#">Charter Schools Facilities Finance: How CDFIs Created the Market, and How to Stimulate Future Growth</a>, Federal Reserve Bank of San Francisco; <a href="#">America's Healthy Food Financing Initiative</a>, Reinvestment Fund; <a href="#">Native CDFIs Improve Credit Outcomes for Indian Country Residents</a>, Federal Reserve Bank of Minneapolis</li> </ul>
CDFI Industry History	<ul style="list-style-type: none"> <li>History of the CDFI Industry – for a brief overview, focus on CRA, 1970s, 1980s, and creation of CDFI Fund in 1990s (pp.5-16)</li> <li>YouTube/Video Playlist: "CDFI Industry History" videos</li> <li>Read and listen to <a href="#">CDFI Making History Interviews</a> with <a href="#">Martin Trimble</a>, former executive director of OFN; <a href="#">Bill Bynum</a>, CEO of Hope Enterprise Corporation; <a href="#">Juliana Eades</a>, former president and founding executive director of New Hampshire Community Loan Fund; <a href="#">Elsie Meeks</a>, former executive director, The Lakota Funds (the first Native CDFI); and <a href="#">Robert Schall</a>, former president, Self-Help Ventures Fund and many more!</li> <li>To dive more deeply into industry history, read <a href="#">Democratizing Finance</a> by Clifford N. Rosenthal</li> </ul>

<b>CDFI Fund</b>	<ul style="list-style-type: none"> <li>• CDFI 101 Toolkit: focus on pp. 11-14</li> <li>• History of the CDFI Industry: focus on pp.14-15</li> <li>• CDFI Fund <a href="#">website</a></li> <li>• Reading List: "1990s: Creation of the CDFI Fund &amp; CRA Reform" section</li> </ul>
<b>CDFIs as Financial First Responders</b>	<ul style="list-style-type: none"> <li>• History of the CDFI Industry: focus on pp.21-22, pp.26-27</li> <li>• CDFI 101 Toolkit: impact stories on p.17</li> <li>• Read <a href="#">Six Lessons Learned from Create Jobs for USA</a>, OFN; <a href="#">Two Years After 9/11: A Report on the Unique Role CDFIs are Playing in the Rebuilding of Lower Manhattan</a>, OFN; <a href="#">CDFIs as Economic Shock Absorbers</a>, Federal Reserve Bank of San Francisco; <a href="#">Community Development Financial Institutions (CDFIs) + Supportive Policies + Capital = Responsible, Affordable Financing for Marginalized Communities: Lessons from the Paycheck Protection Program (PPP)</a>, OFN; <a href="#">CDFIs are starting to flex their post-pandemic clout</a>, American Banker</li> </ul>

In addition, here are some other ways to help orient new staff, board members, and other stakeholders to the CDFI industry:

- **Create a list of local businesses** that have received financing and/or services from your CDFI and others in your region that new staff can visit and support. One way some CDFIs have done this is by [creating gift guides](#).
- **Create a list of local community service facilities and neighborhood development** supported by your CDFI and others in your region with a suggested walking or driving itinerary that new staff can follow to better understand the people and places your CDFI serves.
- **Attend in-person industry events:** Appendix B of the CDFI 101 Guide (on p.21) provides a starting point with a list of annual in-person events and forums.
- **Sign-up for OFN emails and newsletters** to stay informed on industry news, as well as OFN resources, trainings, and events – including webinars, regional meetings, forums, and our annual conference!
- **Join CDFI Connect** to connect with peers, exchange knowledge, and access best practices resources. More information can be found on the one-pager included in the toolkit.



Have suggestions or recommendations to add to this list – or want to share how you used this toolkit to onboard your staff? Reach out to OFN’s Development Services team at [developmentsservices@ofn.org](mailto:developmentsservices@ofn.org)!