

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

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

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!