**CDFI Action Plan Template**

**Purpose:** To develop a preliminary ***CDFI Action Plan*** that will integrate the key learning from the three-day workshop to help address the CDFI’s opportunities for growth and sustainability. The ***CDFI Action Plan*** will be revised throughout the six-month training experience either through the Mentored Cohorts or One-to-One Technical Assistance.

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| **Goal:** |
| **Action Plan Implementation** (The Action Plan and Action Steps should be aligned and complementary) |
| **Action Steps***What Will Be Done?* | **Responsibilities***Who Will Do It?* | **Timeline***By When? (Day/Month)* | **Resources**1. *Resources Available*
2. *Resources Needed (financial, human, political & other)*
 | **Potential Barriers**1. *What individuals or organizations might resist?*
2. *How?*
 | **Communications Plan***Who is involved?* *What methods?**How often?* |
| **Step 1:** |  |  | **A.****B.** | **A.****B.** |  |
| **Step 2:** |  |  | **A.****B.** | **A.****B.** |  |
| **Step 3:** |  |  | **A.****B.** | **A.****B.** |  |
| **Step 4:**  |  |  | **A.****B.** | **A.****B.** |  |
| **Step 5:** |  |  | **A.****B.** | **A.****B** |  |
| **Evidence of Success** (How will you know that you are making progress? What are your benchmarks?)1.
2.
3.
4.
 |
| **Evaluation Process** (How will you determine that your goal has been reached? What are your measures?)1.
2.
3.
4.
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**Continuous Improvement Plans**

**(*CDFI Action Plan* review and update)**

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| Results/Accomplishments1.
2.
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4.
 | Next Steps1.
2.
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 | Date |
| Results/Accomplishments1.
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