**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?) | | | | | |
| **Evaluation Process** (How will you determine that your goal has been reached? What are your measures?) | | | | | |

**Continuous Improvement Plans**

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

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| Results/Accomplishments | Next Steps | Date |
| Results/Accomplishments | Next Steps | Date |
| Results/Accomplishments | Next Steps | Date |
| Results/Accomplishments | Next Steps | Date |
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