# 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:

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<tr>
<th>Topic Area</th>
<th>Onboarding Suggestions</th>
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| **What are CDFIs?**       | • CDFI 101 Toolkit: focus on pp.4-5 and pp.8-10  
                            • Check out the [CDFI Fund’s searchable database](#).                                                                                                  |
| **CDFI Business Model**   | • 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**  | • 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** | • 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 |
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<th><strong>CDFI Fund</strong></th>
<th><strong>CDFIs as Financial First Responders</strong></th>
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| • 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 | • 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 CDFSI 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 developmentservices@ofn.org!