



# Together

**TOGETHER WE CAN BUILD A STRONGER ECONOMY**  
*Invest in Indian Country*

## Day 1 – Tuesday, May 8, 2018 (8:30am-4pm)

8:30-9:45am	• Opening Prayer, Introductions, Orientation
9:45-10:30am	• History of the CDFI Industry • Discussion about Theory of Change, Mission Driven Organizations, and What that Means
10:30-10:45am	<b>BREAK</b>
10:45-12pm	• Robust CDFI 101 (healthy components, understanding your market, CDFI Board roles and responsibilities) • Discussion about CDFI Products and Services
12-1pm	<b>LUNCH</b>
1-2pm	• Continued CDFI 101 Discussion
2-2:45pm	• Sustainability, Growth, Scale, Organizational Models Discussion • Importance of Strategic Planning and CDFI Certification
2:45-3pm	<b>BREAK</b>
3-3:30pm	• Wrap Up Previous Discussion
3:30-4pm	• Close Day (Pluses & Wishes)

## Day 2 – Wednesday, May 9, 2018 (8:30am-4pm)

8:30-9am	• Welcome Back, Reflections, Agenda for Day
9-10:30am	• Discussion on Importance of Marketing and Strategies
10:30-10:45am	<b>BREAK</b>
10:45-12pm	• Development Services Overview and Importance to Mission • Marketing and Outreach
12-1pm	<b>LUNCH</b>
1-2:45pm	• Discussion on Importance of Impact Measurement and Evaluation • Native CDFI Industry and Impact • Client Management Process
2:45-3pm	<b>BREAK</b>
3-3:30pm	• Review Business Model Canvas Boards
3:30-4pm	• Close Day (Pluses & Wishes)



*Together*

**TOGETHER WE CAN BUILD A STRONGER ECONOMY**  
*Invest in Indian Country*

**Day 3 – Thursday, May 10, 2018 (8:30am-4pm)**

8:30-8:45am	• Welcome Back, Reflections, Agenda for Day
8:45-9am	• Financial Management Overview
9-10am	• CDFI Financial Statements
10-10:15am	<b>BREAK</b>
10:15-12pm	• Understanding & Utilizing CAMELS Analysis
12-1pm	<b>LUNCH</b>
1-2:30pm	• Capitalization Strategies and Planning
2:30-2:45pm	<b>BREAK</b>
2:45-3:45pm	• Public Policy Discussion
3:45-4pm	• Close Day (Pluses & Wishes)

**Day 4 – Friday, May 11, 2018 (8:30am-3pm)**

8:30-8:45am	• Welcome Back, Reflections, Agenda for Day
8:45-10:15am	• Loan Underwriting
10:15-10:30am	<b>BREAK</b>
10:30-11am	• Portfolio Management
11-12pm	• Loan Policies
12-1pm	<b>LUNCH</b>
1-2:30pm	• Completing Business Model Canvas Boards • Certification Testing
2:45-3pm	• Close Training