

**Skills and Abilities needed at a CDFI**

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| **Skill** | **Your Staff  1 = weak, 5 = strong** | **Thoughts, Comments** |
| Writing for grants / grant reports | 1 2 3 4 5 |  |
| Researching grant opportunities | 1 2 3 4 5 |  |
| Cultivating funder relationships | 1 2 3 4 5 |  |
| Monitoring performance for funders and investors | 1 2 3 4 5 |  |
| Marketing your products and services to the target market | 1 2 3 4 5 |  |
| Social media | 1 2 3 4 5 |  |
| Assisting applicants to apply | 1 2 3 4 5 |  |
| Capacity building for applicants | 1 2 3 4 5 |  |
| Analyzing loan applications (non-financial) | 1 2 3 4 5 |  |
| Financial analysis of applicants | 1 2 3 4 5 |  |
| Closing loans | 1 2 3 4 5 |  |
| Invoicing for loans | 1 2 3 4 5 |  |
| Applying payments | 1 2 3 4 5 |  |
| Monitoring other loan requirements (insurance, impact, etc.) | 1 2 3 4 5 |  |
| Working with borrowers who are behind in payments | 1 2 3 4 5 |  |
| Collections | 1 2 3 4 5 |  |
| Promoting the CDFI to your Tribe / local government | 1 2 3 4 5 |  |
| Getting positive media attention | 1 2 3 4 5 |  |
| Bookkeeping | 1 2 3 4 5 |  |
| Preparing financial statements | 1 2 3 4 5 |  |
| Preparing financial projections | 1 2 3 4 5 |  |
| Organizing materials for the Board | 1 2 3 4 5 |  |
| Running effective Board meetings | 1 2 3 4 5 |  |
| Other: |  |  |
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