

Financial Institutions



Roles & Responsibilities - By working closely with nonprofits throughout the project planning stage and into the execution, financial institutions will be able to partner with different community groups in their service areas and ensure their investment in a project is fulfilling their strategic goals, assisting LMI households, and positively impacting local communities

Phase 1: Prepare

- 9.10.18 • It is recommended that at least one representative attend the CRC launch webinar
- 10.1.18 • Register for CRC Roundtables and submit one investment strategy, based on given template, to HAI for review

Phase 2: Match

- 10.26.18 • Attend the CRC Roundtables prepared to evaluate and discuss project ideas with community organizations
- 1.1.19 • If a preliminary agreement with an organization is reached, submit a joint commitment, work plan, and project idea to HAI for review

Phase 3: Develop

- Collaborate with partner organization to develop a project proposal and submit proof of dialogue to HAI
- Submit one comprehensive proposal, formatted according to given guidelines, to HAI for approval

Phase 4: Showcase

- 10.19 • Have at least one representative attend project showcase
- If committed to investing in a community organization, submit a single joint project agreement to HAI

Phase 5: Implement

- Implement project agreement over proposed time frame by providing the agreed-upon financial investment, feedback, and assistance on organizational benchmarks