26 Questions to Ask Yourself When Building Your CRA Plan for Your Bank

CRAtoday

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Building a Culture of Compliance

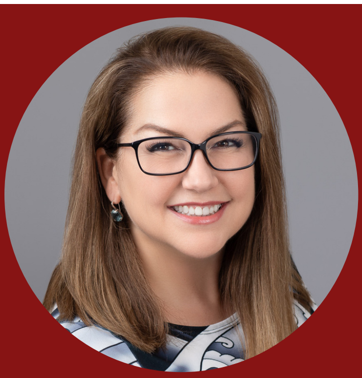
1. How can you partner with executive management to improve your CRA program's impact on the community?
2. Do you have a plan to partner with business units to expand the CRA program?
3. Do you have an actively engaged CRA committee that sets goals and measures CRA performance? If not, what do you need to do to create one?
4. Have you trained your loan officers on how to identify community development loans?
5. Do any other internal stakeholders have CRA responsibilities embedded in their job descriptions? If so, have you trained them on CRA?

Setting Goals

6. What are some of last year's accomplishments?
7. What can you do less, more of, or differently to move your CRA program forward?
8. How can you leverage your unique community-based bank strategy for the greater good?
9. How is the CRA program already supporting the bank's priorities?
10. Are your CRA initiatives supporting new products and services?
11. How can your CRA program better support the core initiatives within the bank?
12. Who do you need to coordinate with when planning around the bank's corporate strategy?

Engaging External Stakeholders

13. How can you continue to promote community growth and stability through partnerships with nonprofits and government agencies?
14. How can you continue to innovate the CRA program while responding to the credit needs of your local community?
15. Is your bank active enough in financial literacy? How could you do better?



Ready to up your CRA game?
Join your peers in the CRA Hub.

www.cratoday.com linda@cratoday.com

Training Internal Stakeholders

16. Which areas of the bank need more CRA training this year?
17. What unique channels can you use to engage employees in training initiatives?
18. Is your internal CRA program training outlined with internal stakeholders identified, frequency of training delineated, and training decks completed?

Professional Development

19. What 2–3 areas of the bank do you want to learn more about this year?
20. What training programs, courses, and/or conferences would support your professional growth? (Have you checked out the CRA Hub? Visit www.cratoday.com to learn more.)
21. When will you meet with your manager to discuss your vision to grow the CRA program and your leadership role in doing so?
22. Do you have adequate resources within the institution to manage a key CRA employee transition?

System Improvements

23. What manual systems might you consider automating this year to reallocate finite resources?
24. Do you have the right CRA proprietary software system to support your CRA data analytics and reporting requirements?
25. Are your CRA data collection, maintenance, and reporting procedures in place, and are they periodically reviewed?
26. Have you scheduled a demo with Kadince? Managing your institution's CRA data is manual and time-consuming. But with Kadince, it's easy to track, manage, and report your CRA data. Stop wasting time and start having an even bigger impact on your community. Schedule a personalized demo at www.kadince.com/#demo.