CIT Services

CIT Feasibility Workflow

1. **ORGANIZATIONAL DASHBOARD**
   - Introductions, overview of sessions; goal setting and expectations.

2. **COMMUNITY MAPPING**
   - Community asset map, discussion of identified neighborhoods/areas of interest.

3. **PROPERTY EVALUATION**
   - Property Evaluation Matrix, characteristics of potential properties.

4. **FINANCIALS**
   - Overview of financial pro forma, operating costs, letter of credit, calculation of dividend and share price.

5. **EDUCATION**
   - Attend Owning to Owning Online classes, or review class set-up, curriculum, best practices.

6. **LEGAL COACHING**
   - Legal components of the East Portland CIT, legal feasibility of replicator ideas.

7. **CAPITALIZATION STRATEGY**
   - Strategies and recommendations for CIT Capitalization.

8. **OPERATIONS**
   - Staff roles, costs, and details of ongoing CIT operations.

9. **DMERL STRATEGY**
   - Design, monitoring, evaluation, research, and learning strategy for CIT property zip codes.

10. **ORGANIZATIONAL ASSESSMENT**
    - Summary of feasibility and steps moving forward.

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- Complete Readiness Survey
- Sign non-disclosure agreement
- Complete team skills grid
- Read Kick-Off prep documents
- Complete Community Mapping Questionnaire
- Identify areas/neighborhoods of interest
- Read Community Mapping Prep Documents
- Complete Property Evaluation Questionnaire
- Identify potential community partners in neighborhoods of interest
- Read Property Evaluation prep documents
- Complete Class Implementation Questionnaire
- Enter top potential properties data in financial pro forma, run financial projection
- Arrange meeting with legal consultants
  - Note questions to explore in session 8
- Identify potential class implementation partners/other financial literacy classes in neighborhoods of interest
- Review CIT legal documents
- Complete capitalization questionnaire
- Solidify strategy for establishing LC or other investor protection
- Complete operations questionnaire
- Review CIT Operations Guides
- Complete operations budget projection and implementation plan
- Clarify capitalization strategy and capital objectives based on pro forma and operations budget
- Complete final questionnaire and feasibility evaluation

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