

IV. Bank Partner Outreach

SVRA Name:

SVRA Professional Involved in Bank Outreach (name and contact info):

What banks does the agency already have a working relationship with:

For agency business?

From an advisory standpoint, such as a member of the State Rehabilitation Council (SRC)?

From an advisory standpoint, on other councils or boards through which the agency is represented?

From a business engagement (placement and training) standpoint, which can also include representation with Chambers of Commerce, SHRM or other groups that include bank representation?

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Is there an active group of bank CRA officers that meet in your state? (if not known, this is an area that can be explored with the VRTAC-QM/NDI team)

Yes **No**

Are there bank and community coalitions (e.g., CA\$H Coalitions, Bank On) operating in your community? For reference: [Projects](#) | [Cities for Financial Empowerment Fund \(cfefund.org\)](#)

Yes **No**

Have you prepared a partnership opportunity outline that can be shared with a bank, along with information about your agency (your story)? (this is activity that can be completed with support by the VRTAC-QM/NDI team)

Yes **No**

With the above information, do you have a strategy for approaching banks?

Yes **No**

If a bank partnership is established, do you have a strategy for maintaining and growing that partnership?

Yes **No**