




CP Pathway Next Steps


 Has your organization completed an assessment of your client protection practices in the last 1- 2 years? 


YES **NO**

Is the assessment useful for creating an action plan? Is it recent enough? Thorough enough?

YES **NO**

 Complete an assessment of your client protection practices. Read about your assessment options here, including getting help from a qualified auditor.

 Use the results of your assessment to create an action plan. You may want to use this template for your action plan. View this sample action plan for more ideas.

 Implement your action plan! We have many resources to assist during this phase. Read about what we offer, including getting help from a technical assistance provider.



Have you advanced your practice and are now ready to pursue client protection certification?

YES **NOT YET**

Great! There are multiple organizations who have been approved by SPTF + CERISE to conduct Client Protection Certifications! Find out more here.

Your organization is on the right track--keep going! Let us know how we can help: cppathway@sptfnetwork.org



Client Protection Pathway