



March 17–19, 2026 | Washington, DC

# 2026

## CDFI Coalition Annual Institute

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### Attendee Briefing & Hill Visit Overview

Tuesday, March 10, 2026

# Agenda for Today's Call



## Agenda Overview

Walk through the full Institute schedule across all three days so you know what to expect.



## Hill Visit Guidance

How to schedule your own Congressional meetings and what support we can provide.



## Talking Points & Fact Sheets

Overview of fact sheets and how to use them, printed copies available at the Institute.



## Q&A

Open floor for questions

# Institute Agenda at a Glance

## Tuesday, March 17

Advocacy Training Day (Included with registration)

1:00 PM Welcome

1:05 PM Overview and Key terms to know

1:20 PM Panel: Advocacy Lessons from CDFI Leaders

Break

2:30 PM Panel: What Congress & Staff Need

3:40 PM Wrap Up & Adjourn

## Wednesday, March 18

Day 1 — Sessions & Hill Visits

8:30 AM Breakfast

9:00 AM Welcome — CDFI Coalition

9:15 AM JPMC Welcome, Kevin Goldsmith

9:30 AM WKKF Remarks, Shana Bartley

9:45 AM 2026 Progress Report Presentation

10:15 AM Washington Update

10:45 AM Break

11:00 AM Perspectives from the Hill

12:00 PM Break to serve Lunch

12:20 PM Perspectives from Practitioners (over lunch)

**1:00 PM Hill Visits**

5:30 PM Briefing — SD-G50

6:30 PM Reception — SD-G50

## Thursday, March 19

Day 2 — Annual Meeting & Sessions

*\*Times to be finalized pending Fund approval\**

7:30 AM Breakfast

- Annual Business Meeting
- Welcome
- Kresge Foundation Remarks, Aaron Seybert
- Investors Panel
- Possible Remarks from the CDFI Fund
- Midterm Elections Outlook, Kyle Kondik, UVA Center for Politics
- Ownership Economy & CDFIs Panel

~12:30 PM Adjourn

★ Hill visits take place Wednesday afternoon (panels end ~1 PM) — you may also schedule at any time that works for you

# Congressional Hill Visits

1

## Schedule Your Own Meetings

Offices respond better to constituents reaching out directly. We're happy to help draft your outreach or provide staffer contact info.

2

## Reach out Now

If you have not already, reach out and ask for availability from staffers now.

3

## Log Your Meetings

Once requested or confirmed, add to the shared spreadsheet or email [madison@rapoza.org](mailto:madison@rapoza.org) with the details.

4

## Connect With Other Attendees

Use the [spreadsheet](#) or request a list of attendees to collaborate with other organizations in your area on meetings if you would like to.

5

## Materials and Talking Points

Fact sheets and talking points shared today with printed versions available at the Institute

## Need help or have questions?

Email Madison at [madison@rapoza.org](mailto:madison@rapoza.org)

*Note: We will not directly set up Hill meetings on your behalf — offices are more likely to respond to direct constituent requests. We are glad to assist with outreach, provide staffer contact info, or accompany you to meetings.*

# FY 2027 Appropriations Request Overview

## THE ASK

# \$324 million

for the CDFI Fund Program Account  
Level funding - same as FY 2024, FY 2025 & FY 2026 enacted

## BILL LANGUAGE REQUEST

*The Coalition also requests language requiring Treasury to publish applications and make awards within 9 months of enactment. The CDFI Fund has yet to release FY 2025 appropriations, leaving \$289 million unobligated.*

## CDFI FUND BY THE NUMBERS

### \$8:\$1

Private capital  
per grant dollar

### 1,383

Certified CDFIs  
(incl. 66 Native CDFIs)

### \$24.5B

Loans & investments  
in FY 2024

### 109K+

Businesses financed  
in FY 2024

### 45K+

Affordable homes  
funded in FY 2024

### 700K+

Consumer & homeownership  
loans annually

See the full appropriations request fact sheet for bill language text and detailed program history, available in print at the Institute and digitally.

# Fact Sheets & Advocacy Materials

- We will have the following fact sheets ready for you to take to your Hill meetings
- Available in print at the Institute and digitally in advance



## CDFI Fund - General Fact Sheet

Overview of the CDFI Fund, its mission, certified CDFIs, and programs: Financial Assistance, Technical Assistance, Native CDFI Assistance, Bank Enterprise Awards, and the Small Dollar Loan program.



## FY 2027 Appropriations Request

The Coalition's request for \$324 million in level funding, including proposed bill language requiring Treasury to publish applications and make awards within 9 months of enactment.



## Related Legislation

Fact sheets on key legislation with CDFI provisions:

- AFFORD Act : community development finance provisions
- Main Street Act : CDFI and small business lending provisions



## State-by-State CDFI Fact Sheets

Customized fact sheets for every Congressional district and state: CDFI activity, loan data, and impact stats specific to your Member's state and district. Use these to make the case locally and show your Representative exactly what CDFIs are doing in their backyard.



Email before the Institute



Available on the CDFI Coalition website



Printed hard copies provided at the Institute

# Logistics & Your Action Items

## LOGISTICS



### Institute Location

Washington Plaza Hotel (10 Thomas Circle NW)  
March 17- National Ballroom  
March 18-19- Grand Ballroom



### Hill Visit Window

Wednesday, March 18 afternoon (panels end ~1 PM)  
Briefing & Reception 5:30-6:30 Senate Dirksen G-50



### Materials Provided

Printed and digital general and appropriations fact sheets, talking points, and other advocacy materials will be provided at the Institute.

## YOUR ACTION ITEMS

1

### Submit appropriations requests if you have not already

Use the form on their website from the shared spreadsheet and notify Madison when done.

2

### Check your inbox

If you indicated interest in Hill visits during registration, you've already received outreach from us, all updates and agenda will be sent through email.

3

### Request Hill meetings

Contact Congressional offices to schedule

4

### Log your meetings

Add confirmed or pending meetings to the shared spreadsheet or email [madison@rapoza.org](mailto:madison@rapoza.org).

5

### Arrive ready to advocate

All fact sheets and talking points will be available at the Institute, in print and digitally.

Questions? [madison@rapoza.org](mailto:madison@rapoza.org)



## Questions?

Feel free to reach out to [madison@rapoza.org](mailto:madison@rapoza.org) after this call and anytime before or during the Institute

# Thank You See You in Washington!

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March 17–19, 2026 | Washington Plaza Hotel

Advocacy Training:	Tuesday, March 17
Main Sessions:	Wednesday, March 18
Hill Visits:	Wednesday afternoon (~1 PM onward)
Day 2 & Adjourn:	Thursday, March 19