

# CDFI Fund Congressional Outreach 101

## Background

The incoming Trump Administration has announced plans for a new Department of Government Efficiency, which would slash an estimated \$2 trillion in federal government spending. Although the Administration has not yet specified where these cuts would be made, it is very likely that the CDFI Fund will be part of the proposed cuts at this magnitude. When the budget proposal reaches Congress, it will be up to legislators to determine the final budget and appropriations, including for the CDFI Fund. With this in mind, we are calling on CDFIs to advocate to your Senators and Representatives to protect this vital source of community development capital and communicate the transformative impact of the CDFI movement in your communities.

## How to Contact Your Legislators

1. Enter your institution's and/or your branches' address(es) in Congress's [Find Your Members tool](#).
2. Once you have identified your Senators and Representative(s), do a Google search to find their website and navigate to their contact page, or utilize the [Senate Contact Directory](#) and [House Contact Directory](#).
3. Reach out via email, phone call, or webpage contact form and request a meeting with the Congress member(s) or their legislative staffer(s) on finance and economic policy. Introduce yourself, your institution, and provide some brief background on the work your CDFI does to serve constituents in their state or district and your interest in discussing the importance of community development finance. Feel free to customize the **email template** provided in this toolkit or compose your own meeting request if preferred. Please attach a customized version of the **full letter template** to provide additional context and detail.
4. Follow up as needed—often the schedulers and staffers manage large volumes of incoming meeting requests, and it can take a few follow ups to get a meeting scheduled. If you have any partner organizations with existing relationships with the Congress member's office, consider asking for an introduction through a partner.

## Communicating Effectively with Your Legislators

1. Do some research on your Congress member(s) before meeting to understand their background, any relevant committees they're on, and positions they've taken in

favor or against bills on community development finance and related topics. This information is usually available on their official website and can provide useful context to understand where your priorities are already aligned and where you may need to communicate strategically to bridge differences.

2. Have a basic agenda in mind to focus the conversation.

- **Introductions:** Kick off the meeting with introductions of your team and your CDFI, explaining the work you do to serve your community and how it aligns with the Congress member's interests and priorities.
- **Raise the Importance of the CDFI Fund:** Be ready to convey why preserving the CDFI Fund is important to people in your community. We encourage you to utilize the **talking points** and **state CDFI profiles** we've provided in this toolkit, and we also strongly recommend preparing a few **member/borrower impact stories** to showcase how the Fund has helped your credit union make a real difference in people's lives.

Personal storytelling can emphasize the powerful, human element to the everyday work of CDFIs and provide a compelling complement to the facts and figures in the talking points. If possible, **invite a member/borrower** who has benefited from your institution's CDFI funding to join the meeting and share their experience firsthand.

When framing the story, be sure to draw a clear line from the CDFI Fund to the member's accomplishments and local impact. Describe their initial unmet need, how the CDFI Fund enabled your institution to provide them with capital, and how that capital was leveraged to improve life for the member/borrower and the broader community (e.g. becoming a first-time homebuyer, expanding locations of a small business, hiring local employees, etc.).

If applicable, thank the Congress member for any support they have shown for CDFIs in the past and describe how that support has resulted in tangible benefits for your community.

- **Make the Ask:** Ask your Congress member to support the preservation and full funding of the CDFI Fund in the next appropriations cycle and thank them for their time. You may also offer your CDFI as a resource for constituents in need of affordable financial services and/or express your openness to future collaboration on the Congress member's economic development goals.

### 3. Additional Suggestions:

- **Bring Materials Communicating Your CDFI Impact:** If you have a brochure, pamphlet, or fact sheet about your CDFI's impact on hand, you can bring a few to distribute at the meeting. Having a physical reminder of your meeting can help the Congress member's office remember your CDFI and your ask after a long day of constituent meetings. Exchanging business cards and contact info at the end of the meeting can also ensure the Congress member's office is able to reach out directly if they have any follow-up questions.
- **Invite the Congress Member to Visit a Business or Project Your CDFI Funded:** Much like sharing a member impact story, inviting a Congress member to witness the positive impact CDFI funding has in your community firsthand can deepen your relationship and make a more powerful appeal. It can also provide an opportunity for the Congress member to meet constituents they may not otherwise engage with and appreciate the consequences on the ground if the CDFI Fund's budget is reduced or eliminated.