



Overview

Congressional recess periods are a great opportunity to extend an invitation to your member of Congress or their staff to visit your CDFI and meet your borrowers. The goal of a site visit is to educate your Member and their staff about the work you are leading in their communities and to build support for CDFI Fund programs.

OFN's congressional site visit toolkit contains tips and sample materials for you to use as you plan your site visit. *The next congressional recess is April 10-21 so send your site visit request today!* This could be a chance to turn a skeptic into a supporter, and a supporter into a champion.

Preparation Tips

The following tips are meant to be a guide as you prepare for a site visit.

- **Assess your congressional delegation:** Check to see if a member of the House or Senate Appropriations Committees represents your district/state. Securing a site visit for an appropriator is a top priority to build support for the CDFI Fund. However, if your member of Congress is not on either Appropriations Committees, it is still important to invite your Member to a site visit. The Member can gain a better understanding of the work you are leading and weigh-in when a vote for CDFI Fund funding comes up for consideration.
- **Select a great project:** Be sure the site you are going to visit with the member of Congress is a success story. If possible, pick a project that has had a widespread impact, i.e., a small business that has created multiple full-time jobs, and would not have been possible but for the loan from your CDFI.
- **Communicate actively with congressional staff:** Provide as many details as possible to the staff in advance of the site visit, including background information about the project you will visit, who will attend the site visit, a draft itinerary of the visit, and topics that you plan to discuss.
- **Ensure all participants are prepared:** Make sure everyone that will talk with the member of Congress and their staff is comfortable with the details of how your CDFI supported this project.
- **Highlight your work in their district/state:** While you will likely only be able to show the member of Congress one site, be sure to have information and data about the other projects you fund in their district/state. You can create a very simple one-pager that includes 2-3 other brief success stories and details of how much your CDFI has invested in the district, number of jobs created/retained, affordable housing units created, businesses financed, etc.

“Day- Of” Tips

The following tips are meant to be a guide during a site visit.

- **Highlight public/private funding:** Make sure that the member of Congress and their staff knows that CDFI Fund programs incentivize investments from the private sector in distressed rural, urban, and Native communities.
- **Tailor your message to their interest areas:** If the member of Congress serves on the Appropriations Committee, highlight the importance of CDFI Fund appropriations to your CDFI and the projects financed in their district/state. It’s also helpful to connect the site visit with the elected official’s legislative interests. For example, if the member of Congress is a veteran or focuses on veterans’ issues, highlight a story or project in which your CDFI financed a project that supported a veteran borrower.
- **Incorporate borrower stories to your narrative:** This will allow you to highlight how the funds appropriated by Congress are leveraged by CDFIs and invested in communities within the legislator’s district/state.
- **Keep focus on Member’s constituents:** Members of Congress are always more willing to champion a cause if it directly improves the lives of their constituents. While the project they visit will be in their district, still try to tie in as many constituents as possible.
- **Check your personal partisan politics at the door:** This site visit should focus on your CDFI and your borrowers. Avoid bringing up political issues.

OFN Resources

As you prepare for your site visit, OFN can:

- Assist you to prioritize key members of your congressional delegation to schedule a site visit.
- Research policymakers’ interests and support of CDFI industry programs.
- Showcase your site visit via social media.

OFN Contact Information

If you have any questions as to how to schedule a site visit or would like for OFN to showcase your site visit via social media, please contact:

- Liz Lopez, EVP of Public Policy at llopez@ofn.org
- Lindsay Li, Social Media Specialist & Blog Editor at lli@ofn.org

Supplemental Materials

- Sample InvitationPg. 3
- Sample ItineraryPg. 4
- Social Media TipsPg.5
- Sample Talking PointsPg. 6
- CDFI Fund FundingPg. 7
- Senate Appropriations Committee Members & their Twitter Handles .Pg. 8
- House Appropriations Committee Members & their Twitter Handles ..Pg. 9-10
- 2017 Congressional CalendarPg. 11

Sample Invitation

General Instructions: Call the member of Congress' district office to request an email address for the in-district scheduler. You can find the contact information for your member of Congress in their web page. Send the invitation, if possible, at least four weeks before the site visit.

Place the sample invitation on your CDFI's letterhead. The highlighted portions are suggested areas where you can include specific information about your CDFI's activities. Please tailor for your specific event/work as necessary and if you are sending the invitation to a Senator or Representative.

March 14, 2017

The Honorable Robert Brady
2004 Rayburn House Office Building
Washington, DC 20515

Dear Congressman Brady,

I am writing today to invite you to tour a community development financial institution (CDFI) project in your district during the April 2017 congressional recess. This will be a chance for you to see how we are investing in local communities to create new opportunities for your constituents.

(Tell them about your CDFI briefly, provide basic stats about your activity in their district) [Insert name of your CDFI] is a certified CDFI founded in 1991. We are committed to our mission of providing distressed urban, rural, and Native communities with access to responsible and affordable capital. From our experience, it is clear that local communities can best spur their own revitalizations when provided with the proper tools. Over the past twenty years, we have invested [insert amount of funds] into your district, creating [insert number] new jobs. We are currently financing [insert number] projects in your district and constantly searching out new opportunities to invest in the communities we serve.

(Provide specific information about the project) We would like to have you visit Small Business A. They could not get a loan to expand their operations because no traditional financial institution serves their community. Our CDFI provided Small Business A with a \$10,000 loan in 2015. As a result, they were able to expand their operations and create three new full-time jobs.

(Provide details about the visit: date, time, attendees) We would be honored to have you visit Small Business A on the morning of **April 11**. However, if another date is better for you please let us know. The owner of Small Business A and our CDFI staff will be on hand to discuss our work in your district and answer any questions that you may have. John Doe at jdoe@cdfi.com or 215-555-2334 will be in touch to coordinate this site visit.

Sincerely,

CEO CDFI

Sample Site Visit Itinerary

This sample itinerary provides tips on how to structure a site visit. It's important to have a plan heading into a site visit, but make sure that it works for your individual circumstances and tells an effective story about the work your CDFI does for the community. Also, be sure to allocate your time appropriately. Ask the staff how much time you'll have in advance and be sure to use all of that time.

Tentative Agenda for Congressional Site Visit April 11, 2017

- 10:00am Congressman Brady and staff arrive.
- 10:00am-10:10am Welcome and introductions.
■ *Provide a brief overview of the site visit, i.e., tell them you will show them around, answer their questions, etc. It is vital that you make them feel comfortable and welcome—like you would treat any guest.*
- 10:10am-10:40am Tour the CDFI project and meet the beneficiaries of the project.
■ *Show the member of Congress around the project. This is also a great chance for them to talk to the individuals that received the support from your CDFI. Let them tell their story about how CDFIs provided them with an opportunity they would not have otherwise.*
- 10:40am-11:00am Answer questions and discuss the CDFI industry.
■ *Be sure to offer the chance to answer questions. If you do not know the answer to a question the member of Congress or staff asks, answer honestly, but be sure to follow up with an answer soon after the visit. Also explain how this project is only an example of the work you do. This would be the opportunity to provide the member of Congress/staff with district or state level information about your investments in the district, jobs created, etc.*

Social Media Tips

We encourage you to use social media to showcase your congressional site visit and foster widespread recognition and support for local CDFI projects. OFN can also showcase your visit via social media! Check out our [#CDFIsInvest campaign toolkit](#) which has additional sample tweets and graphics. If you have any social media questions, please contact Lindsay Li at lli@ofn.org.

The highlighted portions are suggested areas where you can include specific information about your CDFI's activities, the member of Congress, and your city, district or state. Please tailor for your specific event/work as necessary.

Tips and Tricks

- Use #CDFIsInvest to participate in our national year-long CDFI social media campaign to ensure funding for the CDFI Fund at \$250 million for both FY17 and FY18.
- Build your own tweets and use photos of the project to increase engagement.
- Share a highlight of how your CDFI played a role in your borrower's success or highlight impact data.
- Mention @oppfinance so we can retweet your tweets.
- Be sure to keep your posts focused on CDFIs and avoid partisan politics.

Twitter

Generate excitement about your upcoming site visit:

- Excited to show @YourRep how we are creating opportunity with @[insert small business] in Philadelphia.
- Welcoming @YourRep to our project with @[insert small business] to share how #CDFIsInvest in PA-01 through #smallbiz financing.

Thank your lawmaker for their time

- Just gave a tour to @YourRep and shared how #CDFIsInvest \$[insert amount] in #smallbiz in [insert city or district] [include picture of Rep at the site].
- Thank you @YourRep for visiting [insert business] and listening to Pamela's growing small business story. #CDFIsinvest and create #jobs.
- .@YourRep is visiting a project we funded today! In 2016, we created X #jobs, X #smallbiz growth, and X #communityfacilities. #CDFIsInvest in America!

Facebook Posts

Share the news that you the member of Congress is visiting your CDFI:

- This morning, I was able to share with @YourRep the impact CDFI Fund financing had on creating jobs in [insert city/district]. Thank you for a productive and exciting discussion about expanding access to capital and how #CDFIsInvest in America.

Hashtags

- #CDFIsInvest, #CDFIFund, #smallbiz, #jobs, #rural, #veterans, #AffordableHousing, #CommunityFacilities, #CharterSchools, #manufacturing.

Sample Talking Points

Highlight how CDFIs leverage private/public funds, how CDFIs provide responsible and affordable capital, and industry data.

- With leverage of at least \$10 dollars for every \$1 from the CDFI Fund, and a relatively small administrative budget, the CDFI Fund is a great deal for the American taxpayer.¹
- Growth and prosperity cannot be accomplished in places where capital does not flow. The strategy employed by CDFIs and the CDFI Fund is market driven.
- CDFI Fund programs require rigorous competitive application process for every award, and CDFIs must match FA awards with funds from non-federal sources.
- CDFIs provide access to capital, as well as non-financial resources like training and technical assistance that traditional financial institutions often do not offer, and they have the impact to show for it.
- CDFIs as drivers of job creation and economic growth. Ex. In 2015, \$5 billion in affordable lending by OFN Members.²
- In 2015, OFN's Members achieved their results with a net-charge-off rate of just 0.4 %, nearly the same rate as FDIC-insured institutions.³

¹ https://www.cdfifund.gov/Documents/CDFI_infogrphic_v03Aaf.pdf.

² Opportunity Finance Institutions, Side-by-Side, 2015. Find it at ofn.org/publications.

³ Ibid.

CDFI Fund Funding

We are in an unusual budgetary cycle with Congress still working to finalize the FY17 budget while simultaneously beginning to work on FY18 budget requests. The April 2017 congressional recess is a great opportunity for you to make the case for strong funding for the CDFI Fund. OFN's ask is for \$250 million in funding for the CDFI Fund in both FY17 and FY18.

Senate's proposed FY 2017 budget

- \$233.5 million for the CDFI Fund.
- Continuation of the CDFI Bond Guarantee Program with \$500 million in guarantee authority.

House's approved FY 2017 budget

- \$250 million for the CDFI Fund.
- Continuation of the CDFI Bond Guarantee Program with \$250 million in guarantee authority.

FY 2016 CDFI Fund funding

- The CDFI Fund received \$233.5 million.
- The CDFI Bond Guarantee Program was continued with \$750 million in guarantee authority.

Senate Appropriations Committee Members & Their Twitter Handles

<http://www.appropriations.senate.gov/about/members>

*Financial Services and General Government (FSGG) Subcommittee Members

Republicans	Democrats
Thad Cochran (MS), <i>Chair</i> @SenThadCochran	Patrick Leahy (VT), <i>Ranking Member</i> @SenatorLeahy
Mitch McConnell (KY) @McConnellPress	Patty Murray (WA) @PattyMurray
Richard Shelby (AL) @SenShelby	Dianne Feinstein (CA) @SenFeinstein
Lamar Alexander (TN) @SenAlexander	Dick Durbin (IL)* @SenatorDurbin
Susan Collins (ME) @SenatorCollins	Jack Reed (RI) @SenJackReed
Lisa Murkowski (AK) @lisamurkowski	Jon Tester (MT) @SenatorTester
Lindsey Graham (SC) @LindseyGrahamSC	Tom Udall (NM) @SenatorTomUdall
Roy Blunt (MO) @RoyBlunt	Jeanne Shaheen (NH) @SenatorShaheen
Jerry Moran (KS)* @JerryMoran	Jeff Merkley (OR) @SenJeffMerkley
John Hoeven (ND) @SenJohnHoeven	Chris Coons (DE), <i>Ranking Member FSGG Subcommittee*</i> @ChrisCoons
John Boozman (AR)* @JohnBoozman	Brian Schatz (HI) @SenBrianSchatz
Shelley Moore Capito (WV), <i>Chair FSGG Subcommittee*</i> @SenCapito	Tammy Baldwin (WI) @SenatorBaldwin
James Lankford (OK)* @SenatorLankford	Chris Murphy (CT) @ChrisMurphyCT
Steve Daines (MT)* @SteveDaines	Joe Manchin (WV) (<i>new</i>)* @Sen_JoeManchin
John Kennedy (LA) (<i>new</i>) @JohnKennedyLA	Chris Van Hollen (MD) (<i>new</i>)* @ChrisVanHollen
Marco Rubio (FL) (<i>new</i>) @marcorubio and @SenRubioPress	

House Appropriations Committee Members & Their Twitter Handles

<http://appropriations.house.gov/about/members/>

*Financial Services and General Government (FSGG) Subcommittee Members

Republicans	Democrats
Rodney Frelinghuysen (NJ-11), <i>Chair</i> @USRepRodney	Nita Lowey (NY-17), <i>Ranking Member</i> @NitaLowey
Harold Rogers (KY-5) @RepHalRogers	Marcy Kaptur (OH-9) @RepMarcyKaptur
Robert Aderholt (AL-4) @Robert_Aderholt	Pete Visclosky (IN-1) @RepVisclosky
Kay Granger (TX-12) @RepKayGranger	Jose Serrano (NY-15)* @RepJoseSerrano
Mike Simpson (ID-2) @CongMikeSimpson	Rosa DeLauro (CT-3) @rosadelauro
John Culberson (TX-7) @CongCulberson	David Price (NC-4) @RepDavidEPrice
John Carter (TX-31) @JudgeCarter	Lucille Roybal Allard (CA-40) @RepRoybalAllard
Ken Calvert (CA-42) @KenCalvert	Sanford Bishop (GA-2)* @SanfordBishop
Tom Cole (OK-4) @TomColeOK04	Barbara Lee (CA-13) @RepBarbaraLee
Mario Diaz-Balart (FL-25) @MarioDB	Betty McCollum (MN-4) @BettyMcCollum04
Charlie Dent (PA-15) @RepCharlieDent	Tim Ryan (OH-13) @RepTimRyan
Tom Graves (GA-14), <i>Chair FSGG Subcommittee</i> @RepTomGraves	Dutch Ruppersberger (MD-2) @Call_Me_Dutch
Kevin Yoder (KS-3)* @RepKevinYoder	Debbie Wasserman Schultz (FL-23) @DWStweets
Steve Womack (AR-3) @rep_steveWomack	Henry Cuellar (TX-28) @RepCuellar

House Appropriations Committee Members & Their Twitter Handles *cont.*

Republicans	Democrats
Jeff Fortenberry (NE-1) @JeffFortenberry	Chellie Pingree (ME-1) @chelliepingree
Tom Rooney (FL-17) @TomRooney	Mike Quigley (IL-5), <i>Chair FSGG Subcommittee</i> @RepMikeQuigley
Charles Fleischmann (TN-3) @RepChuck	Derek Kilmer (WA-6) @RepDerekKilmer
Jaime Herrera Beutler (WA-3)* @HerreraBeutler	Matt Cartwright (PA-17)* @RepCartwright
David Joyce (OH-14) @RepDaveJoyce	Grace Meng (NY-6) (<i>new</i>) @RepGraceMeng
David Valadao (CA-21) @RepDavidValadao	Mark Pocan (WI-2) (<i>new</i>) @repmarkpocan
Andy Harris, MD (MD-1) @RepAndyHarrisMD	Katherine Clark (MA-5) (<i>new</i>) @RepKClark
Martha Roby (AL-2) @RepMarthaRoby	Pete Aguilar (CA-31) (<i>new</i>) @RepPeteAguilar
Mark Amodei (NV-2)* @MarkAmodeiNV2	
Chris Stewart (UT-2)* @RepChrisStewart	
David Young (IA-3)* @RepDavidYoung	
Evan Jenkins (WV-3) @RepEvanJenkins	
Steven Palazzo (MS-4) @CongPalazzo	
Dan Newhouse (WA-4) (<i>new</i>) @RepNewhouse	
John R. Moolenaar (MI-4) (<i>new</i>)* @RepMoolenaar	
Scott Taylor (VA-2) (<i>new</i>) @Scotttaylorva	

2017 Congressional Calendar

2017 Congressional Calendar

■ House in session
 ■ Senate in session
 ■ Both chambers in session
 ■ Holiday

January

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Sources: "Tentative 2017 legislative schedule," United States Senate, November 21, 2016; "115th Congress, first session," House Majority Leader Kevin McCarthy, November 30 2016.