



CDFI RESEARCH STUDY KICKOFF WEBINAR

WHEDA

Oct. 6, 2020

TODAY'S OUTLINE

- Welcome from Joaquín
- Opportunity summary
- Project team introductions
- Timeline
- Discussion
- Next steps
- Q & A

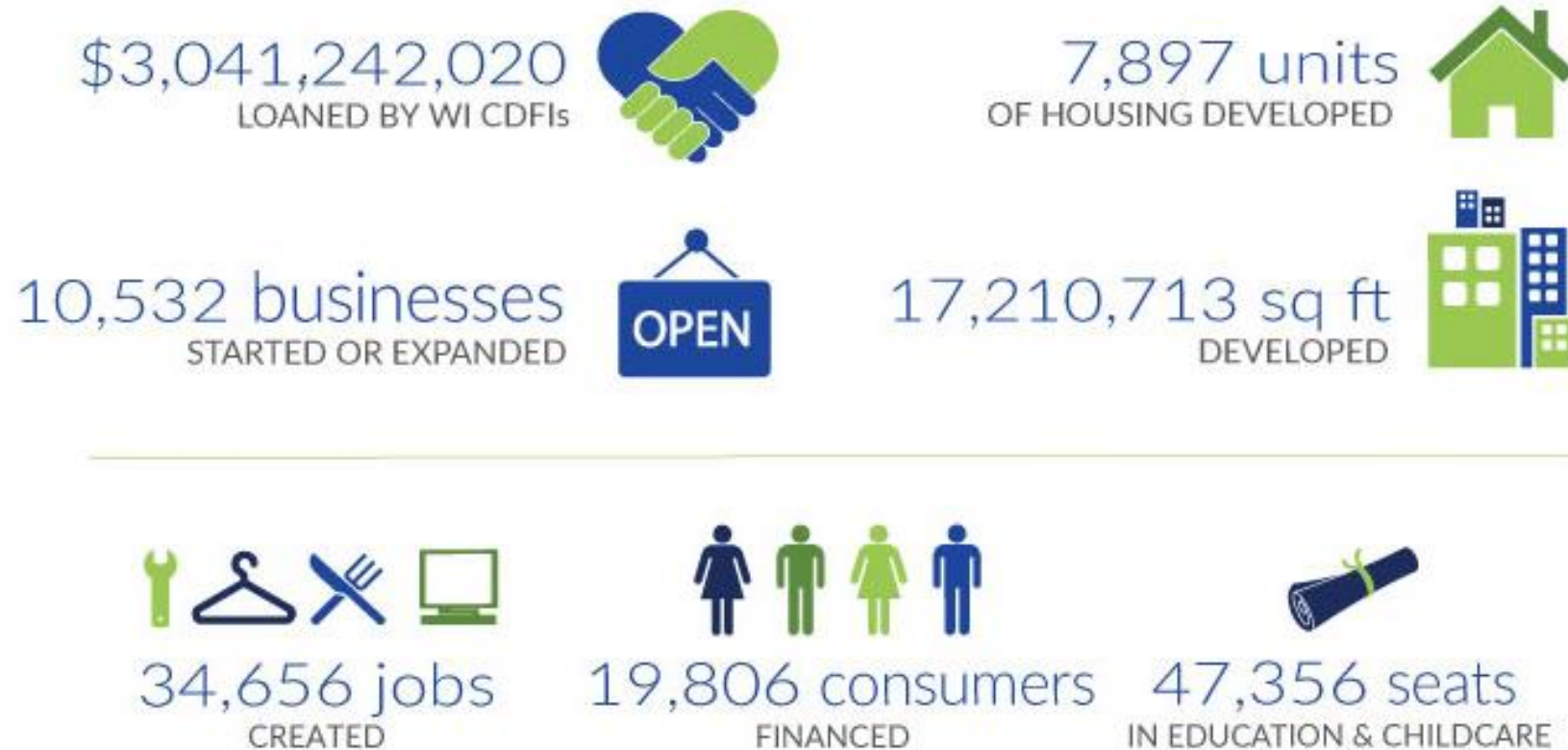
WELCOME FROM JOAQUÍN



Joaquín J. Altoro,
WHEDA Chief Executive Officer

IMPACT OF CDFIs in Wisconsin (2005 to 2018)*

Wisconsin CDFIs serve low- to moderate-income households, diverse consumers and individuals who face barriers to financing.



OPPORTUNITY SUMMARY

WHEDA CDFI Research

- Listen and learn from Wisconsin CDFI network
 - Challenges and opportunities in our state
 - The landscape of mission and impact
- Understand and map the CDFI lending ecosystem
 - Characteristics, capacities, etc. of Wisconsin CDFIs
 - Communities that CDFIs are serving
 - Diverse stakeholders
- Frame out what comes next
 - Recommendations/observations from third-party researcher
 - Insights from participants
 - Share what we learn

INTRODUCTION: P3 DEVELOPMENT GROUP



**Genyne
Edwards**

P3 Partner



**Dominique
Samari**

P3 Partner



Jessie Tobin

P3 Project
Manager



Salli Martyniak

Community
Matters, LLC
Principal

INTRODUCTION: P3 DEVELOPMENT GROUP



HUMBLE INQUIRY

We are skilled process consultants. We listen and stay genuinely curious about client challenges and opportunities. We ask the questions that lead to impactful solutions.

CROSS SECTOR ENGAGEMENT

We work across sectors to inspire new ways of thinking about challenges. Our strength lies in our ability to build relationships, engender trust and leverage collective assets for real change.

DIVERSITY, EQUITY & INCLUSION LENS

We offer strong and experienced voices for inclusion and equity. We use a diversity, equity and inclusion lens to inform our work and the client solutions we co-create.



STUDY PROCESS AND TIMELINE



STUDY PARTICIPATION STEPS

01

Watch your email.

We'll send a follow up message with the survey link.

02

Complete the online survey.

03

Schedule an interview.

At the end of the survey, click on the sign-up link to schedule an interview.

NEXT STEPS

- WHEDA is grateful for your feedback, which we will use to inform the study design.
- Once the study is underway, please share your reality and your dreams.
- WHEDA will report back to the CDFI community and all of you here today following the study's conclusion.
- The study will guide WHEDA's long-term strategy to build community development capacity in the months and years ahead.



QUESTIONS?



THANK YOU!



WHEDA