



50 Years Later: Exploring the CDFI Industry's Roots  
February 7, 2023

Webinar Recording: [https://youtu.be/jAjiL\\_x-Zx0](https://youtu.be/jAjiL_x-Zx0)

# Webinar Agenda

- Welcome - Kristen Scheyder, Senior Program Officer, Citi Foundation
- CDFI 101 Toolkit Overview
- Panel - 50 Years Later: Exploring the Roots of the CDFI Industry
- Q&A

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Webinars

## 50 Years Later: Exploring the Roots of the CDFI Industry

FEBRUARY 7, 2023 | 2:00-3:00 PM ET



**JULIANA EADES**  
Former President &  
Founding Executive Director of  
New Hampshire Community Loan Fund



**MARY HOUGHTON**  
Co-Founder of ShoreBank



**SETH JULYAN**  
EVP, Network Services  
Opportunity Finance Network



**BETH LIPSON**  
Interim President, CEO & CFO  
Opportunity Finance Network

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# CDFI 101 Toolkit

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## CDFI 101 TOOLKIT

February 2023



Citi Foundation



This resource was developed with support from the Citi Foundation.

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## CDFI 101: History of the CDFI Industry

February 2023



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# Access OFN Resources & Toolkits via CDFI Connect!

## CDFI 101 Toolkit Link:

<https://www.cdficonnect.org/viewdocument/cdfi-101-toolkit>

## Navigating CDFI Connect:

1. Login to CDFI Connect
  - If you're not already a CDFI Connect member, you can join for free at [www.cdficonnect.org](http://www.cdficonnect.org)
2. Navigate to the "Resources" dropdown menu and select "[OFN Resources](#)"
3. Find the "OFN Best Practices Resources" folder on the left side of the page and click on it to access the CDFI 101 Toolkit – as well as new ones in the future!



# OFN 2023 Trainings: CDFI 101 Orientations

## In 2023, OFN will offer two options for CDFI 101 Orientations:

### 1) In-person, half-day (3-hour) orientations adjacent to OFN events.

Date	Location	Related OFN Event
April 25, 2023	Phoenix, AZ	Phoenix Regional Meeting
June 22, 2023	Chicago, IL	2023 OFN Small Business Finance Forum (June 20-21, 2023)
August 8, 2023	Boston, MA	Boston Regional Meeting
October 15, 2023	Washington, D.C.	2023 OFN Conference (October 15-18, 2023)

**2) Custom virtual or in-person orientation options:** if you are seeking to host an overview or orientation to CDFIs and have at least 20 attendees, OFN can provide a custom CDFI 101 Orientation virtually or in-person. Complete [this survey](#) to request a custom orientation!



CDFI Operations & Human Capital - March 21, 2023

# Save the Date! 2023 OFN CONNECT+ Forum: CDFI Operations & Human Capital

- **Tuesday, March 21, 2023 from 1-5pm ET**
- **Join us as we consider how CDFIs can most effectively recruit, develop, and retain talent; optimize the efficacy and impact of products and programs; build stronger systems and policies; and invest in operations and technology**
- **Will feature the release of new toolkits**
- **Registration is complimentary and will open next week!**

**Q&A:**  
**Please submit**  
**your questions**  
**via the Zoom**  
**Q&A Box!**

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Thank you for attending today's webinar!