

# 2025 Small Business Finance Forum & OFN Programming

April 28, 2025

# Opportunity Finance Network

The nation's leading intermediary and network focused on community development finance with a mission of ensuring underinvested communities have access to affordable, responsible financial products and services.

## INVESTMENT

A financial institution with over \$1 billion in total assets; trusted investment partner with nearly 40 years of impact investing experience

## MEMBERSHIP

A national membership organization serving 477 CDFIs; deep focus on serving communities with greatest need

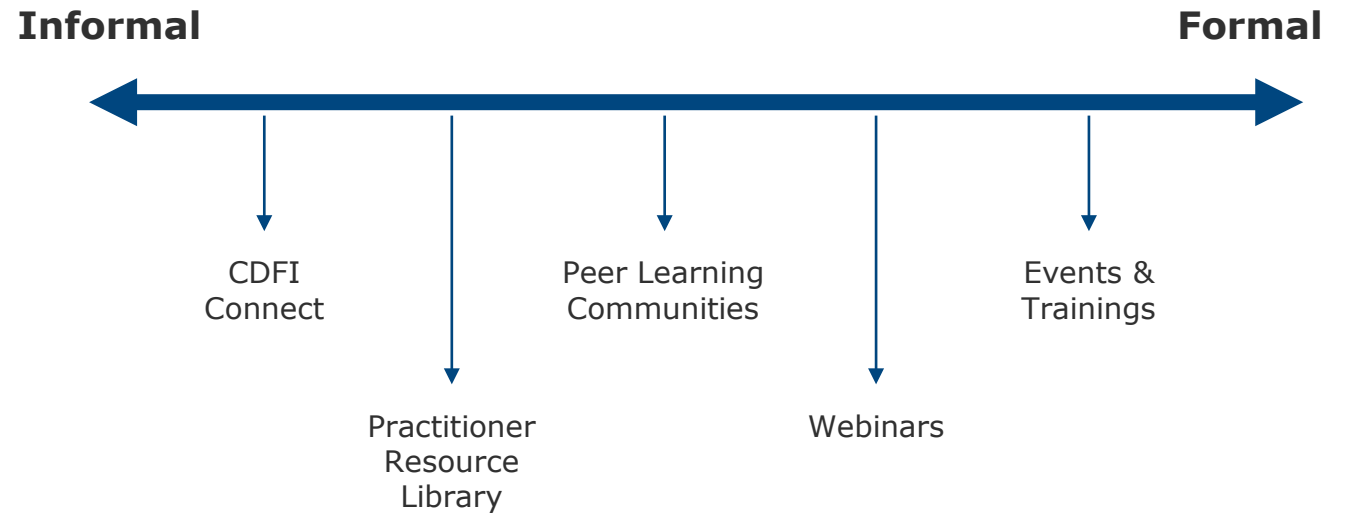
## ADVOCACY

A trusted voice to policymakers and government partners on critical strategies to increase community investment



# Continuum of Services

OFN offers a growing suite of actionable, practitioner-focused programs, events, training, and services tailored to the CDFI industry, catering to a range of job functions and career stages.



OPPORTUNITY FINANCE NETWORK®

# SMALL BUSINESS FINANCE FORUM



**June 11 –13  
Austin, TX**

**Register Here:**

<https://web.cvent.com/event/78938a44-c0e7-4036-bfc6-e7122e4bbfe2/summary>



OPPORTUNITYFINANCE NETWORK® 

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# SMALL BUSINESS FINANCE FORUM



## 2024 Highlights:

- 570+ attendees
- 150+ unique CDFIs, 17 funders and investors, 6 state and federal agencies, and other industry stakeholders
- Plenary speakers included SBA Administrator Isabel Casillas Guzman
- 24 breakout sessions across 6 tracks
- 80+ session speakers
- 17 exhibitors at the Expo

# 2025 SBFF Agenda Highlights

- Pre-Forum **training day**
- 3 mainstage **plenary sessions**
- 30 interactive **breakout sessions**
- 10 **networking sessions**
- Small Business Partner **Expo**
- CDFIs in Action **Tour**

View full SBFF agenda here: <https://web.cvent.com/event/78938a44-c0e7-4036-bfc6-e7122e4bbfe2/websitePage:ce376fd5-c84a-4d21-95be-8612ff226c7c>

# Trainings

- CDFI 101: Orientation to the Industry
- Financial Management Workshop
- Impact Measurement & Management 201
- Small Business Lending



*View more information on trainings at SBFF here:*

<https://web.cvent.com/event/78938a44-c0e7-4036-bfc6-e7122e4bbfe2/websitePage:4a164170-312f-4d14-a774-7295d71b1db2>

# Trainings

- You can register for just the trainings, and not the full Small Business Finance Forum!
- If you're interested in attending trainings only, reach out to our team at [developmentsservices@ofn.org](mailto:developmentsservices@ofn.org) to learn more.





# Breakout Tracks & Example Sessions

## Strategies for Entrepreneurial Success

- *Smarter Support: Digital Tools & Resources Driving TA Impact*

## Data-Driven Impact

- *The Effects of CDFI Fund Financial Assistance Awards*

## Policy in Action

- *Can I Still Say That? Navigating Messaging in the New Policy Environment*

*View more details on session tracks here:*

<https://web.cvent.com/event/78938a44-c0e7-4036-bfc6-e7122e4bbfe2/websitePage:a986a53f-07bf-4744-927d-c4d0476ee4de>

# Breakout Tracks & Example Sessions

## Scaling & Sustaining Loan Portfolios

- *Leading Practices: Loan Policy Workshop*

## Optimizing Operations & Strategy

- *The "Real" ROI of Investing in CDFI Technology Solutions*

## The State of Small Business

- *Catalysts for Collaboration: How CDFIs Can Fuel Small Business Ecosystems*

## Innovating for the Future

- *Uncertainty as a Constant: Innovating for What's Next*

# Other OFN Events & Programming

- In-Person Events
- Trainings
- Webinars
- Peer Learning Communities
- Practitioner Resource Library
- CDFI Connect

# In-Person Events

- **Annual OFN Conference** – the largest gathering for the CDFI industry!



- **Regional Meetings**
- **One-Day Practitioner Summits**

View the calendar at <https://www.ofn.org/events/>

# Trainings



OFN trainings provide industry- specific, tailored professional development opportunities to enhance your knowledge and skills, with a goal of helping you achieve greater impact at your CDFI and in your community.

- We offer half-day and full-day courses, delivered virtually as well as in-person adjacent to OFN events.
- View our growing training course catalogue and calendar at <https://www.ofn.org/events/cdfi-training/>

## Register for upcoming sessions:

- [Virtual Impact Measurement & Management \(IMM\) 101](#) - Wednesday, May 7
- [Virtual CDFI 101: Orientation to the Industry](#) - Thursday, May 15
- [Virtual Governance 101: Developing a Strong Board](#) - Wednesday, May 21
- [Virtual Governance 201: Effectively Managing a Board for Impact](#) - Thursday, May 29

# Webinars & Virtual Events

- Webinars
  - CONNECT+ Webinar Series
  - Public Policy updates
  - Research report releases
- Virtual CONNECT+ Forum
  - Series of virtual discussions and member-only office hours around a timely topic for the industry.
- Recordings available on OFN's Youtube Channel and CDFI Connect

OPPORTUNITYFINANCE NETWORK

The Business Model of CDFI Loan Funds:  
Research Report Release Webinar

ADRIENNE SMITH  
SVP, Research  
OFN

CLINT GWIN  
President & CEO  
Pathway Lending

WATCHEN BRUCE  
President & CEO  
Baltimore Community Lending

ASHLEY AUSTIN  
Senior Associate, Marketing  
OFN

CONNECT+

AI in Community Finance:  
Ethics and Opportunities

JANUARY 28, 2025 2:00 PM ET

DR. MICHAEL AKINWUMI  
Chief AI Officer  
National Fair Housing Alliance

LAURA KOZIEM  
Founder & Lead Marketing  
Strategist, Stop Whispering

ALEX LIRTSMAN  
Founder & CEO  
Corral Data

BULBUL GUPTA  
President & CEO  
Pacific Community Ventures

# Peer Learning Communities

Member-only **Peer Learning Communities** (PLCs) are virtual spaces to regularly connect and network with peers across the country in similar job functions. A key focus is sharing leading practices and advice on managing current challenges. Current PLCs are:

- CFOs & Financial Managers
- HR & Administrative Operations
- Marketing & Communications
- Research & Impact Measurement
- Development & Investor Relations
- Programs & Client Services
- Directors of Lending – sector based; launches May 2025
- Portfolio & Risk Managers - launches May 2025
- Board Members – launches Summer 2025

PLCs meet approximately 4-6 times annually. 2025 PLCs will restart in Q2 2025.

**Email [developmentservices@ofn.org](mailto:developmentservices@ofn.org) to learn more and join a Peer Learning Community!**

# CDFI Connect

CDFI Connect is our free, **online community of 13,000 active users** built by and for the CDFI industry. It's designed for peer knowledge exchange and professional networking.

Register at [www.cdficonnect.org](http://www.cdficonnect.org). If you have trouble signing in, please contact [community@ofn.org](mailto:community@ofn.org) or visit the [FAQs](#).



## Latest Discussion Posts

Add Discussion Post



**RE: EQ2 compliance report template**

By: [Katie McQuaid](#), 20 hours ago

Hi Dana! Are you looking for the annual letter that we send out that includes the new rolling maturity date? If so, feel free to send me an email at [kmcquaid@communityloanfund.org](mailto:kmcquaid@communityloanfund.org) and I can send you what we use. Thanks! Katie ----- ...



**EQ2 compliance report template**

By: [Dana Vincent](#), 2 days ago

Does anyone have a template for what you provide to banks annually for EQ2 compliance reporting? It seems that most investors are looking for the same information. -----  
-- Dana Vincent Compliance Analyst CLIMB Fund Charleston ...



**RE: Where is a good place to post a Director of Finance ...**

By: [Stephaney Kipple](#), 7 days ago

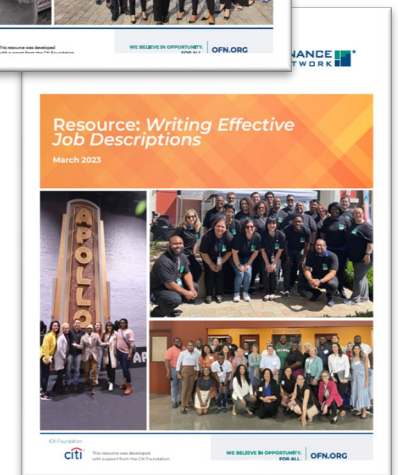
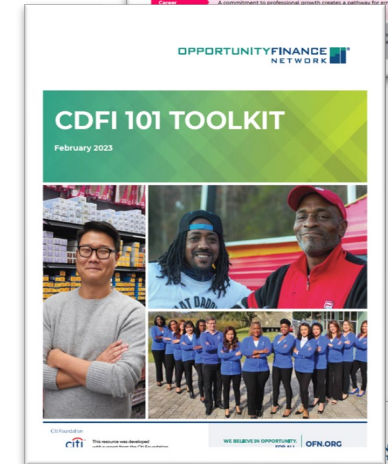
I like this site <https://jobs.thegiin.org/> -----  
Stephaney Kipple Multifamily Lending Manager Housing Trust  
Silicon Valley San Jose CA -----

More

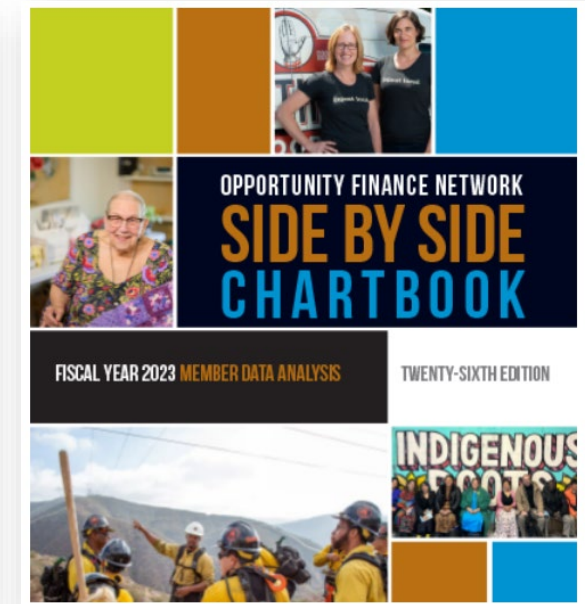
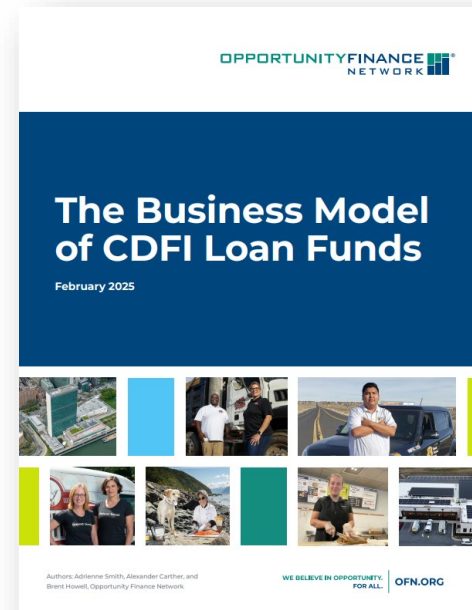


# Practitioner Resource Library

- CDFI Connect is also home to our growing practitioner resource library, which includes leading practice toolkits, templates, on-demand webinars, and guides created with input from CDFIs and industry experts.
- Current resources range from CDFI 101 to Cash Management and Loan Policies Toolkits.
- Resources are available at <https://www.cdficonnect.org/resources/ofn-resources>



# OFN Research



- ***Side by Side*** is an annual reference guide for industry practitioners, investors, and others interested in assessing the activity and performance of the opportunity finance industry.
- It presents data from OFN member financial institutions and includes peer group analyses for the primary financing sectors.

**Download all OFN Research publications for free from:**

- CDFI Connect: [www.cdficonnect.org/resources/ofn-resources](http://www.cdficonnect.org/resources/ofn-resources)
- OFN Website: <https://www.ofn.org/cdfi-resource-library/>

# Find Content by Practitioner Role

## *Example:* CDFI Financial Managers



### Practitioner Resource Library: Financial Managers

- [Cash Management Toolkit](#)
- [Treasury Strategies – 2025](#)
- [On-Demand | The CDFI Financial Manager's Guide to a Resilient Balance Sheet](#)
- [On-Demand | Building Organizational Resiliency Through Financial Management](#)



### Peer Learning

- Peer Learning Community: CDFI Financial Managers
- CECL Office Hours



### Training

- Financial Management Workshop
- Available in 2025: Financial Budgeting, CDFI Financial Statements 101

# Thank you!



Register to attend SBFF here:

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Stay up to date by joining OFN's email lists:

<https://www.ofn.org/subscribe/>

Reach out to our team to learn more about programming at  
[developmentservices@ofn.org](mailto:developmentservices@ofn.org).