



Advocacy Training 101

Texas CDFI Coalition
June 16, 2026



CAMEO
network



Agenda

- Welcome and Introductions
- Your voice is important
- Advocacy Basics
- Legislative Meetings
- Federal Legislative Landscape
 - Baylee Anderson, Public Private Strategies
- Toolkit
- Resources
- Survey



CAMEO Updates

- Building and Retaining Teams: Mission-Driven People Practices
June 18 and 25 | 12:00pm CT
- Introduction to Green and Clean Energy Lending for Small Business CDFIs
June 23 | 12:00pm CT



Why Your Voice Matters

Who are Texas Business Owners

- Women make up **44.9 percent** of all small business owners in Texas.
- Veterans own **5.6 percent** of the state's small businesses.
- About **33 percent** of Texas small businesses are owned by Hispanic entrepreneurs.
- **Fifteen percent** of small business owners in Texas are Black or African American.
- About **12.1 percent** of small businesses across the state operate in rural communities.





What is “Advocacy?”

Advocacy Basics

The act or process of supporting a cause or proposal (Merriam Webster Dictionary)

- **Effective advocates** influence or create policies, laws or regulations by using facts, their relationships, the media and messaging to educate decision makers on the changes they aim to bring for their cause
- Advocacy is a **process**, not an event; it's a **marathon**, not a sprint



Advocacy Basics



Advocacy encompasses a wide range of activities designed to influence public opinion and policy.

vs

Lobbying is a form of advocacy that attempts to influence specific legislation.





Advocacy Basics



Relationship Building

Storytelling

Communications





Basics: Relationship Building

- Join coalitions
- Signing on to letters of support initiated by others
- Support bills with letters of support
- Meet with legislators
 - Cultivate a champion
 - See the Change



When to Advocate

All The Time





When to Advocate

Example Federal Budget

- Oct 1-Sept 30 is the federal fiscal year
- February the President's budget comes out
- Budget goes to House and Senate committees
- Then to each floor
- Then to reconciliation committee
- Done by Sept 30 or a Continuing Resolution is passed



Meeting with Legislators

Prepare. Prepare. Prepare

- Identify the Issue/Purpose of the Meeting
E.g. Meet and Greet? Issue Based?
- Research: Issue and legislator's website for connection
- Set goals
- Plan an agenda



Suggested Agenda

Introduction



- Thank legislators/staff for their time
- Brief introductions
- Thank the legislator if they have done something positive for very small businesses
- If the legislator is carrying a bill you support or is on our priority list, be sure to thank them.



Suggested Agenda

The Why



- Highlight small businesses, their challenges, and the need to support the ecosystem – coaching, capital and connection
- Importance of a small business recovery to our communities
- Impact data
- Client stories



Suggested Agenda

The Ask



This is the goal... why did you want to meet with the legislator

- Discuss the bills or budget items on the bill priority sheet
- Pick one or two issues that stand out to you





Suggested Agenda

The Closing



- Anything you can do for them?
- Confirm any follow ups
- Invite for a business tour or town hall call with your clients
- Thank again
- Take a photo if allowed
- Tag @YourOrg and the legislator



Tips for Working with Policymakers



- Share **specialized knowledge** with your policymaker; don't assume he/she is an expert on this topic
- Make your story personal with **real** experiences
- **Face-to-face** visits are the most effective / **Video** 2nd most
- Explain how they can help you and how you can help them
- **Leave materials** behind – testimony, info sheet, resources

Tips for Working with Policymakers



- **Lead with your passion.** Talk briefly about why you do the work you do and what “gets you up in the morning.”
- **Impressions are important.** You are representing small business owners, not just yourself.
- **Check your politics at the door.** Effective advocacy requires developing relationships with everyone regardless of party affiliation.
- **Data is appreciated.** Use credible data in addition to the impact of the issue on your business.
- **Staff is often as important as the legislator.** Engage them.
- **Follow up.** The biggest complaint we hear is that there was only one meeting/communication with the legislator. They want to get to know you.
- **Offer assistance.** Engage with other business owners or organizations to which you belong.



Federal Landscape



Coordinated Policy Pressure on Community Lending

Timeline of federal actions: April - May 2026

April 22, 2026

Reg B Final Rule

CFPB removes disparate impact liability under ECOA, narrows discouragement standard, restricts SPCPs — core tools CDFIs rely on.

May 19, 2026

KYC Executive Order

EO directs CFPB and regulators to issue credit-risk guidance on lending to undocumented borrowers. Directs citizenship verification reforms.

April, 2026

CFPB Questionnaires

Political appointees order supervisory questionnaires to ≥4 CDFI loan funds — institutions never previously subject to CFPB oversight.

April 27, 2026

Treasury CDFI Probe

Treasury announces CDFI review for "predatory practices." Bessent signals rules to bar CDFIs from serving undocumented immigrants.

May 21, 2026

USCIS Green Card Memo

PM-602-0199: green cards inside U.S. only in "extraordinary circumstances." Forces ~1.2M applicants to leave country to apply.

CFPB - Supervisory Questionnaires

April 2026

- Sent to at least 4 CDFI loan funds
- First-ever CFPB oversight of these institutions
- Ordered by political appointees, not career staff
- Agency simultaneously cutting 90% of supervision division

4+

CDFI's questioned

CDFI's had never been subject to CFPB examination. Expanding into a new class of institutions while gutting supervisory capacity is not standard regulatory behavior.

KYC Executive Order

May 19th, 2026

- Directs CFPB to issue credit-risk guidance on lending to undocumented borrowers
- Requires citizenship verification reforms under Bank Secrecy Act
- Could apply retroactively to existing account holders
- Treasury Sec. Bessent: "not unreasonable" to know who is in the banking system

Sec. 4

EO provision directing CFPB

April CFPB questionnaires now look like pre-implementation groundwork — gathering data before the EO formally required credit-risk guidance from regulators.

USCIS Green Card Policy Memo

May 21st, 2026

- Green cards granted inside the U.S. only in "extraordinary circumstances"
- Approximately 1.2 million pending applicants affected
- Officers directed to make case-by-case discretionary determinations
- Two days after the KYC Executive Order

1.2 million

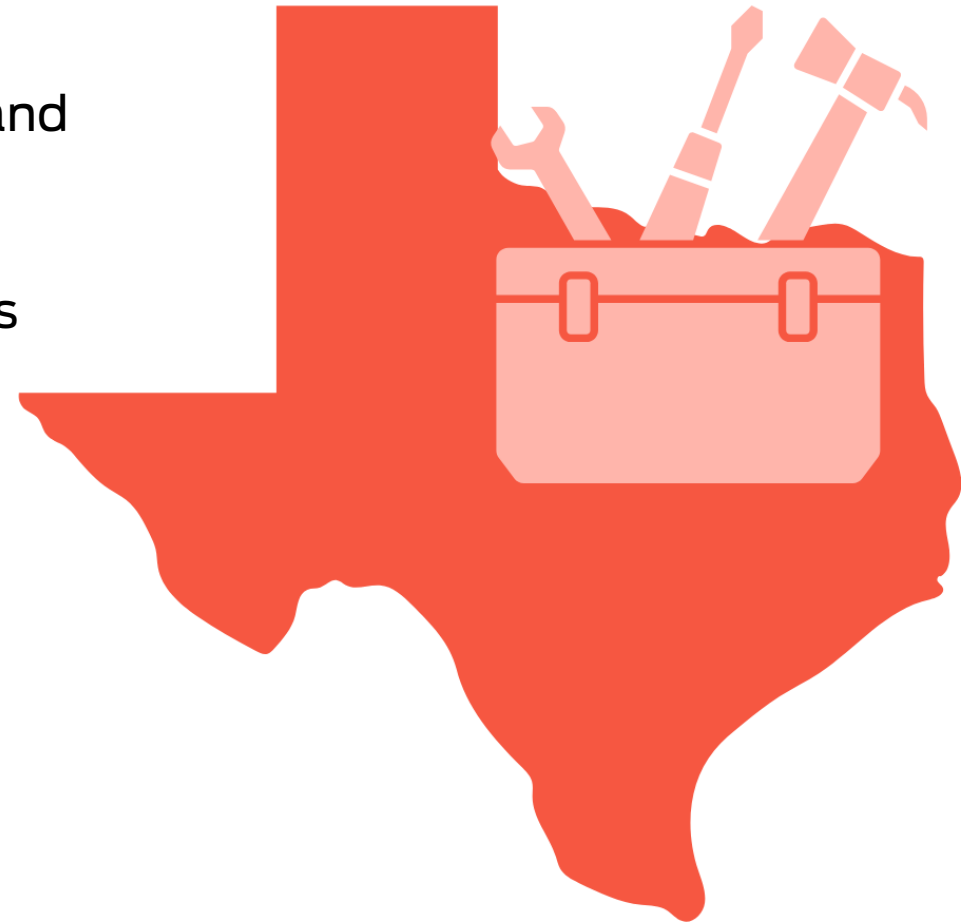
Pending applicants affected

Financial link: People with mortgages, auto loans, and CDFI relationships. Making their immigration status precarious expands the pool the KYC EO frames as credit risks.



Texas Toolkit

- Summer and Fall Recess
- Focus on CDFI Fund
- The ask: what to tell your members of Congress
- Who to contact: Texas lawmakers who can act and how to find them
- Ways to Take Action
 - Sample letter/email to Congressional offices
 - Sample Town Hall Questions
- House of Representatives/Senate Look Up
- CAMEO Network Policy Priorities
- Additional Resources





Next Steps and Resources

- Where to find your [Senator](#) / [Representative](#)
- Meeting brainstorm and outline a meeting
 - Homework: Does your legislator support the CDFI Fund?
 - [CDFI Friendly America Map](#)
 - Client Story
- Advocacy rules for nonprofits ([Independent Sector](#))
- CAMEO Network [Policy Priorities](#)

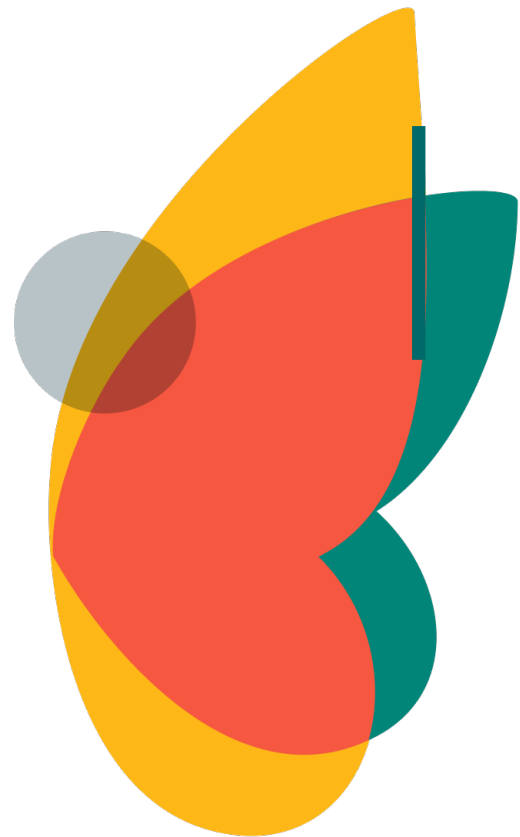


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THANK YOU



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