

NYS CDFI COALITION | 2026 CONFERENCE

Unlocking Private Capital to Deliver Impact

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FIVE THINGS TO DO THIS WEEK

1 Map your capital ladder.

Each source unlocks the next.

2 Write your portfolio story, not your spreadsheet.

One page. The why behind your numbers. Context turns data into confidence.

3 Do the bank's homework for them.

Pull their CRA map. Overlay your lending footprint. Walk in with the answer.

4 Negotiate before you sign.

Reporting terms, covenants, even a TA grant. Everything is negotiable.

5 Say the quiet part out loud. Name it.

If your staff can't monitor the portfolio, that's a credit risk for your funder.