

## **Attachment A: CDFI MDI Lender Survey Introduction Email**

Subject: SBA Evaluation of CDFI and MDI Lender Participation in SBA Capital Programs – Survey Introduction

Dear <lender point of contact name>,

You are receiving this email because your organization is a CDFI and/or MDI lender that has participated in or is eligible to participate in the U.S. Small Business Administration's (SBA) 7(a), 7(a) Community Advantage program, Microloan, 504 Certified Development Company loan programs or the Lender Match tool.

The SBA is interested in increasing access to capital among underserved and minority-owned small businesses by increasing the participation of mission-based lenders such as yours. *This study will enhance the SBA's understanding of why some CDFIs and MDIs participate in SBA programs, while others do not.* The results will provide suggestions for increasing access to the SBA's capital programs among lending entities specializing in underserved communities. Ultimately, the results of this study will help the SBA improve access to necessary capital amongst underserved small businesses.

The SBA has hired a small business research organization, Optimal Solutions Group LLC (Optimal), to conduct an evaluation of lender participation in these programs. This email provides advanced notice of a forthcoming request for your voluntary participation in an online survey that will approximately 30 minutes to complete. The survey is confidential and no personally identifiable information is requested. Your survey responses will be stored as de-identified information.

- For questions about this evaluation, please contact Shay Meinzer at the SBA, at [shay.meinzer@sba.gov](mailto:shay.meinzer@sba.gov).
- For questions or concerns about your participation in this survey, please contact Optimal by phone at (301) 306-1170 Ext. 708 or [ourdapilleta@optimalsolutionsgroup.com](mailto:ourdapilleta@optimalsolutionsgroup.com).

Thank you for your time and consideration.

Sincerely,  
Shay Meinzer, Ph. D.,  
Acting Director Analysis and Evaluation Division  
US Small Business Administration

*The control number for this information collection is 3245-0425 (Expires October 31, 2025).*