

## **Attachment B: CDFI MDI Lender Survey Recruitment Email**

Subject: SBA Evaluation of CDFI and MDI Lender Participation in SBA Capital Programs – Survey Invitation to Participate

Dear <lender point of contact name>,

Recently, the SBA sent you an email regarding its evaluation of the four selected capital programs (7(a) loan program, 7(a) Community Advantage program, Microloan program, 504 Certified Development Company (CDC) Loan program), and the Lender Match tool.

*Your feedback is very important to help the SBA further understand why some CDFIs and MDIs participate in SBA programs, while others do not.* The results of this study will help the SBA improve access to necessary capital amongst underserved small businesses.

Below is a link to the survey that will ask you about your experience with the SBA's loan programs and the lender match platform. The survey is expected to take approximately 30 minutes to complete. The survey is confidential and no personally identifiable information is requested.

**Please use the link below to complete the survey**

### **Survey Link**

- For questions about this evaluation, please contact Shay Meinzer at the SBA via email 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 via email at [ourdapilleta@optimalsolutionsgroup.com](mailto:ourdapilleta@optimalsolutionsgroup.com) or [nbahel@optimalsolutionsgroup.com](mailto:nbahel@optimalsolutionsgroup.com).

Thank you very much for your time and cooperation!

Sincerely,

Oswaldo Urdapilleta  
Project Director  
Optimal Solutions Group LLC

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