

PRESS RELEASE

For Immediate Release: April 23, 2026

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Callahan & Associates And CU Strategic Planning Holds Its First In-Person CDFI Executive Roundtable

Washington, DC – Callahan & Associates and CU Strategic Planning, a Callahan company, will host their first **in-person CDFI Executive Roundtable** on **May 19-20, 2026**, in **Columbus, Ohio** as part of its 2026 lineup. The event is built for leaders of CDFI-certified credit unions who want to connect with peers, share what is working, and tackle the challenges that come with leading a community development institution.

CDFI credit unions play a distinct role in the industry, combining financial services with a strong focus on community impact. Through this work, they expand access to financial opportunity, strengthen inclusive economic resilience, and serve as anchors in the communities that rely on them. Leading a CDFI often means balancing mission with sustainability, navigating complex funding and compliance demands, and translating purpose into measurable impact. There are few peers who carry the same mix of mission expectations, funding pressure, and day-to-day operational demands. That can make it hard to step back, compare notes, and learn from others who truly understand the terrain.

By bringing CDFI leaders together in person, the roundtable focuses on strengthening the institutions that serve communities with the greatest needs. Through open discussion and shared experience, participants will exchange practical insights, learn from peers facing similar challenges, and advance work that supports real communities. The focus is on collaboration that leads to action, helping credit unions move forward with purpose.

True to the Callahan roundtable format, there is no predetermined agenda. The conversation belongs to the people in the room. Attendees shape the discussion based on what matters most to them right now, which means every session reflects the real priorities of leaders who are actively doing the work.

What Leaders Can Expect

Conversations will be guided by the executives in attendance and facilitated by **Stacy Augustine, President, Rick Thomas, Vice President of Account Management at CU Strategic Planning**, and **Jennifer Davis, Vice President at Callahan**, with a focus on the issues CDFI leaders are working through right now.

Topics are expected to include:

- Keeping the mission strong while staying financially healthy.
- Getting capital out the door in ways that make a real difference.
- Telling the credit union's impact story with clarity and confidence.
- Managing grants and funding in a shifting environment.
- Building internal capacity to grow and serve more members.
- Staying ahead of regulatory and reporting requirements.
- Partnering with leagues and community organizations to expand reach.

Who Should Attend

This roundtable is designed for credit union executives directly involved in CDFI strategy, leadership, and community impact. The event is free to leaders from CDFI-certified credit unions (or those seeking certification) with roundtable access through their Callahan subscription, as well as affiliates of the Ohio Credit Union League. Registration options are also available for non-client CDFIs for an additional fee.

How To Register

Seats are limited. Credit unions can register [here](#). For questions about eligibility, fees, or registration, contact marketing@callahan.com.

About Callahan & Associates

For over 40 years, Callahan & Associates has been instrumental in guiding credit union leaders to make informed strategic decisions to ensure their long-term relevance. They accomplish this by helping credit unions measure performance, identify strategic opportunities, and build collaborative networks, all through a mission-focused lens. Learn more at www.callahan.com.

About CU Strategic Planning

CU Strategic Planning, a Callahan company, provides comprehensive consulting services exclusively for mission-focused credit unions, including strategic planning, CDFI certification, grant applications, in-depth lending and policy analysis, executive recruiting and more. With deep expertise in community development finance, the firm helps credit unions amplify their mission while maintaining strong financial performance. For more information, visit www.custrategicplanning.com.