



NATIONAL  
ASSOCIATION FOR  
LATINO  
COMMUNITY  
ASSET  
BUILDERS



## VISION

A nation where Latino communities thrive, with access to opportunity and prosperity, and the power to shape their own destiny.



## MISSION

Build transformational wealth in Latino communities to create a more prosperous future for the entire nation.



## CORE VALUES

### BOLD

We champion audacious solutions, push boundaries and make gutsy moves that ignite economic transformation in Latino communities.

### COLLABORATIVE

We thrive on collective brilliance, knowing we will achieve more together than we can alone.

### INNOVATIVE

We embrace creative solutions and experiment fearlessly to dismantle barriers and drive meaningful progress.

### COMUNIDAD

We cultivate a sense of belonging and shared purpose and celebrate the Latino community's strength.

## LONG-TERM IMPACT

Increase economic equity & power to drive lasting prosperity in Latino communities across the United States.



## GOAL #1

Increase the flow of capital to Latino-focused and Latino-led\* economic development and community lending organizations.

\*Latino-led means ED/CEO or other C-Suite leader is Latino; or there is substantial Latino representation on organization's Board of Directors and in organizational mission.



## GOAL #2

Strengthen the operational, technical, and leadership capabilities of NALCAB members and their leaders.



## GOAL #3

Increase visibility for capital investment opportunities in Latino communities, and awareness of the critical role Latinos play in driving the nation's economy.

## WE ACCOMPLISH THESE BY...

**FACILITATING** the flow of philanthropic, government, debt and equity capital to the more than 200 community organizations that are NALCAB members as well as other organizations serving US Latino communities.

**STRENGTHENING** the operational and financial capacity of NALCAB member organizations, with an emphasis on leadership development to help drive growth, success and increase impact on Latino communities across America.

**CONVENING** NALCAB members so they can learn from each other's experiences, build relationships, collaborate, innovate, and feel validated and recognized.

**ADVOCATING** to influence how political, philanthropic and financial systems invest in, advance and protect prosperity in Latino communities.

**ELEVATING** the Latino community and community leader narratives through research, strategic storytelling and partnerships that showcase economic and community data and highlight NALCAB's impact and success.



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# GOAL #1

*Increase the flow of capital to Latino-focused and Latino-led\* economic development and community lending organizations.*

***OBJECTIVE #1:** Increase the number of NALCAB members receiving capital.*

## ACTIONS

**ACTION:** Accelerate growth of emerging Latino-led CDFI's by aligning dedicated funding for NALCAB members in early loan program stages.

**ACTION:** Empower NALCAB members for sustainable growth and capital absorption by assisting them to:

- Achieve CDFI certification and/or re-certification;
- Secure Technical Assistance Awards from the CDFI Fund for capacity building; and/or
- Obtain Financial Assistance Awards from the CDFI Fund for loan portfolio expansion.

**ACTION:** Prioritize outreach to NALCAB members unfamiliar with the organization's lending products, especially those in core categories like small businesses and affordable housing, as a means of increasing overall lending activity and volume.

**ACTION:** Grow the number of funding partners and intermediaries engaged in secondary markets a in order to expand NALCAB's lending capacity.

**ACTION:** Enhance NALCAB's expertise and expand its lending capacity by securing Community Development Entity (CDE) designation; leverage the CDE status to access to New Market Tax Credits (NMTCS).

**ACTION:** Fundraise for new, targeted and/or responsive themes such as climate and energy initiatives, anti-displacement and place-based efforts, and financial inclusion solutions like alternatives to payday, auto, citizenship or other consumer loans via NALCAB members.

### WHAT WE'RE MEASURING

- Number and percent increase of NALCAB members receiving capital
- Number of NALCAB members applying for CDFI certification
- Amount of funding allocated to NALCAB members in early loan program stage
- Total number of unique loans
- Total dollar amount of loans
- Total dollars raised for new, targeted and/or responsive themes



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# GOAL #1

*Increase the flow of capital to Latino-focused and Latino-led\* economic development and community lending organizations.*

**OBJECTIVE #2:** Increase the number and total dollar amount of philanthropic, corporate and government grants NALCAB facilitates to its members.

## ACTIONS

**ACTION:** Propose and secure larger funding amounts from new and existing funders to significantly increase the number and total dollar amount of pass-through grants available to NALCAB members.

- **SUB-ACTION:** Fundraise for new, targeted, place-based/geographic and/or responsive categories such as pass-through grants focused on general operations, organizational assessments and capacity building, organizational culture, mortgage lending, ITIN services, digital equity, and climate and energy initiatives.

**ACTION:** Facilitate and lead the formation of consortiums of NALCAB members to jointly apply for large federal grant opportunities (ex: NSP2, GGRF, NTIA Broadband, SBA Navigator, etc.).

**ACTION:** Provide pass-through grants for equity and loan loss reserves to NALCAB members who are lenders to enhance their balance sheets and increase their ability to take on debt.

**ACTION:** Create innovative new funds that can be leveraged to attract additional capital investments, targeting social impact investors. (ex: Catalyst Fund, Acceso Fund, NALCE Fund, etc.).

**ACTION:** Facilitate meaningful interactions and engagements between funders and NALCAB members to boost grant opportunities beyond NALCAB funding. (Ex: *Meet the Funder* gatherings.)

### WHAT WE'RE MEASURING

Total number of pass-through grants facilitated to NALCAB members.

Total dollar amount of grants facilitated to NALCAB.

Number of grant applications submitted as a NALCAB member consortium.

Total dollar amount of grants facilitated to NALCAB member consortiums.

Number of pass-through grants for loan loss reserve/equity facilitated to NALCAB members who are lenders.

Total amount in grants for loan loss reserve/equity facilitated to NALCAB members who are lenders.

Number of innovative investment vehicles continued, enhanced, and/or started to attract social impact investors.

Total number of funders and total number of NALCAB members attending or participating in funder events/opportunities.



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## GOAL #2

*Strengthen the operational, technical, and leadership capabilities of NALCAB members and their leaders.*

**OBJECTIVE #1:** Expand access to essential operational and technical knowledge and resources for NALCAB member organizations.

## ACTIONS

**ACTION:** Develop and launch a dynamic digital platform for member learning and collaboration.

- Offer curated resources (best practice guides, case studies, webinars and training modules);
- Foster collaboration through discussion forums and online communities;
- Connect members and program alumni through searchable directories;
- Track members needs and opportunities.

**ACTION:** Launch an intensive *Non-Profit & CDFI Management Essentials Institute* to equip mid- and upper-level managers of NALCAB member organizations with critical non-profit management skills. Cover core topics including:

- Financial management and budgeting;
- Fundraising and donor relations;
- Human resources and team development;
- Organizational culture and leadership; and
- Succession planning.

### WHAT WE'RE MEASURING

Completion and launch of learning digital platform

Number of NALCAB members participating in discussion forums and online communities

Number of members receiving curated resource guides / downloads

Number of NALCAB member managers participating in Essentials Institute



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## GOAL #2

*Strengthen the operational, technical, and leadership capabilities of NALCAB members and their leaders.*

**OBJECTIVE #2:** Increase the number of established and emerging Latino leaders receiving professional development.

## ACTIONS

**ACTION:** Enhance NALCAB's two signature leadership development initiatives (Pete Garcia Fellowship and Latino Executive Advancement & Development Fellowship) by:

- Introducing a "2.0 Training Week" as continued education for program alumni;
- Building social capital and fostering perspective exchanges between mid-career and senior-level professionals by pairing emerging leaders from the Pete Garcia program with CEO's from the LEAD program.

**ACTION:** Establish a *NALCAB Community Impact Certification Series*, providing intensive multi-day certification programs for frontline practitioners in key areas such as:

- Financial capability
- Small business TA
- Rural capacity building
- Policy & advocacy
- CDFI/lending
- Affordable housing
- Economic development

**ACTION:** Secure \$100,000 to launch a scholarship fund to provide NALCAB members with the funding they need to pay for external professional development programs and opportunities.

### WHAT WE'RE MEASURING

Number of NALCAB members participating in NALCAB signature leadership development initiatives.

Number of emerging leaders paired with CEOs from LEAD program

Number of practitioners certified through new and/or enhanced NALCAB certification programs

Number of practitioners provided a scholarship to attend external professional development programs and trainings

Amount of funding raised for scholarships



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**OBJECTIVE #3:** Increase the number of opportunities for NALCAB members to engage with one another and the broader NALCAB network, nationally and regionally.

## ACTIONS

**ACTION:** Foster deeper member engagement and expand opportunities for member interactions by deploying a two-pronged regional strategy:

- Introduce regional meetings (day-long gatherings to draw attendees from specific states and larger regional territories);
- Expand local "Cafecitos" (more social, informal gatherings focused on cultivating connections).

**ACTION:** Develop a structured program connecting expert/successful/mature NALCAB member organizations with organizations aspiring to work in the same field or who are at earlier maturity stage. Facilitate member-to member knowledge transfer and capacity-building and foster JV opportunities, while exploring sustainable compensation models to incentivize participation.

**ACTION:** Foster deeper connections and enable more relationship building at NALCAB's national conference by adding targeted networking sessions grouped by geography, expertise, and function.

### WHAT WE'RE MEASURING

Number of attendees to NALCAB regional meetings and/or Cafecitos

Number of formal peer-to-peer engagements facilitated by NALCAB

Number of attendees to NALCAB National Conference

Number of NALCAB members who attend targeted networking sessions at national conference



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*Increase visibility for capital investment opportunities in Latino communities, and awareness of the critical role Latinos play in driving the nation's economy.*

**OBJECTIVE #1:** Elevate NALCAB's influence and visibility as a champion of Latino economic development among key stakeholders.

## ACTIONS

**ACTION:** Spearhead annual thematic campaigns. Launch impactful multi-prong campaigns (research, policy briefs, events, etc.) tackling critical themes in Latino economic advancement. Each year focus on a distinct aspect, engaging policymakers, philanthropic foundations, corporate partners, NALCAB members and media.

**ACTION:** Forge a powerful think tank partnership. Partner with a prominent DC think tank to co-produce research, co-host forums, influence policy and funding decisions, and coordinate outreach to raise awareness on a national scale.

**ACTION:** Magnify impact through strategic alliances. Partner with other economic development organizations on joint grant applications, policy advocacy, and awareness events, amplifying reach to diverse stakeholders.

**ACTION:** Elevate NALCAB as a thought leadership hub through:

- Content creation (publishing policy briefs, op-eds, video stories showcasing NALCAB's and members' positive outcomes and highlighting data-driven insights);
- Speaking engagements (proactive mining for speaking opportunities for staff, board and members and high-impact events); and
- Social media engagement (deploying targeted social media campaigns to engage policymakers, philanthropic leaders, and other influencers).

### WHAT WE'RE MEASURING

Number of thematic campaigns launched.

Reach of thematic campaigns (downloads of policy briefs, attendance at events, media coverage.)

Number of research projects, joint forums, policy and funding decisions influenced via think tank partnership.

Amount of funding secured through alliances.

Number of joint statements, policy briefs, legislative actions supported through strategic alliances.

Quantity and quality of content created (number of policy briefs, op-eds, video stories produced; views, shares, and comments on content).

Number and significance of speaking engagements secured (keynote speeches, panel discussions, conference presentations).

Reach and impact of social media engagement (follower growth, engagement metrics such as likes, shares, comments; mentions by influencers)



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**OBJECTIVE #2:** Increase the amount of data-driven resources that highlight investment opportunities and the impact of Latinos on the economy.

## ACTIONS

**ACTION:** Produce high-impact research. Publish at least two annual research reports addressing key technical areas like FinCap, END, CDFI and Small Businesses. Explore partnerships with relevant stakeholders (e.g., research institutes, government agencies) for co-branded, fee-for-service research projects.

**ACTION:** Develop and launch the NALCAB Data Hub. Create a comprehensive data platform that:

- Aggregates and analyzes data from member reports;
- Tracks program effectiveness;
- Measures impact across a set of unified metrics (ex: total number of affordable housing units created, total number of businesses started, total number of loans made, total dollars loaned, total jobs created, and/or average improvement in individual client credit scores).
- Generates data/insights that can be used for case studies, blog posts and articles, and other compelling content.

### WHAT WE'RE MEASURING

Number of annual research reports published.

Reach and engagement of research reports (downloads, citations, media coverage).

Number of partnerships established for co-branded research projects.

Total amount of revenue generated via fee-for-service research projects.

Completion and launch of the NALCAB Data Hub.

Effectiveness of programs tracked within the data hub (measured by predefined metrics such as affordable housing units created, businesses started, loans made, dollars loaned, jobs created, first time home purchases, average improvement in credit scores, as well as demographic data about communities and individuals served).

Reach and engagement of data hub content (number of visits, downloads, shares).

Number of case studies, blog posts, articles, and other content generated from data insights.





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**OBJECTIVE #3:** Amplify visibility and awareness of member organizations, their leaders and their transformative work

## ACTIONS

**ACTION:** Elevate member voices through powerful storytelling. Develop multimedia stories showcasing member successes, challenges, and community impact. Share stories on NALCAB's website, social media, and through media partnerships.

**ACTION:** Secure influential media coverage. Cultivate strategic partnerships with key industry publications to secure earned media coverage for NALCAB and its members highlighting their successes, advocating for policy advocacy changes, and bringing attention to the economic impact of Latino communities.

**ACTION:** Launch *The NALCAB Voces Podcast*. Feature in-depth interviews with successful member CEOs and staff, offering insights into community impact, industry trends, and overcoming challenges. Explore co-branding with a funder to expand reach and resources.

**ACTION:** Equip and enable NALCAB members to advocate. Provide them with resources and training to cultivate relationships with elected officials, driving impactful advocacy and increased awareness.

**ACTION:** Actively advocate for NALCAB members and board leaders to secure positions on national boards and high-level appointments.

### WHAT WE'RE MEASURING

Number of multimedia stories developed showcasing members success, challenges, and community impact.

Engagement metrics on NALCAB's website, social media platforms (views, likes, shares, comments) for shared stories.

Media partnerships established for sharing member stories.

Number of strategic partnerships formed with key industry publications.

Frequency and reach of earned media coverage for NALCAB and its members.

Number of podcast episodes produced and released.

Number of successful member CEOs and staff featured in interviews.

Podcast engagement metrics (downloads, listens, shares).

Reach and impact of co-branding with a funder (expanded reach, increased resources).

Number of resources and training sessions provided to members for advocacy.

Level of member engagement in advocacy activities (# of meetings with elected officials, participation in advocacy campaigns).

Number of NALCAB members and board leaders securing positions on national boards and high-level appointments.