

### CDFI Industry Consultant List

**CDFIs Seeking Professional Consulting Services:** Below is a list of professional service providers who provide consulting services to the CDFI industry. If your CDFI is seeking a consultant, you may wish to consider those on this list in addition to others you may know. OFN recommends you follow standard procurement practices when selecting a consultant, including getting several bids and asking for references from CDFIs that contracted with the consultant to do work similar to what you are seeking. Please note that OFN has not verified the information provided below or vetted any consultant.

**The CDFI is the Decision Maker:** Each CDFI is responsible for making its own decisions related to its staffing and operations, including the selection of, and contracting with, consultants. OFN makes no representations about the skills, experience, or capabilities of any particular consultant and any CDFI using this list agrees that no such representations are being made and that OFN shall not be liable for any use of this list or any of the consultants listed by any CDFI or other person. Therefore, each CDFI must decide what is best for their organization — whether or not to use this a consultant on this list, and whether or not to follow any resulting recommendations.

**CDFI Industry Consultants:** OFN plans to continually update this list; if you would like to be added, please email [developmentservices@ofn.org](mailto:developmentservices@ofn.org).

Consultant's Name	Consultant's Firm	Areas of Expertise	Contact Information
Al Shehadi	Shehadi Advisory	Structuring, underwriting & closing complex debt & equity investments; workouts; financial advisory for mergers, strategic planning & other complex situations	O: 203.531.5999 M: 203.233.2688 ashehadi@shehadiadvisory.com
Alice Veenstra	Veenstra Consulting Group	CDFI and NACA Program application writing (FA and TA), CDFI Certification application writing	603.783.4536 Alice@VeenstraCounsultingGroup.com
Amy Collins	The Olea Group	Contract-based underwriting; Consulting; credit policies, lending processes, software, and technology; Lending training	312.620.4616 amy@theoleagroup.com



Andrea Ackers Mader	Sweet Grass Consulting, LLC	Impact Measurement and Evaluation; Logic Models/Theory of Change; Research Design, Data Collection, and Project Monitoring; Market and Feasibility Studies; Database Software Implementation, Customization, and Management; Management and Customization for the Native CDFI Opportunity Through Impacts (OTIS)	970.412.5836 andrea@sweetgrassconsulting.net
Barbara Eckblad	The Eckblad Group, LLC	Loan fund operational improvement and risk management; Creating and Operationalizing a lending program; CDFI certification process and preparation; AERIS rating preparation; Best practice technical assistance w/ focus on post-closing development; Operationalizing a strategic plan; Board development; Developing loan policies and procedures	262.707.6313 barbara@theeckbladgroup.com
BJ Cortis	Craftsman Technology Group	Expert in community lending + Salesforce for CDFIs; Deploy, configure, and enhance Salesforce; Salesforce assessment + road map; Third party tools and integrations; Salesforce administration	617.848.9006 info@craftsmantech.com
Bob Ibanez	Novogradac	Audit, attest, and tax services; CDFI Fund compliance guidance; Consulting on GAAP, CDFI Fung, IRS or other regulatory changes; New Markets tax credit demographic analysis and impact reports; Loan portfolio reviews and valuations, etc.	904.885.0239 bob.ibanez@nc-llp.com
Brenda Smith	Brenda Smith + Associates, LLC	Brand strategy, Consumer research and insights, Naming, Taglines, Messaging, Print and digital marketing materials, Logos and visual identity, Website's design and development	917.816.6297 brenda@bsabrand.com
Claire Morduch	Claire Morduch Nonprofit Consulting	Financial analysis; Financial and Organizational assessment; Portfolio analysis/management; Underwriting	203.415.3721 clairemorduch@gmail.com
David Erickson	Erickson-Pearson Search	Executive search, helping organizations with recruitment of executive and other key staff position	303.703.6165 (m) 720.244.3943 epdavid@earthlink.net



David Fehrenbacher	HORNE LLP	Internal and external audit, Loan review/portfolio management, Lending life cycle process assessments, enterprise risk management, Policy and procedures development, information technology advisory and audit, cyber security and assurance, Data analytics, HR consulting, Workflow process review and automation, Robotic Process Automation and other efficiency boosters, board training, Strategic planning, Grant application writing, marketing, Fraud, and forensic accounting	901.623.8130 David.Fehrenbacher@Hornellp.com
Dawn Johnson	Consultant	Portfolio management, risk management and policy including workouts, liquidations, foreclosure, bankruptcy, REO for all loan sizes, types, and sectors such as small business, SBA, affordable housing, NMTC.	612.790.1293 johnsondawn@comcast.net
Dawn Reiff	Community Funding Advisors	Expert in all CDFI Fund Programs: BEA, CMF, FA & TA, NMTC and Certification	757.630.5918 dawn@communityfundingadvisors.com
Carrie Sanders	Hope Community Capital	Underwriting Assistance using triple bottom line approach; CDFI Fund Application assistance (Capital Magnet Fund, Financial Assistance, Technical Assistance, New Markets Tax Credits); CDFI Fund reporting; CDFI Certification Application; Product and Services Development; Loan Servicing and Management; Asset Management; Capitalization planning; Strategic planning	carrie@hopecommunitycapital.org www.hopecommunitycapital.com
Eileen M. Flanagan	Community Development Advisors, LLC	Outcome evaluation; developing place-based impact strategies through CDFIs; business and strategic planning; market research, analysis, and assessment; training & facilitation.	585.329.5191 emflanagan912@gmail.com
Elizabeth Gilbert Kaetzel	Narratur Studio	Strategic Communications; Holistic Communication Planning; Impact Storytelling; Impact Reporting; Narrative Change; Impact Finance Communications; CDFI Storytelling; Brand Strategy; Digital & Print Marketing; Messaging; Copywriting	egkaetzel@narraturstudio.com www.narraturstudio.com
Eric Hangen	I Squared Community Development Consulting, LLC	Business, capitalization, and strategic planning; financial analysis and projections; market research; impact evaluation; data analysis and visualization	401.781.7395 ehangen@i2community.org



Eric Haralson	Triage Associates	Organizational Assessment, Risk Management for Loan Funds, Writing Loan Policies & Procedures, Strategic Planning, Financial Analysis & Modeling, Cash Flow Projection	865.806.3505 eric@triageassociates.com
Fran Lutz	True Path Advisory Group	Strategic/Operational Planning & Assessment; Credit/Structuring & risk management; Investment product and other types of management consulting	610.551.2141 fran@truepathadvisorygroup.com
Helen Scalia	Scalia & Company	Strategic & Business Planning; Facilitating change; Capital raising; CDFI Fund application development - FA/TA, NACA, CMF; leadership coaching; scaliacompany.com	207.329.3141 hmscalia@gmail.com
James Carras	Carras Community Investment, Inc.	Strategic and Business Planning; Market Analysis; Organizational assessment; CDFI Fund application advising & grant writing; Capitalization plan & strategies; Training; policy & Advocacy Strategy	954.415.2022 carras@bellsouth.net
Jason Friedman	Friedman Associates, LLC	Fifteen industry professionals with cross-cutting expertise in CDFI development, operations and capitalization, incl. certification; compliance; policies and procedures; loan fund management; financial growth model & strategies; loan operations evaluation and remediation; CDFI Fund (Cert. FA/TA, CMF) applications.	O: 319.341.3556 M: 319.321.5884 jasonj@friedmanassociates.net
Jayne Crosby Giles	Giles Consulting	Small business loan policy, product development, and underwriting. Expertise with small/micro-TA programs and funders. CDFI FA applications	207.944.0380 jaynegiles11@gmail.com
Jennifer Weitzel	Fund Consulting	Strategic and operational services to CDFIs including market studies, business plans, strategic plans, impact analysis, and CDFI Certification and funding applications.	773.281.8845 jweitzel@fundconsulting.com
Joanna Donohoe	Seven Sisters Community Development Group, LLC	Strategic planning, public policy, coalition building, grant writing, organizational development, training, and technical assistance for Native CDFIs and housing authorities, specializing in Native homeownership	561.762.8237 joanna@7sistersconsulting.com
John Hamilton	Hamilton Associates	Advisor for growth and leadership transitions so CDFIs evolve and innovate: build bench strength, clarify roles/responsibilities and align workplans with strategies. Program design for investing in promising businesses and homeownership strategies that align community-centered voices with demand-driven strategies and enlist private impact investors.	603.620.0568 Jdhamilton3@comcast.net



Julie Gould	J. Gould Consulting LLC	CDFI Fund application strategic planning; development; writing and/or reviewing for CMF and CDFI FA/TA/HFFI/PPC/DF; and development and updating of CDFI credit policies, procedures, and risk-rating systems.	703.527.3650 juliegould@aol.com
Kayla Baker	Ryse Local Ventures (RYSE)	Impact/Performance Evaluation, Market Research, Program/Product Design, Strategic Planning, Executive Interim Support	202.417.7130 kayla@ryselocal.com
Lance Loethen	Tract Advisors	Research and data analysis, funding applications, market expansion studies, GIS mapping, economic impact analysis, outcome measurement and impact assessment, program evaluation	267.971.8190 lance@tractadvisors.com.com
Laura Kozien	Stop Whispering	Fractional CMO, marketing team for hire, marketing campaigns, content strategy, brand strategy & development, digital marketing, market research, print and digital marketing materials	917.597.1189 laura@stopwhispering.co
Laura Schwingel	Nonprofit Advantage Consulting	Strategic & Implementation Planning, Fundraising & Capitalization Strategy, Policy & Advocacy Strategy and implementation; CDFI FA Applications	215.205.1589 lauraschwingel@gmail.com
Lisa Wagner	Bluestem Consulting, Inc.	Strategic, business and capitalization planning; financial projections and analysis; CDFI Certification preparation and application; NMTC consulting; focus on emerging, small-medium sized CDFIs	307.620.5300 arbowag@gmail.com
Marianne Vermeer	Vermeer Consulting Group LLC	Strategy for growth, business planning, capitalization plans, financial analysis, contract or interim CFO or CEO services for CDFIs in growth or transition phases, developing capitalization plans. Have also conducted community surveys and analysis for potential for new CDFI launches.	804.300.0826 Marianne@vermeerconsulting.com www.vermeerconsulting.com
Mark Digiovanni	ATX Advisory Services	Custom Reporting and Business Intelligence; IT Strategy; Software Selection; Strategic & Operational Planning; Project Management; System Implementation; Integration Design and Development; Organizational Assessment; Ownership Transition and other types of management consulting.	617.308.1871 mark.digiovanni@atxadvisory.com



Marsha D. Krassner	MDK Consulting Group	Business & strategic planning; market analysis and product development; primary author and/or strategist and editor for CDFI Fund applications; specifically, NMTC and FA programs; 3rd party underwriting for foundations, CDFIs and other funders.	210.826.4779 marsha@mdkconsultinggroup.com
Mary Vasys	Vasys Consulting Ltd	Underwriting, Portfolio Management, Capital Strategies	312.423.3613 mwvasys@vasysconsulting.com
Melissa Nemon, Ph.D.	Nemon Consulting LLC	Evaluation and assessment; strategic planning and implementation monitoring; data system development; data analysis and research methodologies; curricula development; training & technical assistance; case studies/promising practices. DBE and 8(a) certifications.	603.4252.2479 melissa_nemon@yahoo.com
Mia Mendoza	Mendoza Group Inc	Marketing to the unbanked and underserved populations; copywriting and design; translation of 80+ languages; social and digital media experts; media buying; strategic consultation; experience with CDFIs and CDCUs.	484.445.4017 (m) 610.659.0190 mmendoza@mendozagroup.com
Michelle Bush	Corporate F.A.C.T.S., Inc.	Our minority- and woman-owned strategic planning and financial advisory firm helps clients build strong, vibrant communities. Our team specializes in neighborhood investment planning, designing CDFI investment strategies, organizational program design and assessment, real estate financing, financial management, and technical assistance and capacity building especially related to effective and compliant management of HUD funds.	735.667.3371 mbush@corporatefacts.net
Nosa Iyare	Overwrite	Underwriting, TA & Consulting for CDFIs	720.262.3856 nosa@overwriteinc.com info@overwriteinc.com www.overwriteinc.com
Pam Porter	Stepping Stone Partners, LLC	CDFI Investors-foundations, banks, ESG and mission-related investor; How to start and grow CDFI investment programs; CDFI Capacity Building; Peer Learning; Leadership Development	610.506.6679 pam@steppintstonespartners.com
Peter Schaeffing	High Impact Financial Analysis	Underwriting; Portfolio Management; Loan Management; Capitalization Plans; Analytics; Financial Modeling	518.599.0482 pschaeffing@highimpactanalysis.com



Ray Daffner	Strategic Advisory & Investment Services	Primarily focused on non-metro markets. Strategic positioning, organizational development, product development, capital raise and application writing for CDFIs, New Markets Tax Credit CDEs. Opportunity Zone and NMTC QALICB project development and capital raise. Angel Investment Fund formation. Entrepreneurship programming. Private philanthropic engagement. Federal program support.	<a href="http://www.linkedin.com/in/raydaffner/">www.linkedin.com/in/raydaffner/</a>
Rian Irani	Next Street	Design and implement solutions that connect entrepreneurs and small business owners with the right resources at the right time from place based small business strategies to capital transactions.	646.392.9516 <a href="mailto:rirani@nextstreet.com">rirani@nextstreet.com</a>
Sarah Hope Marshall	Profound Hope Industries	CDFI & NACA Grant Writing; Other Grant & Proposal Writing; Strategic & Operational Planning: Demographic Studies/Community Needs Assessments; Developing Partnerships; Organizational Culture and Change Management; Credit Unions	773.595.0974 <a href="mailto:sarahhope@profoundhopeindustries.com">sarahhope@profoundhopeindustries.com</a>
Sung Ju Park	Critical Analytics LLC	Financial Analysis & Modeling, Transaction Advisory (underwriting, structuring, and closing) on LIHTC and NMTC, and Predictive Analytics (statistical approach) on Loan/Equity Funds	207.838.0410 <a href="mailto:criticalanalyticsllc@gmail.com">criticalanalyticsllc@gmail.com</a>
Susan Brown	Susan Brown Consulting	Integrated CDFI Program/Policy Development and Training, especially for new and re-booting community lenders. Expert Development and Training re: loan products, underwriting criteria, risk-rating systems, loan-loss reserves, loan servicing, and integration of lending technologies and TA services/partners. Strong Curriculum Development and Training Skills for all personnel (staff, loan committee, board) re program/policy elements and appropriate decision making at each level.	530.925.2530 <a href="mailto:susan@susanrileybrown.com">susan@susanrileybrown.com</a> <a href="http://susanrileybrown.com">susanrileybrown.com</a>
Vickie K. Oldman	Seven Sisters Community Development Group, LLC	Executive Coach, Strategic Planning, Organizational Assessment, cultural competence, teambuilding & communications	505.259.3256 <a href="mailto:vickie@7sistersconsulting.com">vickie@7sistersconsulting.com</a>
Vikki Frank	Lanier Place Consulting	Strategic, business, operation, implementation and capitalization planning; Partnership Development; Organizational Assessment, Executive Coaching	202.368.0500 <a href="mailto:vikki@lanierplace.com">vikki@lanierplace.com</a>



### **Reminders:**

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