

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 Victoria Kennedy vkennedy@ofn.org.

Consultant's Name	Consulting Firm	Area of Expertise	Contact Information
Adina Abramowitz	Consulting for Change	Strategic & Operational Planning; Marketing Analysis; Executive Coaching; Organizational Assessment; Board Development; Business Model Canvas exercises; and other type of management consulting	215.247.1544 adina@consultingforchange.com
Al Shehadi	Shehadi Advisory	Structuring, underwriting & closing complex debt & equity investments; workouts; financial advisory for mergers, strategic planning & others 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@VeenstraConsultingGroup.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

Consultant's Name	Consulting Firm	Area of Expertise	Contact Information
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
Claire Morduch	Claire Morduch Nonprofit Consulting	Financial analysis; Financial and Organizational assessment; Portfolio analysis/management; Underwriting	203.415.3721 clairemorduch@gmail.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
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
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
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 hmscaliam@gmail.com

Consultant's Name	Consulting Firm	Area of Expertise	Contact Information
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 analyses, and CDFI Certification and funding applications.	773.281.8845 jweitzel@fundconsulting.com
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
Marsha D. Krassner	MDK Consulting Group	Business & strategic planning; market analyses 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.	603.425.2479 melissa_nemon@yahoo.com

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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.	https://www.linkedin.com/in/raydaffner/
Vickie K. Oldman	Seven Sisters Community Development Group, LLC	Executive Coach, Strategic Planning, Organizational Assessment, cultural competence, teambuilding & communications	505.259.3256 vickie@7sistersconsulting.com
Vikki Frank	Lanier Place Consulting	Strategic, business, operation, implementation and capitalization planning; Partnership Development, Market Research and New Product Development; Organizational Assessment, Executive Coaching	202.368.0500 vikki@lanierplace.com

Reminders:

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