



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	Consultant's Firm	Area of Expertise	Email Address
Adina Abramowitz	Consulting for Change	Strategic & Operational Planning; Marketing Analysis; Executive Coaching; Organizational Assessment; Board Development; Scenario Planning; Business Model Canvas exercises; and other type of management consulting	215.247.1544 adina@consultingforchange.com



Al Shehadi	Shedhadi 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@VeenstraCounsellingGroup.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, Websites 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, assisting organizations with recruitment of executive and other key staff position	303.703.6165 (m) 720.244.3943 epdavid@earthlink.net
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
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
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
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
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 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 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.	734.667.3371 mbush@corporatefacts.net
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.	www.linkedin.com/in/raydaffner/
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 criticalanalyticsllc@gmail.com



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; Organizational Assessment, Executive Coaching	202.368.0500 vikki@lanierplace.com

Reminders:

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