

2012 Snapshot

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representing:

\$20,442,388,161
in total assets

\$11,559,407,993
in portfolios outstanding

\$22,923,656 in grants,
investments, and tax
credits raised

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2012 Annual Report

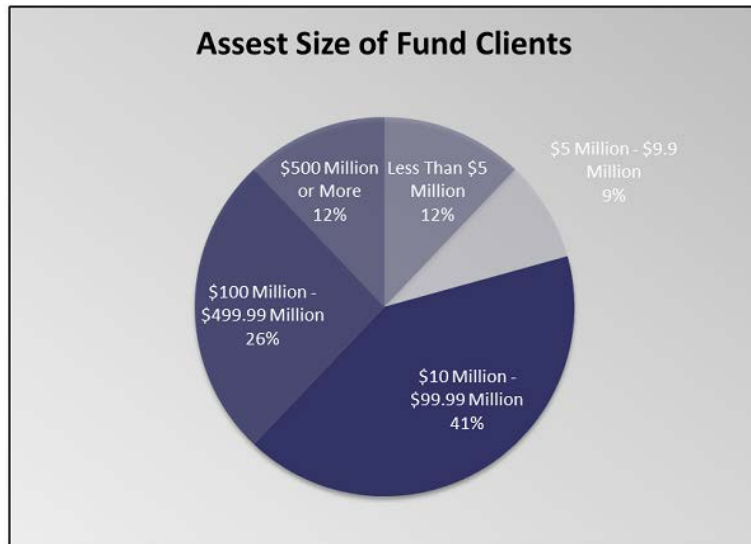
Letter From the Partners

2012 was another successful year for FUND Consulting! We had our single most successful FATA & NACA funding rounds, welcomed 18 new clients, and had the opportunity to speak on panels at three different conferences. An even greater accomplishment in our eyes is that 25% of our clients have worked with us for 5 years or longer. We are proud to have established so many long-term partnerships with our clients! We look forward to continuing to support them in achieving their stated goals and expanding the impact they have in underserved communities throughout the country. This annual report provides a snapshot of these accomplishments. We hope you read on and stay in touch with us in 2013.

Ruth Barber, Lolita Sereleas

The Year in Review

2012 proved to be another high impact year for FUND Consulting. We served 64 clients in 27 states, including 32 CDFI Banks and Credit Unions, 26 Loan Funds, 5 Native Loan Funds, and 1 nonprofit community development organization. These organizations represent \$20,442,388,161 in assets, and have portfolios outstanding totaling \$11,559,407,993.



FUND Consulting works in partnership with its clients to provide both strategic and operational services designed to help clients articulate and achieve their goals. In 2012, FUND Consulting completed 30 customized strategic projects including market studies, capitalization plans, strategic plans, and impact analyses.

The FUND team also delivered 56 operational projects including CDFI Certification applications and funding applications to the CDFI Fund. As a result, applications prepared by FUND Consulting generated \$22,923,656 in grants, investments, and tax credits for clients during 2012:

| CDFI Program | Funds Raised |
|----------------------|---------------------|
| BEA | \$7,652,866 |
| FATA | \$13,471,194 |
| NACA | \$1,799,596 |
| NMTC | TBA |
| Total Funding | \$22,923,656 |

In addition to the continued success of our client partnerships, FUND Consulting was honored to have the opportunity to share its knowledge and expertise on grantwriting, marketing, and strategic planning with broader audiences at three different conferences in 2012, including the International Sprout Growers Association Annual Convention, the Opportunity Finance Network Annual

Conference, and the Midwest Native American Economic Development Conference.

Since FUND was founded in 2000, we have had the pleasure of working with more than 185 CDFI, government, and nonprofit clients. In an effort to assess the impact of FUND Consulting's products and services as well as the success of our client relationships, in 2012 FUND took the opportunity to survey past and current clients.

Among the notable findings from the client survey:

- 86% of respondents stated their work with FUND Consulting resulted in increased financial capacity due to a monetary award
- 50% of respondents stated their work with FUND Consulting resulted in a better understanding of their market
- 100% of respondents stated that their satisfaction with FUND Consulting's work exceeded or met their expectations
- 93% of respondents stated they were very satisfied with FUND Consulting's level of expertise
- 100% of respondents would recommend FUND Consulting to a colleague

2013 is off to a great start for the FUND team with 7 new clients and several exciting strategic and capitalization planning projects in progress for our clients.

To see a full list of our clients, read project examples, and stay up to date on the work of FUND Consulting, please visit our [website](#).

Client Spotlight: Chicago Community Loan Fund



Since 1991 the Chicago Community Loan Fund (CCLF), a nonprofit CDFI loan fund located in Chicago, has provided flexible, affordable and responsible financing and technical assistance for community stabilization and development efforts that benefit low- to moderate-income neighborhoods, families and individuals

throughout metropolitan Chicago. From affordable housing to urban farming, CCLF is committed to supporting challenging and unique projects that revitalize neighborhoods, promise high positive social impact, incorporate sustainable design practices, and have the potential to leverage significant additional investments from other sources.

In its 20 year history, CCLF has grown from an initial investment of \$200,000 to a portfolio of more than \$28 million. To date, CCLF has closed over \$72 million dollars in community development financing. This financing has leveraged an additional \$875 million in public and private sector financing, which has resulted in the creation and preservation of more than 2,000 jobs; 6,700 units of affordable and mixed-income housing; and over 2.4 million square feet of facility and commercial space that provide job opportunities, goods and services, and social service resources for under-resourced neighborhoods throughout metropolitan Chicago.

In 2012, FUND Consulting joined CCLF in its strategic planning efforts to further the organization's mission and expand its impact. The FUND Consulting team kicked off the process by meeting with members of the CCLF management team to review the organization's goals, objectives, strategies and initiatives. Using the SMART (i.e., specific, measurable, attainable, realistic and timely) Framework, the team revised the goals, objectives and strategies as appropriate, and set up a process to finalize any incomplete strategies. Knowing that staff involvement and accountability would be essential to successful implementation of the plan, FUND Consulting and CCLF's management team worked closely throughout the year with staff at all levels of the organization to create the final Strategic Implementation Plan that will lay a path for the organization's growth and development for the next 5 years.

FUND Consulting looks forward to continuing its partnership in support of CCLF's future growth and success.

Learn more about CCLF by visiting their [website](#).

Our Team

FUND is proud to have assembled a team with outstanding experience and credentials. Combined, the team has over 50 years of community development and nonprofit management experience. The diverse staff experience ranges from economic development to

arts and culture and from health and human services to community banking. The team brings first-hand experience with international organizations, CDFI loan funds, community banking, workforce development and more.

View complete staff bios on our [website](#).

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