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10th Anniversary Newsletter

December 2010

Letter From the Partners

FUND Consulting began with one consultant, two products, three clients and a modest vision. We wanted to be viable and be a recognized name in the Community Development Finance (CDFI) Industry. As the CDFI Industry grew both in size and sophistication, so did FUND Consulting. Ten years, a full product menu and 150 clients later we are going strong with a staff of six poised to continue our achievements in the CDFI industry and achieve a new vision: increased name recognition in the nonprofit sector. We owe our success to our loyal clients, partners and staff. We look forward to the next ten years.

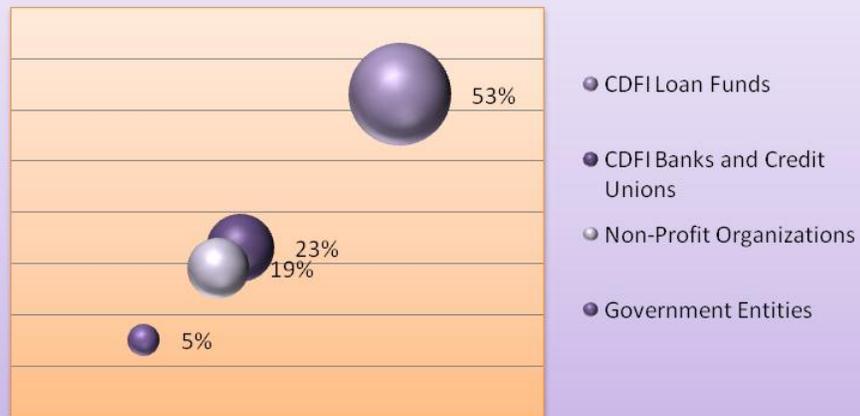
Ruth Barber, Lolita Sereleas

Our First Ten Years in Review

The past ten years, which began with the turn of a new century, have seen many changes presenting both opportunities and challenges. Most recently, the economic climate created unique challenges across the spectrum of our clients. Our client base is diverse and has been affected by the economic downturn in many ways. However, one thing that did not change was our commitment to helping our clients grow their capacity to serve their diverse markets, communities and constituencies.

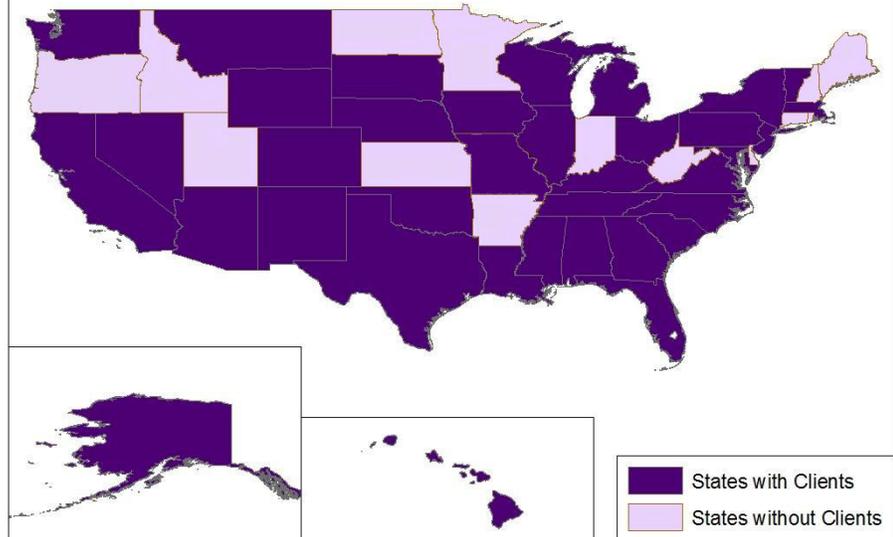
In the past ten years, FUND has had the pleasure of working with more than 150 clients across the CDFI, nonprofit and government sectors. Many of our clients have been engaged with us over several years - in fact, more than one third have worked with us for more than five years -- relying not only on our operational expertise to help get quality applications in on time, for example, but also valuing our strategic advice and guidance to navigate leadership changes, conduct strategic planning exercises and assess market changes.

FUND Clients By Type



Approximately 53% of FUND's clients are CDFI loan funds, 23% are CDFI banks and credit unions, 19% are nonprofit organizations, and 5% are government entities. Our clients operate locally and nationally and are located in more than 35 states. We are proud of the successful and diverse client base we have worked with over the past 10 years.

Location of FUND Consulting Clients by State



But the proof is in the numbers. Over the past ten years, FUND has helped our clients obtain over \$191 million in government and local grants and

investments. During this time period, FUND Consulting has delivered almost 100 research, marketing, and strategic planning projects, in addition to other capacity building solutions. We've been able to do so while staying true to our business model of personalized services tailored to the needs of each of our individual clients. Our high level of responsive customer service yielded a 100% client satisfaction rating. To see a full list of our clients, please visit our [website](#).

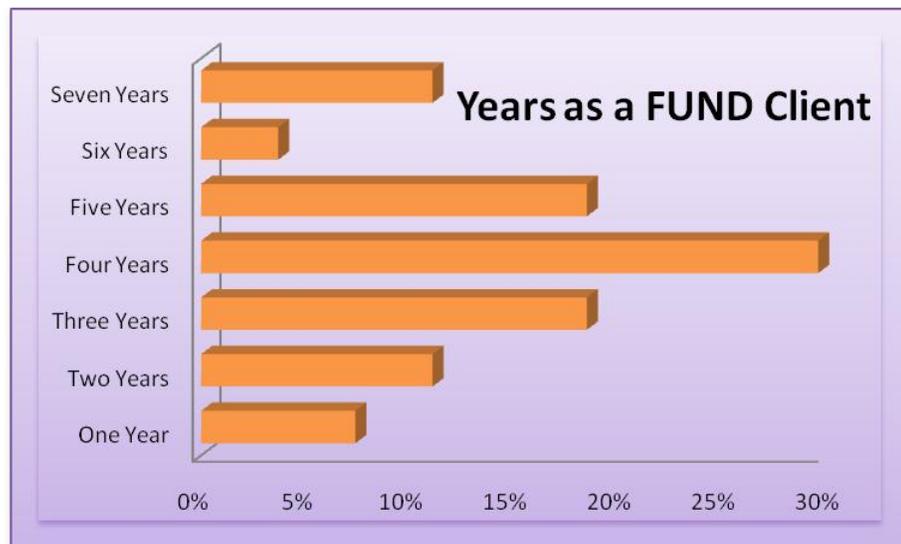
We like the way you make us feel like we're your only client and the extra mile you go to keep us on track for our grant submissions.

-Native CDFI Client Quote

How FUND has Grown from Projects to Partnerships

Over the past ten years, we have expanded our product offerings from our core market analysis and funding application assistance to a full range of products responsive to the needs of organizations at any stage of development. At FUND Consulting, our products are designed to offer both strategic and operational support to our clients.

While many clients approached us initially for support with writing grant applications, our long-term relationships have evolved into more complex strategic engagements based on our deep knowledge and understanding of your organization and its needs.



FUND has built long-term strategic relationships with clients with engagements often structured as annual service packages. In this way, the FUND team served as adjunct staff that provided support throughout the year on a regular basis. Currently FUND has 25 annual service package clients representing non-profit loan funds, Native loan funds, banks, and

credit unions in the CDFI industry. On average these clients have been with FUND for four years.

The examples below provide examples of how annual service package clients have engaged with FUND Consulting.

The ***Cancer Support Center***, a non-profit organization providing no-cost support to those affected by Cancer, initially engaged FUND Consulting for strategic planning in 2008, including an environmental scan and facilitated strategy sessions. Since then, FUND has remained a valued partner to the organization most recently seeing the organization through a leadership transition by providing executive coaching services, as well as supporting a ramp-up in marketing and fundraising efforts with a marketing audit and a brand standards guide. FUND continues in an advisory role providing strategic guidance to the Executive Director and Board President.

FUND Consulting has worked with the ***Citizen Potawatomi Community Development Corporation*** (CPCDC) located in Shawnee, Oklahoma since 2004. FUND is proud to have partnered with the CPCDC through its development into a leading Native American CDFI. Our work with this dynamic organization started with a market study and evolved into writing several successful grant applications, including CDFI, HUD and USDA applications. FUND also created the organization's award winning impact measurement system, as well as conducted capitalization planning. FUND has rounded out its services with the development of marketing collateral, including an annual report and success stories to publicize the organization's excellent work.

Forward Community Investments (FCI) is an innovative non-profit CDFI loan fund lending to Wisconsin non-profits that serve some of that state's most disadvantaged people and communities. FCI first approached FUND for assistance with preparing CDFI applications in 2007. After two rounds of successful support, this growing CDFI engaged FUND to write a successful Capital Magnet Fund application and Wachovia NEXT application, as well as its first New Markets Tax Credit application, which is currently under review. FUND has since completed the research and interview portion of the organization's strategic plan, making the case for a statewide expansion of technical assistance services, and laying the framework for the next phase of growth.

Illinois Service Federal Savings and Loan Association (ISF) is a bank serving African American homeowners on the south side of Chicago since 1934. ISF turned to FUND Consulting in 2007 to help it maximize its status as a successful CDFI. Since that time FUND has prepared two successful BEA applications and a successful TA application. In 2010, the Bank engaged FUND Consulting to conduct a market analysis which identified both risks

and opportunities in its existing as well as new markets. The final report provided strategic recommendations to enable the Bank to stay true to its legacy, while offsetting some of the risk inherent in its core markets.

Liberty Bank and Trust Company, a leading community bank and CDFI headquartered in New Orleans and serving urban markets across several states, has engaged FUND for all of its CDFI-related activities ranging from applications to certifications and compliance, including preparing and submitting required reporting. FUND's support enables the community development staff of this growing bank to focus on the development of innovative community revitalization strategies that are scalable across its diverse markets.

Santa Cruz Community Credit Union (SCCCU) has been serving a primarily Hispanic, urban market since 1977. The Credit Union turned to FUND Consulting for assistance with writing a successful grant application for Recovery Act funding and has continued to engage FUND to assist with grant compliance, including preparing and submitting required reporting, and complete a recent CDFI recertification application, ensuring this busy organization stays on track with its CDFI objectives.

Our Team

FUND is proud to have assembled a team with outstanding experience and credentials. Combined, we have over 50 years of community development and nonprofit management experience. Our experience ranges from economic development to arts and culture and from health and human services to community banking. Our team brings first-hand experience with international organizations, CDFI loan funds, community banking, workforce development and more. We draw on this expertise daily to benefit of each and every engagement. These diverse skill sets add value to our clients' businesses as we enter our next ten years and beyond.

We invite you to learn more about us on our [website](#).

New Website

FUND is proud to announce the launch of our updated website, which reflects all of our products and services and our team. The website also features a new Resources page that highlights organizations and funding opportunities that may be of interest to all of our clients.

Please visit the updated website at www.fundconsulting.com.