



## Senior Consultant

### Job Description

FUND Consulting is a women-owned firm located in the City of Chicago that provides quality service to mission driven organizations nationwide. Our team of ten provides both strategic and operational services to community development financial institution (CDFI), nonprofit, and government clients nationwide.

Founded in October of 2000, FUND Consulting was a pioneer in designing and delivering supportive services for CDFIs seeking assistance in navigating CDFI funding applications and analyzing market need and demand. Over the years, FUND Consulting has grown to become the leading firm in the CDFI industry, providing strategic and operational support on fundraising and capitalization, strategic planning, needs assessments and market analyses, and impact evaluation. Becoming known for its superior customer service and results-oriented products, FUND Consulting skyrocketed in growth achieving close to a 33% market share in the CDFI industry. Over the past twenty years, FUND has successfully helped our clients obtain over \$1.5 billion in grants and investments. In addition, FUND has completed over 470 market analyses, fundraising plans, strategic plans and impact management solutions.

FUND's successes are rooted in our commitment to providing high quality services that support organizations and practitioners fostering positive outcomes in communities nationwide while adhering to our corporate values:

- We do right by our clients and each other, never compromising on quality or integrity.
- We innovate through research, anticipation of client needs, and facilitation of positive outcomes.
- We are committed to equity and our belief that diversity and inclusion make us stronger.
- We are sustainable by promoting profit, supporting our people, and working to minimize environmental impact.

#### **The Position**

The Senior Consultant will serve as a Project Manager, independently managing a portfolio of clients and delivering a full range of products and services and services in collaboration with consulting and data team members and under the guidance of a Team Lead. Projects include but are not limited to CDFI funding applications, CDFI certification applications, CDFI compliance reports, market studies, strategic planning, customer surveys, and impact analyses. Additionally, Senior Consultants participate in training and quality control related to grant applications and research. The position is approximately 45% grant applications and management (mostly government grants and compliance), 40% research (data collection and analysis) and strategic projects (market studies, strategic plans, etc.), and 15% training and quality control.

#### **The Team**

FUND Consulting currently has a team of 16 individuals, comprised of 2 Partners, 4 Managing Consultants, 2 Senior Consultants, 3 Consultants, 3 Associate Consultants, and 3 Associate Data Analysts. The Consultant will be imbedded into a team comprised of a Team Lead, Senior Consultant(s),

Consultant(s), Associate Consultant(s), and Associate Data Analyst(s) to support a specific client portfolio. While the Consultant will be responsible for acting as the primary contact and taking the lead on specific tasks and projects for a portfolio of clients, the Consultant will work directly with a Team Lead who will coordinate project assignments, training, guidance, and quality control. The larger FUND Consulting team works collaboratively to share best practices and expertise.

### **The Skill Set**

- 5 to 7 years of relevant experience or significant coursework in grant writing, research and analysis, and/or community or economic development
- Direct CDFI experience
- Direct experience in at least one FUND Consulting project type
- Excellent writing skills; ability to write grants and comprehensive reports combining qualitative and quantitative data for internally and externally facing audiences
- Experience in project management; proven success managing multiple projects and deadlines
- Proficiency with Excel and data manipulation
- Deadline-oriented
- Detail-oriented

### **Within 1 month, You'll:**

- Complete orientation and onboarding designed to introduce you to FUND Consulting's history, family of organizations, strategic plan and values, team, and products and services. You'll also learn about your portfolio of clients, including the history of our partnership with your portfolio clients as well as past and upcoming projects.
- Get to know the processes, tools, and systems our team uses to manage clients and projects.
- Have one-on-ones with two to three team members to learn more about their work at FUND, previous experience, and areas of expertise.
- Be introduced to the CDFI industry and receive training on CDFI Certification and Compliance.

### **Within 3 months, You'll:**

- Be introduced to and receive training on FUND Consulting's strategic projects and CDFI Financial Assistance Technical Assistance (FATA) funding application and Small Dollar Lending Program (SDLP) grant program.
- Begin work on two to three client strategic projects in collaboration with team members.
- Continue to gain experience in CDFI Certification and Compliance reporting.
- Conduct lending and/or impact analyses for one to two annual service clients.
- Establish a work plan and priorities in coordination with supervisor.
- Have additional one-on-ones with team members to learn more about their work at FUND, previous experience, and areas of expertise.

### **Within 6 months, You'll:**

- Manage the funding application cycle for FATA clients.
- Finish work on client strategic projects.
- Begin to participate in training team members on internal and external projects and processes.
- Begin to conduct quality control reviews, working closely with Team Lead.
- Continue training on FUND Consulting's strategic projects.
- Receive training on the CDFI Fund's Capital Magnet Fund (CMF) grant program.
- Maintain a work plan meeting stated and internal deadlines.

- Complete a mid-year check-in with Team Lead and receive guidance on professional development opportunities.
- Participate in the development of FUND Consulting's strategic and sales plan for the upcoming year.

**Within 12 months, You'll:**

- Conduct CDFI recertification analyses and complete applications CDFI clients.
- Complete CDFI compliance reporting for CDFI clients.
- Have managed the application cycle for the CDFI Fund's FATA, SDLP, and CMF programs.
- Have gained experience in multiple strategic projects.
- Conduct quality control reviews for at least 2 product/project cycles, working closely with Team Lead.
- Continue to participate in training team members on internal and external projects and processes.
- Receive training on the CDFI Fund's Bank Enterprise Award (BEA) program.
- Participated in internal and external industry and/or training opportunities.
- Build advanced knowledge of FUND's products and services to share insights on strategy and process.

**Working Conditions**

This is a remote position and internet is needed. This role routinely uses standard office equipment such as computers, phones, and printers. Must be able to remain in a stationary position for extended periods. The position requires regular communication, verbal and written, internally and externally. The job-related responsibilities and skills included in this job description are not all-inclusive. While this is intended to be an accurate reflection of the current job, management reserves the right to revise the job or to require that other or different tasks be performed as assigned. Reasonable accommodations will be made to enable qualified individuals with disabilities to perform the essential functions of the position (such as modified equipment, modified work schedule, work from home flexibility, etc.).

**Salary Range**

This is a full-time remote position with benefits (including medical, dental, 10 vacation days, 10 paid holidays, and 7 sick days; 401k with employer match up to 5% after 1 year of employment). The salary range is \$75,000 - \$90,000; commensurate with experience.

**How to Apply**

Send a cover letter and resume to Alexandra Mejia at [amejia@fundconsulting.com](mailto:amejia@fundconsulting.com). Only cover letters and resumes received via email through May 8, 2023, will be considered.

**FUND Consulting is an equal opportunity employer.**