

## **Impact Systems Analysis & Development Services**

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FUND Consulting believes that good communication is critical to the success of any consulting project, eliminating potential obstacles to success. To ensure quality communication, the team proposes the following mechanisms:

- At the start of the engagement, FUND will discuss with the client importance of creating a diverse project committee and including all levels of the organization in the project for an inclusive lens. FUND will then facilitate a kick-off call to clarify project goals, processes, timelines, etc. The result of this meeting will be a formal Project Initiation Document documenting the key guiding questions, work plan, timeline, and responsible parties for the project.
- Designation of a project manager and one point person for the client in order to ensure ease of access and communication.
- Weekly project email updates to the entire team that includes work completed, current status, and any project issues and questions to the client. These updates will also include reminders about upcoming project design and deliverables that require client input to streamline the solicitation and incorporation of input.
- Client sign off on all applicable data collection instruments and deliverables.

To undertake a successful Impact Systems Analysis & Development process, FUND will employ the following approach:

- Review of current forms, data collection process, and current technology platforms
- Assessment of current impact data collected by the organization
- Recommendations on ways to capture data critical for CDFI Fund Award compliance, funder requirements, product improvement, and marketing and outreach purposes
- Assessment of current software to determine alignment with impact tracking needs
- Creation of data collection and impact tracking system – including creation of intake forms/surveys
- Staff training on collecting and reporting on impact data

All presentations and training sessions will be done via remote video conferencing software unless mutually agreed upon by the Client and FUND Consulting.

## Competitive Advantage

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FUND Consulting is uniquely positioned as one of the only full-service consulting firms serving the CDFI industry with a track record of working with a broad range of CDFIs across the country. Our firm's wide-ranging CDFI expertise facilitates our in-depth research and analysis to develop comprehensive recommendations for organizations and to create quality and actionable plans that inform decision-making.

FUND Consulting stands out from its competitors in the following ways:

- With a staff of 15, FUND Consulting has a team with the diverse skill set necessary to manage and deliver the range of services responsive to the broad needs of community development organizations. Our staff have advanced degrees in policy, planning, and public administration and are adept at accessing, leveraging, and fusing market, organizational, and policy research to inform data-driven recommendations.
- FUND Consulting has worked with over 350 community organizations throughout the United States and has conducted hundreds of research projects as well as training sessions for our clients. This experience has given the team deep insight into organizational best practices, challenges, and differences across organizational types and markets.
- All work is conducted in-house so that we can tightly manage our product and provide outstanding and consistent customer service.
- Four members of the FUND team are certified in Diversity, Equity, and Inclusion (DEI) from the Yale School of Management.

## Pricing

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Please contact Jen Weitzel, Managing Consultant, at [jweitzel@fundconsulting.com](mailto:jweitzel@fundconsulting.com) for more information and to schedule a call to discuss your organization's Impact Systems Analysis & Development needs!