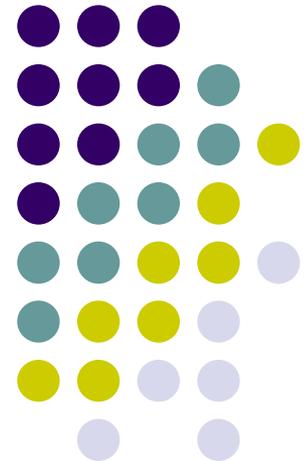


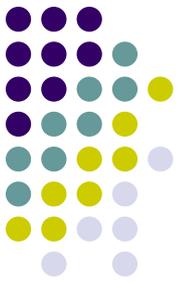
Regional Collaboration Opportunities

Opportunity Finance Network
Southeast Regional Meeting

July 19, 2010

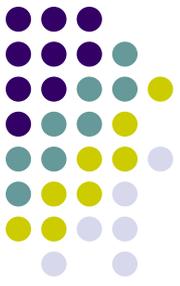
Adina Abramowitz





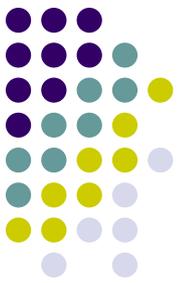
Agenda

- Goals of session 2:30 – 2:40
- Introductions 2:40 – 2:55
- Collaborations & Partnerships to Build CDFI Capacity in the SE
 - Ideas from the OFN Conference 2:55 – 3:00
 - Split up into groups and discuss 3:00 – 4:00
 - Come back together and report out 4:00 – 4:20
 - Further opportunities to work together during this meeting 4:20 – 4:30



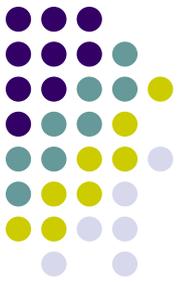
Goal of session

- To decide on a few concrete, achievable projects that this group will commit to work on to build CDFI Capacity in the Southeast
- To identify leaders and other participants for these projects, first steps, and a communication plan



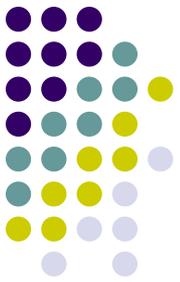
Policy & public education

- Panel on foundation council on investing in SE CDFIs
- Educate community banks
- Form statewide CDFI alliances include policy development function
- Need a compelling straightforward message about CDFIs for state and local government.
- Consider state tax credit for donation/investment in CDFIs



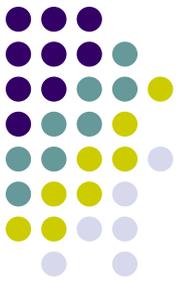
Capital & Funding

- CDFI fund application workshop in the southeast
- SE focused PRI fund
- Risk fund pool
- Intermediaries obtain larger PRIs on behalf of SE CDFIs and administer to aggregate
- Increase community foundation participation by creating pools



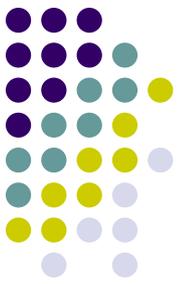
Project based partnerships

- Loan participations
- Training resources
- Technical Assistance resources
- Back room / administrative services



Organizational Capacity Building

- Facilitate a way for rural CDFIs to network
- Senior executive consulting
- Existing CDFIs mentor potential/new CDFIs
- Develop regional strategy to increase geographic coverage



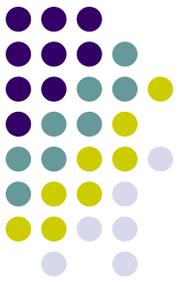
Small Group Work

- Split up into small groups
 - Policy & Public Education
 - Capital & Funding
 - Project Based
 - Organizational Capacity
 - Other?
- Each group will have an Opportunity Finance / Federal Reserve facilitator
- We will spend 60 minutes in small groups



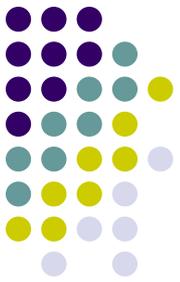
Small Group Tasks / Goals

- Goal: Come up with an achievable project(s) that will advance the capacity of CDFIs in the Southeast
- Begin to develop an Action Plan that includes:
 - A leader
 - Other participants
 - What the project will accomplish
 - First steps
 - A timeline
- Appoint a presenter to share the project with the group



Reporting out

- What is the project?
- What will it accomplish?
- Who is the leader?
- What are the first steps?
- Any difficult questions that need further discussion or obstacles to overcome?



If you are a leader . . .

- All project leaders and others interested in these efforts:
- Please join me at breakfast tomorrow morning at 8:15 – there will be a clearly marked table
- We will discuss next steps, resources, and a plan to stay in touch and move the projects forward