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OCTOBER 14–17, 2014 • THE SHERATON DOWNTOWN DENVER, COLORADO

Stretching Your Resources with Interns and Volunteers

October 15, 2:15 – 3:45 PM

Introduction

- Goals for this session
 - **Discuss programs and partnerships through which CDFIs are expanding capacity and talent with limited budgets**
 - AmeriCorps programs
 - Partnerships with colleges and universities
 - Internship programs
 - **Interactive Discussion/Q&A with the audience**
 - Questions for presenters
 - Discussion about resources for the CDFI industry

Session Presenters

- **Beth Lipson**, Opportunity Finance Network
- **Johanna Anderson**, Four Directions Development Corporation
- **Joan Brodhead**, Community First Fund
- **Rosa Rios Valdez**, BCL of Texas

AmeriCorps Programs

- Three types of AmeriCorps Programs
- CDFI Experiences with AmeriCorps
- Strengths, Challenges, and Best Practices

Partnerships with Colleges and Universities

- Integrating opportunity finance into college and university programs:
 - Curriculum
 - Jobs and Internships
 - Research opportunities
- New resources for CDFI industry
- CDFI experiences

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CDFIS AND UNIVERSITIES



THE OPPORTUNITY FINANCE MOVEMENT ALIGNS CAPITAL WITH JUSTICE.
LEARN MORE ABOUT HOW CDFIS AND UNIVERSITIES CAN WORK TOGETHER
TO PROVIDE OPPORTUNITY. FOR ALL.

OVERVIEW

The opportunity finance movement aligns capital with justice. It's led by mission-driven community development financial institutions (CDFIs) across the country working in low-income, low-wealth, and other disadvantaged communities. This is a growing movement, with countless opportunities for students, professors, and administrators to get involved. We invite you to join us!

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CAREERS

Interested in working in the CDFI Industry? CDFIs operate in all 50 states and are constantly on the lookout for passionate and talented individuals from a variety of majors who are committed to their mission.

Learn more about careers in opportunity finance for students below.

Entry Level Positions



Here are some of the areas in which students could potentially get involved:

LENDING AND INVESTING

Areas of Study: Business, Accounting, Finance, Real Estate

Description:

Lending and investing is the main function of CDFIs. While titles vary by CDFI, employees in this field usually begin as loan administrators and work their way up to junior and senior loan officers, followed by loan managers. Loan administrators maintain loan documents and files, including closing documents, while loan officers source and underwrite loans and interact with borrowers. Sometimes, a separate group of people working in asset management are responsible for ensuring compliance and collecting information after a loan has been issued, but sometimes loan officers do this as well. Working in lending and investing for a CDFI is a great opportunity for students who want to have an impact on local communities often overlooked by traditional financial institutions.

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Internship Programs

- Intern Recruitment
- Best Practices for internship
- Strengths and Challenges
- Example programs

Internship Programs

Best Practices

- Develop a clear project plan (goals and deliverables)
- Provide opportunities for the intern to learn about the CDFI's mission and vision and about the CDFI industry
- Provide opportunities to work on projects with other Interns and/or other junior staff
- Identify upfront one or more areas of professional development that the intern would like to explore through his or her internship
- Bring Intern to meetings and calls to learn about various aspects of the team or organization. Assign tasks (e.g., note taking, research) to provide value-added work from their participation.

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INTERNSHIPS



OVERVIEW

OFN offers several internships across the organization for graduate and undergraduate students. The summer-long experience offers a unique opportunity to learn about the CDFI industry and to sink your teeth into meaningful projects that help transform low-income, low-wealth, and other disadvantaged communities.

While learning about our industry, get hands-on experience in financing, strategic consulting, strategic communications, development, knowledge sharing, and corporate finance. As an intern in one of these areas, you'll participate in departmental initiatives and

Overview

FAQs

Testimonials

2014 Internships

A Day in the Life of an OFN Intern

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Questions and Discussion

- What programs, initiatives, or resources regarding talent development would you be interesting in OFN exploring for the CDFI industry?
 - Web-based resources that house information for job and internship applicants interested in the opportunity finance industry
 - National internship and/or fellowship program in opportunity finance, similar to AmeriCorps designed to introduce young, diverse talent to CDFI industry
 - Curriculum for emerging talent (online or in-person)

Contacts

Beth Lipson

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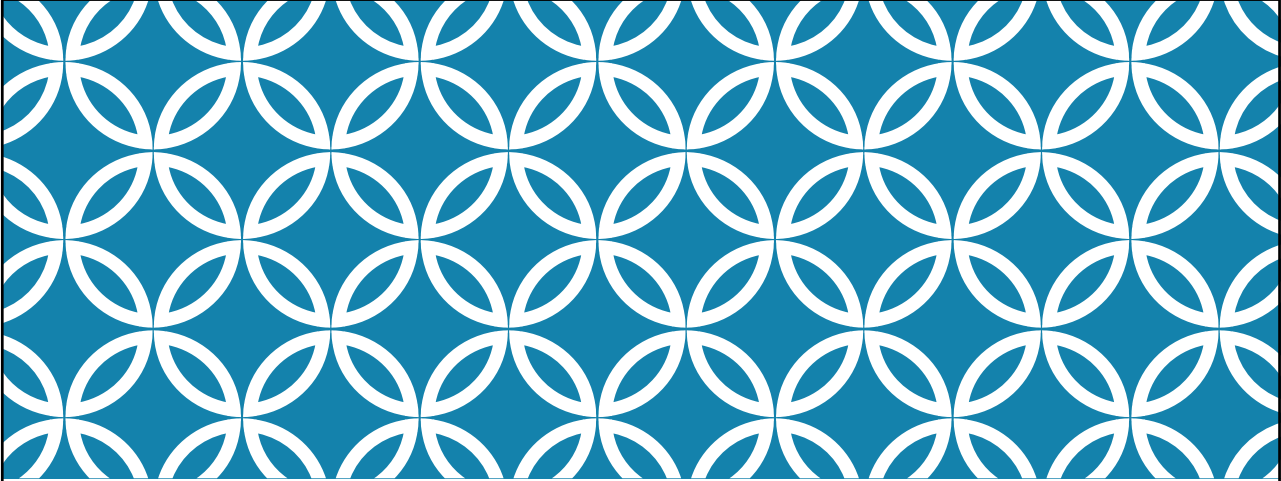
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INTERNS AT BCL OF TEXAS

OFN Oct. 15, 2014

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\$ 20 billion Endowment*	University of Texas	5% AA, 20% Asian, 23% Hispanic
\$139 million Endowment	Texas State University	42% Ethnic enrollment
\$ 82 million Endowment	St. Edwards University	35% Hispanic enrollment
\$ 10 million Endowment	Huston Tillotson University	69% African American

* Highest of any public university in America.

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SELECTION CRITERIA & BENEFITS



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BRIGHT TALENT POOL

Business Development & Lending -

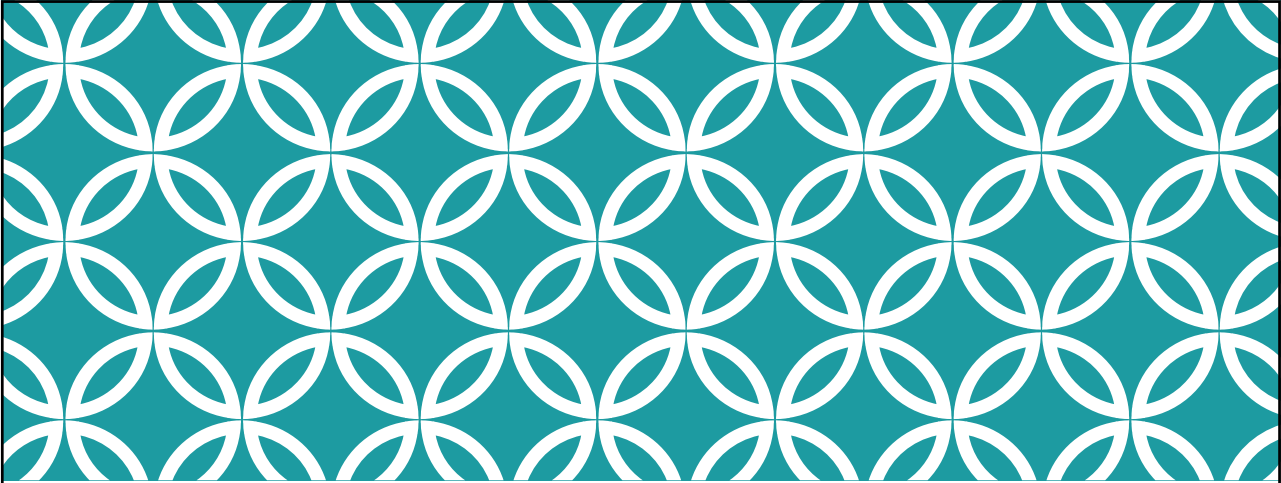
Assist with customer analysis and program development.

Marketing & Outreach - Assist the marketing team with campaigns, social media, marketing material production and event planning.

Community Programs - Assist the homeownership staff with application packaging, program development, and coordinating special projects.



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VALUABLE ON-THE-JOB SKILLS:
CREATE, DEVELOPED, IMPLEMENTED, COORDINATED,
LAUNCHED/PILOTED NEW LINE OF BUSINESS, LEARNED

An Extension of the
BCL Staff

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Green Business Leader & Corporate HR Plan
Lakisha Fredericks
Business Degree – 2010 Job with BCL



Launch of EVOO Social Enterprise/Fiscal
Manuel Morales
Business Degree – 2012 Job with BCL



Launch new Consumer Loan Product
Lucas Martin
BA Degree State University of NY – small
business /entrepreneurship – 2014 Vista

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SUCCESS STORY

Alesha Larkins came to BCL to intern in general management. She has a degree in Biology and is from Nebraska.

After 4 months with BCL, CEO offered Alesha a job as Executive Assistant.

Alesha and the CEO established:

- Corporate resource development tracking system
- Compliance Report Schedule/Monitoring
- Internal & External Communications
- Green Loan Fund
- Green Company Designation



Alesha Larkins, Director of Communications

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BCL OF TEXAS CELEBRATES
COLLEGE COLORS

First Friday of September

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At BCL of Texas everyone works hard and we make time to have fun

Thank you
Rosa Rios Valdez
1-888-241-2215

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