

Fundamentals of the Opportunity Finance Industry

Certificate in Community Development Finance

The Fundamentals of the Opportunity Finance Industry course is designed for practitioners who are interested in expanding their knowledge of the basics of the opportunity finance industry which provides financing and financial services to low-income, low-wealth, and other disinvested communities.

This course is jointly offered by the Carsey School of Public Policy at the University of New Hampshire and Opportunity Finance Network.

March 14–16, 2017
Center for Community Self-Help
Durham, North Carolina

Course Objectives

The goal of this certificate course is to develop the knowledge and capacity of community development finance professionals so that they can productively contribute to expanding their organizations' capacity and impact. The primary objectives are to:

1. Provide participants with an understanding of the history, models, products, and players in the opportunity finance field
2. Expose participants to best practices and trends in financing, capitalization, and operations of community development financial institutions (CDFIs)
3. Inform participants about impact measurement and evaluation as well as key policy issues impacting the industry
4. Learn about portfolio policies and management, and underwriting loans to CDFI borrowers

Who Should Attend

Participants who will benefit from attending this course are new or recent entrants into the field of opportunity finance who want to expand their knowledge of the fundamentals of the industry.

- Professionals changing careers
- Current employees of CDFIs—focused on those who entered the field within the past three years
- CDFI investors and funders, including banks and foundations
- Government employees involved in community and economic development

The Carsey School of Public Policy at the University of New Hampshire is a nationally acclaimed resource for research, leadership development, and engaged scholarship relevant to public policy.

Opportunity Finance Network is the leading network of CDFIs that deliver responsible lending to help low-wealth and low-income communities join the economic mainstream.

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Course Curriculum and Tuition

3-Day Program: \$ 975		
Day 1	Day 2	Day 3
Context, history of industry, and why CDFIs are needed	Financial analysis of CDFIs using a CAMEL analysis (capital, asset quality, management, earnings, and liquidity)	Lending policies and portfolio management
Where CDFIs fit within financial markets		Impact measurement and evaluation
Current status of the field: players, CDFI types, and size and scope of industry	Underwriting CDFI Borrowers	Public policy, advocacy, and federal programs for CDFIs
Models of CDFI growth to improve scale	CDFI Hosted Site Visit	Student case study presentations and discussion of hot topics in the field

Tuition includes daily lunches and course materials. All other meals are the participant's responsibility.

The course will feature guest speakers, group discussions and exercises, case studies, and a site visit to a local, award-winning CDFI.

Scholarships are available on a limited basis.

For more information, visit carsey.unh.edu/cdf or ofn.org/fundamentals



“It was so good to pull all the pieces together on the history of the CDFI industry, learn how to evaluate the financials more closely, and hear from the leaders of the CDFI industry—wow!”

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