

## **CDFI Fund Software Developers Conference**

**Conference Date/Time:** November 17, 2003. 1:00 pm – 4:00 pm EST

**Conference Location:** Metropolitan Square Building  
US Department of the Treasury  
655 15<sup>th</sup> Street, N.W.  
Room 6028 (Board Room)  
Washington, DC 20005  
(Closest Metro station is Metro Center (red line)  
Exit at 13<sup>th</sup> Street; enter building on G Street entrance.  
Take elevator to the 6<sup>th</sup> floor

### **Registration**

Interested software providers must register for the conference by November 10th, 2003 by e-mail with the attendee's name, telephone number, and organization name to [CIIS@kearneyco.com](mailto:CIIS@kearneyco.com).

### **Purpose**

The purpose of the CDFI Software Developers Conference is to provide a forum for software providers serving the Community Development Financial Institution (CDFI) and/or Community Development Entity (CDE) industry to learn the details of the CDFI Fund's reporting requirements so that they may modify or develop systems that CDFIs and CDEs use to track and submit the required data.

The CDFI Fund supports a network of more than 1,800 financial institutions. Approximately 400 of these are required to report annually to the CDFI Fund. The required data includes: a) institution-level data such as financial and organizational information; and b) detailed transaction-level data on each loan or investment in the institution's portfolio. Transaction level data includes loan terms and status; borrower characteristics such as address, race/ethnicity and income; and community development impacts such as the number of affordable housing units developed or the number of jobs created.

The CDFI Fund has contracted with EF Kearney, Limited to design and develop a web-based system for CDFIs and CDEs to report the required data to the CDFI Fund. These institutions use a wide range of software products to track their data and in many cases use more than one software product to collect the different types of information required by the Fund. There is a need for existing software products to be modified and/or new software products to be created to allow CDFIs and CDEs to easily track and submit each data element the Fund requires. At the Conference, the CDFI Fund and EF Kearney will present: 1) a list of the required data elements; 2) an overview of the data collection system; 3) system mapping; 4) methods of data interchange; 5) XML Dictionary and Schema; and 6) Technical Reference; and 7) Testing Opportunities.

### **Background**

A government corporation within the U.S. Treasury Department, the CDFI Fund was created in 1994 with the purpose of expanding the capacity of financial institutions to provide credit, capital and financial services to underserved populations and communities in the United States. The CDFI Fund accomplishes this mission by supporting a nationwide network of CDFIs and CDEs.

CDFIs and CDEs are specialized, regulated and non-regulated, for-profit and nonprofit financial service providers whose primary mission is to fill service and credit gaps in underserved communities. By successfully providing affordable financial products and services to distressed populations and communities, CDFIs and CDEs demonstrate the untapped market potential that exists in these communities and help to pull mainstream financial institutions toward these new markets.

For more information on the CDFI Fund, CDFIs and CDEs, see the CDFI Fund's website [www.cdfifund.gov](http://www.cdfifund.gov).