



CDFI PROGRAM AND NACA PROGRAM FINANCIAL ASSISTANCE APPLICATION

OMB No. 1559-0021

Paperwork Reduction Act Notice

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Executive Summary (Questions 1-4)- Your responses to the following questions are intended to help the CDFI Fund better understand your CDFI.

1. Provide the board-approved mission statement of your CDFI.
 - **Narrative** Response: 500 character limit
 - **AMIS** data entry responses: N/A

2. Provide information about the types of products your CDFI provides in the communities you serve.
 - **Narrative** Response: N/A
 - **AMIS** data entry responses: Yes
 - In AMIS, Applicants will complete these charts:

Note: The formatting of **all** charts and tables displayed in this document will appear differently in AMIS, based on Salesforce functionality.

Loans/Financing/Loan Guarantees/Financial Services Currently Offered			
Line of Business	\$/% Portfolio Outstanding Most Recent Fiscal Year	\$ Disbursed in most Recent Fiscal Year	Product Description
<input type="checkbox"/> Business Loans			
<input type="checkbox"/> Commercial Real Estate Loans			
<input type="checkbox"/> Education Facilities			
<input type="checkbox"/> Commercial			
<input type="checkbox"/> Community Facilities			

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<input type="checkbox"/>	Health Care Facilities			
<input type="checkbox"/>	Consumer Loans			
<input type="checkbox"/>	Intermediary Loans			
<input type="checkbox"/>	Microfinance Loans			
<input type="checkbox"/>	Residential Real Estate Loans			
<input type="checkbox"/>	Consumer Financial Services (Regulated Institutions Only)			
<input type="checkbox"/>	Commercial Financial Services (Regulated Institutions Only)			
<input type="checkbox"/>	Other (Please Describe):			

Development Services Currently Offered (Table Directly from OMB- Approved Annual Cert	
<input type="checkbox"/>	Business Technical Assistance
<input type="checkbox"/>	Credit Counseling
<input type="checkbox"/>	Financial Education
<input type="checkbox"/>	Homeownership Counseling and Technical Assistance
<input type="checkbox"/>	Real Estate Technical Assistance
<input type="checkbox"/>	Other

Activity Levels Chart Disbursements of Financial Products and Services				
	2013	2014	2015	2016
	# / \$	# / \$	# / \$	# / \$
Commercial Facilities				
Small Businesses				
Microenterprise				
Affordable Housing				
Community Facilities				
Consumer				

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Financial Products				
Consumer Financial Services				
Intermediary Lending to Non-profits and CDFIs				
Other (Please Describe)				

3. Provide demographic information about the people your CDFI serves using the AMIS Related List. Regulated entities may use proxy data if regulatory constraints prevent you from collecting this data.
- **Narrative** Response: 3,250 characters
 - **AMIS** data entry responses: Yes
 - *AMIS responses not scored by external reviewers; AMIS responses evaluated by CDFI Fund staff for evaluation context and for award prioritization by statutory requirements.*

In AMIS, Applicants will complete the following charts:

Client Data for Most Recently Completed Fiscal Year	Beneficiary Data for Most Recently Completed Fiscal Year
# Total Clients receiving your Financial Product, Financial Services, and Development Services	# Total Beneficiaries receiving your Financial Product, Financial Services, and Development Services
# Total Clients receiving your Financial Products	# Total Beneficiaries receiving your Financial Products
# Total Clients receiving your	# Total Beneficiaries receiving

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Financial Services	your Financial Services
# Total Clients receiving your Development Services	# Total Beneficiaries receiving your Development Services

Race/Ethnicity Characteristics of Targeted Population or Populations, if applicable	
African American #	African American %
Hispanic #	Hispanic %
Native American #	Native American %
Native Hawaiian/Other Pacific Islander #	Native Hawaiian/Other Pacific Islander %
Alaska Native #	Alaska Native %
Other #	Other %

Income Characteristics of all Clients/Beneficiaries Served for Most Recently Completed Fiscal Year	
Above Moderate Income #	Above Moderate Income %
Moderate Income #	Moderate Income %
Low Income #	Low Income %
Very Low Income #	Very Low Income %
Extremely Low Income #	Extremely Low Income %

Gender and Other Characteristics of Clients/ Beneficiaries Served for Most Recently Completed Fiscal Year	
Female Headed Households #	Female Headed Households %

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Female Headed Businesses #	Female Headed Businesses %
Individuals with Disabilities #	Individuals with Disabilities %
Other (Describe) #	Other (Describe) %

U.S. States/ Territories in which you currently have Clients/Beneficiaries and Loans/Equity Investments

Select all that apply

State	\$ Amount of Total Portfolio/Equity Outstanding in State	State	\$ Amount of Total Portfolio/Equity Outstanding in State	State	\$ Amount of Total Portfolio/Equity Outstanding in State
Alabama		Louisiana		Oklahoma	
Alaska		Maine		Oregon	
American Samoa		Maryland		Pennsylvania	
Arizona		Massachusetts		Puerto Rico	
Arkansas		Michigan		Rhode Island	
California		Minnesota		South Carolina	
Colorado		Mississippi		South Dakota	
Connecticut		Missouri		Tennessee	
Delaware		Montana		Texas	
Florida		Nebraska		U.S. Virgin Islands	
Georgia		Nevada		U.S. Minor Outlying Islands	
Guam		New Hampshire		Utah	
Hawaii		New Jersey		Vermont	

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Idaho		New Mexico		Virginia	
Illinois		New York		Washington	
Indiana		North Carolina		Washington, D.C.	
Iowa		North Dakota		West Virginia	
Kansas		Northern Mariana Islands		Wisconsin	
Kentucky		Ohio		Wyoming	

4. Provide quantitative data about the major needs and challenges of the communities your CDFI serves using the information in the Customer Snapshot AMIS Related List and supplemental statistical data.
- **Narrative** Response: 3,250 character limit
 - **AMIS** data entry responses: Yes
 - In AMIS, Applicants will complete the following chart:

Target Market Statistics for Most Recently Completed Fiscal Year	
Target Market Population Living in Poverty %	TM Poverty: National Poverty
TM Median Family Income \$	TM Income as % of National Income
TM Unemployment Rate %	TM Unemployment: National Unemployment

Business Strategy

Your responses to the following questions are intended to help the CDFI Fund better understand how your CDFI will use a Financial Assistance Award in order to accomplish one or more of the following objectives: expand operations into a new investment area or areas; serve a new targeted population or populations; provide additional or new products or services; and/or increase the volume of current products or services.

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5. Provide your Financial Assistance requested amount. Please select all FA eligible lines of business that apply to your request. This question will be evaluated as part of the Business Plan Review. As such, applicants are encouraged to select those eligible uses that they intends to pursue and those that are clearly related to their strategic plans.

- **Narrative** Response: N/A
- **AMIS** data entry responses: Yes
- In AMIS, Applicants will complete the following chart:

Award Request- Eligible Lines of Business	
Total FA Award Requested: \$	
Commercial Facilities	<input type="checkbox"/>
Small Business	<input type="checkbox"/>
Microenterprise	<input type="checkbox"/>
Community Facilities	<input type="checkbox"/>
Consumer Financial Products and Services	<input type="checkbox"/>
Affordable Housing	<input type="checkbox"/>
Intermediary Lending to Non-Profits and CDFIs	<input type="checkbox"/>
Other	<input type="checkbox"/>

Please note that within eligible lines of business categories, Award funds can be used for the following: Financial Products, Loan Loss Reserves, Development Services, Financial Services (regulated entities only), and Capital Reserves (regulated entities only).

In, AMIS NACA Applicants will complete the following table:

Amount Request - Eligible FA Uses in Native Areas/ to Native Populations			
By Dollar Amount		By Number of Eligible Activities	
Total \$	%	Total #	%

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6. Broadly, how will your CDFI use an FA award to achieve one or more **Financial Assistance (FA) Objectives**? Please note that selecting multiple FA objectives will not make your application more competitive.

- **Narrative** Response: 3,250 character limit
- **AMIS** data entry responses: Yes

In AMIS, Applicants will select all *FA Objectives* that apply:

Financial Assistance (FA) Objectives (Select all that apply)
<input checked="" type="checkbox"/> Expand operations into a new investment area or areas
<input checked="" type="checkbox"/> Serve a new targeted population or populations
<input checked="" type="checkbox"/> Provide additional or new products or services
<input checked="" type="checkbox"/> Increase the volume of current products and services

6a) **If you selected “expand operations into a new investment area or areas,”** identify and provide information about the new investment area or areas you will be serving over the three year award period. Acceptable identification formats include census tract, county, state, city or tribal location. Within the narrative, please describe the demand in terms of potential clients, growth prospects, areas covered, types of financial products and services offered, etc., that justifies your demand.

- **Narrative** Response: 6,000 character limit
- **AMIS** data entry responses: Yes

In AMIS, Applicants will complete the following chart for the three year award period.

New investment area or areas in which you will have Clients/Beneficiaries and

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Loans/Equity Investments			
Specify all that apply			
New Investment Area	State	Census Tract, County, City, or Tribal Location	Projected \$ Loan/ Equity Investment in Three Year Award Period

Total Projected Loan/ Equity Investment in Three Year Award Period dollar amount provided by applicant in the above table will be a Performance Goals and Measure (PG&M) in the applicant's Assistance Agreement. This PG&M will apply to the total amount projected to be disbursed provided by the applicant in the table, not just the FA Grant portion.

6b) If you selected “**serve a new targeted population or populations,**” provide information about the new target population or populations you will be serving within the three year award period. Within the narrative please describe the number of potential clients, growth prospects, areas covered, types of financial products and services offered, etc., that justifies your ability to serve your new population.

- **Narrative Response:** 6,000 character limit
- **AMIS** data entry responses: Yes

In AMIS, Applicants will complete the following charts. Regulated entities may use proxy data if regulatory constraints prevent you from collecting this data.

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New Targeted Population(s) in which you will Become Certified to Serve Over Three Year Period		
Type of Targeted Population (Select All that Apply)	#	%
<input type="checkbox"/> Other Targeted Population		
<input type="checkbox"/> African American		
<input type="checkbox"/> Hispanic		
<input type="checkbox"/> Native Hawaiian/ Other Pacific Islander		
<input type="checkbox"/> Alaska Native		
<input type="checkbox"/> Other		
<input type="checkbox"/> Low Income Targeted Population		
<input type="checkbox"/> Extremely Low Income		
<input type="checkbox"/> Very Low Income		
<input type="checkbox"/> Low Income		
<input type="checkbox"/> Moderate Income		
<input type="checkbox"/> Above Moderate Income		

New Targeted Population(s) in which you will become certified to serve selected by the applicant in the above table will be a Performance Goal and Measure (PG&M) in the applicant’s Assistance Agreement. Applicants will be expected to be certified to serve the selected Targeted Population(s) within two years, which is consistent with the required timeframe for certification through the CDFI Fund’s Technical Assistance Grant program.

6c) If you selected **“provide a new product or service,”** provide information about the new product(s) or service(s) you will be providing. Within your narrative please describe the demand in terms of number of potential clients, growth prospects, areas covered, types of financial products and services offered, etc., that justifies your willingness to provide the new product and/or service.

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- **Narrative** Response: 6,000 character limit
- **AMIS** data entry responses: Yes

In AMIS, Applicants will complete the following charts. The charts will be compared against the information provided in the Executive Summary. A new product or service will be considered one that is currently less than 5% of existing portfolio.

New Loans/Financing/Loan Guarantees/Financial Services To Be Offered			
Line of Business (select all that apply)	\$/% Portfolio Outstanding Most Recent Fiscal Year*	\$ Projected Disbursed over Three Year Award Period	Product Description
<input type="checkbox"/> Business			
<input type="checkbox"/> Commercial Real Estate			
<input type="checkbox"/> Education Facilities			
<input type="checkbox"/> Commercial			
<input type="checkbox"/> Community Facilities			
<input type="checkbox"/> Health Care Facilities			
<input type="checkbox"/> Consumer			
<input type="checkbox"/> Intermediary			
<input type="checkbox"/> Microfinance			
<input type="checkbox"/> Residential Real Estate			
<input type="checkbox"/> Consumer Financial Services (Regulated Institutions Only)			
<input type="checkbox"/> Commercial Financial Services (Regulated Institutions Only)			
<input type="checkbox"/> Other (Please Describe):			

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***Must be less than 5% of existing portfolio for most recent fiscal year to be considered a new financial product or service**

Total Projected Disbursed New Loans/Financing/ Loan Guarantees/ Financial Services Dollar Amount in Three Year Award Period provided by applicant in the above table will be a Performance Goal and Measure (PG&M) in the applicant’s Assistance Agreement. This PG&M will apply to the total amount projected to be disbursed provided by applicant in the table, not just the FA Grant portion.

<u>New Development Services To Be Offered</u>		
New Development Service (Select All that Apply)	# of Clients Currently Served Most Recent Fiscal Year*	Projected # of Clients Served with Three Year Award Period
<input type="checkbox"/> Business Technical Assistance		
<input type="checkbox"/> Credit Counseling		
<input type="checkbox"/> Financial Education		
<input type="checkbox"/> Homeownership Counseling and Technical Assistance		
<input type="checkbox"/> Real Estate Technical Assistance		
<input type="checkbox"/> Other		

***Must be less than 5% of clients the applicant serves through its Development Services for most recent fiscal year.**

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Total Projected Number of Clients Served in Three Year Award Period provided by applicant in the above table will be a Performance Goal and Measure (PG&M) in the applicant’s Assistance Agreement.

6d) If you selected “**increase the volume of your current products and services,**” discuss the planned increases. Within the narrative section please describe the demand in terms of number of potential clients, growth prospects, areas covered, types of financial products offered, etc. that justifies your willingness to increase your volume.

- **Narrative** Response: 6,000 character limit
- **AMIS** data entry responses: Yes

In AMIS, Applicants will complete the following chart.

Projected Activity Levels Chart Projected Disbursements of Financial Products and Services					
	Most Recent Completed Fiscal Year	2018	2019	2020	2021
	#/\$	# / \$	# / \$	# / \$	# / \$
Commercial Facilities					

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Small Business					
Microenterprise					
Affordable Housing					
Community Facilities					
Consumer Financial Products					
Consumer Financial Services					
Intermediary Lending to Non-profits and CDFIs					
Other (Please describe)					

Total Projected Disbursements of Financial Products and Services Dollar Amount in Three Year Award Period provided by applicant in the above table will be a Performance Goal and Measure (PG&M) in the applicant’s Assistance Agreement. This PG&M will apply to the total amount projected to be disbursed provided by applicant in the table, not just the FA Grant portion.

7. Discuss your CDFI’s strategic goals for the next five years. Include how you plan to achieve the stated goals and how your selected *FA Objectives* contribute to or relate to these goals.
 - **Narrative** Response: 5,000 character limit
 - **AMIS** data entry responses: Has the CDFI engaged in or adopted a new business plan or strategic plan during the last completed fiscal year? (Yes/No)

8. Previous award recipients must provide an explanation of how a new award differs from past requests.

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- **Narrative** Response: 3,250 character limit
- **AMIS** data entry responses: Yes

In AMIS, Applicants will complete the following charts:

Previous CDFI Fund FA Award Uses	
Eligible Uses- Line of Business	\$ Amount
Small Business	
Commercial Facilities	
Community Facilities	
Consumer Financial Products	
Consumer Financial Services	
Affordable Housing	
Microenterprise	
Intermediary Lending to Nonprofits and CDFIs	
Other	

9. a) Identify and discuss any risks that may inhibit your CDFI from achieving its strategic goals for the next five years. Discuss how your CDFI will mitigate these risks.
- **Narrative** Response: 3,250 character limit
 - **AMIS** data entry responses: N/A
- b) Identify and discuss any risks that may inhibit your CDFI from achieving its selected FA objectives. Discuss how your CDFI will mitigate these risks.
- **Narrative** Response: 3,250 character limit
 - **AMIS** data entry responses: N/A

Products and Services-

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Your responses to the following questions are intended to help the CDFI Fund better understand your CDFI's current product and services offering and how it meets community needs.

10. Identify how your organization's financial products and services create short term and long term positive outcomes and create economic opportunities in the community or communities you serve. These outcomes should be evidence-based and factual.
- **Narrative** Response: 6,000 character limit
 - **AMIS** data entry responses: Previously entered Product and Customer Information from questions 2,3,4

Market and Competitive Analysis

Your responses to the following questions are intended to help the CDFI Fund better understand your CDFI's awareness of, and positioning within, its markets, as well as determine whether these markets support growth in the future, and whether or not your CDFI is coordinating with other entities.

11. Describe any trends you are witnessing and/or primary competitors who are emerging in the market(s) you serve as they relate to the purpose of your FA request. Please discuss any data sources and analysis that inform your assessment.
- **Narrative** Response: 2,000 character limit
 - **AMIS** data entry response: N/A

Management and Staffing

Your responses to the following questions are intended to help the CDFI Fund better understand your CDFI's staffing and management to determine the

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relative likelihood and viability of executing your FA Objectives and strategic goals.

In AMIS, Applicants will complete the following charts:

Key Staff				
Name	Title	Years of Relevant Experience	Years with Applicant	Role in implementing your strategic goals
<i>Applicants will enter up to ten key staff members</i>				<i>[Provide a brief (700 character paragraph) description of this individual's capacity, skills, and experience - especially as it relates to his or her role in implementing the applicant's strategic goals.]</i>

Board Members				
Name	Title	Years of Relevant Experience	Years on Board	Accountability to the target market(s)
<i>Applicants will enter up to seven board members</i>				<i>[Provide a brief (700 character paragraph) description of this individual's capacity, skills, and experience.]</i>

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Committees			
Name	Number of Board Members	Number of Key Staff Members	How this committee relates to the performance of the CDFI
<i>Applicants will enter up to five committees</i>			<i>[Provide a brief (700 character paragraph) description of this Committee's purpose and how it relates to the performance of your CDFI.]</i>

AMIS Management Dropdown Questions	Response Options
Has the CDFI experienced change within its governance structure during the last fiscal year?	Yes/No, if yes 1,000 character explanation
Has the CDFI changed or implemented a new management information system during the last completed fiscal year?	Yes/No, if yes 500 character explanation
Has the CDFI been subject to any adverse legal actions during the last completed fiscal year?	Yes/No, if yes 1,000 character explanation
Has the CDFI seen the departure, replacement, or change within its senior leadership team during the last completed fiscal year?	Yes/No, if yes 1,000 character explanation

12. Will any changes to your policies and procedures be needed in order to achieve your strategic goals (as described in the executive summary

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SECTION)? Yes/No. If so, please describe and include timeframe for updating these policies.

- **Narrative** Response: 2,000 character limit
- **AMIS** data entry responses: Yes/No

Financial Position

13. Describe how you view your current financial position and explain any large fluctuations or trends. Include discussions on any differences between your financial information entered into the FA as compared to the audited financial statements or Federal Regulator performance reports provided.

- **Narrative** Response: 4,000 character limit
- **AMIS** data entry responses: **Appendix- Financial Inputs for all Institution Types**

14. Describe any audit findings for your CDFI or any of its affiliates or parent company from the last three fiscal years and how you addressed them (this includes material and non-material findings). Applicants must verify this information correctly in this application question. Applicants that do not identify qualified audit opinions at the time of application and are later determined to have withheld this information from the CDFI Fund either intentionally or inadvertently will be evaluated negatively.

- **Narrative** Response: 3,000 character limit
- **AMIS** data entry response: Yes

In AMIS, Applicants will complete the following responses:

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AMIS Financial Dropdown Questions	Response Options
Does the CDFI generate externally reviewed, regulator reviewed, or audited financial statements annually?	<i>Select one of the following options: Annual externally reviewed financial statements; Annual regulator reviewed financial statements; Annual audited financial statements; or None of the above . If none of the above, 500 character explanation</i>
In the last three fiscal years, how many times has this CDFI received a qualified opinion, adverse opinion, or audit finding on its audited financial statements?	<i>Select one of the following options which apply: 0 qualified opinions, adverse opinions, and audit findings; 1 qualified opinion; 2 or more qualified opinions; 1 audit finding; 2 or more audit findings; 1 adverse opinion; 2 or more adverse opinions; or Not applicable. If 1 or more, 1,500 character explanation</i>
What kind of accounting system does this CDFI use to manage its portfolio?	<i>Select one of the following options: No system; Paper-based system; Microsoft Excel-based system; Enterprise accounting software; or Other</i>
Are externally reviewed financial statements or audited financial statements completed annually within 180 days of the fiscal year end?	Yes/No
Has the CDFI received any federal, state, or local government financial assistance in the last ten fiscal years?	Yes/No
<i>[Conditionally Required] If this CDFI has received federal, state, or local government assistance in the last ten fiscal years, does this CDFI maintain a record of all federal, state, or local government assistance received?</i>	Yes/No
[Conditionally Required] <i>If this CDFI has received federal government assistance in the last then fiscal years, has this CDFI submitted a Single</i>	Yes/No/NA

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AMIS Financial Dropdown Questions	Response Options
<i>Audit (A-133) to any of the federal agencies from which it has received financial assistance in the last ten fiscal years?</i>	
Does this CDFI have formal and written policies and procedures for complying with and completing federal, state, or local government financial assistance agreement requirements?	Yes/No
<i>[Conditionally required] If the CDFI has not yet established policies and procedures to comply with federal, state, or local government financial assistance reporting requirements, how long will this CDFI need to do so?</i>	<i>Select one of the following options if the response to the previous question is No; 6 months or less, 1 year or less, or More than 1 year</i>
Does this CDFI maintain staff whose roles and responsibilities include complying with and completing federal, state, or local government financial assistance requirements?	Yes/No
<i>[Conditionally required] If this CDFI does not maintain staff, is the CDFI prepared to designate these responsibilities to specific staff members, should it receive an award?</i>	Yes/No
<i>Has this CDFI defaulted on any federal credit instrument in the last ten fiscal years?</i>	Yes/No
Has the CDFI failed to expend any financial assistance funds in a timely manner as required by any of federal, state, or local government agreements, or contracts?	Yes/No, if yes 1,000 character limit
Has the CDFI developed formal and written policies and procedures to oversee the quality of its investments and loan portfolio?	Yes/No
Has the CDFI had a tax lien imposed in the last ten fiscal years , due to delinquent taxes or failure to pay taxes owed by the entity?	Yes/No
<i>[Conditionally required]. If this CDFI is a prior or current Award Recipient, does it have policies and procedures in place to notify its Board of Directors or governing body of new and existing federal, state, or local government requirements?</i>	Yes/No/NA
<i>[Conditionally Required] If this CDFI is a prior or current award Recipient, is the CDFI required to measure and report on progress toward its Performance Goals and Measures (PG&Ms) to the CDFI's Board of Directors or governing body at least annually?</i>	Yes/No

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AMIS Financial Dropdown Questions	Response Options
<p>[Conditionally Required] If this CDFI is a prior or current award Recipient, how frequently is the CDFI required by its policies and procedures to self-evaluate and track performance on PG&Ms?</p>	<p>Select one of the following options: <i>Annually or more frequently; Less than once per year; or Not required</i></p>
<p>Does the CDFI have financial covenants or other performance requirements with third-party funders?</p>	<p>Select one of the following options: <i>CDFI has accepted funding that included financial covenants or performance requirements from 3rd party funders; CDFI has not accepted funding that included financial covenants or performance requirements from 3rd party funders; or CDFI does not have any 3rd party funders</i></p>
<p>[Conditionally Required] If the CDFI has financial covenants or requirements with third-party funders, how frequently does the CDFI internally measure and report compliance?</p>	<p>Select one of the following options: <i>More frequently than annually; Annually; Less frequently than annually; or Not internally monitored or reported by the CDFI</i></p>
<p>Has this CDFI formally defaulted on any outstanding debt in the last ten fiscal years?</p>	<p>Yes/No</p>
<p>What is the age of the CDFI?</p>	<p>Number in Years</p>

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AMIS Financial Dropdown Questions	Response Options
Is this CDFI a Native CDFI?	Yes/No
What is the CDFI's primary line of business?	List of all CDFI Lines of Business
What is the CDFI's secondary line of business?	List of all CDFI Lines of Business
Is this CDFI a member of any of the following recognized networks or trade association?	List of all CDFI networks or trade associations (i.e. Opportunity Finance Network; CDFI Coalition; National Association of Community Development Credit Unions; Community Development Bankers Association, etc.)
Number of Full Time Equivalent Staff (All CDFIs)	Number by count
Number of Government Grants	Number by count
Has this CDFI previously participated in a Technical Assistance session or received a Technical Assistance award?	Yes/No/NA
Has this CDFI engaged in or adopted a new business plan or strategic plan over the last fiscal year?	Yes/No
Has this CDFI received any audit findings in the last fiscal year?	Yes/No
Has this CDFI failed to expend any financial assistance funds in a timely manner as required by any of federal, state, or local government agreements, or contracts?	Yes/No

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AMIS Financial Dropdown Questions	Response Options
Does the CDFI's information technology infrastructure support an accounting system?	Yes/No
Does the CDFI have a delinquent loan management policy?	Yes/No
In the last year, has the CDFI had one or more missed or overdue payments to any of its funders?	Yes/No

15. Has your CDFI or any of its affiliates or parent company filed bankruptcy over the last ten fiscal years? If so, please describe the circumstances and current status.

- **Narrative** Response: 2,000 character limit, if applicable.
- **AMIS** data entry responses: Yes/No

16. Indicate if your CDFI has ever formally defaulted on any outstanding debt. Applicants must verify this information correctly in this application question. Applicants that do not identify defaulted debt at the time of application and are later determined to have withheld this information from the CDFI Fund either intentionally or inadvertently will be evaluated negatively. If yes, provide a narrative explaining the situation and how it was remedied. Identify when the default occurred.

- **Narrative** Response: 2,000 character limit, if applicable.
- **AMIS** data entry responses: Yes/No

17. AMIS will identify the range in which an applicant falls on a scale of 1-5 for Minimum and Prudent Standard Ratios (MAPS).

a) Explain the financial health of your institution based on where your organization falls on the spectrum of the MAPS ratios

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presented in the AMIS Financial ratio fields, with 1 being the highest performance possible, and 5 being the lowest performance possible. If applicable, explain discrepancies between the financial information provided in AMIS financial fields and your audited financial statements or Federal Regulator performance reports.

- **Narrative** Response: 4,000 character limit
- **AMIS** data entry responses: **Appendix- Financial Inputs for all Institution Types**, MAPS auto-calculated based on previous inputs

b) If your CDFI is currently scoring a 4 or 5 on any MAPS ratios explain what is causing this performance, and your plan to improve the ratio, if applicable.

- **Narrative** Response: 4,000 character limit
- **AMIS** data entry responses: **Appendix- Financial Inputs for all Institution Types**, MAPS auto-calculated based on previous inputs

c) If your CDFI previously scored a 4 or 5 on any MAPS ratios in the three most recently completed historic years, explain what caused this performance, and relevant trends.

- **Narrative** Response: 4,000 character limit
- **AMIS** data entry responses: **Appendix- Financial Inputs for all Institution Types**, MAPS auto-calculated based on previous inputs

Growth and Financial Projections. *Your responses to the following questions are intended to help the CDFI Fund better understand the feasibility of your CDFI's FA Objectives and the intended deployment of a Financial Assistance award.*

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18. Describe the extent to which the requested award (as listed in question 5) will build, increase, augment, or improve your organization’s ability to achieve the identified strategic goals and FA Objectives. Previous FA award recipients should include a quantifiable discussion about how another or new award will additionally increase or augment the organization’s ability to achieve the identified strategic goals or how strategic goals have changed or evolved.

- **Narrative** Response: 2,000 character limit
- **AMIS** data entry responses: Previously entered information in questions 5 and 6

19. Describe how your current staff will be expected to reach increased production goals either for new products, more products, or larger service areas. If you plan on creating new positions or hiring additional staff in your organization to help execute your strategic plan, describe how new staffing needs will be met.

- **Narrative** Response: 2,000 character limit
- **AMIS** data entry responses: Previously entered information in questions 5 and 6, and Management Section AMIS inputs.

20. Discuss how your organization’s financial, lending activity projections align with your strategic goals.

- **Narrative** Response: 2,000 character limit
- **AMIS** data entry responses:
Appendix- Financial Inputs for all Institution Types, MAPS auto-calculated based on previous inputs

Projected Activity Levels Chart Projected Disbursements of Financial Products and Services				
	2018	2019	2020	2021
	# / \$	# / \$	# / \$	# / \$

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Commercial Facilities				
Small Business				
Microenterprise				
Affordable Housing				
Community Facilities				
Consumer Financial Products				
Consumer Financial Services				
Intermediary Lending to Non-profits and CDFIs				
Other (please specify)				

21. Explain the rationale behind the projected figures included in your Balance Sheet and Income Statement **Projected Financial Inputs** (Assets, Liabilities, Equity, Income, Expenses).
- **Narrative** Response: 4,000 character limit
 - **AMIS** data entry responses: **Appendix- Financial Inputs for all Institution Types**, MAPS auto-calculated based on previous inputs

22. Describe how you will combine and leverage resources to achieve the described strategic goals.
- a) If using the FA award to leverage additional private or public financial resources, please include an estimate of the total increase in Total Equity and/or Revenue. If applicable, please provide a description of the source of the financial resources.

- **Narrative** Response: 2,000 character limit

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- **AMIS** data entry responses: N/A

b) Discuss your strategy for community coordination if using the FA award to improve or build new partnerships discuss within the context of your community coordination strategy.

- **Narrative** Response: 2,000 character limit
- **AMIS** data entry responses: N/A

c) Describe any formal or informal partnerships your CDFI has established or plans to establish for the purposes of i) accomplishing your strategic goals, ii) furthering your support of your Target Market's needs, and/or iii) developing your products and services.

- **Narrative** Response: 2,000 character limit
- **AMIS** data entry responses: N/A

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Appendix- Financial Inputs for all Institution Types

ASSETS
Cash and Cash Equivalents (\$)
Unrestricted Cash and Cash Equivalents (\$)
Total Investments (\$)
Current Gross Loans Receivables (\$)
Total Commitments (\$)
Total Current Assets (\$)
Noncurrent Gross Loans Receivables (\$)
Loan Loss Reserves (Cash) (\$)/Allowance for Loan and Lease Losses (Cash) (\$)
Loan Loss Reserves (Accrual) (\$)/Allowance for Loan and Lease Losses (Accrual) (\$)
Total Outstanding Equity Investment Portfolio (\$)
Net Unrealized Loss (Gains) (\$)
Total Gross Loan Receivables and/or Equity Investment Portfolio (\$)
Total Net Loans Receivables and/or Equity Investment Portfolio (\$)
Total Off-Balance Sheet Assets for Financing (\$)
Cash on Deposit (Credit Unions Only, \$)
Short Term Investments (Credit Unions Only, \$)
Total Loans and Leases (Credit Unions Only, \$)
Less: Allowance for Loans and Lease Losses (Credit Unions Only, \$)
Short-term Investments (Banks Only, \$)
Long Term Investments (Banks Only, \$)
Total Loans and Leases, Net of Unearned Income (Banks Only, \$)
Less: Allowance for Loans and Lease Losses (Banks Only, \$)
Average Assets (Banks Only, \$)
Earning Assets (Banks Only, \$)
Long Term Assets (Banks Only, \$)
Total Assets (\$)
LIABILITIES
Current Liabilities (\$)
Total Notes Payable (\$)
Total Adjusted Notes Payable (\$)/ Financing Debt
Non-Current Liabilities Due (Debt & Equity) (\$)

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Senior Debt (\$)
Subordinated Debt/EQ2 (\$)
Total Off-Balance Sheet Liabilities (\$)
Total Borrowings (Credit Unions Only, \$)
Accrued Dividends & Interest Payable in Shares and Deposits (Credit Unions Only, \$)
Accounts Payable and Other Liabilities (Credit Unions Only, \$)
Interest-bearing Deposits (Banks Only, \$)
Total Deposits (Banks Only, \$)
Total Notes Payable (Banks Only, \$)
Non-Core Liabilities (Banks Only, \$)
Other Liabilities (Banks Only, \$)
Total Liabilities (\$)
SHARES/DEPOSITS (Credit Unions Only)
Total Member Deposits (\$)
Total Non-Member Deposits (\$)
Total Shares and Deposits (\$)
NET ASSETS
Total Net Assets Available for Financing (\$)/Equity/ Net Worth
Unrestricted Net Assets (\$)
Temporarily Restricted Net Assets (\$)
Permanently Restricted Net Assets (\$)
Total Net Assets or Equity (\$)
Change in Net Assets (\$)
Undivided Earnings (Credit Unions Only, \$)
Regular Reserves (Credit Unions Only, \$)
Appropriation for Non-Conforming Investments (State-chartered Credit Unions Only, \$)
Other Reserves (Credit Unions Only, \$)
Uninsured Secondary Capital (Credit Unions Only, \$)
Net Income (Unless this amount is already included in the Undivided Earnings) (Credit Unions Only, \$)
Total Net Worth (Credit Unions Only, \$)
Perpetual Preferred Stock (Banks Only, \$)

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Common Stock (Banks Only, \$)
Surplus (Banks Only, \$)
Undivided Profits (Banks Only, \$)
Tier 1 Core Capital (Banks Only, \$)
Tier 2 Capital (Banks Only, \$)
Total Equity Capital (Banks Only, \$)/ Equity (Capital Category)
INCOME
Total Interest Income (\$)
Fee Income (\$)
Total Earned Revenue (\$)
Total Grants and Contributions (\$)
Total Income (\$)
Total Non-Interest Income (Credit Unions Only, \$)
Net Income (Credit Unions Only, \$)
Total Non-Interest Income (Banks Only, \$)
Income Before Taxes and Extraordinary Items and Other Adjustments (Banks Only, \$)
Net Income (Banks Only, \$)
EXPENSES
Total Interest Expense (\$)
Total Pre-tax Operating Expense (\$)
Provision for Loan Loss Reserve (Bad Debt) Expense (Accrual) (\$)
Total Expenses (\$)
Provision for Loan and Lease Losses (Credit Unions Only, \$)
Total Non-Interest Expense (Credit Unions Only, \$)
Provision for Loan and Lease Losses (Banks Only, \$)
Total Non-Interest Expense (Banks Only, \$)
LOAN PORTFOLIO
Total On-Balance Sheet Loans Closed (#, \$)
Total On-Balance Sheet Disbursements Made (#, \$)
Total On-Balance Sheet Outstanding Loan Portfolio (Gross)(Annual Data) (#, \$)/ Total Loan Portfolio

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Off-Balance Sheet Loans Closed (#, \$)
Total Off-Balance Sheet Loans Managed (#, \$)
CURRENT LOAN PORTFOLIO
Total On-Balance Sheet Outstanding Loan Portfolio (Gross)(Annual with Quarterly Detail)(#, \$)/ Total Loan Portfolio
Total Loans Charged-Off (#, \$)/Charge Offs
Restructured Loans (#, \$)
Recoveries (#, \$)
Total Delinquent Loans (90+ days) (#, \$)/ Loans 90 or more days past due
Total Loans Delinquent 31 to 60 days (#, \$)
Total Loans Delinquent 61 to 90 days (#, \$)
EQUITY INVESTMENT PORTFOLIO VALUATION
Total Number of Equity Investments and Combined Value of Investments (#, \$)/ Total Equity Investments
Equity Investments Exited During the Year (#, \$)
Equity Investments Written-off During the Year (#, \$)
Unrealized Gains (Losses) (#, \$)
Realized Gains (Losses) (#, \$)
Target Rate of Return (%)
Actual Rate of Return (%)
ACTIVITIES LEVEL
Product Category/Sub-Category
Total On-Balance Sheet Lending/Equity Activities (Do not include Development Service or Financial Service activities)
IMPACTS
Category & Methodology
Jobs Created or Retained

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Housing Units Developed/Rehabilitated
Square feet of Real Estate Developed/Rehabilitated
First-Time Homeowners
First-Time Account Holders
First-Time Business Owners
Foreclosures Prevented
Enter Other Impact
Enter Other Impact
Enter Other Impact
MEMBERSHIP (CREDIT UNIONS ONLY)
Category
Total Members (#, %)
Total Field of Membership (#, %)
NEW DATA POINTS FOR APPLICATION
Financing Capital Available
Financing Capital Detail
Total Financing Capital
Non-performing Assets
Current Assets (Short-Term Assets)
Current Liabilities (Short-Term Liabilities)
Nonaccrual Loans
Other Real Estate Owned (OREO)
Cash Restricted for Operations
Operating Revenue
Operating Expenses
Non-cash expenses
Government Grants
Total Full Time Equivalent Turnover

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