



Member driven.
Community focused.

Partnership Grant Program

2024 Guidelines and Application



Partnership Grant Program Questions and Answers

Q. What type of CBOs can apply?

A. 501(c)3 organizations located in AR, LA, MS, NM or TX with annual revenues at or below \$1,000,000 that are involved in affordable housing or economic development can apply for Partnership Grant Program funds through an FHLB Dallas member institution. Examples of eligible CBOs include non-profit affordable housing developers or organizations that provide credit counseling, financial literacy services, small business technical assistance, job skills training, etc.

Q. How is the Partnership Grant amount determined?

A. The Partnership Grant is a matching grant program. The Partnership Grant amount is based on the amount of the member's contribution to the CBO. FHLB Dallas will match member contributions to the CBO of \$500-\$5,000 on a 5:1 basis up to \$25,000 per member application and no more than \$50,000 per year if the CBO is supported by multiple members.

Q. The CBO has not filed their 2023 taxes, can we submit the 2022 tax return?

A. No, FY2023 financial information is required as one of the CBO qualifications. If a 2023 return has not been filed, we will accept other 2023 financial information such as a compilation of revenue.

Q. What financial information should be provided if the fiscal year for the CBO is different from the calendar year?

A. If the fiscal year for the CBO does not end on December 31, 2023, then please provide financial information for the fiscal year ending 2023 and projected revenues for the fiscal year ending 2024. For example, if the fiscal year for the CBO is July 1 - June 30, then provide financial information for the fiscal year ending June 30, 2023 and projected revenues for the fiscal year ending June 30, 2024.

Q. Can Partnership Grant funds be used for home repairs or construction?

A. No, construction material and labor costs are not acceptable ways to use Partnership Grant funds. However, Partnership Grant funds may be used to offset operational and administrative expenses (Organizational Capacity Building) or cover pre-development costs like architectural, engineering and survey fees (Contractual Services). See the Program Guidelines for other eligible uses of Partnership Grant funds.

Q. How do we submit our application for PGP funds?

A. An individual from the member institution must email the application and supporting documentation to pgp@fhlb.com. Email submissions from the CBO will not be accepted. The deadline to apply is May 31, 2024.

Q. Will you allow electronic signatures for the application?

A. Yes, an electronic signature, using software such as DocuSign or AdobeSign, will be permitted. If an electronic signature is used, we will require an individual listed on the member's signature card with Advances or AHP authority to send an email attesting to the PGP application. The email must come from the member's account, not a personal email address.

Q. What is the selection process for awarding PGP funds?

A. Applications are selected through a lottery system. Money is not allocated to each state. However, the initial lottery is one per state. After that, the applications are pooled together for a general lottery. If a CBO submits multiple applications through different member institutions, all applications from that CBO will be grouped together and counted as one for the lottery drawing.

Partnership Grant Program Guidelines

Overview

- The Partnership Grant Program (PGP) was developed by the Federal Home Loan Bank of Dallas (Bank) to provide funding for the operational needs of community-based organizations (CBOs) – nonprofits involved in affordable housing, stimulating small business development, or providing small business technical assistance within the District. The program is offered through eligible Bank member institutions to eligible CBOs.
- These grants are intended to help promote and strengthen the relationships between CBOs and the Bank’s member institutions, and to complement the development activities currently fostered by the Affordable Housing Program (AHP), Community Investment Program (CIP), and Economic Development Program (EDP) of the Bank. For the purposes of the Partnership Grant Program, an economic development oriented CBO is qualified for the program if the community-based (neighborhood) organization is engaged in stimulating or maintaining a business activity and/or employment in its local community.
- The Partnership Grant award is based on the cash contribution of the member institution. A member’s contribution of \$500 to \$5,000 will be match-funded at a 5:1 ratio. **The maximum Bank grant permitted is \$25,000 per member grant to a CBO. The maximum annual Bank grant per CBO is \$50,000.**
- **All funds will be allocated through a lottery system.** If a CBO sends in multiple applications from different member institutions, all of the applications from that organization will be grouped together and counted as one for the lottery drawing.

Use of Funds

- **2024 Partnership Grant funds may be used for the following purposes:**
 - **Organizational Capacity Building:** to offset operation and administration expenses; purchase or rent equipment or computer software, etc; hire staff and/or consultants; secure technical assistance, training, or consulting; or to sponsor special program-related events, meetings, and/or conferences.
 - **Assistance in Applying for Grants and Other Funding Sources:** to cover expenses in preparing applications for Bank programs; hiring fund-raising and/or grant-writing consultants.
 - **Research and Studies:** for marketing, feasibility and planning studies for economic development and affordable housing projects; environmental studies or lead and asbestos testing.
 - **Contractual Services:** for architectural, engineering, and survey fees (pre-development project costs); or legal, accounting and administrative costs (program operating expenses).
 - **Social Services:** to offset costs associated with providing aid and meeting needs of the community such as economic and rental assistance, temporary shelter and housing or job training.

Program Requirements

- The applicant must be a member of the Bank.
- The co-applicant must be a CBO **with an annual revenue of \$1,000,000 or less and must be located within the Bank’s five-state District of Arkansas, Louisiana, Mississippi, New Mexico or Texas.**
- The CBO must have 501(c)(3) recognition by the IRS. For federally recognized tribes, the tribe must have a copy of the IRS determination letter indicating that your organization is a tribal government entity.
- Requests for Bank matching grants may range from \$2,500 to \$25,000. The participating member institution must provide a cash contribution, the value of which will determine the amount of the matching grant for which the CBO may qualify.
- In the event that the Bank determines that a member be designated as a “restricted member,” then such member shall not be eligible to apply for PGP funds.

Application Process

The Bank will accept applications from May 6, 2024 through May 31, 2024. Applications received after May 31, 2024 will not be considered. After the applications are received, a lottery system will be utilized to select the recipients.

- The fully executed application with supporting information should be submitted to the Bank’s Community Investment Department. All applicable documents should reflect the CBOs legal name on its letterhead. If multiple members are supporting the same organization, an executed application is required from each member.
- CBO must have a 501(c)(3) nonprofit designation from the IRS. For federally recognized tribes, the tribe must have a copy of the IRS determination letter indicating your organization is a tribal government entity.
- A commitment letter from the member institution describing and guaranteeing matching funds or a copy of check for any donations given in the 2024 calendar year.
- A copy of the CBO’s FY2024 total projected revenue. The maximum total revenue may not exceed \$1,000,000.
- CBO's FY 2023 revenue support for the entity identified on the 501(c)(3) such as a copy of the CBO’s FY 2023 IRS Forms 990, 990-EZ, or 990-N, or a copy of the FY 2023 Audit, Review or Compilation Report, prepared by an independent audit firm.

Future Reporting Requirements

A report will be required from each participating CBO by September 1, 2025. Reporting questions will be provided to those that are awarded funds.

Completed application(s) and supporting documentation should be **emailed to pgp@fhlb.com.**

For additional information, please contact the Bank’s Community Investment Department at 800.362.2944, or visit the Bank’s website at fhlb.com.



Member driven.
Community focused.

Partnership Grant Program Application

Member Institution

Name: _____ FHFA ID #: _____
 Street Address/P.O. #: _____
 City: _____ State: _____ ZIP: _____
 Contact Person: _____ Title: _____
 Phone: (____) _____ Email: _____

Community-Based Organization (Co-Applicant)

Name: _____
 Street Address/P.O. #: _____
 City: _____ State: _____ ZIP: _____
 Congressional District: _____
 Contact Person: _____ Title: _____
 Phone: (____) _____ Email: _____

Has CBO previously participated in the Partnership Grant Program? Yes No
 Total FHLB Partnership Grant Program funds previously received: \$ _____

Computation of Grant Funds

A. Contribution by member institution (\$500 to \$5,000) \$ _____
 B. 5:1 Match by the Bank: \$ _____
 C. **TOTAL GRANT** (sum of A and B): \$ _____

Please prepare the submission as a single PDF file with supporting documentation provided in the following order:

1. The fully executed application with supporting information.
2. Copy of the CBO's 501(c)(3) IRS designation or IRS determination of tribal government entity.
3. Copy of the CBO's FY 2024 total projected revenue.
4. Revenue support for the entity identified on the 501(c)(3) such as a copy of the CBO's FY 2023 IRS Form 990, 990-EZ or 990-N, or a copy of the FY 2023 Audit, Review or Compilation Report, prepared by an independent audit firm.
5. Commitment letter from member institution describing and guaranteeing matching funds or a copy of check for any donations given in the 2024 calendar year.
6. CBO performance history. Please include a history of the CBO's production and/or accomplishments.
7. Intended use of grant funds statement.

All items must be submitted by the member for acceptance of application. Applications received from the organization will not be accepted.

CBO Performance History

Briefly describe the CBO's current performance capacity. Describe the history of the CBO and emphasize its performance over the past two years. Include the recent accomplishments, target market, and administrative and board structure. Include the description as an attachment.

Size of paid staff/volunteers: Staff _____ Volunteers _____

Population of area served: _____

Intended Use of Grant Funds

Briefly describe the intended use of grant funds, specifically how the requested funds will be used in one or more of the five areas described in the Application Guidelines (page 1). Include the description as an attachment.

Certification

The undersigned member institution hereby applies for a grant, pursuant to and subject to the terms of the previously executed Advances, Specific Collateral Pledge and Security Agreement (as such agreement may be amended, restated, or otherwise modified) and the Member Products and Credit Policy of the Bank in effect at the time of disbursement.

The member institution and the community based organization certify that any grant which will not be, or ceases to be, used for the purpose approved by the Bank will be recaptured and the unused or improperly used subsidy will be returned to the Bank.

The community based organization agrees to deliver to the Bank all reports, certifications and supporting documents as the Bank may request.

By signing below the member institution and the community based organization each certifies to the best of their knowledge the information in this application is true and correct and has met all the above criteria for the Partnership Grant Program.

(Authorized Signature of Member Institution*) Print Name (Date)

(Signature of CBO) Print Name (Date)

*Applications must be signed by a member contact authorized by the Bank with AHP or Advances authority.

The Bank will accept applications from members beginning May 6, 2024 through May 31, 2024. Applications received after May 31, 2024 will not be considered.

Please email the application and supporting documentation as a PDF attachment to pgp@fhlb.com. Files sent as a link to an external site (e.g. Dropbox, ShareFile, Google Drive, etc.) will not be accepted.

For more information or to confirm receipt of the application, please contact the Community Investment Department at 800.362.2944.

Federal Home Loan Bank of Dallas | Community Investment Department