



FEDERAL HOME LOAN BANK OF DALLAS

# partnership grant program



*Guidelines and Application*

2009



## PARTNERSHIP GRANT PROGRAM GUIDELINES

### OVERVIEW

- The Partnership Grant Program 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, community local development funds, or small business technical assistance providers within the District. The program is offered through 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.
- 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 3:1 ratio. The maximum Bank grant permitted is \$15,000. **The total maximum lifetime grant available to the CBO is \$30,000.**
- **All funds will be allocated on a first-come, first-served basis.**

### USE OF FUNDS

- **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; or funding education and awareness programs for housing and economic development groups and lending institutions.
  - **Research and Studies:** for marketing, feasibility and planning studies for economic development and affordable housing projects; environmental studies; lead and asbestos testing; or fair-housing policy development.
  - **Contractual Services:** for architectural, engineering, and survey fees (pre-development project costs); or legal, accounting and administrative costs (program operating expenses).

## PROGRAM REQUIREMENTS

- The applicant must be a member of the Bank.
- The co-applicant must be a CBO **with an annual operating budget of \$500,000 or less**. The CBO must have 501(c)(3) recognition by the IRS.
- Requests for Bank matching grants may range from \$1,500 to \$15,000. 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.

## APPLICATION PROCESS

The Bank will begin accepting applications on **July 1, 2009**. **Applications received prior to that date will not be considered.** The Bank must receive the fully executed original application with supporting information **by 5:00 p.m. C.S.T. on Friday, August 14, 2009:**

- The fully executed original of this 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.
- CBO must have a 501(c)(3) nonprofit designation from the IRS.
- A commitment letter from the member institution providing the matching funds.
- 2009 "Certificate of Good Standing" from the CBO's state.
- A resolution from the Board of Directors of the CBO stating the following:

"RESOLVED, that the Board of Directors of the       (CBO)       hereby grants authorization for its executive director to apply for the Federal Home Loan Bank of Dallas 2009 Partnership Grant program through       (member institution)      . The Board affirms that the operating budget for the calendar year ending December 31, 2009 will be at or below \$500,000. The Board resolves that       (executive director)       is hereby authorized to furnish the       (member institution)       and the Bank a copy of our 2008 IRS completed Form 990 and 2008 audited financial statement."\*

Signed and Dated by the Chair/Secretary of the       (CBO)       Board of Directors.
- A copy of the CBO's Y2009 total operating budget **as approved by its Board of Directors**. The maximum total operating budget, which excludes dollars "passed through" to beneficiaries, may not exceed \$500,000 and must have been approved by a majority of the Board of Directors of the CBO.

One of the following is required:

- A copy of the CBO's 2008 "filed" IRS Form 990, or a copy of the 2008 Audit or Compilation Report, prepared by an independent audit firm. Note: If the CBO's 2008 receipts are less than \$25,000, please provide a Board Resolution stating, "CBO's gross receipts are less than \$25,000 and CBO is not required to file a Form 990." in lieu of the IRS Form 990 or Financials.

## REPORTING REQUIREMENTS

- A report will be required from each participating CBO by October 1, 2010. Each report should answer the following questions:
  - How was this funding used in building organizational capacity of providing technical assistance to small business?
  - What activities has your organization provided during this funding period to meet your stated objectives?
  - How has this process enhanced your relationship with the Bank's member institution?
  - How did this grant complement other development activities in your community in conjunction with other local, state, or federal programs?

Original completed applications and supporting documentation should be **mailed** to the following address no later than 5:00 p.m. C.S.T. on August 14, 2009. **Faxed or e-mailed applications will not be accepted.**

Federal Home Loan Bank of Dallas  
Community Investment Department  
P.O. Box 619026  
Dallas, Texas 75261-9026

*Physical Address:*  
8500 Freeport Pkwy South, Suite 600  
Irving, TX 75063-2547

For additional information, please contact the Bank's Community Investment Department at (800) 362-2944, or visit the Bank's website at [fhlb.com](http://fhlb.com).



## PARTNERSHIP GRANT PROGRAM APPLICATION

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### MEMBER INSTITUTION

Name: \_\_\_\_\_ FHFA ID #: \_\_\_\_\_

Street Address/P.O. #: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

### COMMUNITY-BASED ORGANIZATION (CO-APPLICANT)

Name: \_\_\_\_\_

Street Address/P.O. #: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Congressional District: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

Has CBO previously participated in the Partnership Grant Program? Yes\*  No

Total Partnership Grant Program funds previously received: \$ \_\_\_\_\_\*

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### COMPUTATION OF GRANT FUNDS

a) Contribution by member institution (\$500 to \$5,000):

\$
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b) 3:1 Match by the Bank:

\$
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c) **TOTAL GRANT** (sum of a and b):

\$
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\*If the CBO has previously received Partnership Grant Program funds totaling \$30,000, it is no longer eligible to participate in the Program.

**Please provide the following information on behalf of the co-applicant:**

1.  Copy of the CBO's 501(c)(3) IRS designation.
2.  Copy of the CBO's total operating budget.
3.  A copy of the CBO's 2008 "filed" IRS Form 990, or a copy of the 2008 Audit or Compilation Report, prepared by an independent audit firm. Note: If the CBO's 2008 receipts are less than \$25,000, please provide a Board Resolution stating, "CBO's gross receipts are less than \$25,000 and CBO is not required to file a Form 990." in lieu of the IRS Form 990 or Financials.
4.  Commitment letter from member institution describing and guaranteeing matching funds.
5.  Copy of the 2009 "Certificate of Good Standing" from the State.
6.  Resolution from CBO's Board of Directors (please see page 2, "Application Process").
7.  The fully executed original of this application with supporting information.
8.  CBO performance history.
9.  Intended use of grant funds statement.

**All items must be submitted for acceptance of application.**

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**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. (Please limit to two typed pages.)

Size of paid staff/volunteers (# FTBs): Staff \_\_\_\_\_ Volunteers \_\_\_\_\_

Population of area served: \_\_\_\_\_

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**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 four areas described in the Application Guidelines (page 1). (Please limit to two typed pages.)

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**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 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 it has met all the above criteria for the Partnership Grant Program.

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(Authorized Signature of Member Institution\*)

Print Name

(Date)

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(Authorized Signature of CBO)

Print Name

(Date)

The Bank will accept applications beginning **July 1, 2009**. **Applications received prior to July 1, 2009 will not be considered.**

Please mail application and all required information to:

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Community Investment Department  
P.O.Box 619026  
Dallas, TX 75261-9026

*Physical Address*  
8500 Freeport Pkwy South, Suite 600  
Irving, TX 75063-2547

**Applications and information recieved after 5:00 p.m. C.S.T., August 14, 2009 will not be considered.** For more information, please contact the Community Investment Department at (800) 362-2944. An application and instructions may also be downloaded from the Bank's website at [fhlb.com](http://fhlb.com).

**\* Individual must have authorization to execute advances as indicated on the signature card on file with the Federal Home Loan Bank of Dallas.**