INVESTMENT CONNECTION
COMMUNITY DEVELOPMENT INVESTMENT AND LENDING PARTNERSHIP

FEDERAL RESERVE BANK OF KANSAS CITY
Denver / Oklahoma City / Omaha

Thank you for your interest in Investment Connection! Here's what you need to know about who can apply, how to fill out the proposal form, and what happens after you submit.

## Eligibility

To be eligible for the Investment Connection program your organization must provide reviewed or audited financials. Please attach your most recent reviewed or audited financials in PDF format to your submission email. Your proposal submission will be considered incomplete until the appropriate financial documentation is provided. Your reviewed or audited financials will only be viewed by Federal Reserve staff; prospective funders will not be able to view your financials.

**About Financials**

A review or audit of financials is usually conducted by a CPA and utilizes analytical procedures and tests to ascertain the validity of the financials and provide a level of assurance. A review is an official assessment of the account books and is used to identify potential areas of error or change. An audit is a much more intensive review of the financials and provides a higher level of assurance that the financials are free from error or misstatement.

The Federal Reserve Bank of Kansas City does not recommend that your organization obtain reviewed or audited financials solely for the purpose of participation in the Investment Connection program. We realize that obtaining reviewed or audited financials can be a lengthy and costly process. A connection with potential funders and subsequent funding cannot be guaranteed for participating organizations in the Investment Connection program.

## Proposal Form Instructions

Download the proposal form from our website and save it where you and your team can save your work and come back to it.

Use the Table of Contents to easily move to the proposal's sections using hyperlinks on Contents page. Hover over the page you want to jump to, Hold Ctrl and Click.

The proposal form is a fillable PDF with brief instructions and character limits provided for each field. Each field is labeled "Required" or "Optional".
**NOTE:** Content copied and pasted from external sources may be truncated to comply with character limits.

Not every field is required, depending on your selections. Some fields are only applicable if certain selections are made in prior fields.

- If the support request includes Service, then you are required to describe the service(s) needed.
- If the support request includes Loan or Investment/Grant, then you are required to enter the requested dollar amount.
- If the geographic impact is Local, then you are required to enter list the county or counties your proposal impacts. If your proposal impacts more than one state, please group the counties by state.

The primary focus of the Investment Connection program is communities in Colorado, Kansas, western Missouri, Nebraska, northern New Mexico, Oklahoma, and Wyoming. If your proposal covers other states too, select the available states and include the others in the narrative sections of your proposal. If your proposal truly has a national footprint, you should select 'National' for both geographic impact and state.

You can add extra documents to support your proposal, which funders will see. Two ways to do this:

1. Share links (websites, documents, videos, or audio files) in the "other supporting documentation" section.
2. Attach up to two files to your submission email. (JPEG or PDF, each under 8MB). We will add attachments to your proposal to create a single document.

When you finish your proposal, click the **Check Form** button. This will review your form to make sure all required fields are filled in. A message will let you know if your form is complete or if something still needs your attention.

**TIP:** Save a copy of everything you submit. This makes it easier to update or create a new proposal later.

## Submitting Your Proposal

Email proposal submissions to InvestConnect@kc.frb.org
Attach:

1. Completed proposal form (in PDF format)
2. Most recent reviewed or audited financials (in PDF format)
3. Up to two additional files (in JPEG or PDF format, under 8MB each)

## Proposal Life Cycle

The Federal Reserve Bank of Kansas City accepts proposal submissions any time.

**Once approved, your proposal cannot be revised.** If you do have revisions to your proposal, you must submit a *new* proposal. When you submit a new, updated proposal, contact us to request we remove your outdated proposal.

**Exception:** We can update the contact person or contact information on your proposal; just email us at InvestConnect@kc.frb.org.

Approved proposals are active for funders to select for **one year**. You can tell us anytime if your proposal is no longer current, and we'll remove it.

Each year, we'll email the primary and secondary contact to ask if the proposal is still current.

- **A response is required to keep the proposal active.** No response means the proposal expires.
- If you confirm it's still accurate, we'll renew it for another year.
- A proposal can be renewed **up to two times** (3 years total), then it's complete and removed from the funder list.

## Questions?

The Investment Connection team is happy to help! Just email us at **InvestConnect@kc.frb.org**.

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| Disclaimer |
|---|
| **The Federal Reserve Bank of Kansas City does not endorse or make any representations as to the propriety or suitability of organizations, investments, or programs listed. Organizations should perform their own due diligence before engaging in any transactions with these entities to ensure that any such transactions meet the organization's objectives.** |

| Proposal Approval Date |
|---|
| *Administrator Use Only* |
| |

| Primary and Secondary Contact | | | | | |
|---|---|---|---|---|---|
| **Primary Contact** | | | **Secondary Contact** | | |
| *All primary contact fields are required.* | | | *All secondary contacts fields are required.* | | |
| *First Name* | *Last Name* | | *First Name* | *Last Name* | |
| | | | | | |
| *Professional Title* | | | *Professional Title* | | |
| | | | | | |
| *Email Address* | | | *Email Address* | | |
| | | | | | |
| *Phone* | | | *Phone* | | |
| | | | | | |
| *Street Address* | | | *Street Address* | | |
| | | | | | |
| *City* | *State* | *Zip Code* | *City* | *State* | *Zip Code* |
| | | | | | |

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## Proposal

### Proposal Title

*Please enter your proposal title. Limit: 135 characters. Required.*

| Support Request (Select all that apply) | Requested Dollar Amount |
|---|---|
| *Required* | *Required only if support request includes Loan or Investment/Grant* |
| ☐ Loan ☐ Investment / Grant ☐ Service | |

### If service selected, describe the type of service(s) needed

*Required only if support request includes Service. Limit 255 characters.*

Not Applicable

| Issue Addressed - Primary | Issue Addressed - Secondary |
|---|---|
| *Please select the primary issue your proposal addresses. Required.* | *Select secondary issue, if applicable, or leave as is. Optional.* |
| Select Issue: | Not Applicable |

### Project time frame – is your request for an existing or new program? *(Required)*

Select Timeframe:

## Organization

### Name of Organization

*Please enter the name of your organization. Limit 135 characters. Required.*

### Website

*Please enter the website address for your organization. Limit 135 characters. Required.*

### Mission Statement

*Please enter the mission statement for your organization. Limit 500 characters. Required.*

### Overview of Organization

*Please provide brief overview of your organization. Limit 1500 characters. Required.*

## Significant Partners

### Please list other Significant Partners in the Proposal

*Please list other significant parters for this proposal.  Limit 1500 characters.  Required.*

## Proposal Description

### Description

*Please describe your proposed project.  Limit 2500 characters. Required.*

## Geographic Impact and Population Served

### Geographic Impact

*Please select the geographic impact of your proposal. Required.*

- [ ] Local
- [ ] State-wide
- [ ] Multi-state
- [ ] National

### U.S. States

*Please select the state(s) impacted by your proposal. Required.*

- [ ] Colorado
- [ ] Kansas
- [ ] Missouri
- [ ] Nebraska
- [ ] New Mexico
- [ ] Oklahoma
- [ ] Wyoming
- [ ] National

### Local Impact Area (by county)

*Required only if you picked "Local" in Geographic Impact. Please list the county or counties your proposal impacts. If your proposal impacts more than one state, please group the counties by state.*

Not Applicable

### Population Served

*Please describe the population served by your proposal. Limit 500 characters. Required.*

### Provide:

- **Income levels by Area Median Income (AMI) percentage**
- **Youth indicators: % and number receiving Free / Reduced Lunch**
- **Area Designations Disaster / Distressed / Underserved Status**
- **Numbers total persons in each category AND total persons your proposal will serve**

*Please provide each of the specific metrics requested. Limit 1500 characters. Required.*

## Outcomes and Evaluation

### Anticipated Outcomes / Impact

*Please describe the anticipated outcomes and impact of your proposal. Limit 2000 characters. Required.*

### Describe evaluation methods used to measure success

*Please describe the evaluation methods used to measure the success of your proposal. Limit 1500 characters. Required.*

## Other Supporting Documentation

**Add additional links to supporting documentation for your proposal**

*If available, provide links to supporting materials such as websites, documents, videos or audio files relevant to your proposal. Information available to funders. Limit 500 characters. Optional.*

**Adding Photos or Documents to Your Proposal (Optional)**

**What you can add:** You may add up to two files. Each file can be a photo (JPEG) or a document (PDF). Funders will be able to see these files.

**File size rule:** Each file must be smaller than 8MB.

**If your file is too big:**

- For photos: Make the picture smaller or lower quality.
- For PDFs: Use a tool to shrink the file size.

**How to add:** Add attachments to your submission email. We will add attachments to your proposal to create a single document.

**TIP:** If your document is already online, you don't need to attach it! Just paste the website link in the text box above instead.

Check Form