

CDFI Assistance Program Proposal Checklist

- Completed Exhibit A1: Cover Sheet
- Completed Exhibit A2: Cover Sheet - Secondary or Co-Partner Application (if applicable)
- Complete Exhibit B: Proposal Summary
- Complete Exhibit C: Project Budget
- Proposal Narrative (See pages 6-10 of RFP)
- Complete Exhibit D: Project Task & Timeline

ATTACHMENTS

- Annual financial statements for the past three years, including a draft of the applicant's internal statements or the most recent interim statements, if annual statements are more than 12 months old.
- Loan Portfolio Accounts Receivable Aging Report (Refer to Exhibit D)
- Proof of current Federal CDFI Certification and/or recertification
- Operating Budget for 2017
- Loan Policy manual or guidelines
- Resumes of key staff

If the applicant has previously received ESD funding through the CDFI Assistance Program, attach:

- A copy of the final report narrative (Exhibit B without attachments) submitted for the last two completed projects
- An interim Technical Assistance and Lending Report and Institutional Capacity Report (Exhibit G-2) without attachments from any grant disbursement agreement still in effect (primarily round 17 of the CDFI Assistance Program), with a description of the organization's cumulative progress toward the goals listed in Exhibit A of said agreement, and the anticipated date of project completion.
- Information on the current status of each grant in terms of the amount of funding awarded and the amount disbursed to date by ESD.

Refer to page 16 of the RFP for additional instructions on the following;

- Vendor Responsibility Questionnaire
- Non-Discrimination and Contractor & Supplier Diversity Requirements