

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

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Getting Acquainted with Your FY 2017 Financial Assistance Award Assistance Agreement

FY 2017 FA CDFI Program and NACA Program Awards

Purpose of this Presentation



- The purpose of this presentation is to help FY 2017 CDFI and NACA Program Recipients understand the requirements, terms, and conditions of the Assistance Agreement for their Financial Assistance (FA) award.
- References to FA awards in this presentation include both CDFI and NACA Program Recipients, unless otherwise stated.
- This information is for educational purposes only.

Presentation Objectives



- Describe the Assistance Agreement and its purpose.
- Show what the Assistance Agreement looks like.
- Explain what the Assistance Agreement contains.
- Provide instructions on what to do with your Assistance Agreement.
- Deliver information about amending your Assistance Agreement.
- Explain the difference between an Assistance Agreement and an application for an award.

Presentation Topics



Assistance Agreement Overview

Assistance Agreements Availability

Assistance Agreement Components

Other Important Assistance Agreement Information

Authorized Financial Assistance Activities

Making Changes to an Assistance Agreement

Loan Documents and Standard Loan Product

Assistance Agreement Overview



- The Assistance Agreement is a legally binding contract between the CDFI Fund and the Recipient.
- The terms of the Assistance Agreement are based on the Recipient's institution type, award type, information submitted in the application, and other factors, such as matching funds.
- All CDFI and NACA Program award Recipients must execute an Assistance Agreement.

Assistance Agreement Overview



- The Assistance Agreement contains the following key components:
 - Annual Reporting requirements and associated deadlines;
 - Performance Goals & Measures (PG&Ms);
 - Eligible Activities for award funds;
 - General Award Terms and Conditions;
 - Promissory Note and Loan Terms.
(for awards in the form of loans only)

Assistance Agreement Overview



- Recipients should read the entire Assistance Agreement.
 - Recipients with awards from multiple funding rounds should read each agreement closely, as terms and conditions change year to year.
 - Recipients should adhere to reporting requirements, PG&Ms, and associated deadlines.
- Recipients should keep a copy of their Assistance Agreement on file. It is also located on the award detail page in AMIS.
- Recipients should create a tickler system with due dates for reports. You can also use the reporting schedule in AMIS to find the report due dates.

Assistance Agreement Overview



- The Assistance Agreement must be signed by an Authorized Representative listed in the Recipient's AMIS account.
- The Authorized Representative must have the legal authority to enter into an Assistance Agreement on behalf of the Recipient's organization.
- Consultants cannot sign on behalf of the Recipient's organization.

Assistance Agreement Overview



- The CDFI Fund urges Recipients to review the commitments in the Assistance Agreement very carefully before signing the document as the CDFI Fund expects Recipients to fulfill all terms and conditions and meet timelines therein.
- The CDFI Fund will contact the Authorized Representative if additional information regarding the Assistance Agreement is needed.

Assistance Agreement Overview



- Throughout the Period of Performance of the Assistance Agreement, Recipients are required to report on its performance toward meeting the Performance Goal and Measure (PG&M) benchmarks.
 - Recipients that meet all terms and conditions are considered to be compliant with the Assistance Agreement.
 - Recipients that fail to meet the terms and conditions of the Assistance Agreement are considered to be noncompliant.

Assistance Agreement Overview



- FA Objectives Performance Goals and Measures (PG&Ms):
 - PG&Ms are determined by the FA Objective(s) selected by Recipients in their funding application;
 - The benchmark amount of the FA Objective PG&M is set according to the Recipient's projected performance in its application and the award size.
 - PG&M benchmarks were reduced on a pro-rata bases determined by the amount of the award size received versus the award amount requested.
 - If the reduction in the PG&M was less than the amount of the award, the CDFI Fund implemented a floor to ensure a minimum amount of activities are achieved.

Assistance Agreement Changes



- New definitions in the PG&Ms of Eligible Market and Geographic Area.
- New PG&M specific to investments in Native Communities for NACA FA Recipients.
- New PG&M specific to investments in Persistent Poverty Counties for Recipients awarded PPC-FA supplemental funding.
- Change to the benchmarks for Goal 1, Measure 1B of the PG&M specific to HFFI Recipients.

Assistance Agreement Changes



- All activities must be in an Eligible Market(s) or the Applicant's approved Target Market(s) to satisfy the PG&Ms.
- Eligible Market is defined as mean (i) a geographic area meeting the requirements set forth in 12 C.F.R. § 1805.201(b)(3)(ii), or (ii) individuals that are Low-Income, African American, Hispanic, American Indian, Native Hawaiian residing in Hawaii, Native Alaskan residing in Alaska, or Other Pacific Islanders residing in American Samoa, Guam or the Northern Mariana Islands.

Presentation Topics



- Assistance Agreement Overview
- Assistance Agreements Availability
- Assistance Agreement Screenshots
- Other Important Assistance Agreement Information
- Authorized Financial Assistance Activities
- Making Changes to an Assistance Agreement
- Loan Documents and Standard Loan Product

Assistance Agreement Notification



- An email notification is sent when the Assistance Agreement is available in each Recipient's AMIS account.
 - The email will be sent to the Authorized Representative and Point(s) of Contact listed in the Recipient's FY17 funding application.
 - The email will contain two attachments – the *Transmittal Letter* and *Instructions for Accessing and Signing the Assistance Agreements in AMIS* – that provide detailed instructions regarding the award closing process.

Assistance Agreement Notification



- Once the notification email is sent, the final Assistance Agreement will be available in the Notes & Attachments section of the Recipient's award record in AMIS.
- Recipients of HFFI-FA will receive only one Assistance Agreement that will cover both the FA and HFFI awards.
- To ensure you receive email communication, AMIS@cdfi.treas.gov should be listed as a safe sender by your email system and all contact information needs to be kept up to date.

Assistance Agreement Timeline



- The following Recipients can expect to receive their Assistance Agreements first:
 - SECA and NACA FA Recipients; and
 - Core FA Recipients that provided 100% in-hand matching funds.

Assistance Agreement Timeline



- Core FA Recipients that did not have 100% in-hand matching funds at the time of award will receive their Assistance Agreements after submitting an updated matching funds workbook that demonstrates they have in-hand matching funds totaling their award amount.

Presentation Topics



- Assistance Agreement Overview
- Assistance Agreements Availability
- Assistance Agreement Components
- Other Important Assistance Agreement Information
- Authorized Financial Assistance Activities
- Making Changes to an Assistance Agreement
- Loan Documents and Standard Loan Product

Assistance Agreement Components



- This section discusses key components to the Assistance Agreement, such as:
 - Applicable Annual Reporting Requirements;
 - All PG&Ms listed in the Assistance Agreement;
 - Screenshots of relevant and frequently referenced pages and schedules found in the Assistance Agreement.
 - Note: screenshots are provided to familiarize and orient Recipients with the Assistance Agreement. An executed Assistance Agreement may differ in format and content.

Assistance Agreement Cover Page



COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND ASSISTANCE AGREEMENT

Recipient:	CDFI Fund Award Number: DUNS Number: Employer Identification Number:
Address:	
Applicable Program: CFDA Number: Date of Applicable NOFA:	Announcement Date (Period of Performance Start Date):
<p>By signing this Assistance Agreement and in consideration of the mutual covenants, conditions, and agreements hereinafter set forth, the parties hereto, by their respective Authorized Representatives, agree to the following: (i) the award of Assistance hereunder shall be administered pursuant to the General Award Terms and Conditions, attached hereto as Schedule 3 and made a material part hereof; and (ii) the award of Assistance shall be further subject to the provisions, terms, conditions, requirements, certifications and representations set forth in all such additional schedules that are attached hereto and constitute a material part hereof. In witness whereof, the parties hereto do hereby execute and enter into this Assistance Agreement.</p>	
Community Development Financial Institutions Fund	
By:	By:
Authorized Representative:	Authorized Representative:
Title:	Title:
Federal Award Date**	
Date:	

(1) CDFI Fund Award Number can be found in the upper right corner of the Cover Page.

(1a) Recipients of HFFI-FA will have a second Award Number.

(2) Announcement Date is located here. It is the Period of Performance Start Date and Beginning of Year 1 of the Period of Performance Schedule (found in Schedule 1-C).

Assistance Agreement Cover Page

FA Details



Recipient Information				
Entity Type:				
Depository Institution Holding Company:				
Subsidiary Depository Institution (if applicable):		Subsidiary Depository Institution Employer Identification Number		
Financial Assistance				
Matching Funds:				
	Amount and Form of Financial Assistance (FA) Award (including Persistent Poverty County (PPC-FA) Award)	Initial FA Payment	Amount and Form of HFFI Financial Assistance (HFFI-FA) Award	Initial HFFI-FA Payment
Grant				
Loan				
Equity				
TOTAL				

Amount and Form of Award (including PPC and HFFI-FA):
Grant, Loan, Equity

Specific Authorized FA Activities are Outlined in Schedule 2-B

Note Initial Payment(s)

** The Federal Award Date shall be the date in the CDFI Fund's signature block above.

Annual Reporting Requirements (Schedule 1-A)



Report	Description
Single Audit Report (A-133 Audit)	Non-profit Recipients must complete Single Audits pursuant to the Uniform Administrative Requirements (2 C.F.R. 200.500) if they expend \$750,000 or more in Federal awards in their FY, or such other dollar threshold established by OMB pursuant to 2 C.F.R. 200.500. If a Single Audit is required, it must be submitted electronically to the Federal Audit Clearinghouse and via the Recipient's AMIS account.
Financial Statement Audit Report (Non-profit Recipient)	Non-profit Recipients must complete the Financial Statement Audit (FSA) Report, along with the Recipient's statement of financial condition audited or reviewed by an independent certified public accountant, if any are prepared. Under no circumstances should this be construed as the CDFI Fund requiring the Recipient to conduct or arrange for additional audits not otherwise required under Uniform Administrative Requirements or otherwise prepared at the request of the Recipient or parties other than the CDFI Fund. The FSA report is submitted through the Recipient's AMIS account.
Financial Statement Audit Report (For-profit Recipient)	For-profit Recipients must complete the Financial Statement Audit (FSA) Report, along with a statement of financial condition audited or reviewed by an independent certified public accountant. The FSA report is submitted through the Recipient's AMIS account.

Annual Reporting Requirements (Schedule 1-A) (Continued)



Report	Description
Institution Level Report (ILR)	All Recipients must submit the ILR. The ILR must be submitted electronically through the CDFI Fund's Community Investment Impact System (CIIS), which the Recipient will access through its AMIS account.
	The TLR must be submitted electronically through the CDFI Fund's CIIS, which the Recipient will access through its AMIS account.
Transaction Level Report (TLR)	capture dataIf the Recipient is a Depository Institution Holding Company (DIHC) that deploys all or a portion of its Financial Assistance through its Subsidiary Insured Depository Institution, that Subsidiary Insured Depository Institution must submit an ILR and a TLR. Furthermore, if the DIHC itself deploys any portion of the Financial Assistance, the DIHC must submit a TLR.
Shareholders Report	If the Assistance is in the form of an Equity Investment, the Recipient must submit shareholder information to the CDFI Fund showing the class, series, and number of shares and valuation of capital stock held or to be held by each shareholder. The Shareholder Report must be submitted for as long as the CDFI Fund is an equity holder. The Shareholder Report is submitted through the Recipient's AMIS account.

Annual Reporting Requirements (Schedule 1-A) (Continued)



Report	Description
Performance Progress Report (PPR)	All Recipients must submit the PPR. The PPR Report is submitted through the Recipient's AMIS account.
Uses of Funds Report	All Recipients must submit the Use of Funds Report. The Use of Funds Report is submitted through the Recipient's AMIS account.

Annual Report Submission Deadlines (Schedule 1-B)



Report	Due
PPR	Three (3) months after the end of each year of the Period of Performance
Uses of Award Report	Three (3) months after the end of each year of the Period of Performance
ILR	Six (6) months after the end of each year of the Period of Performance
TLR	Six (6) months after the end of each year of the Period of Performance
Shareholders Report	Six (6) months after the end of each year of the Period of Performance
Financial Statements Audit Report	Six (6) months after the end of each year of the Period of Performance
Single Audit Report (A-133)	Nine (9) months after the end of each year of the Period of Performance

Performance Goals & Measures (Schedule 1-C)



- PG&Ms are performance benchmarks that a Recipient must meet in order to remain in compliance with the Assistance Agreement.
 - PG&Ms for all institution and award types will be visible in the Assistance Agreement.
- Note: In addition to the PG&Ms, compliance is also dependent upon timely report submissions and, if applicable, an unqualified audit opinion and an absence of material weakness findings in the Single Audit (A-133).

Performance Goals & Measures (Schedule 1-C)S



Goal and Measure Numbers	Description										
[1-1]	<p><u>Increase Volume of Financial Products:</u> At the end of each Year of the Period of Performance, the Recipient shall report the number of Financial Products in an Eligible Market(s) or in the Recipient's approved Target Market in an amount equal to or greater than: 25% of the total projected Financial Products by the end of Year 1 of the Period of Performance, 50% of the total Projected Financial Products by the end of Year 2 of the Period of Performance, and 90% of the total Projected Financial Products by the end of Year 3 of the Period of Performance. The Recipient may satisfy this goal using the Financial Assistance or other available funds. Financial Products reported under Performance Goal 1-1 may be reported for Performance Goals 1-3, 1-4, and 1-8, if applicable, but not for Performance Goals 2-1 or 3-1.</p> <p><u>Benchmarks:</u></p> <table> <tr> <th>Dollar Amount (\$)</th><th>% of Total Projected Financial Products</th></tr> <tr> <td>Total dollar amount of Projected Financial Products:</td><td></td></tr> <tr> <td>Period of Performance, Year 1 benchmark (25%):</td><td>25%</td></tr> <tr> <td>Period of Performance, Year 2 benchmark (50%):</td><td>50%</td></tr> <tr> <td>Period of Performance, Year 3 benchmark (90%):</td><td>90%</td></tr> </table>	Dollar Amount (\$)	% of Total Projected Financial Products	Total dollar amount of Projected Financial Products:		Period of Performance, Year 1 benchmark (25%):	25%	Period of Performance, Year 2 benchmark (50%):	50%	Period of Performance, Year 3 benchmark (90%):	90%
Dollar Amount (\$)	% of Total Projected Financial Products										
Total dollar amount of Projected Financial Products:											
Period of Performance, Year 1 benchmark (25%):	25%										
Period of Performance, Year 2 benchmark (50%):	50%										
Period of Performance, Year 3 benchmark (90%):	90%										

PG&M Number. PG&Ms that apply to your Assistance Agreement will show "Applicable" below.

Description of PG&M

Applicable Benchmarks

Presentation Topics



- Assistance Agreement Overview
- Assistance Agreements Availability
- Assistance Agreement Components
- Other Important Assistance Agreement Information
- Authorized Financial Assistance Activities
- Making Changes to an Assistance Agreement
- Loan Documents and Standard Loan Product

General Award Terms & Conditions (Schedule 3): Receiving Payments



- To receive award payments, Recipients must:
 - Electronically sign the Assistance Agreement and upload all required documentation into AMIS (e.g. Certificate of Good Standing)
 - Provide In-Hand Matching Funds documentation for 100% of FA award amount (Core FA Recipients only)
 - Be in compliance with terms & conditions of any prior award from the CDFI Fund
 - Maintain accurate banking information in the System for Award Management (SAM). SAM information must be updated every 6 months!

General Award Terms & Conditions (Schedule 3): Matching Funds



- Matching Funds are only applicable to Core FA Recipients.
- Core FA Recipients are responsible for ensuring that Matching Funds used for the FY17 award meet the following criteria:
 - Have not been used by the Recipient to satisfy a legal requirement under another Federal grant or award program;
 - Are considered non-federal in nature;
 - Have documentation to prove receipt of funds and eligibility; and
 - Adhere to the guidance published by the CDFI Fund.

Depository Institution Holding Company (DIHC) Recipients



- DIHC Recipients that deploy a FA award through a Subsidiary CDFI Insured Depository Institution, must use the award funds to capitalize the Subsidiary CDFI Insured Depository Institution to carryout Authorized FA Activities.
- The name and Employer Identification Number (EIN) of the Subsidiary CDFI Insured Depository Institution that will carryout the award activities will be included in the Assistance Agreement.

Depository Institution Holding Company (DIHC) Recipients Cont'd



Continued from previous slide.

- The DIHC Recipient must ensure that the transfer of funds to the Subsidiary CDFI Insured Depository Institution meets the requirements described in section 200.331 of the Uniform Requirements.
- DIHC Recipients should consult their regulators to determine if a FA award that a DIHC passes through to a Subsidiary CDFI may be considered Tier 1 capital.



Presentation Topics

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General Award Terms & Conditions (Schedule 3): Authorized Activities



- Award funds can be spent on the following Authorized Activities outlined in the General Terms & Conditions (GT&C) section of the Assistance Agreement:
 - Financial Products, Financial Services, Development Services, Loan Loss Reserves, Capital Reserves
 - 15% of total award can be used on Direct Administrative Expenses related to the above activities.
- All FA Eligible Activities must be in an Eligible Market(s) or the Applicant's approved Target Market(s).
- The CDFI Fund reserves the right to require the Recipient to repay all or a portion of the award if the Recipient expends funds for an Activity(ies) that does not meet the criteria for allowable activities.

General Award Terms & Conditions (Schedule 3): Authorized Activities



Continued from previous slide

- Direct Administrative Expenses, defined as “Direct Costs” and described in 2 C.F.R. 200.413 of the Uniform Requirements, are allowed:
 - Costs that can be identified specifically with a particular final cost objective such as a Federal award, or other internal or external activity, or that can be directly assigned to such activities with a high degree of accuracy.
 - For example, the salary for a loan officer is a Direct Administrative Expense for Financial Products; the salary expense is proportional to the loan officer’s workload of providing Financial Products.

General Award Terms & Conditions (Schedule 3): Authorized Activities



Continued from previous slide

- Indirect Costs as described in section 200.56 of the Uniform Requirements are **not allowable**.
 - Costs that are incurred for common or joint objectives and therefore cannot be identified readily and specifically with a specific sponsored project.
 - Indirect costs typically include salaries of staff not directly tied to the provision of Financial Products, depreciation expenses, interest to pay off debt, equipment and capital improvement, and maintenance expenses.
 - For example, the salary for maintenance staff in the building where loans are provided is an indirect expense, and not allowable.

Authorized Activity Questions



- If you want to spend award funds on something that does not fit neatly into the previously mentioned Authorized Activities categories, or if you are unsure, first consult the Uniform Requirements, Part 200. (2 CFR 200).
 - Cost principles are found in Subpart E
 - Contact the CDFI Fund **before** expending funds if you have questions (contact information is available at the end of the presentation)
 - Recipients are responsible for funds expended on unallowable activities.

Presentation Topics



- Assistance Agreement Overview
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Making Changes to an Assistance Agreement



- Before the Assistance Agreement has been executed, changes can be made to your Assistance Agreement by submitting a Service Request in your AMIS account.
 - If you are not comfortable that you will meet the PG&Ms in your Assistance Agreement, do not sign your agreement, and submit a service request to modify the PG&M and provide supporting documentation.
 - Adjustments to your PG&Ms will be reviewed and by approved the CDFI Fund.

Making Changes to an Assistance Agreement



- After the Assistance Agreement has been executed, changes can be made to your Assistance Agreement through an Amendment process.
 - An Amendment allows the terms of the Assistance Agreement to be amended, modified, or supplemented only by the mutual written consent of the Recipient and the CDFI Fund.
 - Amendment requests must be received by the CDFI Fund in writing via a Service Request through the Recipient's AMIS account.
 - Amendments need to be approved by the CDFI Fund.

Making Changes to an Assistance Agreement



Continued for the Previous Slide

- Amendment Requests must be received with all required documentation no later than 60 days prior to the effective date of the change and no later than 60 days prior to the end of the Period of Performance.
- The Recipient must include justification for the amendment when it submits the amendment request to the CDFI Fund.
- The following slides explain when you may need to request an Amendment.

Making Changes to an Assistance Agreement



- You need to request an Amendment (Section 7.9 of the Assistance Agreement) if you:
 - Want to change your organization's Fiscal Year End, or business structure.
 - Are unable to meet specific Performance Goals and Measures.
 - Need additional time to complete Performance Goals and Measures for which the award funds have been expended.
- Note: Amendments other than those to change the Recipient's fiscal year end will be permitted on a limited basis at the discretion of the CDFI Fund.

Making Changes to an Assistance Agreement



- The following can be done without an Amendment:
 - Transfer funds between Eligible Activities; and/or
 - Making a organizational name change. Please submit a Service Request in AMIS requesting this change be made.

Making Changes without needing an Amendment: Example



- Per 2 CFR Part 200, FA Recipients do not need prior approval from the CDFI Fund to eliminate an FA Authorized Activity or task.
 - Example: A small business loan fund Recipient received \$500,000 for loan loss reserves (Loan Loss Reserves). The Recipient also received a grant from a foundation that provides them with \$500,000 of Loan Loss Reserve capital. Because the Recipient only needs \$500,000 of loan loss reserves, they can use their CDFI Fund award instead for small business loans, even though they did not request funds for Financial Products in their original application.

Making Changes without an Amendment: Example



Continued from the previous slide

- Since Financial Products is an Authorized Activity, the Recipient can use the funds for that Activity without requesting an Amendment..
- In this sense, the FA Authorized Activities are interchangeable.
- Generally, as long as the uses fall into one of the Authorized Activities, are allowable under and Uniform Administrative Requirements, and build your organization's capacity to meet your strategic goals and serve your target market(s), then a modification can be made without an amendment.

Presentation Topics



- Assistance Agreement Overview
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Loan Documents



- Core FA Recipients that submit loans as a source of matching funds will receive award funds in the form of the Standard Loan Product.
- Based on the loan amount submitted, a Recipient will receive a standard loan with a rate of 1.9% with a thirteen year term.
- The loan is interest only for the first ten years and will fully amortize for the last three years of the term.

Loan Documents



Continued from previous slide

- For Core FA Recipients with loan-component awards, a Promissory Note will be included in the Assistance Agreement package in Attachment A and a Loan Repayment Schedule will be included in Attachment B:
 - The promissory note sets the principal, interest rates and term of the loan and is a legal agreement between the Recipient and CDFI Fund stating that the Recipient agrees to repay principal and interest to the government.

Loan Documents: Promissory Note



Attachment A
Award No.: [1]
Awardee: [2]

PROMISSORY NOTE

\$ _____

Washington, DC

Date: _____

FOR VALUE RECEIVED, the undersigned, _____ (the Recipient) hereby promises to pay to the order of the Community Development Financial Institutions Fund (the CDFI Fund), a wholly owned government corporation within the U.S. Department of the Treasury, at 1500 Pennsylvania Avenue, N.W., Washington, DC 20220, or to order, up to the principal sum of \$ _____ (or such lesser amount as shall equal the aggregate unpaid principal amount of the loan paid by the CDFI Fund to the Recipient under the Assistance Agreement), payable in its entirety in _____ years by the date of maturity of this promissory note (this Note), _____, _____ (the Maturity Date). The loan funds will be paid to the Recipient in one or more payments as described in section 3.3 and 3.4 of the Assistance Agreement.

Total Loan Amount

The Recipient further promises to pay interest at the rate of _____ (____%) per annum, accruing daily from the date hereof on the unpaid principal balance from time to time outstanding on this Note. Interest shall be payable semi-annually in arrears on the last day of June and December of each year until the Maturity Date, beginning on the first June or December after payment of the loan funds. Interest shall be computed on the basis of a year of 360 days comprised of twelve

FY 2017 Standard Loan Product



Term Sheet

Amount	Based on approved Matching Funds
Rate	1.9% fixed rate
Term	Thirteen (13) years
Principal	Principal amortized payments due in years eleven through thirteen
Interest Payments	Semi-annual
Collateral Requirements	None
Lender Position	Senior

Additional Presentations



- Please view the following materials for more information about 2017 CDFI Program awards:
 - 2017 CDFI and NACA Financial Assistance Award Compliance
 - HFFI 2017 Financial Assistance Award Compliance
 - Payments for 2017 Financial Assistance and Technical Assistance

Contact Information



- For questions on general terms and conditions of an award, and allowable uses of funds, contact the CDFI and NACA Program office:
 - Submit a Service Request in AMIS;
 - 202-653-0421, option #1;
 - You may also contact your assigned Program Portfolio Manager, designated in your FY 2017 award record in AMIS.

Contact Information



- For questions on reporting requirements or allowable uses of funds:
 - Submit a Service Request through AMIS to the Certification, Compliance Monitoring and Evaluation (CCME) Office

Thank You



This concludes the presentation.

Thank you for viewing!