The Investment Connection Platform

The Investment Connection Platform is a website, which allows organizations to create, edit, and submit proposals for consideration.

A link to the online platform will be available on our website on September 30. Organizations will be asked to create a username and password for access to the site. Once you have created a profile, you may create your proposal. The site will also allow you to save an edit your proposal. More detailed instructions on how to use the website will be available on August 30.

Step 1: Create a Username and Password

You will need a valid email address to create an online profile to use investment connection. Your profile will allow you to create, edit, and submit your proposal.

Step 2: Complete Your Personal Profile

The website will ask that you complete a personal profile with the following information.

- First Name
- Last Name
- Title
- Email Address
- Phone
- Street Address
- City
- State
- Zip

Step 3: Complete Your Proposal

A copy of proposal template that will appear on the website is below.

Name of Organization: *

Mission Statement: *

Please limit to 1500 characters. Please be aware that your content may be truncated if you are pasting from another source.

Overview of Organization: *

Please limit to 2500 characters. Please be aware that your content may be truncated if you are pasting from another source.

Website: *

II. Proposal Contacts - Please enter information for the Primary and Secondary Proposal Contacts

Primary Contact

First Name *

Last Name *

Title *

Email Address *

[ ]

Phone *

[ ]

Street Address *

[ ]

City *

[ ]

State *

[ ]

Zip *

[ ]

Secondary Contact

First Name *

[ ]

Last Name *

[ ]

Title *

[ ]

Email Address *

[ ]

Phone *

[ ]

Street Address *

[ ]

City *

[ ]

State *

[ ]

Zip *

[ ]

III. Proposal Information

Proposal Title: *

[ ]

Support Request (check all that apply): *

☐ Loan

☐ Investment/Grant

☐ Service

Requested Dollar Amount: *

$ [ ]

Please describe the type(s) of service(s) needed:

[ ]

Please list other Significant Partners in the Proposal:

[ ]

Proposal Description: *

[ ]

Please limit to 2500 characters. Please be aware that your content may be truncated if you are pasting from another source.

Issues Addressed (check all that apply): *

☐ Asset Building / Financial Access, Capability and Empowerment

☐ Affordable Housing

☐ Broadband Services / Digital Inclusion

☐ Community Development Finance

☐ Community Services and Facilities

☐ Disaster Relief

☐ Small Business Development / Microlending

☐ Stabilization and Sustainability

☐ Workforce Development / Economic Development

☐ Other

If you selected "other" above, please describe. *

If your project affects multiple states or counties, please use the CTRL key to multi-select.

Geographic Impact *

State: *

Population Served: *

[text box]

Please limit to 500 characters. Please be aware that your content may be truncated if you are pasting from another source.

Population Income by Area Median Income (AMI) and other identifiers (percentage of Free and Reduced Lunch for youth or designated "Disaster Area" or designated "Distressed or Underserved": *

[text box]

Anticipated Outcomes/Impact: *

[text box]

Please limit to 2000 characters. Please be aware that your content may be truncated if you are pasting from another source.

Describe evaluation methods used to measure success: *

[text box]

Please limit to 2000 characters. Please be aware that your content may be truncated if you are pasting from another source.

Project timeframe - Is your request for an existing or new program? *

○   Existing Program

○   New Program

IV. Submit Supporting Documentation - Please attach your most recent audited or reviewed financials in PDF format to this proposal application. Your proposal application will be considered incomplete until

the appropriate financial documentation is provided. By submitting a proposal application you agree to share with the Federal Reserve information regarding connections that were made with funders regarding the proposal or other work your organization conducts that was identified by a funder that used the Investment Connection platform. After you submit a proposal application, we will follow up with you to see if Investment Connection was helpful with your informational and business needs.

○ You will required to submit a copy an audited financial statement from the year 2014-2018.

V. Other Supporting Documentation - You may submit a photo (jpeg) and/or a video (mp3 or mp4) that helps describe your proposal.

○ You will required to submit a copy of your organizations strategic plan and can also submit copies of other supporting documentation for your proposal.

VI. Disclaimer - The Federal Reserve Banks do 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.