

# Diverse Community Capital Program

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Interest Form Guide – Capacity Building Grant

December 2018

Together we'll go far



# Interest Form

<https://www.cybergrants.com/wellsfargo/DCC/interestform>

# Log in page

## Diverse Community Capital Program Interest Form

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First time user? [Create your password](#)

Please Log In

\* indicates required field

Please review the [Grant Application Guide](#) prior to completing your application in order to know what information will be required.

NOTE: If you are a first time user, click on the link above. If you need a password reset, please click on the link below. Interest Forms from CDFIs are due by midnight Pacific time on January 31, 2019. For more information about the Diverse Community Capital program, please visit our website at [www.wellsfargo.com/cdfi](http://www.wellsfargo.com/cdfi)

\* E-mail Address:

\* Password:

[Show password](#)

Invitation Code:

Log In

[Forgot your password?](#)

Please note that you must have cookies and JavaScript enabled on your browser in order to successfully log in.

Need Support?

Use this link for technical assistance.

# Welcome page

Welcome, Malissa Hix!

The organization you are currently associated with is **CYBERGRANTS TEST ORGANIZATION**.

If you work with multiple organizations and want to submit for an organization different from the above, please [add a new organization to your account](#).

## Interest Form Overview

Thank you for your interest in the Diverse Community Capital Program. We are currently accepting interest forms for **Capacity Building Grants**, for CDFIs *working on and ready to make active or implement* or expand a strategy with the potential for industry or market replication.

Capacity Building grants are open to CDFIs seeking to build their capacity (capital, resources and knowledge) with flexible grant capital. Please review program guidelines at [www.wellsfargo.com/cdfi](http://www.wellsfargo.com/cdfi) before completing this form.

**READY TO BEGIN?** Click the "Start a New Application" link at the end of these instructions.

## Helpful Hints

Before you begin, we recommend that you review the following:

- To preview the application [click here](#).
- To save an in-progress interest form and return to work on it later: Close your browser after clicking the "Save and Proceed" button.
- To return to your saved form: Type the following URL in your browser's address bar to gain access the login screen directly:

<http://www.cybergrants.com/wellsfargo/DCC/interestform>

You may wish to bookmark this link for future reference.

Once you've logged in again, click the "Continue" link to the left of the form's Project Title, below.

- To delete an incomplete or erroneous interest form that you've started: Click the trash can icon next to its Project Title, below.
- To print a paper copy of your completed interest form: Prior to submitting your interest form, you will see a summary screen of the entire form. Select "Print" from your web browser's "File" menu.
- To review previous applications submitted by your organization: Click the "View" link next to the appropriate Project Title below.

**NEED HELP?** If you have technical questions regarding this interest form, use the "Need Support" link located at the bottom of every page to contact our support team.

# Initiate request

## Navigation

Each section of the application will have a timeline like the one below to help you monitor your progress. The arrows ( >> ) indicate your current position. Clicking a link in the timeline will take you to that section.

Welcome Page

Contact Information

Organization Information

DCCP Interest Form

Confirmation

» Start a New Application «

Need Support?

Click here to access  
interest form

Click here for  
technical support, if  
needed

# Organization information

## Organization Information

\* indicates required field

**Official Name** Name associated with specific tax ID in the IRS business master file or name associated with school/school district in NCES data  
CYBERGRANTS TEST ORGANIZATION

\* **Legal Name** What is the legal name of your organization?

CyberGrants TEST Orgar

**AKA Name** If your organization is known by another name please enter the name here.

CTO

\* **Address** 790 TURNPIKE STREET

**Address 2**

\* **City** Charlotte

\* **State** North Carolina

\* **ZIP Code** 28202

\* **Telephone** 7043746128

# Organization information

Website Address

Mission Statement

Provide a brief mission statement for your organization.

(690 character(s) remaining)

Year Organization was Established

IRS W-9 Form

An IRS W-9 form is required. Note that we must have the November 2017 version of the form, available [here](#).  
[Click here to download](#) IRS W-9 form.

Note: Maximum file size is 10 MB any file format is acceptable.

Upload File

Save and Proceed

# Contact information

Contact Information

\* indicates required field

☐

Match: Check the box to associate this individual with this application.

Name: JANE DOE

Telephone Number: 123.456.7890

E-mail Address: jdoe@me.com

Contact Type: Executive Director

☐

Match: Check the box to associate this individual with this application.

Name: MIMI PHILLY

Telephone Number: 123.456.1011

E-mail Address: m.phillips@wellsfargo.com

Contact Type: Primary Contact

Save and Proceed

Create New

Need Support?

Select appropriate contact; Save and Proceed.

Click here to create a new contact for this organization.



# DCCP interest form

## DCCP Interest Form

\* indicates required field

Please provide the required documentation and answer the following questions to express your interest in the Diverse Community Capital Program.

\* Request Date

11/21/2018

\* Project Title

Diverse Community Capital Program

\* DCC Grant Program

Select the grant in which you are expressing interest:

Capacity Building Grant

\* Please provide the name, title, and email address of the President/CEO of your organization.

Check all that apply for the President/CEO of your organization (?)

- ☐ Hispanic or Latino
- ☐ American Indian/Alaskan Native
- ☐ Asian
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ Two or More Races
- ☐ Woman
- ☐ Veteran
- ☐ LGBTQ

**Hispanic or Latino (Ethnicity):** Cuban, Mexican, Chicano, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

**American Indian/Alaskan Native (Race):** Origins in any of the original peoples of North America, people who maintain cultural identification through tribal affiliation or community recognition; not of Hispanic or Latino origin.

**Asian (Race):** Origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; not of Hispanic or Latino origin.

**Black or African American (Race):** Origins in any of the black racial groups of Africa, and you are not of Hispanic or Latino origin.

**Native Hawaiian or Other Pacific Islander (Race):** Origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands; not of Hispanic or Latino origin.

**Two or More Races:** People who identify with more than one of the above five races; not of Hispanic or Latino origin.

# DCCP interest form

\* Is your organization a U.S. Department of the Treasury Certified CDFI?

No  
Yes

\* Grant amount requested (In U.S. dollars)

\* Lending Capital Interest?

Wells Fargo Community Lending & Investment may offer additional funding opportunities. Additional documentation will be required to support an expanded financial analysis for credit underwriting. Should your CDFI be selected for a grant award, please indicate whether you would also be interested in discussing lending capital.

Proposed Use of Capacity Building Funds

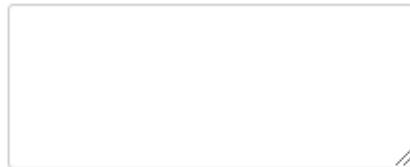
Please specify the use of grant proceeds and how Diverse Community Capital resources would help your CDFI implement its Diverse Small Business Lending strategy. Please describe how your strategy will be sustained after the DCC resources are exhausted.

(2000 character maximum)

# DCCP interest form

## **Diverse Small Business Capital Access and Capacity Gaps**

Describe your market(s) including the geographic scope (City, County, State, Region), and the capital and capacity gaps of diverse small businesses in your market(s).

A rectangular text input box with a thin border and a small diagonal icon in the bottom right corner.

(4000 character maximum)

## **Diverse Small Business Lending Strategy and Projected Outcomes**

Describe your organization's strategy to increase lending and technical assistance to this market sector, particularly African-American-owned and Hispanic/Latino-owned businesses. State the capital access problem your diverse small business strategy is trying to solve and how DCC resources can help you address the identified problem. Include whether your strategy represents a new approach (e.g. different underwriting criteria; different channels; new technical assistance services) and/or an expansion of your current approach into new or existing markets. Please include a timeline for your strategy with milestones and metrics (loans, TA, jobs, etc.) that you will track.

A rectangular text input box with a thin border and a small diagonal icon in the bottom right corner.

(8000 character maximum)

# DCCP interest form

**Current Products and Services** List your organization's current products and services targeted to the needs of diverse small businesses.

A rectangular text input box with a thin grey border. In the bottom right corner, there is a small double-slash icon (//) indicating a character limit.

(2000 character maximum)

**Current Organizational Capacity** List the job descriptions of your organization's staff focused on lending and development services/technical assistance. Include the total number of FTE's for each job description.

A rectangular text input box with a thin grey border. In the bottom right corner, there is a small double-slash icon (//) indicating a character limit.

(2000 character maximum)

# DCCP interest form

## \* Lending/Portfolio/Financial Metrics Template

Detailed Instructions:

1. Click the link below to SAVE the template below to your computer.

### Lending/Portfolio/Financial Metrics Template

2. Complete the chart and save your changes. It is acceptable to include explanations for any unusual metrics.
3. Click the 'Upload File' link to attach the template to this application.
4. You will need to BROWSE to locate the file on your computer. Select your file and select the 'Open' button.
5. Click on the 'Upload File' button.

Note: Maximum file size is 10 MB and only .doc or .pdf file formats are acceptable.

Upload File



DCC Metrics  
Template

\* **Financial Statement** Please upload your organization's most recent interim financial statement.

Upload File

\* **Audited Financial Statements** Please upload your organization's previous three years audited financial statements.  
Note: Maximum file size is 10 MB any file format is acceptable.

Upload File

**Resizing Instructions** If your file is too large, please [click here](#) for instructions on how to resize your file.

Save and Proceed

# Confirmation

## Confirmation

\* indicates required field

### \* Non-discrimination Statement

Does your organization discriminate on the basis of race, color, gender, national origin, religion, age, sexual orientation, gender identity, genetic information, physical or mental disability, pregnancy, marital status, status as a protected veteran or any other status protected by federal, state or local law?

No  
Yes

→ If yes, please explain basis for discrimination (e.g. organization serves only one gender).

Note that organizations who respond 'yes' may be subject to additional review.

### \* No Benefits

Selecting this field confirms your agreement that no goods or services will be provided to any Wells Fargo organization and/or its team members as a result of receiving a Diverse Community Capital Program grant, if awarded.

☐ No goods, services or benefits are being provided to Wells Fargo, its affiliates or team members.

Save and Proceed

Need Support?

# Review

## Review Your Application

Please review your proposal information. If you are not ready to submit your proposal at this time, click the "Save Only" button. The proposal will then be available to edit from the Welcome Page. Clicking the Submit button will immediately send the application to Wells Fargo and you will then be unable to perform further editing.

## Organization Information

**Official Name** CYBERGRANTS TEST ORGANIZATION

**\* Legal Name** CYBERGRANTS TEST ORGANIZATION

**AKA Name** CTO

**\* Mailing Address** 790 TURNPIKE STREET SUITE 300

**\* City** NORTH ANDOVER

**\* State** Massachusetts

**\* ZIP Code** 01845-6129

**Telephone** 7043746128

**Website Address** [www.website.org](http://www.website.org)

**Mission Statement** support Imi

**Year Organization was Established** 2000

**IRS W-9 Form**

- [test.docx \(11.1 K\)](#), uploaded by Malissa Hix on 11/05/2018

# Submit

## DCCP Interest Form

\* Request Date 11/21/2018

\* Project Title Diverse Community Capital Program

\* DCC Grant Program Capacity Building Grant

\* Please provide the name, title, and email address of the President/CEO of your organization. xx

Check all that apply for the President/CEO of your organization  
Hispanic or Latino  
Woman

\* Is your organization a U.S. Department of the Treasury Certified CDFI? Yes

\* Grant amount requested \$1.00

## Confirmation

\* Non-discrimination  
No

\* No Benefits  
No goods/services/benefits are provided exclusively to Wells Fargo, its affiliates or team members.





Submit

Save Only



# Email acknowledgement to grant seeker

From:  wells Fargo@cybergrants.com Sent: M  
To:  Phillips, Marian F  
Cc:  
Subject: Wells Fargo Grant Proposal Received

Thank you for your interest in the Wells Fargo Diverse Community Capital Program. We have received your interest form. We will be reviewing applications and will notify you of a decision within 90 days.

If your organization is selected to move forward and complete the full application, you will receive an invitation with a link to the application site.

Please refer to [www.wellsfargo.com/cdfi](http://www.wellsfargo.com/cdfi) for more information regarding requirements and guidelines.

As always, thank you for all you do in your communities.

Please use Request ID number 30787065 on any correspondence related to this proposal.

Thank you.

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NOTE: Please do not reply to this email as it is being sent from a generic email address and any responses will not be received or acknowledged.

CG/JMAIL/88231525

# Email notification to grant seeker, if approved

Wells Fargo Diverse Community Capital Program: Invitation to Apply

Based upon our review of the interest form submitted by your organization, we are inviting you to complete an application for grant funding under Wells Fargo's Diverse Community Capital Program. Please go to [www.cybergrants.com/wellsfargo/DCC/application](http://www.cybergrants.com/wellsfargo/DCC/application) and enter your log in credentials. Click on the Revise link in the Applications Requiring Action section of the welcome page. Use the Need Support link at the bottom of any page on the site if you have technical difficulties.

Thank you.

Our reference no.: {Request ID}

NOTE: Please do not reply to this email as it is being sent from a generic email address and any responses will not be received or acknowledged.

# Resources

- Program Manager
  - Connie Smith – [connie.e.smith@wellsfargo.com](mailto:connie.e.smith@wellsfargo.com)
- Technical Assistance
  - “Need Support” link available on application site
  - Malissa Hix – [malissa.hix@wellsfargo.com](mailto:malissa.hix@wellsfargo.com)