

Request Memo Guidance for [UUCEF](#) Community Investments

Thank you for your interest in the UU community investment portfolio. The items below will assist the Socially Responsible Investment Committee (SRIC) in evaluating and voting on your request. Please submit responses in a memo addressing each numbered item, not to exceed 3 pages. Email to SHelbert@uua.org with attachments or referenced hyperlinks within the memo.

1. Applicant Info: Organization Name, Address, Website, Contact Person's Data
2. Proposed Investment Terms: Amount, Term, Interest Rate, Note Type/Payment
3. CDFI Fund History: If applicable, list any certifications and/or awards including programs, dates, award amounts. Learn more at www.cdfifund.gov.
4. Fund Background: Origin, mission and intended impacts. Describe the underwriting process and systems. Attach investment staff/volunteer committee profiles (training and experience), and a list of all board members.
5. Product Offerings, Portfolio Holdings, and Community Lending Impact: In addition to brief narrative, attach your most recent portfolio summary presented to your loan committee or board. Report should summarize portfolio breakdown as well as impacts. Discuss geographic and demographic diversity within the portfolio.
6. Commitment to Anti-Racism / Dismantling White Supremacy: Summarize organization's policies/commitments to these core UU values. Attach/link project articles or summary of activities or impact data demonstrating this commitment. Consider [Decolonizing Wealth by Edgar Villanueva](#), for guidance.
7. Risk Factors & Mitigations: Describe strategies for minimizing portfolio defaults and ensuring investor capital is repaid as promised. Discuss historical portfolio losses and investment defaults. Attach most recent financial audit including notes.
8. UUA Connection(s): List referral sources or connections to any UUA congregation or district. See below for details about the [UUA Community Investing Matching Program](#) as a tool for attracting more investments.
9. Other Info: Any other information that may be helpful in demonstrating your capacity, impact, or other important factors that may not be addressed above.

UUA Community Investment Match Program: Community investments made by a UUA Congregation or District can be matched up to a maximum of \$10,000. The investment must be for at least \$5,000 and a term of at least 1 year. Other terms and conditions may apply as described in the form guidance.

Submission Checklist (via hyperlink or attachment):

- Request Memo (maximum 3 pages)
- Financial Audit + Notes
- Investment Committee Profiles + Board List
- Anti-Racism / Dismantling White Supremacy examples/statement
- Portfolio Report & Breakdown (Financial + Impact)