

# Investment Readiness Program Fall 2022

## Impact Stream

### Application Instructions

These instructions are intended to help you complete the application. During the selection process, we rely solely on the answers to each section and the supporting documents, so please be as specific as possible. Your proposal will be evaluated on how clearly you describe your initiative and how well we can understand what you intend to do. **Incomplete applications will not be considered.**

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If you have any questions about your application, please review the [Funding Guideline, FAQ and Glossary](#) on our website.

### Application Portal

**APPLY NOW**

Use the link below to register for the online application portal:

[https://www.grantrequest.com/SID\\_5647?SA=SNA&FID=35596](https://www.grantrequest.com/SID_5647?SA=SNA&FID=35596)

**TO RETURN TO YOUR APPLICATION IN PROGRESS**

Once you have registered and logged in, please use the following link to access your application in progress:

[https://www.grantrequest.com/SID\\_5647?SA=AM](https://www.grantrequest.com/SID_5647?SA=AM)

## For Further Assistance

Please review the [Funding Guideline](#), [FAQ](#) and [Glossary](#) on our website.

Please note that our offices will be closed from December 23, 2022 to January 2, 2023. Staff will make every effort to respond to inquiries upon their return, however due to the high volume of inquiries, we may not respond to all inquiries. If you have general inquiries, please contact [socialinnovation@canadianwomen.org](mailto:socialinnovation@canadianwomen.org)

For questions related to your project, eligibility, technical issues, troubleshooting or accessing the online application portal, contact:

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## Register for our webinars:

### English

[Investment Readiness Program - Info session](#)

December 6, 2022 3:00-4:00 pm ET

[Investment Readiness Program - Q&A session](#)

December 13, 2022 3:00-4:00 pm ET

### French

[Programme de préparation à l'investissement - séance d'information](#)

December 8, 2022 3:00-4:00 pm ET

[Programme de préparation à l'investissement - Questions et réponses](#)

December 15, 2022 3:00-4:00 pm ET

## Application Steps

### 1. STEP ONE: READ ALL SUPPORTING DOCUMENTS

Please read the Funding Guidelines, Glossary and FAQ on the Canadian Women's Foundation website: <https://canadianwomen.org/irp-ppi/>

### 2. STEP TWO: ACCESS THE ONLINE APPLICATION SYSTEM

Applications for Canadian Women's Foundation funding are administered through an online platform called IGAM, [which you can access here](#).

You will be required to create an account to use this platform using your email address. If you have accessibility needs, please contact staff at [socialinnovation@canadianwomen.org](mailto:socialinnovation@canadianwomen.org) to accommodate any other needs. We do not accept mailed hard copies of applications.

Once you create your account, you will receive a confirmation email and can login to start your application. The welcome page looks like this (see below):



- Welcome to your "My Application Page." This is the area where you will manage your work.
- Select "In progress applications" or "Submitted applications" in the drop-down menu.
- If you select "Submitted applications", you can only view the applications that you have submitted.
- If you select "In progress applications", you will be able to continue working on your application.
- To delete an application, simply select the garbage can to it.

The online application questions and guidance on how to answer them are listed in this "Application Instructions" document.

### 3. STEP THREE: COMPLETE THE ORGANIZATION OVERVIEW SECTIONS

Once you create a login for the online application platform, the online application will guide you through the questions. You will need to complete the Organization Overview section for “Charity Organization” which is legally and fiscally responsible for the funding. If you are a non-charity partnering with a registered charity or a qualified donee, the information provided in this section is referring to the Charity organization, which must be completed, along with the “Delivery Organization” (Non-charity) as well.

### 4. STEP FOUR: COMPLETE THE BASIC PROJECT INFO SECTION

This section mostly contains multiple choice questions with drop-down menu options to select from, such as the geographic impact of the project, amount of funding request, etc.

### 5. STEP FIVE: COMPLETE THE DETAILED PROPOSAL SECTION

There are a total of **10 proposal questions** to complete. We have provided guidance for each question to help guide you with your responses. Each question has been designated a maximum word count that will be enforced by the online application platform. Please note that one proposal question may not be applicable to your project, and you may indicate n/a.

**We recommend copying and pasting answers that you compose in your own separate Microsoft Word document so you can check your word count, spelling, and grammar in advance.**

### 6. STEP SIX: COMPLETE THE INVESTMENT READINESS SECTION

These questions are mostly multiple-choice questions for aggregate data collection, evaluation, and statistical purposes only. Your answers in this section do not have any merit on the review and selection process.

### 7. STEP SEVEN: BUDGET AND SUPPORTING DOCUMENTS

**Budget (Excel):** Complete and upload the [Excel Project Budget](#) template provided in the online portal.

**Supporting Documents (PDF):** Upload supporting documents. Some are required, others are optional. If possible, we encourage you to upload supporting documents in PDF format. For the full list of supporting documents, please see Tab 6 of this document.

## Tab 1 - Charity Organization

These questions are referring to the Charity Organization which is legally and fiscally responsible for the funding. If you are partnering with a registered charity or a qualified donee, the information provided in this section is referring to the Organization (Charity).

Application Question	Guidance on your answer
<p><b>Organization Details</b></p> <p>Name of Charity Organization, Mailing Address, Email, Website, Mission/Mandate</p>	<p>Legal name of the organization and mailing information. Provide a brief summary of the mission or mandate of the Charity Organization.</p>
<p><b>Organization Contact Info</b></p>	<p>Contact info for the CEO/Executive Director or delegated signing authority (e.g. senior finance officer) or any other individual within the organization who has legal binding authority.</p>
<p><b>Organizational Governance:</b></p> <p>Annual revenue of the Organization for the last three years (2019, 2020, 2021)</p> <p>Approx. Number of full-time staff, part-time staff, and volunteers (estimate)</p> <p>Total number of members in organization's Board of Directors or similar governance structure</p> <p>Estimate the number of Board of Directors (or similar governance structure) that self-identify as women or gender diverse and from each underserved communities:</p> <ul style="list-style-type: none"> <li>• Women</li> <li>• Those who identify as 2SLGBTQI+</li> <li>• Black people</li> <li>• Immigrants, refugees, newcomers &amp; and non-status people</li> <li>• First Nations, Métis and Inuit people</li> <li>• Official language minority communities</li> <li>• Racialized people</li> <li>• People from Northern Canadian communities</li> <li>• Seniors / Elders / Older people (65+ years old)</li> <li>• Persons with disabilities and/or who are deaf</li> <li>• Youth (15-24 years of age)</li> <li>• Those living on low-incomes</li> <li>• None of the above</li> <li>• Don't wish to respond</li> </ul>	<p>Annual revenue (numerical and text field): For example, \$100,000 in 2019, \$150,000 in 2022, \$200,000 in 2021. Annual revenue can refer to the fiscal year or calendar year depending on which your organization commonly uses. Write N/A if the organization is new.</p> <p>Numerical value only for number of full time/part-time staff, or volunteers.</p> <p>Estimate to the best of your ability, the total number of board members/board council members in your organization.</p> <p>Numerical value. Estimate to the best of your ability how many board members self-identify in each of the options listed. If you don't wish to respond, please answer "Don't wish to respond".</p> <p>Note: Northern: A northern area is defined as one of the three territories (YK, NWT, Nunavut) OR an area being above these designated geographical lines above the 54th parallel in ON and QC, 50th parallel in NFLD, 53rd parallel in MB and 54th parallel in SK, AB, BC. Refer to the map here: <a href="https://tinyurl.com/2p8ndt7h">https://tinyurl.com/2p8ndt7h</a></p>

<p><b>Organization’s Community/ies Impacted</b></p> <p>Localities impacted by the Organization (select all that apply)</p> <p>Which underserved community is your Organization <b>led-by</b> from the list provided (select up to 3)</p> <p>Which underserved community does your Organization <b>primarily serve</b> from the list provided (select up to 3)</p>	<p>Large Urban centres: 100,000 + people Small Urban centres: 1,000 and 29,999 people Medium Urban centres: 30,000 and 99,999 people Rural: less than 1000 people</p> <p>Hover your mouse over the blue “I” information sign in the online application and a pop-up will appear to explain the definitions of large vs small vs medium urban centre, rural and northern communities</p> <p>Select up to 3.</p> <ul style="list-style-type: none"> <li>• Women</li> <li>• Those who identify as 2SLGBTQI+</li> <li>• Black people</li> <li>• Immigrants, refugees, newcomers &amp; and non-status people</li> <li>• First Nations, Métis and Inuit people</li> <li>• Official language minority communities</li> <li>• Racialized people</li> <li>• People from Northern Canadian communities</li> <li>• Seniors / Elders / Older people (65+ years old)</li> <li>• Persons with disabilities and/or who are deaf</li> <li>• Youth (15-24 years of age)</li> <li>• Those living on low-incomes</li> <li>• None of the above</li> </ul> <p>See list above.</p>
<p><b>Canada Revenue Agency Information</b></p> <p>Does your organization have charitable status?</p>	<p>Yes/No</p> <p>If yes, insert 9-digit charity registration number. If no, complete the next section “Delivery Organization” (Non-Charity). If you are a non-charity applying for funding, you must complete the “Delivery Organization” section and must partner with a charitable organization and include their charitable number in the “Organization” section.</p>
<p><b>UN Sustainable Development Goals and Purpose</b></p> <p>If possible, identify which of the United Nations Sustainable Development Goals (SDFG) your organization address(es) (select up to 2)</p>	<p>Click the link below for the list of the 17 UN SDG Goals: <a href="https://sdgs.un.org/goals">https://sdgs.un.org/goals</a></p>

<p>What is the primary purpose(s) of the Organization? (select up to 2)</p>	<p>Choose up to 2 options that best describe the mission and mandate of your “Organization”</p> <ul style="list-style-type: none"> <li>• Social Services</li> <li>• Arts and Culture</li> <li>• Sports and Recreation</li> <li>• Education and research</li> <li>• Health</li> <li>• Development and housing</li> <li>• Philanthropic intermediaries and voluntarism promotion</li> <li>• Professional associations and unions</li> <li>• Environment</li> <li>• Law, advocacy or politics</li> <li>• Religion</li> <li>• International</li> <li>• Other</li> </ul>
<p><b>Previous Funding</b></p> <p>Have you previously applied for funding to the Canadian Women’s Foundation IRP? Have you applied for funding to other Readiness Support Partners of the IRP?</p>	<p>Yes/No and drop-down options to choose from</p>

## Tab 2 - Delivery Organization (Non-Charity), if applicable

**If applicable**, these sections must be completed by the Delivery Organization (non-charity) (e.g. the non-profit, incubation hub, or other partner organization that does not have charitable status) and is partnering with a Charity Organization).

Application Question	Guidance on your answer
<p><b>Delivery Organization Details</b> Name of Delivery Organization, Registration Number, Mailing Address, Email, Website, Contact information, Mission/Mandate</p>	<p>Legal name of the delivery organization (e.g. incorporated non-profit number, business registration number, etc.). Complete all the contact information and provide a brief summary of the mission or mandate of the Delivery Organization.</p> <p>Example Delivery Organizations: Incorporated non-profit, Social enterprise Incubation hub, Business centre, Cooperative Other organizations with a registration number</p> <p>Note: Individuals and sole proprietorships are <b>ineligible</b> for funding</p>
<p><b>Delivery Organization's Governance:</b> Annual revenue of the Delivery Organization for the last three years (2019, 2020, 2021)</p> <p>Approx. Number of full-time staff, part-time staff, and volunteers (estimate)</p> <p>Total number of members in the delivery organization's Board of Directors or similar governance structure</p> <p>Estimate the number of Board of Directors (or similar governance structure) that self-identify as women or gender diverse and from each underserved communities:</p> <ul style="list-style-type: none"> <li>• Women</li> <li>• Those who identify as 2SLGBTQI+</li> <li>• Black people</li> <li>• Immigrants, refugees, newcomers &amp; and non-status people</li> <li>• First Nations, Métis and Inuit people</li> </ul>	<p>Annual revenue (numerical and text field): For example, \$100,000 in 2019, \$150,000 in 2020, \$200,000 in 2021. Annual revenue can refer to the fiscal year or calendar year depending on which your organization commonly uses. Write N/A if the organization is new.</p> <p>Numerical value only for number of full time/part-time staff, or volunteers.</p> <p>Estimate to the best of your ability, the total number of board members/board council members in your organization.</p> <p>Numerical value. Estimate to the best of your ability how many board members self-identify in each of the options listed. If you don't wish to respond, please answer "Don't wish to respond".</p> <p>Note: Northern: A northern area is defined as one of the three territories (YK, NWT, Nunavut) OR an area being above these designated geographical lines above the 54th parallel in ON and QC, 50th parallel in NFLD, 53rd parallel in MB and 54th parallel in SK, AB, BC.</p>



<ul style="list-style-type: none"> <li>• Official language minority communities</li> <li>• Racialized people</li> <li>• People from Northern Canadian communities</li> <li>• Seniors / Elders / Older people (65+ years old)</li> <li>• Persons with disabilities and/or who are deaf</li> <li>• Youth (15-24 years of age)</li> <li>• Those living on low-incomes</li> <li>• None of the above</li> </ul>	
<p><b>Delivery Organization's Community/(ies) Impacted, UN Sustainable Development Goals, and Purpose</b></p> <p>Which underserved community is your Organization <b>led-by</b> from the list provided (select up to 3)</p> <p>Which underserved community does your Organization <b>primarily serve</b> from the list provided (select up to 3)</p> <p>If possible, identify which of the United Nations Sustainable Development Goals your organization address(es) (select up to 2)</p> <p>What is the primary purpose(s) of the Organization? (select up to 2)</p>	<p>Select up to 3:</p> <ul style="list-style-type: none"> <li>• Women</li> <li>• Those who identify as 2SLGBTQI+</li> <li>• Black people</li> <li>• Immigrants, refugees, newcomers &amp; and non-status people</li> <li>• First Nations, Métis and Inuit people</li> <li>• Official language minority communities</li> <li>• Racialized people</li> <li>• People from Northern Canadian communities</li> <li>• Seniors / Elders / Older people (65+ years old)</li> <li>• Persons with disabilities and/or who are d/Deaf</li> <li>• Youth (15-24 years of age)</li> <li>• Those living on low-incomes</li> <li>• None of the above</li> </ul> <p>See list above.</p> <p>Click the link below for the list of the 17 UN SDG Goals: <a href="https://sdgs.un.org/goals">https://sdgs.un.org/goals</a></p> <p>Choose up to 2 options that best describe the mission and mandate of your "Organization"</p> <ul style="list-style-type: none"> <li>• Social Services</li> <li>• Arts and Culture</li> <li>• Sports and Recreation</li> <li>• Education and research</li> </ul>

	<ul style="list-style-type: none"> <li>• Health</li> <li>• Development and housing</li> <li>• Philanthropic intermediaries and voluntarism promotion</li> <li>• Professional associations and unions</li> <li>• Environment</li> <li>• Law, advocacy or politics</li> <li>• Religion</li> <li>• International</li> <li>• Other</li> </ul>
<p><b>Previous Funding</b> Have you previously applied for funding to the Canadian Women's Foundation IRP? Have you applied for funding to other Readiness Support Partners of the IRP?</p>	<p>Yes/No and drop-down options:</p> <ul style="list-style-type: none"> <li>• Previously applied but not funded</li> <li>• Previously applied and funded</li> <li>• Applied and a decision is yet to be made</li> <li>• Did not apply previously for this project</li> </ul>

## Tab 3 - Project Information

For data collection purposes, please complete the questions below. These questions are related to your **proposed project, social enterprise or business initiative**. These questions are not related to your organization or delivery organization. For example, the primary purpose of the “project” could be to address “gender equality”, whereas the primary purpose of the organization is to address “affordable housing”.

Application Question	Guidance on your answer
<p><b>Project Information</b></p> <p>Name of Project / Social Enterprise / Business Initiative</p> <p>Brief summary of your project / social enterprise / business initiative (Max 100 words)</p> <p>Program Start &amp; End Date</p> <p>Total budget for initiative</p> <p>Total amount requested from the Canadian Women’s Foundation</p>	<p>Provide a short title which describes the proposed project.</p> <p>Describe the initiative as if you were writing a paragraph in a brochure for a general audience to give a clear idea of your work. Ask someone who is unfamiliar with your initiative to read your description to see if they understand the intent of the project.</p> <p>Date, Month, Year. Start date cannot be before May 1, 2023 and end date after March 31, 2024.</p> <p>Enter the numerical value of the total budget for your project.</p> <p>Up to \$75,000 is the maximum amount you can apply for in the Impact Stream.</p>
<p><b>Primary Contact Info</b></p>	<p>Project-level contact info for the individual who will be responsible for the day-to-day operation / implementation of the project.</p>
<p><b>Project Impact:</b></p> <p>Geographic Impact Area of Proposed Project/Business Initiative: Select all that apply.</p> <p>Number of individuals who will directly or indirectly benefit from this initiative annually</p> <p>Is the proposed project / business initiative <b>led by</b> the community it serves?</p>	<p>Select the province or territory that the project will have an impact in. For example, the “Organization” may be headquartered in British Columbia, the “Project” itself will impact participants and communities in Alberta and Manitoba. If the project is primarily national in scope, select “National”.</p> <p>Numerical value. To the best of your ability, estimate the number of total beneficiaries that will be impacted by the project e.g. 50 direct participants in Saskatoon and 1,500 individuals engaged through community sessions, therefore a total of 1550 people in Saskatoon are potentially impacted by this project. You should be comfortable enough with the approximate number indicate, if it was included in a public press release.</p> <p>Yes/No</p>

## Tab 4 - Proposal Questions

A total of **10 proposal questions** to complete. We have provided guidance for each question to help you to develop your responses. Each question has designated maximum word count that will be enforced by the online application platform. If you are writing in a separate Microsoft Word document before you copy and paste your answers into the online application portal, the total word count for the 10 questions is 2,200 words or 4 pages single spaced.

### Project /Business Initiative

Application Question	Guidance on your answer
<p>1. How will the proposed project / business venture / activities generate revenue/profit and explain the business model: (300 words).</p>	<p>One of the goals of the IRP is to support social purpose organizations working towards building, growing, or scaling existing or new <b>revenue-based</b> activities.</p> <p><b>A strong project which fails to demonstrate clearly that it can potentially generate revenue, profit and describe clearly the monetization piece may result in an unsuccessful proposal.</b></p> <p><b>You must have or plan to have, a mechanism that generates revenue/profit from the sale of goods and/or services. Revenue from donations does not count in this context. The IRP is intended to support the adoption and growth of revenue generation through the sale of goods and/or services.</b></p> <p><b>You must have a plan or intention to seek investment, whether loans or equity in the future.</b></p> <p>Tell us about your projected growth, how do you intend to meet this growth, and describe your organization's target market (customer, market size, etc.)</p> <p>Tell us if you have completed a Business Plan/Feasibility Study, etc. and even better, attach it as a supporting document. If the project is related to a community bond and/or community-driven outcomes contract initiative, describe the proposed activities, including the potential earned revenue.</p> <p>If the proposal is an incubation hub, business hub, accelerator, or commercialization centre, describe how the hub, accelerator and/or business centre <b>itself</b> plans to</p>

	<p>generate revenue and profit as a social enterprise/social venture and be financially resilient to take on future capital/investment.</p>
<p>2. Provide a brief summary (or bullet points) of your project workplan / schedule of activities of how you will achieve the project outcomes: <b>(250 words)</b></p>	<p>We should have a clear understanding of the purpose of this initiative and what it involves. Tell us exactly <b>how</b> you will undertake activities as part of your initiative. This is your moment to frame out the specifics of your initiative. If you have a Theory of Change - a detailed description and illustration of how and why the desired change is expected to happen - attach it as a supporting document.</p> <p>In addition to your answer, upload a Workplan / Schedule of activities in the “Budget and Supporting Documents” section. There is no template to follow, but please include clearly outline activities, deliverables and timelines. If you are partnering with other organizations, indicate how activities will be divided.</p>
<p>3. Summarize how you will spend the funding. <b>(200 words)</b></p>	<p>Clearly outline how you plan to use this funding, and if applicable, indicate any external experts, consultants and/or service providers that could help support the advancement of your initiative. If applicable, provide a general estimate of these services.</p> <p>e.g. will you use the funding to help with product/service enhancement, seek technical assistance from a lawyer or accountant, complete a financial model, get extra support to build your impact measurement framework, develop an investor pitch/plan, hold community-investor engagement sessions, etc.</p> <p>We place a strong emphasis on proposed budgets that are reasonable and explain how funding would be allocated, and whether activities are directly related to the proposal.</p> <p>In addition to your answer, upload a detailed Budget in the template provided in the “Budget and Supporting Documents” section. Please consult the budget template for a list of ineligible and eligible expenses.</p>
<p>4. If you are applying for the same previously funded project from the Canadian Women's Foundation, please describe in detail the achievements to date and how continued IRP funds will further the project, enterprise or initiative. If this proposal is different</p>	<p>Complete this question only if you have received IRP funding from the Canadian Women's Foundation, otherwise write n/a.</p> <p>Tell us about how the previous project went, how you overcame challenges, what you achieved and why now is an unlocking and opportune time to continue to advance your organization's/initiative's investment readiness goals. Explain why your organization should receive funding to</p>

<p>from the previously funded project, describe why you are applying for a different project, enterprise, or initiative. <b>(250 words)</b></p>	<p>further these readiness goals and the likelihood of securing future investment//capital for the initiative.  Write n/a if you have not received IRP funding in the past.</p>
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## Community Impact

Application Question	Guidance on your answer
<p>5. Describe the target population or community that the project will impact or serve through this initiative. Is there an identified need in this target population and how do you aim to address this need? <b>(200 words)</b></p>	<p>Who is most likely to benefit in your community, and how will you reach them? Do you already have an idea from the community that this is the right initiative for their needs? Please include specifics of demographics and mention any marginalized populations that you are serving.  Please also include the reach of your initiative e.g. 200 people will be directly impacted by the project, or 10 individuals will directly benefit and 500 people may be indirectly impacted by the project / business initiative</p>
<p>6. If the project/business initiative is led by the community it serves (meaning are decisions &amp; direction provided by the community served), share the decision-making process and how you ensure representation? If not, write n/a <b>(200 words)</b></p>	<p>We prioritize projects where representative and inclusive leadership is demonstrated. Does the project's team include diverse voices/lived experiences which represent the communities served? How are they involved in the decision-making process?  You could also consider if the project/social enterprise includes human-centered design approaches, meaning are people at the centre of developing products/services.  We encourage applications that value and embody the concept of "nothing about us, without us" within their organizational structure and programming. Tell us how individual representatives of the population(s) you are seeking to serve, could be involved in the decision-making and delivery of your project. For environmental organizations, describe your approach to ensuring environmental justice, reconciliation and traditional ecological knowledge will inform your approach, if applicable.</p>
<p>7. How are you encouraging gender analysis, intersectionality, equity, diversity, and / or inclusivity in the proposed project/business initiative? <b>(200 words)</b></p>	<p>Describe your approach to gender inclusivity, equity, diversity and inclusion and how these values align with you/your organization; and/or you can tell us more about how the project / business initiative considers the different intersecting realities of those who identify as women and/or non-binary.</p>

## Alignment

Application Question	Guidance on your answer
<p>8. (a) How does your project / initiative align with the Canadian Women's Foundation - Investment Readiness Program? and (b) How will IRP funding help you progress to a different stage of investment readiness (e.g. launch, growth, established)? <b>(300 words)</b></p>	<p>In reading this answer, we will be looking for coherence and organizational alignment between the project / business / initiative, the IRP and the Canadian Women's Foundation.</p> <p>Tell us <b>how this funding will help you progress within or along the different stages of investment readiness</b> and advance/sustain your initiative and/or your organization's mission and goals</p> <ul style="list-style-type: none"> <li>• <b>Launch:</b> formalizing and implementing the project to bring the demonstrated early concept to fruition</li> <li>• <b>Growth:</b> growing operations and scaling the impact</li> <li>• <b>Established:</b> mature operation with deep/broad impact</li> </ul> <p>Reminder: This Impact funding stream is primarily for organizations that are sustaining, scaling or growing the impact of an existing or well-developed social enterprise/business initiative that generates revenue from the sale of goods/services.</p>
<p>9. Who is involved in carrying out your initiatives activates (e.g. staff, elders, mentors, and/or volunteers?) What particular skills and experience do they bring to the initiative? <b>(200 words)</b></p>	<p>Please give an overview of the roles played by staff, elders, mentors, and/or volunteers and the experience they bring. Please indicate their level of engagement and commitment to this initiative. You do not need to provide bios or resumes. If possible, please speak to their relationship with the proposed target population(s).</p>
<p>10. If you are the "Delivery Organization" partnering with the "Charity Organization", describe each organization's role. If this does not apply to you, please type N/A. <b>(100 words)</b></p>	<p>If you're the "Delivery Organization" (non-charity, for-profit or non-profit) partnering with the "Charity Organization", describe the partnership and clearly describe each other's roles in the project.</p>

## Tab 5 - Investment Readiness

These questions are for data collection and statistical purposes only. Your answers in this section do not have any merit on the review and selection process. Projects can be in the early, middle, or later stages of investment readiness and anywhere in between. There are many stages along the path to becoming investment ready, so we are not prioritizing one stage over another.

Application Question	Guidance on your answer
<p>What stage of business development is the project?</p>	<ul style="list-style-type: none"> <li>• <b>Idea:</b> mostly thinking and brainstorming of multiple scenarios</li> <li>• <b>Concept:</b> articulating concrete plans continuously being further developed and refined</li> <li>• <b>Launch:</b> formalizing and implementing the project to bring the concept to fruition (e.g. piloting or launching operations)</li> <li>• <b>Growth:</b> growing operations and scaling the impact</li> <li>• <b>Established:</b> mature operation with deep/broad impact</li> </ul>
<p>Choose a maximum of three activities for which funds is requested.</p>	<p>To the best of your ability, select up to 3 options that best describe the key activities of your project/business initiative and/or how funding will be used:</p> <ul style="list-style-type: none"> <li>• <b>Market study:</b> Researching user and customer needs, segmenting customer types, sizing market opportunities, analyzing the competitive landscape, and other market/sector research.</li> <li>• <b>Feasibility study:</b> Researching the potential for impact, designing a high-level strategy and operating model, developing high-level financial forecasts, and other early-stage activities relating to validating the potential for a concept to be realized.</li> <li>• <b>Business Plan - Marketing Strategy:</b> Developing the marketing strategy, e.g. strategy/plan related to any of the unique value proposition, pricing, promotion, distribution.</li> <li>• <b>Business Plan - Operations Strategy:</b> Developing the operating model, e.g. strategy/plan related to supply-chain, product/service development, human resources, equipment and other capital assets.</li> <li>• <b>Business Plan - Financial Modelling:</b> Developing the financial model, e.g. core economics, investment structure, and/or forecasts, comprising the balance sheet, income statement or statement of operations, and cash flow statement.</li> <li>• <b>Business Plan - All of the above</b> - Use if service provider worked on all aspects of a business plan and did not disaggregate their quote, e.g. developing all of the sections listed above within the business plan.</li> <li>• <b>Business Plan - Other:</b> Developing other sections not listed above within the business plan.</li> <li>• <b>Impact Measurement and Management:</b> Developing the plan, system, processes and/or measuring and reporting on the quantitative metrics and/or qualitative stories that illustrate your positive social/environmental/cultural/economic impact.</li> </ul>



	<ul style="list-style-type: none"> <li>• <b>Team and skills development:</b> Training activities and skills acquisition that is required for the project implementation and scaling</li> <li>• <b>Organizational structure and management systems:</b> Developing the right management structure and researching and/or developing internal processes and systems, e.g. accounting software and controls processes, management information systems, customer management systems, etc.</li> <li>• <b>Development of new products and/or services:</b> Conceiving, developing, and/or refining a new product offered to a user or customer, e.g. developing software technology offered to customers.</li> <li>• <b>Expansion of existing products and/or services:</b> Conceiving, developing, and/or refining a new service offered to a user or customer, e.g. programs offered to beneficiaries.</li> <li>• <b>Legal services:</b> Accessing advice or completing legal tasks related to investment documentation, product/service compliance, intellectual property, corporate structure, and/or any other legal matter aside litigation.</li> <li>• <b>Other Specialist Services:</b> Accessing specialist/technical services, e.g. equity/diversity/inclusion/access specialists, engineering, consulting, architectural planning, etc.</li> <li>• <b>Marketing activities and promotion:</b> Developing marketing collateral or campaigns, e.g. designing a website, digital ads, print media or other resources for marketing through other channels.</li> <li>• <b>Investor relations and investor network development:</b> Researching, establishing, and/or building relationships with potential investors, accessing capital advisory services, developing an investor management plan, and other activities related to directly interfacing with investors.</li> <li>• <b>Other</b></li> </ul>
<p>On a scale of 1-5 how familiar are you in the following areas: i) Concept of social finance and ii) Social finance opportunities and how to access them iii) Services and tools available to support an organization's readiness to access social finance opportunities</p>	<p>1 = not familiar 2 = slightly 3 = somewhat 4 = moderately 5 = extremely familiar</p>
<p>Has your organization previously accessed one of the following Social Finance instruments?</p>	<p>Yes/No</p> <p>Loans = debt, term loans, working capital, bonds, etc. Equity instruments = common shares, preferred shares, etc.</p>

	<p>If yes, specific the name of investor (Investor Organization) and the source of investment (bank, financial institution, private equity investor, etc.)</p>
<p>When does your organization anticipate being ready to take on future investment (for the project proposed in this application)?</p>	<p>Select one of the options available. Consider where the project / business initiative / social enterprise sits in the different “Stages of Readiness” and when it will be ready to receive investment in the future. If not sure, select I don’t know.</p> <ul style="list-style-type: none"> <li>• 6 months</li> <li>• 1 year</li> <li>• 2-3 years</li> <li>• 5 years</li> <li>• I don’t know</li> </ul>
<p>If awarded funding, please select which skills training, capacity building and shared learning activities may be of interest to your project/ organization (select all interests you):</p>	<p>If awarded funding, we provide capacity-strengthening opportunities in the form of Peer-to-Peer sessions, an online Community of Practice, webinars, workshops and training programs with some 1-on-1 coaching, on a variety of topics based on feedback. Please share with us the types of topics that may interest/support your organization/project:</p> <ul style="list-style-type: none"> <li>• Introduction to Intersectional Feminism 101</li> <li>• Introduction to Gender Diversity and Inclusion</li> <li>• Business Plan/Model Development</li> <li>• Intro to Investment Readiness</li> <li>• Intro to Financial Modelling (cash flow, financial statements, scenario planning)</li> <li>• Advanced Financial Modelling</li> <li>• Feminist Business Practices</li> <li>• Revenue Diversification</li> <li>• Impact Measurement (data, key performance indicators, measuring “impact”)</li> <li>• Communicating impact (story-telling)</li> <li>• Governance and board buy-in/training</li> <li>• Legalities of operating a social enterprise in a charity org.</li> <li>• Financial literacy</li> <li>• Grant writing</li> <li>• Decolonizing and Indigenizing social finance</li> <li>• Diversity, Inclusion, Equity, Access</li> <li>• Marketing and digital strategies, E-commerce support</li> <li>• Understanding Gender Lens Investing / Financial Feminism</li> <li>• Developing your Investor Pitch</li> <li>• Guide to Social Procurement and tendering contracts</li> <li>• Awareness and use of Social Finance tools: debt financing (loans, community loan funds), equity financing (patient/long-term capital), outcomes financing (e.g. social impact bonds, pay for success models), Community Bonds (raising capital from community investors)</li> <li>• Case studies on types of social enterprise models</li> <li>• Other</li> </ul>

## Accessibility

Application Question	Guidance on your answer
Did your organization seek help in applying for this application? For example, hiring a consultant or grant writing company.	Yes or No question. The committee would like to know what kind of supports organizations are reaching out to, if any, to apply for investment readiness opportunities. A text box is also provided if you wish to share which consultant or grant writing company was hired to assist with the process.
Have you previously, currently and / or are planning on hiring consultants?	Yes or No question. A text box is provided to share which consultants have been accessed or which consultants you are planning on accessing and the service(s) provided.

## Tab 6 - Budget and Supporting Documents

### Budget (Microsoft Excel):

You **must fill in and complete the [Excel Budget template](#)** provided in the online portal.

In the excel budget template, complete TAB A which itemizes the **proposed** expenses. TAB B in the excel template provides a general list of eligible and ineligible expenses. We will assess proposed budgets based on how realistic the proposed expenses are, and whether expenses align with proposed activities. Please submit the project budget (excel template provided) in excel format, please avoid uploading as a PDF.

### Supporting Documents (PDF):

Upload supporting documents listed below. Some are required, others are optional. If possible, we encourage you to upload all supporting documents in PDF format.

#### *Important Note regarding Supporting Documents*

**Charity Organization:** If you are a Charity Organization applying on your own and without a delivery/partner organization, please submit the required documents listed below (#1,2,3).

**Delivery Organization (Non-Charity):** If you are “Delivery Org” (non-charity) applying in partnership with a “Charity Organization”, supporting documents # 1 and #2 listed below are required from the “Charity Organization” and supporting documents #3 is required from “Delivery Organization” (non-charity). Supporting documents #4-6 are optional.

Application Question	Guidance on your answer
1. Organizational Budget Overview	<b>Required</b> Upload your organization’s current budget/financial health summary
2. Audited Financial Statement	<b>Required</b> If you do not have audited financial statements, provide the most recent financial statement that has been presented to your Board of Directors/Band Council or similar governance structure/community membership structure.  If your organization is new, grassroots or does not have audited financial statements, please provide either your unaudited financial statement OR your most recent financial report submitted to your board of directors / the governing body of your organization.
3. Project Workplan / Schedule of Activities	<b>Required</b> Upload a detailed workplan that explains how and when the project will be implemented. You are welcome to use any template or format you prefer (.pdf, .xlsx, .doc, etc.)
4. Annual/Impact/	<b>If available</b>

Community Report	You are welcome to share an annual report, impact report, community report, etc. from either the Organization (Charity) or Delivery Organizations (Non-charity)
5. Current Board list or Band Council list	<b>If available</b> Provide their names and titles, but do not provide their contact information such as email and phone number.
6. Other Supporting Documents	<p><b>If available</b> Upload anything else you would like to share with us such as a business plan, feasibility study, market assessment, etc.</p> <p><b><u>Important note for organizations that received previous IRP funds:</u></b></p> <p>We strongly recommend uploading any updates/achievements from the previously funded IRP project, if the project is relevant to your current application. You are welcome to upload any supporting documents that support your application. Please upload supporting documents in PDF format only.</p>