



# IRP Application Form for Charities and Other Qualified Donees

**\*Please note:** This downloadable version is to help you prepare your application before submitting it through [CFC's online application portal](#). **If internet connectivity is an issue for you please send us an email at [readiness@communityfoundations.ca](mailto:readiness@communityfoundations.ca) to find alternative means to apply.**

## Instructions

Please read the Guidelines and all the questions before you start this application. Avoid repetition wherever possible and note that each section has a word count. We suggest that you draft your responses and collect all attachments before entering your application on the portal.

## Select Your Regional Partner

The IRP is delivered through a collaboration between Community Foundations of Canada (CFC) and local community foundations ('Regional Partners') across Canada.

Your application will be received and adjudicated by the Regional Partner that serves your area. That Regional Partner will be responsible for answering questions, considering requests for funding, and administering the IRP locally.

To learn more about the Regional Partner that serves your region, and how you can get in touch with them, [click here](#).

**Note:** For potential applicants from **Quebec**, [please click here](#) to learn more about the IRP program in that province. In Quebec, the IRP accepted applications on a rolling basis as early as December 2019 and it has already closed to new applications, having awarded all available funds.

## Your Province or Territory

In which province or territory will your social purpose organizations and/or project operate?

*If your social purpose organization and/or project will operate at a national level, with national impact, select the national stream by selecting "other: National" from the province of Ontario list.*

## Your Regional Partner

Which Regional Partner serves the area where your social purpose organization primarily operates? \*

The application website will send periodic confirmation emails. In which language would you like to receive those emails?

- English
- French

## Organizational Information

Attachments required in this section:

- Project budget, clearly outlining all IRP program expenses and revenues.
- Past 5 years financial statements, Please upload your social purpose organization's financial statements for each of the past five fiscal years, or since establishment, if shorter than five years. Financial statements prepared by a third party are preferred.
- Corporate bylaws
- Corporate filings
- List and bios of Management Team members and Board members, Please provide a list, including bios, of the Board members and/or management team members that will lead your project.
- Support document: Please share one (1) document or file that will help inform the selection jury about the operations of your social purpose organization. This could be a letter of support, a quote from a service provider, etc.)

1. Name of the applicant social purpose organization:

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2. Legal name (if different from operating name)

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3. Contact:

Who should we contact about this application?

Contact name: -----

Email address: -----

Phone number: -----

4. Corporate street address:  
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5. City / Town:  
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6. Province/Territory:

*If you're applying from Quebec, please be aware that there is a separate application process; please refer to the [CFC website](#)*

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nova Scotia
- Nunavut
- Ontario
- Prince Edward Island
- Saskatchewan
- Yukon

7. Postal code:  
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8. Organization website:

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9. Summarize the project for which you are seeking funding from the Investment Readiness Program in one sentence. (word count: 30) e.g. Use the format: "Our SPO does ..., the project we are apply for will..."

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9. Corporate type of the applying body:

\*Please note this section will trigger the appropriate version of the application for your corporate type. This should match the eligibility questions.

- Not for Profit
- Co-op
- Co-op with charitable status
- For Profit
- Registered Charity
- Other Qualified Donee, including registered Indigenous governments
- Other, please specify: -----

11.b) **Charitable number or other qualified donee status:**

Find your organization's charitable number using [CRA's list](#) of registered charities and other qualified donees

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11.c) **Every registered charity or qualified donee has a [webpage](#) on the CRA website. Please include your organization's URL on the CRA website.**

Here is an example: This is [Community Foundations of Canada](#)'s web listing on the CRA website.

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12. Fiscal Year End

MM/DD

13. Have you applied to the IRP previously?

- Yes

No

14. To which Readiness Support Partner have you submitted an application?

- Community Foundations of Canada and/or a Regional Partner
- Chantier de l'économie sociale
- Canadian Women's Foundation
- National Aboriginal Capital Corporations Association
- National Association of Friendship Centres

15. When was it submitted?

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ (YYYY/MM/DD)

15.b) Was it successful?

- Yes
- No

If you are reapplying to CFC, what elements of your application is different, *please give as much detail as possible, including noting where your answers to questions may be different that in your previous application, including where you have changed strategies, business/impact goals, edits to your proposed budget and community impact.*

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## Organizational Mission

16. Please provide a short description of your organization's mission (*word count 60*).

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17. What social, cultural, or environmental problem does your organization address, or intend to address, and how? (*word count 60*)

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18. If possible, identify which of the United Nations Sustainable Development Goals your work addresses. (Max: 3 Choices)

*Learn more about the United Nations Sustainable Development Goals (SDGs) [here](#).*

- Goal 1: No Poverty
- Goal 2: Zero Hunger
- Goal 3: Good Health and Well-Being for People
- Goal 4: Quality Education
- Goal 5 : Gender Equality
- Goal 6: Clean Water and Sanitation
- Goal 7 : Affordable and Clean Energy
- Goal 8: Decent Work and Sustainable Economic Growth
- Goal 9: Industry, Innovation, and Infrastructure
- Goal 10: Reducing Inequalities
- Goal 11: Sustainable Cities and Communities
- Goal 12: Responsible Consumption and Production
- Goal 13: Climate Action
- Goal 14: Life Below Water
- Goal 15 : Life on Land
- Goal 16: Peace, Justice and Strong Institutions
- Goal 17: Partnerships for the Goals
- Not Applicable

## Organization:

### Sustainability, Outcomes Measurement and Investment Readiness

This section of the application is asking questions about your overall organization, not the enterprise/project you seek to launch or advance with help from the IRP, if that is different.

19. If applicable, what are the **total revenues** of your organization (from all sources of revenue) and the **revenues generated** from the **sale of goods and services**, for each of the past five fiscal years or since establishment, if shorter than 5 years? (Enter N/A for years that were pre-revenue)

	Total revenue (\$)	Revenue from sales of goods and services (\$)	Comment
Year 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Year 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Year 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
Year 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
Year 5	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>

20. Broadly speaking, what is your social purpose organization's plan for securing investment in the future? Even if you are at an early stage of development please provide some insight into how loans, equity or other financial investment fit into the future of your organization? (word count 150)

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21. Please explain how your social purpose organization is handling the impacts of COVID-19? What adaptations have you made to ensure the success and continued operation and growth of the organization?

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## Social Enterprise Activities

*This section pertains to your existing or planned enterprise activities (the project), not your organization overall*

22. Do you have an existing social enterprise within your existing charitable organization's structure, or in trust?

- Yes (the form will only show '**Section A: Existing Social Enterprise.**')
- No (the form will show only '**Section B: Planned Social Enterprise**')

\*If you said yes in 22, Please explain: (word count 250)

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## Section A: Existing Social Enterprise

(If Yes to question 21)

23. If applicable, how many employees does your social enterprise have?



Full Time -----

Part Time -----

24a. If applicable, how many volunteers does your social enterprise have?

Number: -----

25a. How does your social enterprise measure, or plan to measure, its social, cultural, environmental impact? (*word count 150*)

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26a. How does your social enterprise report on those measurements? (*word count 150*) \*

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27a. The investment readiness continuum is a non-linear spectrum between the conception of an idea, its implementation and investment readiness. Employment and Social Development Canada defines five stages in this continuum with different skills and supports required at each stage. Please capture, to the best of your ability, where your social enterprise is on this continuum. IRP looks to support organizations throughout the continuum.

- Early Stage Innovation: Exploration and ideation of the initiative - aligning a proposed solution to an identified need.
- Strategic Impact Focus: Feasibility analysis and community support development.
- Impact Sustainability: Business model development, use of data for planning & impact measurement, diversification of funding sources.
- Financial Resilience: Revenue generation, legal structure (incl. debt & equity), ability to scale and replicate.
- Investment/Investor Ready: Sustainable cash flow and assets, track record for sustainability and networking with prospective investors.

28a. What goods and services does your social enterprise deliver? Please explain your market for these goods and services, and any growth strategy. (*word count 250*)

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29a. How does your social enterprise generate revenue? (word count 60)

Please note fundraising activities are not eligible (please consult the program guidelines for SPO and project eligibility).

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**Note: For charities and other qualified donees, there are no question numbers 29 and 30. The next question is number 31, on the following page**

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**Section B: Planned Social Enterprise.**

**Please answer on behalf of your current organization**

(If No to question 22)

23b. If applicable, how many employees does your organization have?

Full Time -----

Part Time -----

24b. If applicable, how many volunteers does your organization have?

Number: -----

25b. How does your organization measure, or plan to measure, its social, cultural, environmental impact? (word count 150)

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26b. How does or how will your organizations report on those measurements? *(word count 60)*

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27b. The investment readiness continuum is a non-linear spectrum between the conception of an idea, its implementation and investment readiness. Employment and Social Development Canada defines five stages in this continuum with different skills and supports required at each stage. Please capture, to the best of your ability, where your organization is on this continuum. IRP looks to support organizations throughout the continuum.

- Early Stage Innovation: Exploration and ideation of the initiative - aligning a proposed solution to an identified need.
- Strategic Impact Focus: Feasibility analysis and community support development.
- Impact Sustainability: Business model development, use of data for planning & impact measurement, diversification of funding sources.
- Financial Resilience: Revenue generation, legal structure (incl. debt & equity), ability to scale and replicate.
- Investment/Investor Ready: Sustainable cash flow and assets, track record for sustainability and networking with prospective investors.

28b. What goods and services does (or will) your organization deliver? Please describe your market for these goods and services, and any launch or growth strategy. *(word count 250)*

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29b. How does or how will your organization generate revenue? *(word count 60) Please note fundraising activities are not eligible (please consult the program guidelines for SPO and project eligibility).*

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**Note: For charities and other qualified donees, there are no question numbers 30 and 31. The next question is number 32, on the following page**

## Project Information

*This section pertains to the project activities for which you are seeking funding from the Investment Readiness Program.*

32. Please specify the precise amount of non-repayable capital your social purpose organization is requesting through the IRP.

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32b. Could you proceed with this project if partial funding was only available?

Yes/No

33. Project start date: (no earlier than January 15, 2021) b) Project end date: (no later than June 1st 2021)

34. Provide details about what you plan to do with the requested funds. Be sure to outline the complete project, both activities and/or research you propose to undertake. (word count 250)

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35. The IRP will prioritize applications that value and embody the concept "nothing about us, without us" within their organizational structure and programming. How will individuals representative of the population(s) you're seeking to serve, be involved in the decision making and delivery of your project/initiative? *For environmental organizations, describe your approach to Indigenous land stewardship and diversity, as applicable.*

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36. What primary information gap are you hoping to fill, or what skill or competency do you hope to acquire through the Investment Readiness Program? (word count 60)

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37. What types of supports and services are you looking to access to help deliver your project, e.g. business planning consultant, marketing resources, pitch/deal guidance?

Please identify if these are online or in person, and who will provide them. (word count 60)

*The Government of Canada has funded a number of [expert service providers](#) but other service providers are also acceptable.*

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38. Do you intend to purchase any capital assets to fulfill a contract?

*Please be sure to refer to the Program Guidelines to learn more about eligible asset purchases*

- Yes
- No

38b. \* If yes, how will this help you move along the investment readiness continuum? (word count 150)

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39. Please describe the relevant skills and experience (leadership, skills, networking, coaching) of the team associated with this project. (word count 150)

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40. Please describe any key community relationships or partnerships your organization has in its community and their impact on the project for which you are seeking IRP funding. (word count 150)

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41. How will completing your project enable your social purpose organization to accept a loan or to take an equity investment in the future? (word count 250)

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## General Information

*This section pertains to your existing or planned enterprise activities, not your organization overall.*

42. What is the primary purpose(s) of your project/social enterprise?

*Please check all that apply.*

- Cultural
- Environmental
- Social

43. What is the secondary purpose(s) of your project/social enterprise?

*Please check all that apply.*

- Employment development
- Income generation for a parent organization
- Training for workforce integration
- Awareness-raising
- Sustainable and affordable housing
- Food security
- Reusing and recycling program
- Youth services, daycare and after-school programming
- Other \_\_\_\_\_

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*These questions pertain to your organization overall.*

44. Which populations does your social purpose organization serve?

- Rural
- Urban
- Both

45. Does your organization offer services:

*Please check all that apply*

- Locally
- Regionally
- Nationally
- Internationally

46. What community do you support through the activities related to this project?

Province: -----

City/town :-----

47. Which primary group does your social purpose organization serve or seek to serve through its social mission? *Please select up to three groups in ranked order.*

- Youth
- LGBTQ+
- Indigenous people
- Black People
- People living with a disability
- Women
- New Canadians
- Refugees
- People experiencing homelessness
- People experiencing low incomes
- Another group, please specify: -----
- SPO primarily benefits the environment
- Other Racialized people

48. If applicable, how many Board members does your organization have? (enter 0 for no board)

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48b. If applicable, how many of your Board members self-identify as members of the following groups?

*Community Foundation of Canada seeks to understand who is leading the social purpose organizations applying to the investment readiness program. This question is optional but we encourage you to answer it if you can. This information assists CFC and Regional Partners to better understand how we deploy our resources and be accountable for building equity and inclusion.*

LGBTQ+

Indigenous people

Black People

People living with a disability

Women

Other racialized people/people of colour

Decline to state

48c. If you decline to state, please let us know why:

- We do not collect this data
- I do not feel comfortable disclosing this information
- Other [please specify]

49. How many people are in your organization's leadership team (such as Founders, CEO, COO, VPs, Executive Directors, and Directors) -----

49b. How many of your organization's leadership team self-identify as members of the following groups?

*Community Foundation of Canada seeks to understand who is leading the social purpose organizations applying to the investment readiness program. This question is optional but we encourage you to answer it if you can. This information assists CFC and Regional Partners to better understand how we deploy our resources and be accountable for building equity and inclusion.*



LGBTQ+	<input type="text"/>
Indigenous people	<input type="text"/>
Black	<input type="text"/>
People living with a disability	<input type="text"/>
Women	<input type="text"/>
Other racialized people/people of colour	<input type="text"/>
Decline to state	<input type="text"/>

49c. If you decline to state, please let us know why:

- We do not collect this data
- I do not feel comfortable disclosing this information
- Other [please specify]

*The information collected in this section is for research purposes only*

50. When does your social purpose organization anticipate being ready to take on investment?

Within:

- 6 months
- 1 year
- 3 years
- 5 years
- I don't know

51. On a scale of 1-5 how familiar are you in the following areas?

1: not familiar | 5: very familiar

1            2            3            4            5

Concept of social finance

                      

Social finance opportunities and how to access them

                      

Services and tools available to support an organization's readiness to access social finance opportunities

## Feedback, Conflict of Interest and Authorization

Do you have any feedback about this application process? (*word count 150*)

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I certify that the information contained in this application and the accompanying documents is true, accurate and complete.

Yes

Please confirm that you or any other member of staff do not have any family or business (financial) connections to the service provider you have selected that would present a conflict of interest.

Yes

The representative with designated signing/decision-making authority for the organization has authorized this application.

Yes

I consent to being added to the IRP contact list and to receive relevant information pertinent to the Investment Readiness Program.

Yes

No

I confirm that I have obtained express consent to collect, use, and disclose the personal information of the Directors (or like officials) and confirm that they provided the Directors with the information about how their personal information would be used and disclosed.

Yes

No