



COMMUNITY
FOUNDATIONS
OF CANADA



**Investment
Readiness**
Program

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](#).

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 about a similar IRP opportunity in Quebec only.

Your Province or Territory

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

If your social enterprise and/or project will operate at a national level, select the province where your organization has its head office.

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:

- Past 5 years financial statements (preferably third party prepared)
- Corporate bylaws
- List and bios of Management Team members and Board members
- Evidence of Qualified Donee status if other than Charitable Number

1. Name of social purpose organization:

2. Legal name (if different from operating name)

3. Contact:

Who should we contact with any questions about your project?

Contact name: _____

Email address: _____

Phone number: _____

4. Corporate street address:

5. City / Town:

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:

8. Organization website:

9. Summarize the project for which you are seeking funding from the Investment Readiness Program in one sentence. (*word count: 30*)

10. Corporate type:

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

11. a) Business Registration Number:

Must be in proper format (ex. 123456789RR001)

11.b) Charitable Number:

Must be in proper format (ex. 123456789RR001)

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
- 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)

Organizational Mission

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

17. 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

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

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.

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?

	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. What is your plan for your organization's long-term sustainability, including for securing future investment, if you are at that stage? (word count 150)

Social Enterprise Activities

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

Attachments Required for this section:

- One attachment that will help inform the selection jury about the social purpose organization's operations

21. 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: Organization**')

*If you said yes in 21, Please explain: *(word count 250)*

Section A: Social Enterprise

(If Yes to question 21)

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

Full Time _____

Part Time _____

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

Number: _____

24a. How does your social enterprise measure, or plan to measure, its social, cultural, environmental impact? *(word count 150)*

25a. How does or how will your social enterprise report on those measurements? (*word count 150*) *

26a. 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.

- 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.

27a. What goods and services does your social enterprise deliver? (*word count 150*)

28a. How does your social enterprise generate revenue? (*word count 60*)

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

Section B: Organization

(If No to question 20)

21b. If applicable, how many employees does your organization have?

Full Time _____

Part Time _____

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

Number: _____

24b. How does your organization measure, or plan to measure, its social, cultural, environmental impact?
(word count 150)

25b. How does or how will your organizations report on those measurements? (word count 60)

26b. 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.

- 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.

27b. What goods and services does or will your organization deliver? (word count 150)

28b. How does or how will your organization generate revenue? (word count 60)

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

Project Information

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

Attachments for this section:

- Project Budget, clearly outlining all expenses and revenues. Please indicate whether revenues are preferred or pending.

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

32. Project start date:

b)Project end date:

33. 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)*

34. 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)*

35. What types of supports and services are you looking to access?

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.

36. 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

36a. * If yes, how will this help you move along the investment readiness continuum? *(word count 150)*

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

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

39. How do you believe this project furthers the sustainable delivery of your organization's mission and goals? How do you think it will make your organization ready for some form of social finance investment? *(word count 150)*

Information Collected for Investment Readiness Program Research Only

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

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

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

Please check all that apply.

- Cultural
- Environmental
- Social

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

Please check all that apply.

- Employment development
 - Income generation for 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 _____
-

These questions pertain to your organization overall.

42. Which populations does your social purpose organization serve?

- Rural
- Urban
- Both

43. Does your organization offer services:

Please check all that apply

- Locally
- Regionally

- Nationally
- Internationally

43a. What community do you support through the activities related to this project?

Province: _____

City/town : _____

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

- Youth
- LGBTQ+
- Indigenous people
- Racialized people
- People living with a disability
- Women
- New Canadians
- Refugees
- People experiencing homelessness
- People experiencing low incomes
- Another group, please specify: _____

45. If applicable, how many Board members does your organization have? _____

45a. If applicable, how many of your Board members self-identify as members of the following groups?

This question is optional; feel free to leave it blank if you are unsure or prefer not to respond.

LGBTQ+

Indigenous people

Racialized people

People living with a disability

Women

46. 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

47. 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social finance opportunities and how to access them	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Services and tools available to support an organization's readiness to access social finance opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Feedback, Conflict of Interest and Authorization

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

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