



Application for Funding

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To submit your application for funding complete the form and SAVE IT to your computer. Once you have saved your application ATTACH IT IN AN EMAIL along with a copy of the financial statements and send to jen@astleyfamilyfoundation.ca Jennifer Astley-Kinsey, Executive Director

Section A: Organizational Contact Information

A1 – Organization Address and Contact

Organization Legal Name:

Organization Operating Name:

Charitable Registration Number:

(If you are an organization that is not a registered charity and this application is a fiscal sponsorship please provide fiscal sponsor's charitable number. Fiscal sponsor to complete Section E of the application.)

Address/P.O. Box:

Address Line 2:

City: Province: Postal Code:

Telephone Number:

Fax:

Website:

Organizational Email Address:

A2 – Executive Contact Person

Who is the person with executive decision-making in your organization (e.g. CEO, Executive Director, Chair, President)?

Salutation:

First Name: Last Name:

Title/Position:

Email:

Telephone Number:

Ext.



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A3 – Primary Contact for this Proposal

(if person completing this form is other than above contact)

Salutation:

First Name:

Last Name:

Title/Position:

Email:

Telephone Number:

Ext.

A3 – Primary Contact for this Proposal

Are you applying as a collaborative?

Yes

No

If yes, please provide a collaborative agreement signed by each member of the collaborative that lists the members, and describes the roles and responsibilities of each member, how decisions will be made, how the grant will be spent and accounted for, and who will prepare reports. All organizational questions and organizational attachments are to be provided for the lead applicant. If the collaborative has been operating for a period of time and has its' own budgets and financial statements, these should also be submitted.

Please include the attachments at the end of the application.

Section B: Organizational Profile

B1 – Mission and Mandate

What is your organization's mission and mandate? (100 words or less)



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B2 – Primary Activities

What are your organization's primary activities, services and programs?

B3 – Accessibility

Are your services, programs and/or events accessible to people with low incomes?

Yes

No

Please describe.

Are your services, programs and/or events accessible to people with a disability?

Yes

No

Please describe.



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B4 – Strategic Plan

Does your organization have a current strategic plan?

Yes

No

If yes, when was it approved? What are the strategic priorities of the plan?

B5 – Challenges and Successes

Briefly describe your organization's most recent challenges and successes.
How many people were served by your organization?

B6 – How many active staff and volunteers worked for your organization last year?

Full-time employees:

Part-time employees:

Volunteers:



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B7 – Annual Income

Last year's total gross annual income was \$

B8 – Endowment and Reserve Funds

Does your organization – or any related organization i.e. foundation – have an endowment fund, reserve fund or large surplus?

Yes No

If yes, please advise us of the Board policy, purpose and restrictions on these funds. Please indicate the fund balance(s) at the end of the last fiscal year.

B9 – Major Sources of Revenue

List the amounts and the total of your organization's top 10 sources of revenue in the last complete fiscal year. Identify government departments, charities, foundations, faith organizations, etc. that made these contributions. For individuals, please indicate as individual donation.

B10 – Annual Donors

How many individuals made a charitable gift to your organization last year?

B11 – United Way

Does your agency receive annual funding from United Way? Yes No

Section C: Proposal Description

C1 - Proposal Title

Please provide a short title. (Maximum 10 words)

C2 - One Sentence Proposal Summary

Please provide a one sentence proposal summary which will appear on the Foundation's website if the proposal is approved. (Maximum 25 words)

C3 – Proposal Description

Please provide a brief description of your proposal which addresses the following questions. You may use point form.

(a) What you want to do?

(b) Who will do the work? Will volunteers be involved?

(c) How will it be done?

(d) Where will the activity(ies) take place? (e.g. which community(ies), neighbourhood(s), etc.)

(e) What age group will the proposal primarily serve?



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C4 - Rationale

This is your opportunity to tell us why we should fund your proposal.

(a) Why is this proposal a priority for this community? Where possible, include local statistics, community priorities, etc.

(b) What will be different as a result of the work?

(c) Who will benefit? How many?

(d) What will the lasting impact of the initiative be?

(e) Why are you the right organization to do the work?

C5 – Strategic Plan

Is this proposal one of your organization's strategic priorities?

Yes

No

Please explain.



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C6 – Proposal Cost

What is the total cost of this proposal?

C7 – Amount Requested

What amount of funding is being requested from the Astley Family Foundation?

C8 – Other Funders

What other funders have been approached to support this project?
Please list the name of funder(s), amount requested and status of the request.

C9 – Proposal Timeline

When do you intend to start your project (mm/yyyy)?

C10 – Other Community Services

What other organizations are providing a similar or related service in the community? Please indicate how their services complement or differ from what is being proposed.

C11 – Other Organizations/Groups

If applicable, tell us which other organizations and groups will contribute to the work and what role they will play? (i.e. resources/participation)



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C12 – Proposal Impact

How will you know you have succeeded? What measurements will help you decide if you have been successful?

How will you share the learnings from this proposal with others in the community?

C13 – Sustainability

If you are applying for project/program funding, will the activities continue beyond the time of your grant request? If so, how will you ensure that the activities can continue?



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Section D: Checklist of Required Documents

The following documents are required as part of your application. You can upload these documents as attachments or send them to us.

All applicants must submit attachments D1 – D5.

Please provide other required attachments where applicable.

D1 – Financial Statements – please provide the most recent completed fiscal year.

If gross annual revenues are in excess of \$250,000, you must submit financial statements that have been audited by a licensed public accountant.

If gross annual revenues are less than \$250,000, you must submit financial statements that have been audited or reviewed by a licensed public accountant.

IF THE APPLICATION IS FROM A COLLABORATIVE – attach financial statements from the lead applicant. If financial statements are produced for the collaborative, attach these as well.

D2 – Proposal/Project Budget

Please attach an itemized proposal/project budget including revenues and expenses, and star* the items for which you are requesting support from the Foundation.

D3 – Current Operating Budget

This is a forecast of revenues and expenses for the organization's current complete fiscal year. Please indicate your fiscal year-end. Your operating budget should not include the requested Astley Family Foundation grant in the revenues or any related expenses. Explain any major increases or decreases in operating revenues from the previous year.

IF THE APPLICATION IS FROM A COLLABORATIVE – attach the current operating budget for the lead applicant. If an operating budget is prepared for the collaborative, attach this as well.

D4 – Directors/Officers

Please provide a list of the current Board of Directors and Officers.

D5 – Letter of Approval to Submit

Please provide a letter from the organization signed by CEO/senior staff position and Board Chairperson, indicating that the organization has approved that this request be submitted to the Astley Family Foundation.



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E: FISCAL SPONSOR

Are you submitting this application on behalf of an organization that is not a registered charity?

Yes

No

A non-profit organization (NPO) which is not a registered charity under the Canadian Revenue Agency (CRA) guidelines must be sponsored by a registered charity to receive a grant from the Astley Family Foundation.

In order for an NPO to be sponsored by a registered charity there should be a partnership between the two organizations (demonstrated by a written agreement), a history of collaboration or a recognizable link between the two organizations, and a shared vision of the project. (See the CRA website www.cra-arc.gc.ca/tax/charities or call 1-800-267-2384 for more information)

The application should be submitted jointly by the NPO and registered charity. The registered charity's charitable number will be used on the application. **A letter from the registered charity, on their letter-head and signed by a signing officer of the charity, must be submitted with the application and clearly state that the organization is willing to sponsor the grant application and in so doing outline the following:**

describe the partnership between the two organizations (preferably demonstrated by a written agreement), a history of collaboration or a recognizable link between the two organizations, and a shared vision of the project,

the grant, if approved, will be made payable to the registered charity for disbursement to the NPO, the registered charity is accountable to the Astley Family Foundation for ensuring the funds are used for the purposes intended and that any conditions are met prior to requesting the funds,

the registered charity is accountable to the Astley Family Foundation for ensuring that any reporting required is completed by the due dates,

the name of the registered charity will be used, either solely or linked to the NPO name in all public announcements issued from the Astley Family Foundation about the grant, and

the registered charity is accountable to ensure that appropriate public recognition is given to the Astley Family Foundation by the NPO.



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E1 – Fiscal Sponsor – Organizational Information

Organization Legal Name:

Organization Operating Name:

Charitable Registration Number:

Address/P.O. Box:

Address Line 2:

City:

Province:

Postal Code:

Telephone Number:

Fax:

Website:

Organizational Email Address:

E2 – Signing Officer

Who is the person of the fiscal sponsoring agency that will be the fiscal sponsor contact and has signing authority to authorize this application? This person should be the same person submitting the required sponsoring letter.

Salutation:

First Name:

Last Name:

Title/Position:

Email:

Telephone Number:

Ext.

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