Uploads Checklist for the Assessment Grant

Please use this checklist as a reference to uploading additional documentation in the uploads task. We highly recommend re-naming all files as per the titles here, before uploading.

- ☐ Documents of incorporation.
  In the case of a sole proprietorship, please provide the master business license.
- ☐ Business plan (optional)
  Please upload a business plan the social enterprise has one.
- ☐ Marketing plan (optional)
  Please upload a business plan the social enterprise has one.

<div align="center">**PIRF Assessment Grant application**</div>

Instructions: When answering open-ended questions in this application, please do not repeat information you have stated in a previous question. Instead, make reference to the question in which you have already provided the information. We would appreciate your feedback at the end of the application on how we might streamline the application process.

General information

1. Name of the social enterprise:
2. Have you applied to this grant before? Yes/No
3. In what Ontario region does the social enterprise primarily operate? Please choose one main region. *For details of the regions, please see the program guidelines (link to readinessfund.ca.) (for information purposes only)*

      Northern (red)
      Southwestern (light blue)
      Central and GTA (green and yellow)
      Eastern (dark blue)

4. Does the social enterprise offer services:
   locally
   regionally
   nationally
   Internationally
5. Does the enterprise serve rural or urban populations?
    Rural
    Urban
    Both

Tell us about your social enterprise:

6. What is the social enterprise's mission statement? (required) (max character: 600)
7. What social, cultural, environmental, and/or economic problem does the enterprise solve and how? (required) (max character: 600)
8. Please describe the goods and services the social enterprise delivers. (required) (max character: 600)
9. List the NAICS Code(s) for all goods and services delivered? Maximum 5 (North American Industry Classification System –http://www.naics.com link) (required)
-Pick from drop down

10. What impact area is the social enterprise most focused on? (Max. 3 Choices) United Nations Sustainable Development Goals. (required) *(for information purposes only)*
    https://www.un.org/sustainabledevelopment/sustainable-development-goals/
    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

11. What is the primary purpose of the social enterprise? *(for information purposes only)* (required)
     Social
     Cultural
     Environmental
     Income generation for parent organization
     Employment development
     Training for workforce integration
     Other:

12. What is the secondary purpose of the social enterprise? *(for information purposes only)* (required)
     Social
     Cultural
     Environmental
     Income generation for parent organization
     Employment development
     Training for workforce integration
     Other:

13. How does the social enterprise measure its social, cultural, environmental or sustainable economic impact? (required) (max character: 1000)

14. How does the enterprise report on those measurements? (required) (max character: 1000)

15. Which groups does the social enterprise seek to serve through its social mission? (Please check all that apply) *(for information purposes only)* (required)
     Refugees
     People experiencing homelessness
     Newcomers
     People facing addiction challenges
     Indigenous peoples
     Francophone communities
     People who are racialized
     People with psychological disabilities
     People with physical disability
     People with intellectual disability
     Children
     People with employment barriers
     Seniors
     Men
     Women
     Family
     Youth
     LGBTTQ+
     People with low income
     Other:

16. How many employees does the social enterprise have? (required)
Full Time:
Part Time:
17. If you are a sole proprietor or for-profit social enterprise, please explain how the profits are spent.
    Explain:
    N/A
18. Please list any partnerships or support that the social enterprise has with the community. Where relevant, please briefly explain. (max character: 2000)
19. How does the social enterprise operate in a transparent and responsible manner? Please explain. (required) (max character: 1000)

Business plan:

20. Does the social enterprise have a business plan?
    Business plans can be uploaded in the upload documents task of the application.

    If the social enterprise does not have a business plan, please summarize the strategy to sustain or grow the social enterprise.

Coaching and training:

21. Has the social enterprise received any coaching or training in the past 5 years? If so, please select any support received. For each type of support, please state when the enterprise last received the training and briefly explain the impact of the training on the social enterprise (how the training was applied and outcome thereof).

Training	Approximate date of most recent training	Impact/ outcome of the training for the social enterprise
Strategic Planning		
Business Plan Development		
Financial Planning		
Impact Measurement		
Finding Volunteers / Employees		
Office Space		
Production Space		
Legal		
Accounting		
Marketing / Sales		
Networking / Community Connections		

Board Governance		
Funding – Access to funding, grants, private capital		
Investment		
Procurement-contract readiness		
General Coaching / Mentoring		
Other:		

Investment and Procurement:

22. What is the social enterprise's experience with procurement or investment? (Including but not limited to whether or not the social enterprise has ever won a contract or secured investment in the past.) (req) (max character: 3000)
23. What is the social enterprise's plan for securing future procurement or investment contracts? (req) (max character: 4000)
24. Why does the social enterprise need help building capacity for procurement or investment? (req) (max character: 4000)

Financial information:

When inputting numbers, do not include any commas, points, dollar sign or other symbol.

25.	**What are the total revenues and the revenues from sales and services of the social enterprise for each of the past two fiscal years? (req) Please also include financial information for a third year if you have this information.**		
Year	**Total Revenue $**	**Sales and Services Revenue $**	**Period** **(dd/mm/yyyy to dd/mm/yyyy)**
Year 1 *(most current)* (req)			to
Year 2(req)			to
Year 3 *(least current)*			to

26. Has the social enterprise received grants or other funding sources (not including sales revenues) in the past two years? ☐ Yes ☐ No
If yes, please provide details on amount received for each of the past two years.
Please also include financial information for a third year if you have this information.

Funding Source	Year 1 (most current) *Use same period as above*	Year 2 *Use same period as above*	Year 3 *Use same period as above*
Grants			
Donations			
In Kind			
Membership Dues			
Endowments			
Other (please specify)			

Service Provider

27. Select one of the following service providers to undertake the assessment with the social enterprise:
    Buy Social Canada
    Conseil de la Coopération de l'Ontario (CCO)
    Pillar Nonprofit Network
    Centre for Social Enterprise Development (CSED)
    PARO Centre for Women's Enterprise (PARO)
    mecènESS
    Northern Ontario Research, Development, Ideas and Knowledge Institute (NORDIK)
    Social Enterprise Institute (SEI)
    Social Venture Connexion (SVX)

28. Do you have any feedback about this application process?

I certify that the information contained in this application and the accompanying documents is true, accurate and complete. Must say 'Yes' to proceed.

The representative with designated signing/decision-making authority for the organization has authorized this application. Must say 'Yes' to proceed.