Uploads Checklist for the Catalytic 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
- ☐ Supporting documentation to demonstrate transparent and responsible operations
- ☐ Financial statements for the past three years
  These are preferably audited statements.
- ☐ Financial forecast of the next two years
- ☐ Budget for use of grant funds
  (detailed breakdown of how grant funds will be used, including timelines, activities and costs)
- ☐ Quote from service provider
  You will be required to select the service provider you would like to work with in the application. Please make sure the quote contains at a minimum the number of hours estimated to complete the work and the estimated length of time in which the work will be done.
- ☐ Resumé of key team members
- ☐ Documentation about the specific opportunity
  This can be in website link format, and should be as detailed as possible.
- ☐ Investment references (For investment focus only)
  Please include up to 3 investors / funders / lenders / partners / customers. Name these documents accordingly.
- ☐ Procurement references (For procurement focus only)
  Please include up to 3 client references for projects similar in scope for the procurement opportunity identified for this funding. Name these documents accordingly.
- ☐ Organizational chart (optional)
  Please upload any chart concerning the structure of the social enterprise.
- ☐ Marketing plan (optional)
- ☐ Pitch deck (optional)
- ☐ Supplementary documentation (optional)
  Please make use of the following space to describe what additional documentation you will be uploading in the upload tasks. Please include document file names.
  <u>Comment Box</u>

PIRF Catalytic Grant application

Instructions: When answering open-ended questions in this application, please do not repeat information you have stated in a previous question or which is contained in a document you will upload. Instead, make reference to the question or document 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 (all required):

1. Name of the social enterprise:
2. Is this a collaboration with multiple partners? Yes/No
If yes - Please name the collaboration, list the partners and their roles and describe:
3. Has the social enterprise applied before? Yes/ No
If yes (Question A)- Which grant? Select all that apply (drop-down list): Assessment, Capacity Building, Catalytic

If yes (Question B)- If the social enterprise was not successful, what has changed?

4. 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)

5. Does the enterprise offer services: (please check all that apply)
    locally
    regionally
    nationally
    internationally
6. Does the social enterprise serve rural or urban populations? (select one)
    Rural
    Urban
    Both

Tell us about your social enterprise:

7. What is the social enterprise's mission statement? (required) (max character: 600)
8. What social, cultural, environmental, and/or economic problem does the social enterprise solve and how? (required) (max character: 600)
9. Please describe the goods and services the social enterprise delivers. (required) (max character: 600)
10. 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 list

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

    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

12. 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:

13. 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:

14. How does the social enterprise measure it's social, cultural, environmental and/or sustainable economic impact? (required) (max character: 1000)

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

16. 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
    Family

Women
Youth
LGBTTQ+
People with low income
Other:

17. Please list any partnerships or support that the social enterprise has with the community. Where relevant, please briefly explain. (max character: 2000)
18. Please either describe the social enterprise's governance structure or upload an organizational chart depicting this structure in the uploads task.
19. Is the Board Chair/Executive Director/CEO of the social enterprise supportive of pursuing future contracts and/or investment? Yes/No (required)
20. If you are a sole proprietor or for-profit social enterprise, please explain how your profits are spent.
    Explain: (max character: 1000)
    N/A
21. If the enterprise is a for-profit social enterprise, please explain how it demonstrates stakeholder value as well as shareholder value. (max character count 1000)
22. How does the social enterprise operate in a transparent and responsible manner? Please explain. List the supporting documentation that you will upload in the upload task. (required) (max character: 2000)

Business Review:

1. Please ensure that you upload the social enterprise's business plan in the upload documents task of the application.

Please answer questions #2 to #8 only if this information is not already provided in your business plan and/or if you would like to provide supplemental information:

2. What is the projected growth of the social enterprise? Explain in terms of A) economic growth, B) social, cultural, environmental and/or sustainable economic impact, and C) expected reach. (max character: 4000)
3. How does the social enterprise intend to meet this growth? (max character: 2000)
4. What are the social enterprise's plans to achieve long term sustainability for the enterprise? (max character: 2000)
5. Describe the enterprise's target market (target customer, market size). (max character: 2000)
6. Who are the enterprise's top competitors? (max character: 1500)
7. What is the social enterprise's competitive advantage? (max character: 1500)
8. Please explain how the social enterprise has demonstrated traction and problem /solution fit (i.e., sales, users, growth, partners, LOIs / contracts, etc.).
9. Please describe the social enterprise team's relevant skills and experience. (Leadership, skills, networking, coaching.) (required) (max character: 4000)

Experience with investment and procurement and request for support:

1. 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)
2. What is the social enterprise's plan for securing future procurement or investment contracts? (req) (max character: 5000)
3. What support is the social enterprise requesting in order to become investment or procurement ready? (required) (max character count 5000)
4. What is the expected impact of the investment and/or contract win? (max character: 4000)
5. Please describe what resources and assets the enterprise will leverage for this opportunity. (max character: 3000)

Financial information

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

1. What are the total revenues and the total revenues from the sales of goods and services of the social enterprise for each of the past three fiscal years?			
Year	**Total Revenue $**	**Sales and Services Revenue $**	**Period** **(dd/mm/yyyy to dd/mm/yyyy)**
Year 1 *(most current)*			to
Year 2			to
Year 3 *(least current)*			to
2. Has the social enterprise received grants or other funding sources (not including sales revenues) in the past three years? ☐ Yes ☐ No *If yes, please provide details on amount received for each of the past three years.*			
Funding Source	**Year 1** (most current) *Use same period as above*	**Year 2** *Use same period as above*	**Year 3** (least current) *Use same period as above*
Grants			

Donations			
In Kind			
Membership Dues			
Endowments			
Other (please specify): Funding from family / friends / personal			
Funding from banks / credit unions / loans *(please specify if bank or credit union)*			
Accelerators			
Capital investment			
Other			

3. For what type of support is the social enterprise seeking a grant? (required)
   Investment
   Procurement

Investment-only questions:

1. Who are the investors the social enterprise is looking to work with? Please identify the specific investors and attach any relevant information about these investors. (max character: 3000) (required if investment)

2. What stage of the relationship is the social enterprise at with these investors? (max character: 3000) (required if investment)

3. What is the amount of investment the social enterprise is seeking? (max character: 2000) (required if investment)

Procurement-specific questions (required if procurement)

1. Has the social enterprise successfully bid on a procurement contract in the past? Yes/No

If yes - Please describe what the contract was, when it took place, the value of the contract, and the outcome of the contract. (max character: 5000)

2. Is this application for a specific upcoming bid or to prepare for a likely contract in the future? If yes –
   a) Please specify that type of contract and describe the opportunity. (max character: 3000)
   b) Please ensure that you upload any relevant information about the contract opportunity in the upload documents task of the application.

Service Provider and social enterprise contribution: (required)

1. Will the social enterprise be able to cover some costs associated with hiring a service provider? This is a grant requirement. Yes/No
   Specify if cash or in-kind.
   If yes - How much will the social enterprise be contributing? State value and brief description if in-kind. (max character count of 2000)

2. In addition to the costs mentioned above, what (if any) other time and resources will the social enterprise contribute to the capacity building process? (Including in-kind) Please describe and provide a monetary value. (max character: 1000)

3. Which service provider would the social enterprise like to work with? Please provide a rationale for this decision. You will be asked to provide a quote from the service provider in the upload document task.

4. 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 check 'yes' to proceed.

Signature of the Executive Director, CEO or Board Chair authorizing this application. (*please use your mouse, or if you have a touch screen, your finger or stylus pen, to sign below*)

Sign in signature field to proceed.