

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.
- Upload financial statements for the past 2 years
Please upload the last two years of financial statements for the social enterprise.
- Business plan (optional)
Please upload a business plan if the social enterprise has one.

Assessment Grant Application Form

Download PDF of Assessment Application form

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

What has changed from your last application? Please insert all new information here:

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.

- Northern
- Southwestern
- Central and/or GTA
- Eastern

4. Does the social enterprise offer services: (please check all that apply)

- locally
- regionally
- nationally
- Internationally

5. Does the enterprise serve rural or urban populations?

- Rural
- Urban
- Both

Tell us about your social enterprise:

6. a) What is the social enterprise's mission statement? b) Please explain what makes this business a social enterprise.

7. What social, cultural, environmental, and/or economic problem does the enterprise solve and how?

8. a) What are the goods and services the social enterprise delivers? b) How does the social enterprise generate revenue?

9. List the NAICS Code(s) for all goods and services delivered. Maximum 5 (North American Industry Classification System)

For more details find the full list at <https://www.naics.com>

- 11:Agriculture, Forestry, Fishing and Hunting
- 21:Mining

- 22:Utilities
- 23:Construction
- 31-33:Manufacturing
- 42:Wholesale Trade
- 44-45:Retail Trade
- 48-49:Transportation and Warehousing
- 51:Information
- 52:Finance and Insurance
- 53:Real Estate Rental and Leasing
- 54:Professional, Scientific, and Technical Services
- 55:Management of Companies and Enterprises
- 56:Administrative and Support and Waste Management and Remediation Services
- 61:Educational Services
- 62:Health Care and Social Assistance
- 71:Arts, Entertainment, and Recreation
- 72:Accommodation and Food Services
- 81:Other Services (except Public Administration)
- 92:Public Administration
- Other:

10. What impact area(s) is the social enterprise most focused on? (Max. 3 Choices) United Nations Sustainable Development Goals. (for information purposes only)

- 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)

- 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)

- Social
- Cultural
- Environmental
- Income generation for parent organization
- Employment development
- Training for workforce integration
- Other

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13. How does the social enterprise measure its social, cultural, environmental and/ or sustainable economic impact?

14. How does the enterprise report on those measurements?

15. Which primary group does the social enterprise seek to serve through its social mission?

If applicable please list any secondary or tertiary population groups served by your social enterprise.

16. How many employees does the social enterprise have including owners?

Full Time

Part Time

17. If you are a sole proprietor or for-profit social enterprise, please explain how the profits are spent. How do you re-invest the profits into the social mission?

18. Please list any partnerships or support that the social enterprise has with the community. Where relevant, please briefly explain.

Max character count 2000

19. How does the social enterprise operate in a transparent and responsible manner? Please explain.

Business plan:

20. Does the social enterprise have a business plan?

Business plans can be uploaded in the upload documents task of the application.

- Yes
- No

If the social enterprise does not have a business plan, please summarize the strategy to sustain or grow the social enterprise. In your answer, please also include the following information:

a) What is the projected growth of the social enterprise? b) How does the enterprise intend to meet this growth? c) What are the social enterprise's plans to achieve long term sustainability for the enterprise? d) Describe the enterprise's target market (target customer, market size). e) Who are the enterprise's top competitors?

Coaching and training:

21. Has the social enterprise received any coaching or training in the past 5 years? Fill in 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).

	Approximate date of most recent training	Impact/ outcome of the training for the social enterprise
Accounting	<input type="text"/>	<input type="text"/>

Board Governance	<input type="text"/>	<input type="text"/>
Business Plan Development	<input type="text"/>	<input type="text"/>
Financial Planning	<input type="text"/>	<input type="text"/>
Finding Volunteers / Employees	<input type="text"/>	<input type="text"/>
Funding – Access to funding, grants, private capital	<input type="text"/>	<input type="text"/>
Investment	<input type="text"/>	<input type="text"/>
Impact Measurement	<input type="text"/>	<input type="text"/>
General Coaching / Mentoring	<input type="text"/>	<input type="text"/>
Legal	<input type="text"/>	<input type="text"/>
Marketing / Sales	<input type="text"/>	<input type="text"/>
Networking / Community Connections	<input type="text"/>	<input type="text"/>
Office Space	<input type="text"/>	<input type="text"/>
Procurement-contract readiness	<input type="text"/>	<input type="text"/>
Production Space	<input type="text"/>	<input type="text"/>
Strategic Planning	<input type="text"/>	<input type="text"/>
Other:	<input type="text"/>	<input type="text"/>

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.)

Max character 3000

23. What is the social enterprise’s plan for securing future procurement or investment contracts, and how does this fit with the social enterprise's long term sustainability plan?

*This is a critical question for the evaluation of the application. Max character 3000

24. Why does the social enterprise need help building capacity for procurement or investment?

Max character 3000

Financial information:

25. What are a) the total revenues of your social enterprise (from all sources of revenue) and b) the revenues generated from the sale of goods and services, for each of the past two fiscal years? Please also include financial information for a third year if you have this information. If you would like to include explanatory notes, please include these in the comment box located after question #26. When inputting numbers, do not include any commas, points, dollar sign or other symbol.

\$ Total revenue	\$ Revenue from sales of goods and services	Year
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Year 1 (Most current)			
Year 2			
Year 3 (least current) (optional)			

26. With regards to other revenue (not including sales revenues), has the social enterprise received grants or other funding sources in the past three years?

- Yes
- No

If yes, please provide details on amount received for each of the past three years. For grants and 'other', please provide details in the comment box below this question. When inputting numbers, do not include any commas, points, dollar sign or other symbol.

	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 (specify in box below)			
Donations			
In Kind			
Membership Dues			
Endowments			
Other (specify in the box below)			

Please use the comment box below to enter any additional financial information for questions #25 and #26. For question #26, if applicable, please provide details about the name or type of grant received, and information about the 'other' category.

Service Provider

27. Select one of the following service providers to undertake the assessment with the social enterprise:

Please select an Assessment Partner based on the social enterprises location geographically (details can be found in the Program Guidelines). The Program Administrator may suggest an alternative Assessment Partner after review.

- Buy Social Canada
- Conseil de la Coopération de l'Ontario (CCO)
- Pillar Non-Profit Network (Pillar)
- Centre for Social Innovation (CSI)
- Centre for Social Enterprise Development (CSED)
- PARO Centre for Women's Enterprise (PARO)
- mecenESS
- 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.

- Yes

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

- Yes

