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# APPLY FOR A GRANT

**OTF is the largest granting Foundation in Canada and invests in projects that will result in change that matters to communities. The more you know about OTF, the better.**

<b>1.</b>	<p><b>Understand our Investment Strategy</b> Familiarize yourself with our new <b>Investment Strategy</b>. Attend an applicant information session near you and check our <b>Events Calendar</b> for upcoming dates and locations.</p>
<b>2.</b>	<p><b>Get familiar with our Investment Streams</b> OTF has four Investment Streams: Seed, Grow, Capital and Community Impact. Each has its own criteria and applications. Read an overview of each <b>Investment Stream</b> to help you determine which best fits your project.</p>
<b>3.</b>	<p><b>Complete the Applicant Self-Assessment</b> Complete a quick online <b>self-assessment</b> to find out which Investment Stream makes sense for you.</p>
<b>4.</b>	<p><b>Read our Policies</b> <i>Don't skip this!</i> The following <b>policies</b> contain key information needed to submit a successful application. Policies that may apply to your organization or project include: Eligibility, Capital, Advocacy Activities for Grantees, Collaborative Applicants, Financial Health, Funding other Funders, Overhead and Administrative Costs.</p>
<b>5.</b>	<p><b>COMING SOON - JULY 22: Register your Organization</b> Before you may begin an application, you must first register and/or update your organizational profile with specific information about your organization. Review the information we ask for: <b>gather these items before beginning a registration</b> (pdf). Even if you have received OTF funding before, we will ask you to update your Organizational Profile online annually. Once registered, OTF will email you a user ID and password.</p> <p><b>IMPORTANT NOTE FOR THE AUGUST AND SEPTEMBER 2015 DEADLINES!</b></p> <p><b>To guarantee OTF can process your registration with enough time for you to complete and submit your application, please register by Wed. August 12. After this date, OTF cannot guarantee that registrations will be verified in time to provide access to the grant application.</b></p>

6.	<p><b>Review Application Questions and Assessment Criteria</b></p> <p>Before you start, know what we will be asking for. First review our application questions for <b>Seed, Grow</b> and <b>Capital</b> (pdfs) and consider our assessment criteria specific to each stream: <b>Seed, Grow</b> and <b>Capital</b> (pdfs) to ensure you can provide us with the information we need to fairly assess your project.</p>
7.	<p><b>Review our Application Deadlines and related Registration dates</b></p> <p>Seed, Capital and Grow Investment Streams each have their own <b>application deadlines</b> and associated decision dates. Choose the application deadline that's right for your project. Remember, the <b>Collective Impact Investment Stream</b> has unique requirements.</p>
8.	<p><b>COMING SOON: Submit an Application</b></p> <p>Using your user ID and password, log in and access the online applications for the Seed, Grow or Capital Investment Streams. Upon submitting your application, you will receive OTF confirmation that we have received it. Your application will be reviewed for eligibility, completeness, and how well your project fits with your chosen Priority Outcome</p>

**Don't forget!**

- **We do not fund retroactively, no matter how great the project.** Ensure your project does not start before we have had a chance to review your application and get back to you with our decision.
- **Incomplete applications are not accepted.** Review your application to ensure you have provided everything we need to assess your application.
- **Late applications are not accepted.** Submit your application by 5:00 p.m. EST on the deadline date or you will have to start a new application for the next deadline date.

Have questions or need help? Contact our Support Centre at [otf@otf.ca](mailto:otf@otf.ca) or 1.800.263.2887 for information and assistance.

# REGISTRATION & APPLICATION DEADLINES

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## Organization Registration opens July 22, 2015

### IMPORTANT NOTE FOR THE AUGUST AND SEPTEMBER 2015 DEADLINES!

**To guarantee OTF can process your registration with enough time for you to complete and submit your application, please register by Wed. August 12. After this date, OTF cannot guarantee that registrations will be verified in time to provide access to the grant application.**

To allow time for your registration to be verified, we recommend you register your organization at least **four weeks** prior to the deadline for which you intend to apply. The Foundation will confirm within 10 business days whether your registration has been accepted and you are eligible to apply.

OTF cannot guarantee that registrations submitted less than **four weeks** before a grant application deadline will be verified in time to provide access to the grant application.

*Please note: These deadlines are for 2015 only.*

### Grow Grants

1. Organization registration deadline: **August 12, 2015**  
Application deadline: **August 26, 2015**
2. Organization registration deadline: **November 4, 2015**  
Application deadline: **December 2, 2015**

### Seed and Capital

1. Organization registration deadline: **August 19, 2015**  
Application deadline: **September 2, 2015**
2. Organization registration deadline: **November 16, 2015**  
Application deadline: **January 6, 2016**

### Collective Impact Grants

There are no deadlines for submitting applications and they will be accepted on an ongoing basis. Contact the Support Centre at 1.800.263.2887 or [otf@otf.ca](mailto:otf@otf.ca) if you have any questions.

# ORGANIZATION REGISTRATION CHECKLIST

To prepare for your registration, you will need the following pieces of information in advance:

REGISTRATION SECTION	INFORMATION REQUIRED	DIRECTIONS
<b>Organization Primary Contact Information</b>	1. The following information will be required for the primary contact/authorizing person <ol style="list-style-type: none"> <li>Name</li> <li>Position/Title</li> <li>Phone number</li> <li>Email</li> </ol>	<i>Note: The Primary Contact must have the authority to legally bind the organization. If you are registering on behalf of the person with legal authority/primary contact, you will need to provide his/her name and contact information.</i>
<b>Basic Organization Information</b>	2. Organization Name 3. Legal Name of Organization 4. Address of the organization 5. Organization type-specific information, when applicable: <ol style="list-style-type: none"> <li>Charitable Registration number &amp; year of registration</li> <li>Incorporation number &amp; year of incorporation</li> <li>Band/municipality</li> </ol> 6. Optional: website URL, Ontario Business Number (BN15) 7. Executive contact information <ol style="list-style-type: none"> <li>Name</li> <li>Position/Title</li> <li>Phone number</li> <li>Email</li> </ol> 8. Brief backgrounder on your organization's typical activities, services, or programs (max. 500 words) 9. Your organization's mission statement/principal mandate/overarching goal (max. 100 words) 10. Your organization's impact on your community (max. 250 words) 11. Number of paid staff over the last 12 months 12. Number of volunteers over the last 12 months	
<b>Governance</b>	13. Number of board or council members 14. For each board member: <ol style="list-style-type: none"> <li>First Name</li> <li>Last Name</li> <li>Position</li> <li>Director Term Start Date</li> <li>Director Term End Date</li> </ol>	<i>OTF requires applicants to have a minimum of three members on an organization's board of directors.            Organizations Applicants will be required to declare 'arm's length' relationships between board members, and between board members and management.            An 'arm's length' relationship requires that board members and organization executives not be married or related, business partners or in a relationship where interests may be compromised. To be eligible for OTF funding, at least 50% of board members must maintain an arm's length relationship to each other.</i>
<b>Financial Health</b>	15. Financial Statements for your organization's two most recent completed fiscal years, including a statement of revenue and expenses, and a balance sheet. (Organizations less than two years old should provide what is available.)	<i>Financial statements are required. Audited statements are preferred for all revenue levels.            Minimum requirements are:</i> <ol style="list-style-type: none"> <li><b>Annual revenues under \$25,000:</b> Internally-prepared statements.</li> <li><b>Annual revenues between \$25,000 and \$250,000:</b> Independently-prepared statements by a public accountant.</li> <li><b>Revenues over \$250,000:</b> A complete set of financial statements for each of the two most recent years, audited by a licensed public accountant.</li> </ol>