



SVP 2023 Investee Grant Application

Thank you for participating in the next steps of SVP's Investment Committee. The application below is an opportunity to share detailed information around your organization's work, accomplishments, and goals.

Please submit your proposal by **11:59 PM on October 3, 2023**. The SVP Investment Committee reserves the right to ask further questions. We will ask some applicants to join the Investment Committee on either **November 2nd or 9th** for a Q&A night; the leader/ decision maker for the organization must attend the Q&A night. If selected, the applicants will be notified of the evening of their Q&A session in October. All applicants will be notified of the status of their application in November. Our 2023 Investee will be announced publicly in December.

Note: SVP reserves the right not to select an Investee in any given year if the committee feels that the proposals and organizations are not a suitable fit.

Section 1 (Contact Information)

1. Contact -First & Last Name & Pronouns
2. Email Address
3. Phone Number
4. Preferred Contact Method
 - a. Email Address
 - b. Phone Number
5. Organization Website
6. Social Media Handles (Facebook, Twitter, Instagram, other)

Section 2 (Organization Information)

1. Organization Name
2. Street Address
3. City
4. Postal Code
5. Organization Phone Number (please indicate if this is an office land line or a cell phone owned by a person)
6. I have attended the SVP Information Night
 - a. Yes
 - b. No
7. Have you had a conversation with a staff member at SVP prior to completing this application? (Note that this is a mandatory step in the application process (rose@svpwr.org and/or mehrunnisa@svpwr.org))
 - a. Yes
 - b. No



Section 3 (Operations, Strategy, & Growth)

1. How do you think SVP can help you build capacity and make an impact?
2. How do you collaborate and/or partner with other organizations in the Waterloo Region. Please share a success story that represents one of these relationships.
3. Is your Board of Directors fully aware of and supportive of this application?
4. Do your primary activities support residents of the region of Waterloo?
5. How many paid staff are employed by your organization? Is your leader a paid employee? (Please indicate full time or part time).
6. Please demonstrate and give an example of how your organization is working to build equity, diversity, accessibility and inclusion within the workplace, Board, and program delivery.
7. Why is now the right time to invest in your organization?

Section 4 (Board & Leadership)

1. Is there any reason why your leader/decision maker would not be able to spend 8-10 hours per month working with SVP?
2. Has your leadership changed in the last 12 months or expected to change in the next 12 months? If yes, please explain.

Section 5 (Organizational Vision & Capacity Development)

1. Please provide a brief but specific description, including two to three proposed projects or ways you envision using the skills and time of the SVP partners to enhance your organization's capacity. How will you grow your capacity and impact as a result of these projects? (suggest ~1500 characters/250 words)

Section 6 (Funding & Budget)

1. Please summarize, in percentage of revenue, your top 5 funders over the last 5 years.
2. Does your organization have outstanding litigation or claims against it? If so, what is the nature of the litigation or claim and is it material in either type or amount?
3. In the past three years, has the organization experienced a "financial crisis" (i.e.: shortage of funds, loss of major donor, financial fraud or mismanagement) which required immediate staff or board action? If so, indicate the number of times of such occurrence, the action taken by the staff or Board, and the outcome.

Section 7 (Requested Documentation)

1. Key Leadership Bios (Leader/Decision Maker/ Board Chairperson)
2. Organizational Chart (if applicable)
3. List of your current Board of Directors
4. The organizations two most recent audited financial statements
5. Current year operational budget (forecast vs. actual)
6. Proof of Revenue Canada status as a charitable organization (If you do not have charitable status, please see question 7.7)
7. If you do not have charitable status, please have a fiscal sponsor complete the form at the following link and upload here. <https://www.svpwr.org/wp-content/uploads/2023/09/SVP-Fiscal-Partnership-Agreement-2023.pdf>
8. Current Strategic Plan (if available)

