



Education Savings Community Outreach 2007 Application Package

Instructions and Checklist

General Instructions

This Application Package consists of six (6) documents:

1. Instructions and Checklist
2. Application for Funding
3. Proposal Template for Applicants
4. Additional Information on the Sponsor M-30 (for Québec applicants only)
5. Determination of Whether an Environmental Assessment is Required
6. Budget

Instructions, where appropriate, are included with each document.

Mail the complete package on or before the **closing date of October 10, 2007** to:

Call for Proposals
Education Savings Community Outreach
c/o Martin Ravary
Skills Employment Branch, Financial Monitoring Unit
Human Resources and Social Development Canada
140 Promenade du Portage, Phase IV, 6th Floor
Gatineau, QC K1A 0J9

Please note that Human Resources and Social Development Canada (HRSDC) cannot reimburse any costs incurred before an agreement is approved and signed by the Government of Canada.

Funding Application, Proposal Template, and Budget Suggestions/Scoring Framework

Please read the following before you complete your Application for Funding and Proposal Template for Applicants documents. It explains the information requirements, and offers hints on how to avoid errors that may lead to the rejection of your application.

Summary of Scores

Section	Document	Maximum Score
A	Application for Funding	14 (10%)
B	Proposal Template for Applicants	106 (76%)
C	Budget	20 (14%)
TOTAL		140

A. APPLICATION FOR FUNDING

Reviewers use this section to confirm the organization's eligibility and assess its ability to carry out the proposed project. They look for evidence that the organization:

- Is legally incorporated and either private, public, or not-for-profit
- Administers any other Government of Canada funding successfully
- Has both the experience and resources to carry out the project
- Is financially and administratively sound

Note: Be sure you provide original signatures with your application.

Note: Any amounts owing to the Government of Canada which are in default or arrears may be deducted from amounts payable under Contribution Agreements negotiated with successful applicants.

B. PROPOSAL TEMPLATE FOR APPLICANTS

Section 1 and 2 - Reviewers use this section to confirm the organization's eligibility and assess its ability to carry out the proposed project. They look for evidence that the organization:

- Has a mandate and regular activities relevant to the Education Savings Community Outreach initiative and the specified target groups
- Administers any other Government of Canada funding successfully
- Has both the experience and resources to carry out the project
- Is financially and administratively sound

Note – Duration: The anticipated start date is six (6) months after the application deadline; however, this may vary depending on the number of applications received, the results of the assessment process, and the time required to negotiate the individual contribution agreements with successful applicants.

Section 3 - The Executive Summary will be used by the selection panel in the application review process. In one page it won't be possible to include every point, but make sure the purpose, target groups, activities, and intended results of the project are conveyed.

Hint: You may prefer to complete this section after preparing the detailed project description in Section 4.

Section 4 - Reviewers use the detailed Project Description to determine whether your project supports the goals of the Education Savings Community Outreach initiative, if it addresses the needs of the target groups, and how you plan to achieve your objectives. They are looking for clear logical links between the main elements: Objectives ⇒ Activities ⇒ Budget ⇒ Outcomes.

Numbers in parentheses refer to the corresponding questions in Section 4.

(1-2) Reviewers look for project objectives that are logically related to the Education Savings Community Outreach initiative. Outcomes should be concrete and measurable.

Hint: Don't overstate your objectives and outcomes. They must be reasonable given the maximum three-year timeframe of the project.

(3-5) Reviewers should be convinced that your organization is aware of key potential players and can build working relationships with them. Demonstrate your capacity to plan, allocate, and coordinate the work of several organizations to maximize benefits for target groups.

(6) Reviewers look for evidence that you understand relevant issues and that your activities and those of your partners will address these problem. Support your statements with data from established authorities or statistics from your organization's own experience.

(7-8) Reviewers assess how well you have thought through the sequence of activities required to implement the project and that the activities and expected results are logically connected to your project's objectives listed in section 4(1).

(9) Reviewers should be convinced that you understand potential clients and partners, their information needs, and the most effective way of informing of your project and getting them involved with it.

(10) Reviewers look for evidence that you will use evaluation as a project management tool to identify project design or implementation issues, identify and evaluate performance indicators and performance measurements, refine processes, and improve the final results of your project.

Hint: Schedule evaluation early in the project so that you can fully benefit from resulting improvements in activities or processes.

(11) Reviewers will assess whether the knowledge and expertise you develop will be widely shared with others and ensure the results of your project have a broad and lasting impact.

(12) If a project generates revenues, these revenues are normally applied to reduce the federal contribution.

Section 5 - Key Project Personnel: Reviewers will look for a clear designation of responsibility for project coordination, financial management, project outcomes and reporting. Additional key positions may be appropriate to your project's activities. It is not necessary to name individuals.

Section 6 - Partnership Form: Each partner should fill out an electronic copy and a hard copy of the Partnership Form. Include both in your application package. Reviewers will evaluate the extent to which your partners will increase the project's chance of success and maximize the impact of project in the target community.

Hint: You may want to offer partners a copy of the Guidelines for Project Proposals and a short description of your planned project.

C. BUDGET

Reviewers use this section to assess your organization’s ability to plan for the proposed project and to manage funds. They look for evidence that your budget:

- Covers all elements listed in your action plan
- Adequately explains expenditure items
- Shows that you and your partners are willing to commit towards the realization of the project
- Is organized in the format provided and free from calculation errors

Remember to identify the GST when recording your cost items. HRSDC will reimburse that portion of the GST not covered by your normal rebate for eligible project costs.

Hint: Check both your row and column totals, since points are deducted for omissions and inconsistencies.

Checklist

Before submitting your application, make sure that you have addressed all of the following. When you have verified that all requirements are fulfilled, sign this form and include with your application.

Completed	Requirements
	Instructions and Checklist document (1) is complete and signed by an authorized person
	Application for Funding document (2) is complete and signed by an authorized person
	Proposal Template for Applicants document (3) is complete and respects length requirements. The Partnership Form is complete and signed by an authorized person for each partner organization
	Additional Information on the Sponsor M-30 (for Quebec applicants only) document (4) is complete and signed by an authorized person
	Determination of Whether an Environmental Assessment is Required document (5) is complete and signed by an authorized person
	Budget spreadsheet (6) is completed and provides detailed information about costs, which expenses HRSDC funding will cover, and which expenses each contributor will cover in whole or in part: <ul style="list-style-type: none"> ▪ Funding requested from HRSDC does not exceed \$750,000 over a maximum of 3 years, including audit/evaluation costs ▪ The amount of total government funding does not exceed 75% of the total project costs ▪ The applicant is contributing a minimum of 25% of the total project value in cash and/or in kind ▪ Any sub-contract over \$25,000 must be awarded through a documented competitive process ▪ Remember to budget for fees related to the annual external audits and external evaluation (up to 10% each of total HRSDC contribution) ▪ There are no calculation errors in the budget ▪ All costs must clearly relate to project activities ▪ Verify which project costs are eligible and which are ineligible for funding ▪ The budget declaration is signed by an authorized person
	The package you are sending to HRSDC includes: <ul style="list-style-type: none"> ▪ Two (2) paper copies and one (1) electronic copy (CD-ROM) of the fully completed and signed forms/documents listed above in Microsoft Word or Excel format. ▪ One copy each of your organization’s most recent annual financial statement and annual report.

Name (Print)	Title
Authorized signature	Date