

INSTRUCTIONS FOR COMPLETING THE SLOCAN VALLEY LEGACY FUND GRANT APPLICATION

Steps to Submit an Application

1. Create an online account or use account from previous year
2. Upload a letter of support from your sponsor organization if you are not a qualified donee
3. Complete the online application form
4. Upload a completed budget template
5. Upload any additional supporting documentation
6. Submit the completed application

STEP 1. CREATING AND USING AN ONLINE ACCOUNT

If you submitted an online application last year, use your existing login credentials and skip to Step 2 on Page 4.

Follow the link on our website <https://www.slocanvalleylegacy.com/grants/> to create an account or login. There is a video available from the login screen that outlines the process, but we suggest you read the instructions below.

When creating an account, pay particular attention to the information requested

- for the *organization* carrying out the project
- for the *person creating the account* on behalf of the organization

Leave the Email Address and Password blank, and click

Create New Account

Issues with creating an account or accessing an existing account? Contact admin@ospreycommunityfoundation.ca



Logon Page

Email Address*

Password*

[Forgot your Password?](#)

Welcome to the Osprey Community Foundation's Online Portal.

New Users: Please click on "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password?" link to the left to reset your password.

Please add administrator@grantinterface.com to your email contacts so that future grant correspondence doesn't end up in your junk folder!

Questions? Contact: admin@ospreycommunityfoundation.ca

Video Tutorial: [How to Create an Account and Apply](#)

Enter the information for **the organization that will be carrying out the project** as follows:

Field	Required?	Notes
Organization carrying out project	Yes	Enter the name of the organization that will be carrying out the project
CRA Registration Number	Yes	If the organization carrying out the project is a qualified donee, enter the CRA registration number. If the organization carrying out the project is NOT a qualified donee, enter 123456789RR1234. You cannot leave this field blank or enter any other characters.
Website	No	If your organization has a website, enter the URL (web address) here. If your organization does not have a website, leave blank.
Telephone number	Yes	Enter the organization's phone number in the format ###-###-#### x### If the organization does not have its own phone number, enter your phone number.
Organization email	No	If your organization has its own email address (e.g., ValleySeniors@gmail.com), you may enter it here, but it is not required.
Address 1	Yes	Enter the mailing address for the organization (street address or post office box number)
Address 2	No	If there is a second part to the organization's mailing address, enter it (e.g., Suite #402)
City	Yes	Enter the city
Province or Territory	Yes	Enter the 2 letter postal abbreviation for the province or territory without periods (e.g., BC)
Postal Code	Yes	Enter the postal code in the format A#A #A#

Country	No	Select from the drop down options or leave blank.
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Check to make sure all required fields have been completed correctly, then click

Next >

Enter the information for **the person who will be completing the grant application** as follows:

Field	Required?	Notes
First Name	Yes	Enter your first name
Last Name	Yes	Enter your last name
Suffix	No	Enter if appropriate (e.g., Jr, III)
Business Title	Yes	Enter your relationship to the organization carrying out the project (e.g., Board Chairperson, Project Manager, Administrator, etc.)
Email / Username Email / Username Confirmation	Yes	An email address is required for account creation. It will be the user ID for accessing the grant application and for all communications.
Telephone Number	Yes	Enter in the format ###-###-#### x###
Mobile Number	NO	Enter in the format ###-###-####
Address 1	Yes	Enter your mailing address or click to autofill from the previous page
Address 2	No	If there is a second part to the mailing address, enter it (e.g., Suite #402)
City	Yes	Enter the city
Province or Territory	Yes	Enter the 2 letter postal abbreviation for the province or territory without periods (e.g., BC)
Postal Code	Yes	Enter the postal code in the format A#A #A#
Country	No	Select from the drop down options or leave blank

Check to make sure all required fields have been completed correctly, then click

[Next >](#)

Answer “Yes” to the question regarding whether you are the Executive Officer or Authorized Signatory for the organization carrying out the project. *SVLF does not require this information, but you cannot advance without entering a response.*

Are you the organization's Executive Officer/ Authorized Signatory?*

☒ Yes

☐ No

Click

Next >

Enter a password that will be used with your user ID to log in to the grant application site. The password must be

- minimum 6 characters
- letters, numbers
- special characters: ! @ # \$ % ^ * ()

Confirm your password. *You may wish to write it down for future reference.* You will need it to log in to the application site.

Click

Create Account

You will receive an automated email to confirm your user ID (email address) and provide a link to the application portal. Follow the link to login with your user ID and password.

If you do not receive the confirmation email, contact admin@ospreycommunityfoundation.ca

STEP 2. OPENING THE LEGACY FUND APPLICATION

Log in using your user ID and password.

Look for the Legacy Fund logo in the list of applications available, and click

Apply

Note that there may be other grant opportunities listed so be sure you are clicking to apply for the SVLF grant.

Slocan Valley Legacy Fund Application - TEST JAN 12TH

Accepting Submissions from 01/13/2022 to 01/13/2022

Apply

**SLOCAN VALLEY
LEGACY FUND**

Application Deadline: March 18th, 2022

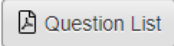
The **Slocan Valley Legacy Fund** is an affiliate community fund operating under Osprey's wing. The **Slocan Valley Legacy Fund** supports projects that develop resiliency in a variety of ways—agricultural, artistic, environmental, and economic—ideas that spring from our rich and creative community.

Projects must take place within RDCK Area H and/or the villages of Slocan, New Denver, or Silverton. For detailed granting guidelines and criteria, along with step by step online application instructions, click [here](#).

Preview

Verify the information entered in your account is correct for both the *Applicant* and the *Organization* carrying out the project. If changes are needed, contact admin@ospreycommunityfoundation.ca.

The screenshot shows a web form with two tabs: 'Contact Info' and 'Request'. The 'Contact Info' tab is active. It contains two columns of information. The left column is labeled 'Applicant:' and lists: John Smith, admin@hillsgrailfest.ca, 250-358-2459, 4480 Highway 6, New Denver, BC V0G 1S1. The right column is labeled 'Organization:' and lists: Hills Emergency Services Society, 123456789RR1234, 250-358-2459, 4480 Highway 6, New Denver, BC V0G 1S1. Below the organization information, there is a link 'Contact Email History'. At the bottom of the form, there is a blue-bordered box with a warning icon and the text: 'If your organization information does not appear correct, please contact the funder. Thank you.'

To get a PDF copy of the application to download or print, click  the actual application.

THE ONLINE APPLICATION SHOULD AUTOMATICALLY SAVE; HOWEVER, WE RECOMMEND SAVING OFTEN.

Scroll to the bottom of the page and click  as you work.

Use the Previous and Next buttons to move from section to section. **Do not use the browser “Back” button.**

Responding to the Application Questions

The screenshot shows a dropdown menu with the text 'Qualified Donee Question'. Below the dropdown, there is a question: 'Is the organization carrying out this project, as shown above, a qualified donee?*' with two radio button options: 'Yes' and 'No'.

A qualified donee is a registered charity, Canadian municipality, or school district (if registered as a charity).

- If your organization is not a qualified donee, answer “No” to enter the information for your sponsor organization.
- If your organization is a qualified donee, answer “Yes.”

Note: If you are not a qualified donee, you need a letter of support from your sponsor organization signed by an authorized signatory (usually the president or treasurer). Use the “Upload a file” button to include this letter of support with your application (required).

Please upload a Project Letter of Support by Qualified Donee*

Upload a file [8 MiB allowed]

STEP 3: COMPLETE THE APPLICATION

Enter the name of your project, a brief description of your project, and the amount of funding you are requesting from SVLF.

Information About Your Project

Project Title*

Name of Project.

Project Description*

1,000 characters left of 1,000

Amount requested from the Slocan Valley Legacy Fund*

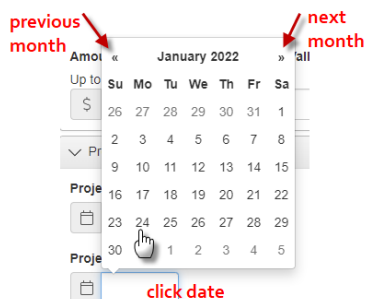
Up to a maximum of \$5000.

\$

Enter the expected start and end dates for the project. Clicking in the box brings up a calendar. Use the scroll arrows to find the appropriate month, then click on the date.

Project Start Date:*

Project End Date:*

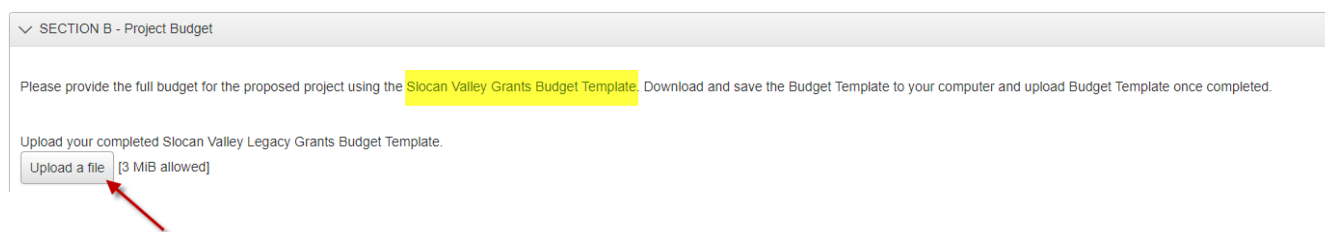


Respond to the remaining questions as requested. You can prepare your responses in a word processing document and copy/paste into the response areas. **Remember to save often. Remember to use Previous and Next to move from section to section.**

STEP 4: PROJECT BUDGET

Upload a file

Click the embedded link “Slocan Valley Grants Budget Template” to download the budget template. Save it to your computer, complete it, save it, then click



SECTION B - Project Budget

Please provide the full budget for the proposed project using the [Slocan Valley Grants Budget Template](#). Download and save the Budget Template to your computer and upload Budget Template once completed.

Upload your completed Slocan Valley Legacy Grants Budget Template.

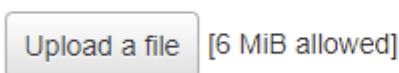
[Upload a file](#) [3 MiB allowed]

Instructions for completing the budget template are available on our website <https://www.slocanvalleylegacy.com/grants/>

STEP 5: ADDITIONAL DOCUMENTATION

If you have additional documents such as letters of support or price quotes that support your budget, they can be uploaded in this section. Up to 4 documents can be uploaded (note maximum file sizes allowed).

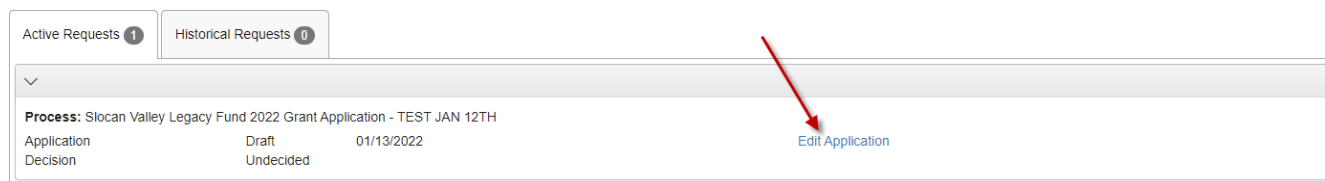
Upload any additional supporting documentation here.



[Upload a file](#) [6 MiB allowed]

Saving and Returning to the Application

You can save the application, leave and return at another time to resume. To resume working on an existing application, after logging in, from the Dashboard, click the “Edit Application” link.



Active Requests **1** Historical Requests **1**

Process: Slocan Valley Legacy Fund 2022 Grant Application - TEST JAN 12TH

Application	Draft	01/13/2022
Decision	Undecided	

[Edit Application](#)

STEP 6: SUBMITTING THE APPLICATION

Review your responses to ensure accuracy. You cannot edit responses once you submit the application.

To submit, click the “Submit Application” button at the bottom right of the screen.

Submit Application

After submitting the application, if you realize there are changes necessary prior to adjudication by the Granting Committee, please call Ellen at 250.358.2459.

Collaborating on the Application

Collaborate

Click the Collaborate button at the top of the page to enable multiple people to work on the application. Enter the email address of a potential collaborator, select the appropriate level of permissions (view only, edit the application, submit the application), and add a message.

Click

Invite

Collaborate

Invite someone

Email Address

Email address / username of the person you are inviting

Permissions

☐ Can view

☒ Can edit

☐ Can submit

Message

This message from you will be included in the email that is sent to the person you are inviting

Cancel Invite

Downloading the Application to View and/or Print

Use the appropriate buttons as indicated:

	view uploaded documents (e.g., letters of support); this button only appears after at least one document has been uploaded; If only one document has been uploaded, it will be displayed. If more than one document has been uploaded, select from the list in the upper right corner to display.
	download a PDF version of the completed application including any uploaded documents
	open a PDF version of the application without any entered responses

After viewing documents, use the Close button to return to the application.

