**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 any additional supporting documentation
5. 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*

Log On   Create New Account

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.

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 Copy Address from Organization 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.

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.

To get a PDF copy of the application to download or print, click [Question List]
It will open in a new tab on your browser so you can return to the actual application.

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

Scroll to the bottom of the page and click [Save Application] 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

A qualified donee is a <mark>registered charity, Canadian municipality, or school district</mark> (if registered as a charity). Non-profit organizations that are not one of these classifications require a sponsor organization that is a qualified donee. Refer to this document for information.

- 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). A template is available here. 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, the geographic area(s) that will benefit, the sector/category that best reflects the nature of the project, a brief description of your project, and the amount of funding you are requesting from SVLF.

Tell Us About Your Project

Project Title*

Name of Project.

[   ]

What geographic area of the Slocan Valley will this project most benefit?*

Check all that apply.

☐ Area H South

☐ Areas H North

☐ Village of Slocan

☐ Villages of New Denver/Silverton

Please indicate what sector, or category from the list best reflects your project:*

○ Arts, Culture, and Heritage

○ Community Facility Upgrades

○ Child, Youth, and Family Development

○ Education and Libraries

○ Environment

○ Outdoor Recreation, Physical Activity, and Sports

○ Programs for Seniors

○ Social and Health Services

Provide a brief (2-3 sentences) description of your project*

[   ]

1,000 characters left of 1,000

Amount requested from the Slocan Valley Legacy Fund*

Up to a maximum of $2500

[$ | _____]

Is this request for a new project or existing project?*

○ New

○ Existing

Enter Project Budget Information into the tables, starting with the drop down selection of expense categories, total cost of the expense, and the amount requested as part of the grant request. Any description or explanatory notes can also be entered. Columns will total automatically.

∨ Project Budget

Slocan Valley Legacy Fund Grants Budget

Please provide the full budget for your proposed Project as well as what you are asking the Slocan Valley Legacy Fund (SVLF) to fund.

Please select from each drop down list below to enter your project's main expense items	Total cost of Expense Item (Column A)	Requested amount from SVLF (Column B)	Description/Notes
▽ Fee paid to Qualified Donee sponsor ∨	$ 200.00	$ 150.00	A 10% of total grant
▽ Suppies/materials ∨	$ 800.00	$ 800.00	A
▽ Wages, contracts, consulting fees ∨	$ 1000.00	$ 1000.00	A Project manager
▽ ∨	$	$	A
▽ ∨	$	$	A
▽ ∨	$	$	A

Enter funding sources that are confirmed or pending.

Other Sources of Anticipated Income

Please fill in the fields below listing all sources of income for this project other than the proposed amount from Slocan Valley Legacy Fund (e.g. other grants, cash, in kind contributions, volunteer support, ticket sales). Value volunteer time @ $20/hour.

Source	$ Assured Funding (Column C)	$ Potential Funding (Column D)	Contact Name & Telephone
A Cash reserves	$ 50.00	$	A A. Smith, Treasurer
A ReDi grant	$	$ 1200.00	A
A	$	$	A
A	$	$	A
A	$	$	A
A	$	$	A

Enter column totals into the appropriate spaces:

1. Please enter "Requested Amount From SVLS" (Total of Column B)*

$ 1950.00

2. Please enter "Assured Funding" (Total of Column C)*

$ 50.00

3. Please enter "Potential Funding" (Total of Column D)*

$ 1200.00

4. Please enter the sum of questions 1 to 3*

(Total of Column B + Total of Column C + Total of Column D)

$ 3200.00

5. Please enter "Total Cost of Project Expense" (Total of Column A)*

$ 3200.00

The difference between your total project expenses and total project revenues must be zero.

5. Please subtract question 5's answer from question 4's answer*

This is your project's **Net Income.** This amount MUST EQUAL ZERO. *Please do not submit your application until this number is zero.*

$ 0.00

**Eligible project must have a net income of $0.00. In other words, your project's "total income" must equal your your expected "total expenses".

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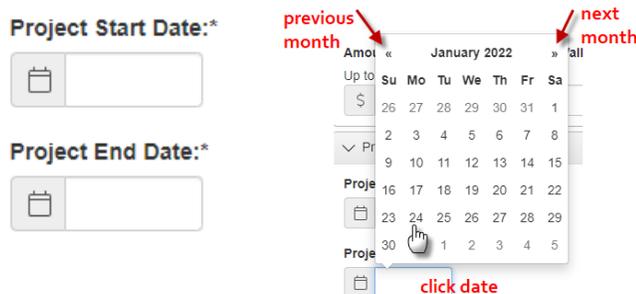
Respond to the remaining questions as requested. You can prepare your responses in a word processing document and copy/paste into the response areas. **Remember to save often. Remember to use Previous and Next to move from section to section.**

STEP 4: 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).
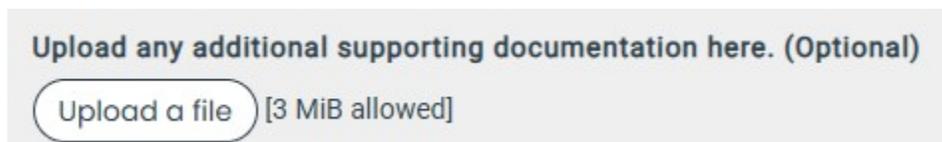
Saving and Returning to the Application

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.

STEP 5: 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
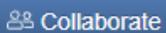
👥 Collaborate

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**
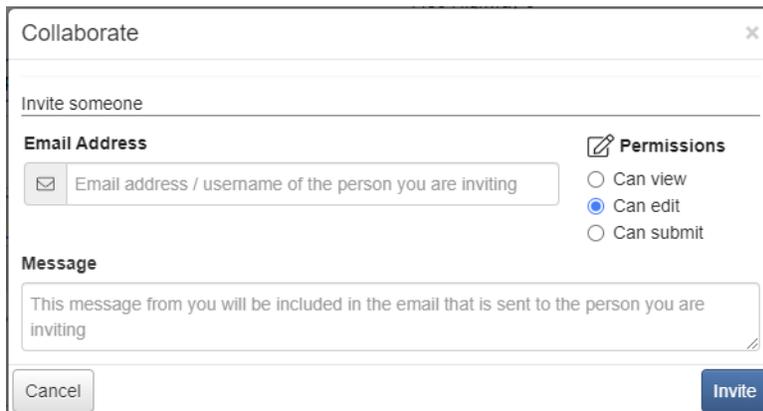
Collaborate	✕
Invite someone	

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:

🖼 Document Viewer	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.

[PDF] Application Packet	download a PDF version of the completed application including any uploaded documents
[PDF] Question List	open a PDF version of the application without any entered responses

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

SLOCAN VALLEY
LEGACY FUND