

# GROW INVESTMENT STREAM – APPLICATION ASSESSMENT

During the decision-making process, we carefully read each submitted grant application. Each grant application is evaluated on the organization's eligibility, project's eligibility and lastly, the project is scored based on four assessment areas.

## Organization Eligibility

When your organization is completing a Grow grant application, you must first begin with the **Organization information** and upload the required attachments. We assess an organization's eligibility using the information submitted in the Organization section. An organization will be eligible for funding if they meet **all of the following criteria**:

ELIGIBILITY CRITERIA	
The organization adheres to OTF's <a href="#">Anti-Discrimination Policy</a>	Yes / No
<b>Organization's Financials</b>	
The appropriate financial statements are provided based on the organization's total revenues and fiscal year end date. See <a href="#">Financial Statement Requirements</a>	Yes <ul style="list-style-type: none"> <li><input type="checkbox"/> Complete Financial Statements</li> <li><input type="checkbox"/> Up-to-date Financial Statements</li> <li><input type="checkbox"/> Financial Statements prepared by a Licensed Public Accountant</li> <li><input type="checkbox"/> (If applicable) Provided Audited Financial Statements</li> <li><input type="checkbox"/> Board approved Financial Statements</li> </ul>
The organization has a surplus/deficit that requires explanation, and the explanation meets OTF requirements	Yes <ul style="list-style-type: none"> <li><input type="checkbox"/> Information meets surplus requirement</li> <li><input type="checkbox"/> Information meets deficit requirements</li> </ul>
<b>Board of Directors</b>	
The Board of Directors meets OTF Requirements	Yes <ul style="list-style-type: none"> <li><input type="checkbox"/> Information meets requirements – minimum of three or more Board members</li> <li><input type="checkbox"/> Information meet requirements – at least 50% of Board members are arms-length</li> </ul>

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<b>Granting History</b>	
(If applicable) The organization has past OTF applications, either approved or declined, and OTF has no concerns with the organization's granting History	Yes
<b>ORGANIZATION ASSESSED AS ELIGIBLE</b>	<b>YES/NO</b>

## Project Eligibility

The second part of the Grow grant application is where you provide your **Project information**. During the assessment process, Grow projects will be assessed as eligible for funding if they meet **all of the following criteria**:

<b>ELIGIBILITY CRITERIA</b>	
The project information is complete and includes all of the attachments	Yes <ul style="list-style-type: none"> <li><input type="checkbox"/> All questions are answered</li> <li><input type="checkbox"/> Complete Project Plan</li> <li><input type="checkbox"/> Evidence submitted</li> <li><input type="checkbox"/> Complete documentation</li> <li><input type="checkbox"/> Collaborative Agreement submitted</li> <li><input type="checkbox"/> Emerging Governance Platform (EGP) Agreement submitted</li> </ul>
The project aligns with Grant Result and Metric picked	Yes / No

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<p><b>The project complies with OTF policies</b></p>	<p>Yes</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Advocacy Activities for Grantees Policy</a></li> <li><input type="checkbox"/> <a href="#">Anti-Discrimination Policy</a></li> <li><input type="checkbox"/> <a href="#">Collaborative Applicants Policy</a></li> <li><input type="checkbox"/> <a href="#">Eligibility Policy</a></li> <li><input type="checkbox"/> <a href="#">Financial Need and Health of Applicants Policy</a></li> <li><input type="checkbox"/> <a href="#">Overhead and Administrative Costs Policy</a></li> <li><input type="checkbox"/> <a href="#">One Application Per Cycle Policy</a></li> </ul>
<p><b>The project aligns with the Grow Investment Stream</b></p>	<p>Yes</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Sufficient evidence was submitted with the application             <ul style="list-style-type: none"> <li>o The model used to design the project was evidence based</li> <li>o Application did demonstrate how the model will be effective in achieving the Grant Result</li> </ul> </li> <li><input type="checkbox"/> Did demonstrate how the program will grow or improve</li> <li><input type="checkbox"/> Amount requested for capital costs is within 20% of the total OTF Grant Budget</li> <li><input type="checkbox"/> The capital costs requested are directly associated with, and necessary for, the success of the Grow project</li> </ul>
<p><b>PROJECT ASSESSED AS ELIGIBLE</b></p>	<p><b>YES/NO</b></p>

## Project Assessment

Lastly, Grow projects are scored by experienced staff and local volunteers based on the information submitted in the Project section of the application. The four assessment areas are: Strategy, Process, People and Value of money. Each assessment area has a series of accompanying application questions and assessment considerations, and are scored as follows:

**SCORE: -2 (SD: Strongly Disagree) -1 (D: Disagree) 0 (N: Neutral) +1 (A: Agree) +2 (SA: Strongly Agree)**

Weight	Assessment Area	Assessment Considerations	Application Questions
40%	Strategy	The strategy is appropriate for achieving the Grant Result and the need or opportunity is clearly identified.	

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		<ul style="list-style-type: none"> <li>The project is clearly described and understood.</li> <li>The project's need and who will benefit is clearly presented and understood.</li> <li>There is alignment between the project need, project description and the selected Grant Result.</li> <li>If applicable, the capital components are appropriate for this project.</li> </ul>	<ul style="list-style-type: none"> <li>What Action Area/Priority Outcome/Grant Result is the focus of your project?</li> <li>What is your project and what do you want to do?</li> <li>Why is your project needed, and why is now the right time to be doing it?</li> <li>Who will benefit from the project? Where will the project take place?</li> <li>How does the project align with the Grant Result you selected?</li> <li>If applicable, upload photos or diagrams illustrating your projects capital needs.</li> </ul>
30%	Process	<p><b>The processes are well thought out and identify the steps needed to implement the Project Plan and support the Grant Result.</b></p>	
		<ul style="list-style-type: none"> <li>A strong evidence-based model was used and is appropriate for the project.</li> <li>The model is effective in achieving the Grant Result selected</li> <li>The Project Plan is well thought out, aligns with the project description and evidence-based model, and will be effective in achieving the Grant Result.</li> <li>It is feasible to carry out the activities in the stated timelines.</li> <li>The resources required, and project budget, are appropriate to carry out the activities.</li> <li>Areas for risk are identified and ways to manage them are addressed.</li> </ul>	<ul style="list-style-type: none"> <li>Summarize the evidence-based model you are using including any adaptations or improvements that have been made to the model. (Briefly describe the key components; who produced it; when was it developed; where was it implemented; who was the target population)</li> <li>The evidence-based model you are using must have achieved positive change in the Grant Result you have selected. Summarize the results achieved and describe how the results were obtained.</li> <li>Upload the evidence which supports the model you are using and any relevant documents that informed the adaptations or improvements to the model.</li> <li>Project Plan: List the activities you will undertake to implement your project.</li> <li>Risk Management Plan: What risks have you identified for your project?</li> <li>Financial Workbook</li> </ul>
20%	People	<p><b>The people involved are qualified and capable of managing this project. The evaluation plan will help people learn from the project.</b></p>	
		<ul style="list-style-type: none"> <li>The core team members have the skills, knowledge, experience and competencies needed to lead/manage the project.</li> <li>If applicable, contributions from collaborative and/or partnering</li> </ul>	<ul style="list-style-type: none"> <li>Who are the core team members leading the project? List any organizations you are partnering with to successfully implement this project and their contributions.</li> <li>Tell us about other projects (similar in size, cost, duration or scope) that your organization and/or partners previously implemented.</li> </ul>

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		<p>organization(s) support project implementation and success, and the organization(s) involved have experience implementing similar projects.</p> <ul style="list-style-type: none"> <li>The expected learning and evaluation questions are clearly stated and appropriate for this project.</li> <li>There is a plan in place to collect the data, to use and share the evaluation findings, and the people involved can administer the evaluation plan for this project</li> </ul>	<ul style="list-style-type: none"> <li>What do you expect to learn from this project?</li> <li>What key questions do you want to have answered through this evaluation? How will you collect the data needed to evaluate this project? What is your plan to use and share your evaluation findings for this project? Who will administer the evaluation plan for this project?</li> </ul>
10%	Value for Money	<b>The project demonstrates value for money.</b>	
		<ul style="list-style-type: none"> <li>The cost per output (\$/metric) is appropriate for this project.</li> <li>The Financial Workbook is clearly presented and provides appropriate details of financial resources required to support project activities.</li> </ul>	<ul style="list-style-type: none"> <li>Cost per output (\$/metric)</li> <li>Financial Workbook</li> </ul>
100%	TOTAL		

## Project Selection and Approval

The final stage of the assessment process is when volunteers recommend the approval or decline of each application. Recommendations are considered, and then approved by the Board of Directors.

We do not fund retroactively, so choose your project start date so that it falls after the date when you would receive OTF notification that your grant has been approved. This is approximately a four-month period.