

## ORGANIZATIONAL MENTOR (OM) APPLICATION TOOL

**THANK YOU** for your interest in being an organizational mentor to a YOF grassroots group and joining our OM Network! We appreciate your commitment to supporting grassroots leaders in the YOF's Youth Innovations and Family Innovations streams. With your help, we are creating conditions that will support and sustain youth and parent-led leadership in communities across Ontario. Please know that as a YOF organizational mentor, you will have access to a network of other organizational mentors as well as resources that will support you in this role. We look forward to learning more about your organization through this process!

### Authorization

1. Please confirm that the decision to be an organizational mentor has been authorized by your organization's Board of Directors, the Chief Executive Officer, Executive Director, or someone of equivalent authority in your organization (Check one only).
  - Yes
  - No

**IF NO:** Who in your organization has authorized the decision to be an organizational mentor?

- Name
- Title
- Phone Number
- Email

Participation as an Organizational Mentor requires authorization from an individual that is at a senior leadership level.

2. As an organizational mentor, your organization agrees to assume **all legal and fiduciary responsibility** for a grassroots project just as you would with all other projects and activities of your organization. Check one only.
  - Yes
  - No

**IF NO:** Please know that YOF requires organizational mentors to assume all legal and fiduciary responsibilities. Please email the YOF team at [yof@otf.ca](mailto:yof@otf.ca) for more information.

3. In your organization, who is or will be responsible for managing these projects and relationships on a day-to-day basis?
  - Name
  - Position/Title
  - Telephone
  - Email

## Organizational Capacity

4. Has your organization acted as an organizational mentor in the past? The sector also uses terminology such as trusteeship, emerging governance platform, or charitable home to describe the relationship between an organization and a grassroots group.
5. Please confirm that your organization has the **infrastructure** to support grassroots projects. This means that your organization has the staff to support these projects administratively. It means that the roles and responsibilities of your staff team are clearly defined and can be shared with project leaders. Infrastructure also means that relevant financial and human resources (HR) policies and procedures are in place and can be shared with project leaders. Check one only.
- Yes  
 No

**IF NO:** Please know that YOF requires Organizational Mentors to have the required infrastructure to support grassroots projects. Please email the YOF team at [yof@otf.ca](mailto:yof@otf.ca) for more information.

Please note that some YOF grassroots groups are very new and have come together to test new ideas, lead research, or strategize around pressing issues. Other groups have a longer track record and are being funded through YOF to scale a tested idea.

6. In addition to administering projects, Organizational Mentors provide **mentoring supports** to project leaders during the life of the grant. Does your organization have the capacity and interest to mentor project leaders? Check one only.
- Yes  
 No

This looks like coaching project leaders or supporting groups to reflect on what is working best in their project delivery. Please know that the YOF Team also provides coaching to project leaders and this work can be shared between your organization and YOF.

## Organizational Mentor Profile

7. Your organization is:  
Check all that apply
- Black-led  
 Indigenous-led

See [link to definitions](#) to learn more about how YOF understands the leadership, mandate, and structure of Black-led or Indigenous-led organizations.

8. Please indicate the **types of projects** that your organization would be interested in supporting as an organizational mentor. Check all that apply. Select at least one.
- We are interested in being a mentor to projects that focus on:
  - Creating safe spaces for Indigenous youth and families to build strong cultural and community connections
  - Creating safe spaces for Black youth and families to build strong cultural and community connections
  - Education and training
  - Employment and training
  - Youth justice
  - Systems navigation
  - Housing and social supports
  - Improving access to resources for economic stability
  - Access to mentors
  - Culture and arts
  - Increasing access to mentors
  - Other

**IF OTHER SELECTED:** Please describe any other types of projects your organization has the capacity and mandate to support:

9. YOF project activities take place in **communities across Ontario**. Please indicate those catchments where your organization is able to administer projects and mentor groups. Select at least one catchment:

Please use the census division breakdown to indicate more specific regions where your organization is able to administer projects and mentor groups. Select at least one census division per selected catchment.

10. Is your organization interested in participating in on-line and in-person knowledge exchange sessions with other organizational mentors across the province? Check one only.
- Yes
  - No
11. YOF maintains a **published OM Network list** of organizations that have expressed interest in being an organizational mentor to YOF groups/projects. The list includes organization name, contact name, your geographic reach, and types of grassroots projects you are interested in working with. Does your organization give permission to be added to this organizational mentor list? Check one only.
- Yes
  - No
12. Once this form has been verified, do you give OTF/YOF permission to refer your organization to grassroots groups that match your profile?
- Yes
  - No

**IF YES CHECKED FOR PUBLISHED LIST OR YES CHECKED FOR YOF REFERRAL.**

Who can grassroots leaders or the YOF contact for more information?

- Name
- Position/Title
- Telephone
- Email

**Organization Profile Documents**

13. **If new to OTF:** Please provide financial statements and Board member list to complete your organizational profile.

**If you have an existing org profile:** Are your financial statements and Board member details up to date on your org profile?

- Yes
- No

If your organization submitted an application for the two most recent OTF deadlines, your organizational documents are most likely up to date. Check your organizational profile.

**IF NO:** Upload your organization's most recent completed financial statements. Please ensure you are submitting the required financial statements based on your organization's financial year-end date and total revenues

To consider an organization as eligible, the Ontario Trillium Foundation (OTF) requires at least one fiscal year of financial statements from the date of incorporation or charitable registration. Review our Financial Statement Requirements to ensure you submit the right type of Financial Statements based on your organization's total revenues and fiscal year end date.

- Financial statements for the most recent completed fiscal year must have been completed within six months of your organization's financial year-end.
- Organizations with annual revenues of over \$250,000 must submit audited financial statements for the most recent fiscal year, which must include comparative information for the prior fiscal year. A licensed public accountant external to your organization must provide external to your organization must provide an Audit Report on the financial statements and accompanying notes.
- Organizations with annual revenues between \$50,000 and \$249,999 must submit financial statements for the most recent fiscal year, which must include comparative information for the prior fiscal year. A licensed public accountant external to your organization must provide a Review Engagement Report or a Notice to Reader on the financial statements and accompanying notes.
- For revenues \$49,999 or less, your organization is required to provide us with internally prepared financial statements for the two most recent fiscal years.

14. Please provide a breakdown of your revenues from your most recent completed fiscal year.

**Revenue Sources Table: [Open]**

Type of Revenue	% of Revenue
Government Funding - Municipal	_____
Government Funding - Provincial	_____
Government Funding - Federal	_____
Fundraising / Donations	_____
Income Generated	_____
Other	_____

Using your organization's financial statements for the most recent completed fiscal year, please calculate the percentage of revenues for each category: Federal funding, Provincial funding, Municipal funding, Fundraising/Donations, Income-Generated, Other.

For example, if your organization's total revenues are \$100,000 and you receive \$55,000 from the provincial government, generate \$25,000 in fundraising and receive \$20,000 in donations, you would enter 55% for Provincial Funding and 45% for Fundraising/Donations.

15. Does your organization have three or more board members, with at least 50% of board members at an arm's length relationship to each other?

Your organization must have a minimum of three active board members. To be eligible for funding, at least 50% must maintain an arm's length relationship to each other. An 'arm's length' relationship means board members and organization executives are NOT married or related to each other, do not work as business partners or are otherwise in a relationship where interests may be compromised.

**Answer YES if:** board members and organization executives are not married or related to each other, do not work as business partners or are otherwise in a relationship where interests may be compromised.

**Answer NO if:** board members and organization executives are married or related to each other, do work as business partners or are otherwise in a relationship where interests may be compromised.

16. Please provide / Update Board List below (delete inactive members and add new members)

**Board Members Info Table: [Open]**

- First Name
- Last Name
- Position

- 
- Director term start date
  - Director term end date
  - Arm's length relationship?
    - Yes
    - No

**If NO**, provide the nature of the relationship/conflict.

## Acknowledgements

17. Please check to indicate agreement:

- I understand that in order to be an organizational mentor to a funded YOF grassroots group, our organization must be verified as eligible to receive funds from OTF.
- I understand that should we become an organizational mentor to a funded YOF grassroots group, our organization will be required to enter into a **formal, legally-binding agreement** with the Ontario Trillium Foundation that will outline the terms and conditions of the grant.
- I understand that should we become an organizational mentor to a funded YOF grassroots group, OTF will not reimburse any expenses incurred prior to the date of OTF Board approval for the grant.
- I understand that as an organizational mentor, I will be responsible for reviewing responses written by youth leaders and submitting annual Progress Reports and Final Reports.
- I understand that as an organizational mentor, I will be invited to participate in an annual check-in with a YOF Program Manager.

## Other Comments and Information

Please add any additional information or comments related to questions on this form and your interest in being an organizational mentor. Someone from the YOF team will follow-up within 48 hours.