

# SEED 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 Seed 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 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>
(If applicable) 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 requirements</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 active Board members</li> <li><input type="checkbox"/> Information meet requirements – at least 50% of Board members are arms-length</li> </ul>
<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 Seed grant application is where you provide your **Project information**.

During the assessment process, Seed projects will be assessed as eligible for funding if they meet all the following criteria:

ELIGIBILITY CRITERIA	
<b>The project information is complete and includes all of the attachments</b>	<p>Yes</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> All questions are answered</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>
<b>The project aligns with Grant Result picked</b>	Yes / No
<b>The project complies with OTF policies</b>	<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>
<b>The project aligns with the Seed Investment Stream</b>	<p>Yes, aligns with one of the following project types:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrated how the project is convening around an emerging issue</li> <li><input type="checkbox"/> Demonstrated how the project is conducting a feasibility study</li> <li><input type="checkbox"/> Demonstrated how the project is researching a new concept</li> <li><input type="checkbox"/> Demonstrated how the project is developing or piloting a new idea</li> </ul> <p>Yes</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Funds requested are for a future project (not currently or previously delivered)</li> <li><input type="checkbox"/> Funds requested exclude renovations, repairs or new buildings</li> </ul>
<b>PROJECT ASSESSED AS ELIGIBLE</b>	<b>YES / NO</b>

## Project Assessment

Lastly, Seed projects are scored based on the information submitted in the Project section of the application. The three assessment areas are: Strategy, Process, People. 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)**

Assessment Area	Assessment Considerations	Application Questions
<b>Strategy</b> (50%)	The strategy appropriately identifies the need or opportunity as well as an overall plan designed to achieve the identified learning.	
	<ul style="list-style-type: none"> <li>There is alignment between the project need, project purpose and the selected Grant Result.</li> <li>The project purpose is clearly stated and understood.</li> <li>The project need or opportunity and who will benefit is clearly presented and understood.</li> <li>Photos or diagrams demonstrate funding needs.</li> </ul>	<ul style="list-style-type: none"> <li>What is your project and what do you want to do? Why is your project needed, and why is now the right time to be doing it? Who will benefit from the project?</li> <li>Where will the project take place?</li> <li>How does the project align with the Grant Result you selected?</li> <li>Does your project have a capital component (equipment)?</li> </ul>
<b>Process</b> (25%)	The project is well thought out and identifies the activities and steps needed to achieve the identified learning.	
	<ul style="list-style-type: none"> <li>The activities are aligned with the project purpose.</li> <li>It is feasible to carry out the activities in the stated timelines.</li> <li>The budget is appropriate to carry out the activities and learning plan.</li> <li>If applicable, contributions from collaborative and/or partnering organization(s) support project implementation.</li> </ul>	<ul style="list-style-type: none"> <li>What are the key project activities that you will complete in order to successfully implement the project?</li> <li>If applicable, list the collaborative organizations identified in your Collaborative Agreement.</li> <li>If applicable, list any organizations you are partnering with to make this project a success. Describe each organization's contribution to the project (i.e., financial, time, location, space, etc.) and indicate the status of the partnership.</li> </ul>
<b>People</b> (25%)	People and organizations will learn from this project.	
	<ul style="list-style-type: none"> <li>The expected learning is clearly stated.</li> <li>There is a plan in place to use and/or share the learning.</li> <li>The learning plan is appropriate for the project purpose.</li> </ul>	<ul style="list-style-type: none"> <li>What do you expect to learn from this project?</li> <li>What key questions will you need to answer to achieve your expected learning?</li> <li>How will you capture the learning and how will you use it?</li> </ul>
<b>TOTAL</b>		

## **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.