

# Application Guide for Test Grants

This is a step-by-step guide for completing your application for Vancouver Foundation. We recommend that you read through this guide BEFORE beginning the online application process.

This application guide is specific to TEST grants. If you are applying for a Develop or Grow grant, please download the application guide for those grant types. There are variations in the questions asked and in the information to be provided.

This guide is divided into several sections:

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You may wish to prepare a draft of your application using external software, such as Microsoft Word. This will allow you to check your spelling, grammar, and character counts. Similarly, you may wish to draft your project budget using external software, such as Microsoft Excel. Once you're satisfied with your responses, you can then copy and paste them into the online application. We appreciate the time and effort you take to prepare your submission and hope this guide will make the process easier.

## Introduction

- Your application will be assessed by staff and volunteer advisors, many of whom have extensive knowledge and experience related to field of interest outcomes. Although you can assume a high level of technical knowledge, please write in plain English and avoid unnecessary jargon.
- For a brief video introduction to social innovation, please view <https://vimeo.com/60114688>. For more in-depth information, please see [Social Innovation Generation's Knowledge Hub](#)
- By submitting an application, you consent to and acknowledge that Vancouver Foundation may share information about the application and/or your organization with our staff, donors, advisors and community partners.
- If you have questions or comments, please contact a member of the Field of Interest Grants Team at 604.688.2204.

## Application process and grant types available

Vancouver Foundation offers a one or two stage online application process, depending upon the type of grant you choose. Develop, Test and Grow grants are available through the Field of Interest program.

**Develop grants** are short-term grants available to project teams that have already worked on a social issue to some extent and need support to move the idea forward to create a viable project plan.

**Maximum grant:** \$10,000 for up to one year.

**One stage application:** You submit a Project Overview including a project summary and budget.

Develop grants are particularly well-suited to support teams where there may be a lack of certainty on what the systemic root causes are, what systemic behaviours should change or what the intervention should be, or when there is lack of agreement on how to move forward and with whom. These grants support teams to gather additional information, meet with key stakeholders to learn more about the system or systemic issue, and begin to form a model or prototype of the eventual project. The intended output of a Develop grant is a viable plan for a project that can then be submitted to funders for consideration.

**Test grants** are longer-term grants to help project teams to test and evaluate whether they can influence the systemic behaviours(s) they are targeting through a fully-developed project plan. Test grants are available to evaluate the effectiveness of new or existing work meant to influence systemic change.

**Maximum grant:** \$75,000/year for up to three years.

**Two stage application:** You submit a Project Overview including a project summary and budget.

Then, if you're invited to proceed, you submit a Full Proposal that builds upon the information you've already provided. You also upload or send in other documents that support your application.

Test grants are particularly well-suited to help project teams who have a clear sense of what the complex social issue is, have already identified the systemic behaviours that are the root cause(s) of this issue, know how they will work to influence these systemic behaviours, have confirmed the people and organizations they will partner with throughout the work, and understand how they will monitor and evaluate their efforts. These social innovations typically have well developed timelines of activities and budgets that reflect a sound knowledge of what is required to influence change to the systemic behaviours associated with one of the broad outcomes listed under each field of interest. Test grants can be used to connect your project to other projects working towards the same outcomes, and can help you to generate the evidence needed to approach sources of longer-term funding.

**Grow grants** are longer-term grants to help project teams to scale a successful social innovation that has been proven to influence systemic behaviours, such as changes to policy and practice guidelines.

**Maximum grant:** \$50,000/year for up to three years.

**Two stage application:** You submit a Project Overview including a project summary and budget.

Then, if you're invited to proceed, you submit a Full Proposal that builds upon the information you've already provided. You also upload or send in other documents that support your application.

Grow grants are particularly well suited to help project teams to scale an existing and successful social innovation to new geographic sites or populations (scale out), to new levels of systems or institutions (scale up), or to further embed the social innovation within existing levels of systems or institutions

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(scale deep). Project teams will have a clear sense of what type of scaling they would like to implement, who they are partnering with throughout the work, and how scaling the social innovation will support the potential for greater systemic intervention and contribution to change. These social innovations have well developed timelines of activities and budgets that reflect sound knowledge of what will be required to continue to influence change to the systemic behaviours associated with one of the broad outcomes listed under each field of interest. Grow grants can be used to connect your project to other projects working towards the same outcomes, and can help you to generate the evidence needed to approach sources of longer-term funding.

## Section A: Field of Interest and Grant Type

### 1.1 Field of Interest

Please select the field of interest that you believe best aligns with the systemic change that you hope to influence through your project.

### 1.2 Grant Type

Select a Test grant. (See above for descriptions of other available grant types.)

## Section B: Confirmation of Qualified Donee Status

### 2.1 Confirmation of Eligibility

Check the box to confirm that

- you have read the general funding guidelines and/or completed the eligibility quiz and believe that both the applicant organization and this project are eligible for Vancouver Foundation funding
- you are authorized by the governing body of the applicant organization to submit this proposal on its behalf

### 2.2 Qualified Donee Type

The Applicant Organization must be a [Qualified Donee](#) listed by the Canada Revenue Agency.

- Select [Registered Charity](#) if applicable, and then enter the full registered charity number. (It is a 13-digit number as follows: XXXXX XXXX RR XXXX.)
- If the Applicant Organization is not a registered charity, then select [Other Qualified Donee under the Income Tax Act](#) and then select the correct donee type.

**Please note:** Vancouver Foundation can only grant to organizations that are included on Canada Revenue Agency's lists of qualified donees. If your organization is not listed as a qualified donee, then you must develop an [intermediary arrangement](#) with an organization that is a registered charity or other listed qualified donee in order to bring a project proposal forward.

## Section C: Applicant Organization

### 3.1 Legal Name

Provide the full legal name of the Applicant Organization. This is the name that appears on its incorporation and registration documents. If your application involves multiple partners, then ensure that the organization entered is listed as a qualified donee with Canada Revenue Agency.

### 3.2 Operating Name (if different from above)

Complete this if the Applicant Organization's operating name is different from its legal name (e.g. "The West Coast Women's Resources Society" is the registered name, while "Birch Transition House" is the name that the organization usually uses).

### 3.3 Address / Phone Number

Provide the Applicant Organization's mailing address related to this grant, including the city, province and postal code, as well as its phone number, email and website.

### 3.4 Senior Staff Person (with signing authority)

Enter the salutation, first name, last name, job title and email address of the senior staff person at the Applicant Organization who has the authority to commit the organization to accept the conditions associated with a grant. (This person is commonly the Executive Director.) For organizations that are volunteer-operated, please enter the Board Chair or President instead.

### 3.5 Board Chair/Board President/Council Representative (with signing authority)

Enter the salutation, first name, last name, job title and email address of the Board member at the Applicant Organization who has the authority to commit the organization to accepting the conditions associated with a grant. For organizations that are volunteer-operated, please enter another member of the Board who has signing authority.

### 3.6 Project Contact at Applicant/Qualified Donee Organization

Enter the salutation, name, job title, phone number and email address of the contact person at the Applicant Organization for this grant application. This person should be able to speak, in detail, to the project's objectives and budget, and serve as the main contact for Vancouver Foundation. Provide the person's full contact information even if this repeats information provided in a previous question.

Note: This email address will be used for all correspondence related to this application.

### 3.7 Profile or Purpose Statement

Please briefly summarize the main purpose and/or mission of the Applicant Organization.

#### **EXAMPLE**

Founded in 1958, the purpose of the Youth2Youth Society is to advocate for the safety and well-being of youth between 16 to 25 years of age, by providing supported housing and employment options.

## Section D: Intermediary Organization

According to the Income Tax Act, a qualified donee can only use its resources (for example - funds, personnel and property) in two ways:

- on its own activities (those which are directly under the charity's control and supervision, and for which it can account for any funds expended); and
- on gifts to other qualified donees

A qualified donee usually carries on its activities using its own human and financial resources; however, it can also use an intermediary organization to lead the activity instead. When using an intermediary, the qualified donee must still direct and control the use of the resources associated with the activity (although it may generally delegate authority to the intermediary to make day-to-day operating decisions).

For the purposes of this application form, an intermediary is the organization that the applicant works with to carry out the applicant's own activities. **An applicant cannot merely be a conduit to funnel money to an organization that is not a qualified donee.** Refer to Canada Revenue Agency's guidelines for more details about [intermediary organizations](#).

### 4.1 Legal Name

Provide the full legal name of the Intermediary Organization, if the organization that will lead the project is different from the Applicant in Section C.

### 4.2 Operating Name (if different from above)

Complete this if the Intermediary Organization's operating name is different from its legal name (e.g. "The Society for Children's Advancement" is the registered name, while "Kid's Corner" is the name that the organization usually uses).

### 4.3 Address / Phone Number

Provide the Intermediary Organization's mailing address related to this grant, including the city, province and postal code, as well as its phone number, email and website.

### 4.4 Project Contact at the Intermediary Organization

Enter the salutation, first name, last name, job title, phone number and email address of the contact person at the Intermediary Organization. This person should be able to speak in detail to the project's objectives and budget, and to serve as the secondary contact for Vancouver Foundation. Do not re-enter the Project Contact listed in Section C, question 3.6.

### 4.5 Profile or Purpose Statement

Please briefly summarize the main purpose and/or mission of the Intermediary Organization.

## Section E: Project Details

### 5.1 Which broad outcome is your project working towards primarily?

To help assess the impact of our grantmaking over time, Vancouver Foundation asks that all projects work toward at least one of the outcomes listed under each field. We don't anticipate that any one project will achieve this outcome on its own, and understand that you have project-specific outcomes that you will work and measure progress towards as well.

We also appreciate that the outcomes we've listed are not systemic changes in and of themselves, and so we ask that you interpret the outcome statement you select as, "Our project is working primarily to influence and change the systemic behaviours that are creating barriers to [*Broad Outcome*] within a [*Field of Interest*] system."

**Example:** if you select the *Increase the Employability and Livelihoods of Artists* outcome under the *Arts and Culture* field of interest, then we'll interpret your selection to mean, "Our project is working primarily to influence and change the systemic behaviours that are creating barriers to employment and leadership opportunities within an artistic and cultural system."

### 5.2 Working title for the project

State the title/name of your project, even if it is just a temporary working title.

### 5.3 Anticipated Project Start and End Dates

Indicate the anticipated start and end dates for your project using the drop-down calendar option and format of mm/yyyy.

Note: We may consider applications for projects that are already running, provided that the request does not include expenses that have been, will be or should be paid through other sources of funding. Vancouver Foundation does not provide bridge funding to sustain projects between grants. Project start and end dates should cover the period for which funding is being requested from Vancouver Foundation.

Submitting an application for a project that is already running does not increase the likelihood that it will be funded.

### 5.4 What is the social system that you would like to change or influence? What is the systemic issue or social challenge within this system that you want to address? (3,000 characters, including spaces)

Describe the system that you are working within. Tell us about some of the key elements within that system and how they might relate to each other to create the system's behavior. Provide us with an understanding of the social challenges that you are trying to address.

A social system is a group of things (elements) that combine into different patterns and those patterns create certain kinds of system behaviours that have social outcomes. For example, the education system is partly made up of School District Administrators, Teachers, Students, Parents, Ministry of Education funding, approved curriculum, instructional resources, and support staff working within local schools.

A systemic issue is an outcome/effect that is caused by how the system's different elements interact with each other to create a behavior. For example, a systemic issue could be displacement of people who need to move into care facility beds and the behavior would relate to how wait lists

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for care facility beds work differently across different kinds of care facilities within BC and how that results in people being placed in different kinds of communities and facilities.

## 5.5 Summarize the social innovation project. How will this project influence systemic change towards the broad outcome you've selected? *(1,500 characters, including spaces)*

Provide a concise summary of your project. Describe how your project might trigger a change in the system's behaviour. You may want to consider how introducing your innovation into the system will cause different relationships to form between key elements.

What is the project (the systemic intervention) that you will work on to create systemic change? How will the project plan change one of the following:

- How we act, what we do (the basic routines of a social system)
- Money, knowledge, people (the resource flows of a social system)
- Laws, policies, rules (the authority flows of a social system)
- What we believe is true, right/wrong (the beliefs of a social system)

Your project or program is considered to be a social innovation if it influences or changes one or more of these four key levers within a system. Making a change in one, or more, of these levers often creates a ripple effect of new behavior(s) across the system. A strong example of this is MADD Canada's efforts towards changing the legislation regarding drunk driving. MADD was able to influence change, directly and indirectly, across all four of these key levers. (Excerpted from <http://sigknowledgehub.com>)

## 5.6 What research or other evidence are you using to inform the development and implementation of this innovation? *Asked at Full Proposal stage. (1,500 characters, including spaces)*

Tell us about the information that has informed your social innovation and its development, and then outline the capability of your organization to conduct a project of this kind. The evidence could be formal research, statistics, white papers, information gathered through community networks or peer groups, knowledge of similar projects or work in a similar system, et cetera.

Examples may include an inventory of community strengths and assets, a needs assessment, consultation and/or input from community leaders, other agencies, and experts in the field. Tell us what background research you have done. If the project is to develop resource materials (audio-visual or print), explain how you are assured that this resource is not already available.

## 5.7 What are your anticipated outcomes for the project (short, medium, and long term)? *(3,000 characters, including spaces)*

Outcomes are the results of your project. What changes do you expect as a result of this project? New and different curriculum that improves literacy rates? New policies and practices that create safer seniors' centres? New employment training practices that increase the self-confidence among at-risk youth?

Define the overall goal(s) and specific objectives of the project. Keep in mind that goals tend to be longer-view. Your project probably won't achieve the goal(s) on your own. Objectives are more sharply focused, and short- or medium-term. They describe realistic and specific expectations of what you plan to achieve.

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5.8 Describe the timeline of activities. **Asked at Full Proposal stage.** (500 characters, including spaces, in each box of the table, to a maximum of 10 rows in the table)

Please share with us the proposed activities for this project. Please provide us with as much detail as possible and a realistic projection of your activity timelines. The timeline, project plan and budget should align.

## EXAMPLE

TIMELINE	KEY STEPS	PERSON RESPONSIBLE
January 2015 - mid February 2015	Facilitate community dialogues	Jane Smith, Instructor
March 2015	Outreach/recruit community team	Project Assistant (TBD)
April 2015 - June 2015	Conduct environmental scan and meetings with government officials and local staff of housing organizations	Sheila Thomas, Marketing Coordinator

5.9 Why do you believe there is readiness for the social innovation at this time? How is the system/policy environment receptive and capable of supporting or integrating the innovation? (1,500 characters, including spaces)

Tell us about the capacity of the current system to adapt to your social innovation and to allow for the intervention to shift the system's behavior. Describe the actions that you have taken to decide whether the system seems ready for your intervention and is willing to accept it, in part or whole, to create systemic change. You may want to consider how rules, relationships and values will impact whether your intervention is taken up within a system.

5.10 Innovation is inherently risky. What are the risks associated with this project? What processes will you put into place to recognize and respond to these risks? **Asked at Full Proposal stage.** (1,500 characters, including spaces)

Tell us about some of the potential risks that you might experience through this project. Describe how you might respond to them and use this learning to adapt your social innovation.

5.11 How will the people who are affected by the systemic issue be involved in the implementation and evaluation of the social innovation? (1,500 characters, including spaces)

Engaging people within project and program development has the potential to increase the diversity of routines, resources, authority and beliefs. This diversity is key to the resiliency of social systems and is a potential indicator of a robust social innovation.

Describe how people in the community who are affected by the issue are involved in the project and their specific roles at various stages within the project. Tell us how people might be both involved and empowered through the social innovation.



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**5.12 Who are you partnering with? Who else is working on this challenge? How will you collaborate with them? (1,500 characters, including spaces)**

Describe community involvement and the extent to which you are collaborating with other agencies for this specific project. Indicate the degree of community support that exists. Be as specific as possible.

**5.13 How will you assess your progress towards the anticipated outcomes? How will you incorporate what you are learning into the ongoing development of the project? *Asked at Full Proposal stage.* (1,500 characters, including spaces)**

Describe how you intend to evaluate the success and challenges of your project or program. Are you planning to conduct a formal evaluation? What evaluation tools will you use? (e.g. pre-and post-participant surveys or feedback forms, anecdotal information from participants, record of participation, etc.)

**5.14 How will the knowledge generated by this project be shared with others? *Asked at Full Proposal stage.* (1,500 characters, including spaces)**

How do you intend to share the experiences and impact of your program with others who might benefit from your wisdom? Try to be specific. For example, if you plan to share the lessons at a conference, please indicate the name of the conference and when it will take place; if it is community forums or dialogues, indicate how often and where.

**5.15 If funding is awarded, how will you sustain the work of this project once the grant ends? *Asked at Full Proposal stage.* (1,500 characters, including spaces)**

If you think the project will continue past the duration of the funding requested, then tell us how your organization will continue to support it in future years.

## The Public Statement

Vancouver Foundation shares excerpts from approved grants on our website and with our donors and Board of Directors. We might also share your proposal with other funders or external reviewers that we think may have valuable insight into your work (such as your local community foundation). Many people do not have a background in your area of expertise and so please use plain, compelling language (avoiding jargon) to write a paragraph that answers the following questions.

**5.16 What is the social issue that your project is trying to address? How will your project address this issue to influence systemic change? Why is this change meaningful? (700 characters, including spaces)**

### EXAMPLE

Wait lists for care facility beds are managed differently across health authorities and are monitored differently within each facility. Quite often, seniors and young people with disabilities are housed together because it's the only available bed known at the time of need. Our community coalition has been working with health authority staff to identify ways to manage better the overall system, and has now identified several options (including policy changes) that need further exploration with community stakeholders and patient groups. A better managed system will not only reduce wait times, but might also keep people living in their home communities longer, with other people their own age.

## Section F: Project Budget

### 6.1 Funding Duration

Please enter the number of years of funding you are seeking. *Note:* Test grants have a maximum of 3 years.

### 6.2 Expenditures

Project budgets must be balanced and the expenses must reflect the real, incurred costs associated with the project. A full project budget is required.

- Separate your project's expenses into logical categories. Put each category on a separate line in the budget table.
- For multi-year grants, specify the total project cost for each line item that will be incurred in each year of the funding. If you are not applying for multi-year funding, please disregard the columns for years two and three.
- In the final column, specify the amount of funding from Vancouver Foundation you wish to allocate against each budget line.
- For Test grants, Vancouver Foundation will cover up to 50% of a project's total cost, up to \$225,000 in total. Within this context, Vancouver Foundation will consider requests to fund specific budget items at more or less than 50% of their individual costs.

Note: The Expenditure and Revenue budget form will automatically calculate the totals for both columns and rows, as you insert your numeric dollar values.

### EXAMPLE (2-Year Project)

Budget Line Item	Description	Year 1 Cost	Year 2 Cost	Total Cost	Total Amount Requested from Vancouver Foundation
Salaries & Benefits	Outreach staff, Team Leader	50,000	45,000	95,000	20,000
Rent/Utilities/Phone	Mobile phone for outreach, office space for 4 days per week	10,000	10,000	20,000	10,000
Publicity/Promotional Materials	Printing, photocopying of brochures and posters	2,000	500	2,500	1,000
Transportation	Staff mileage, parking, bus tickets	2,000	1,000	3,000	0
Supplies	Supplies and materials for facilitation and leadership training	700	500	1,200	800
Professional fees	Honoraria for 4 facilitators @ 100 each for 2 sessions	800	0	800	700
<b>TOTAL</b>		<b>65,500</b>	<b>57,000</b>	<b>122,500</b>	<b>32,500</b>

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## 6.3 Revenues

List each anticipated source of revenue, and indicate the amount requested per year from them. Under the *Confirmed* column, indicate the amount that is confirmed for each source at the time of application. Finally, provide the name and telephone number of each funding contact.

- List the sources of confirmed in-kind contributions separately from cash contributions.
- Under Organization’s Contribution, separately indicate contributions from donations/fund-raising and in-kind contributions. Put a cash value on those in-kind contributions for which you can assess a market value. Remember that in-kind contributions should be reflected in your expenses (i.e. overall revenue should equal overall expenses to produce a balanced budget).
- In-kind contributions relate directly to real, anticipated and essential expenses in the project budget. In-kind contributions can be in the form of cash-equivalent goods or services, which, if not donated, would have to be purchased with project funds. In-kind contributions can also include the time of individuals within partnering organizations (e.g., experts in a specific area) spent providing direction and participating to the project, as long as their involvement is not considered to be volunteer time. In some cases, the partners may provide specialized skills and advice or access to special equipment, space, data sets, etc. ([Adapted from Social Sciences and Humanities Research Council](#))

Vancouver Foundation must be confident that the project can be successfully completed and that all necessary resources are available before we will release funds for approved projects. When additional funding or in-kind contributions are required and are still pending, it is our practice to approve a grant on the condition that sufficient funding is obtained before proceeding.

### EXAMPLE (2-Year Project)

Revenue Source	YEAR 1 Requested	YEAR 2 Requested	Total Revenue	Amount Confirmed	Contact/Tel:
Vancouver Foundation	18,500	14,000	32,500		G. Bertha 604.688.2204
United Way of the North Valley	15,000	11,000	26,000		G. Mary 250.999.9999
K Foundation	5,000	5,000	10,000		K. Hoskins 250.444.4444
Private Donor	2,000	2,000	4,000	4,000	C. Ray 604.222.2222
Community Organization’s Contributions:					Community Housing Organization
Cash	15,000	15,000	30,000	30,000	D. Jones 604.889.0000
In-Kind gifts	10,000	10,000	20,000	30,000	D. Jones 604.889.0000
<b>TOTAL REVENUE</b>	<b>65,500</b>	<b>57,000</b>	<b>122,500</b>	<b>64,000</b>	

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## 6.4 Political Activities (1,500 characters, including spaces)

Vancouver Foundation understands that non-partisan political activities, as part of a larger project, can be a useful way to address complex social issues. Learn more about allowable [political activities](#), and consider whether these activities will add value to your project.

- Select YES if your project will include political activities; select NO if it will not.
- Please indicate the dollar amount of Vancouver Foundation funding that will be dedicated to political activities. For multi-year grants, please indicate the dollar amount per project year. NOTE: this amount needs to be reflected within the [project budget](#), as either a standalone expense or as part of a broader expense category (such as salaries).

Please provide a description of the political activities and how they support and advance the charitable purposes of this project.

## Section G: Supporting Documents

*Supporting documents are only required at the Full Proposal stage.*

This is a list of the required supporting documents for the Applicant Organization, as well as for the Intermediary Organization (if applicable). Please upload before you hit “Submit” at the Full Proposal stage.

### 7.1 Audited financial statements for last completed fiscal year (If you do not have audited financials, then please submit the most recent year-end financial statement.)

Submit a full financial statement (preferably audited) for your organization's most recently completed fiscal year, including any statement of accumulated surplus or deficit (e.g. balance sheet).

### 7.2 Operating budget for the current fiscal year

Submit your organization's current fiscal year operating budget.

### 7.3 Most recent year-to-date income statement(s) or statement of activities

Submit your most recent interim (monthly or quarterly) income statement, comparing actual to budgeted expenditures, year-to-date.

### 7.4 Board of Directors List or Senior Governance Body of your organization

Attach a list of your current Board of Directors, including their names and positions. If your organization does not have a Board of Directors, please include information for an equivalent senior governance body. We do not require information that may be considered confidential, such as home mailing addresses or telephone numbers for your Board.

### 7.5 Letters of Support (maximum 3)

You can include up to three letters from organizations that are working with you on this specific project or have endorsed your project (e.g. other funders; and community members who support your initiative, etc.). These letters should demonstrate genuine knowledge of and/or involvement with your project and be unique from one another.

## Section H: Review & Submit

Check the box to confirm that you agree with the following terms and conditions:

- Vancouver Foundation will not assess an incomplete proposal.
- Vancouver Foundation may elect to assess only one proposal if more than one proposal is submitted on behalf of the same Applicant/Qualified Donee.
- Vancouver Foundation requires Field of Interest grantees to openly license materials created through our grant funding (reports, videos, curriculum, and the like) under a Creative Commons Attribution license. For more information and exceptions, please refer to the [full policy](#).
- All information and ideas submitted remain the intellectual property of the Applicant Organization. The Applicant Organization provides Vancouver Foundation the non-exclusive license to share or adapt the submission as part of our grant-making process, including sharing this proposal with community advisors or other funders at our sole discretion. A list of approved grants is made public on Vancouver Foundation's website.
- The information provided in this Project Overview is true, accurate and complete (to the best of my knowledge).

Please review and agree to the final Terms and Conditions. Once you click the "Submit" button on the last page of the application, you will not be able to make any changes online. You can, however, still log-in and view your application or print a copy for your records.

*Note:* A signature page is no longer required during application. Signatures are only required for applications that are approved.