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GUIDE TO PREPARING AN ON-TRACK OR CONTINUING PROGRAM APPLICATION
(Last Revised 06 March 2019)

This guide is to be used for applications for new or renewed Law Foundation-funded on-track and continuing programs. Please refer to this guide before answering the questions in the application. If you have any questions about the application process that are not answered in this guide, please contact your Law Foundation program director, or if you do not have a program director, email info@lawfoundationbc.org.

Applications for Law Foundation grants are to be submitted using the SmartSimple online Grants Management System Portal. The Portal can be found at

https://lawfoundationbc.smartsimple.ca/

If your organization has previously received Law Foundation funding, then it is likely that your organization already has an organization profile in the SmartSimple Portal. An activation email can be sent to your email address by clicking on the "Forgot Password" link and following the instructions. If you have not received an activation email, please contact info@lawfoundationbc.org or your Law Foundation program director.

If you do not have a profile on the SmartSimple Portal, visit the URL above and click the Register button
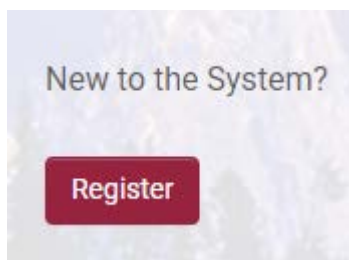

After clicking on the Register button, answer the registration questions, and provide the contact information for your organization and the organization's Primary Contact (normally the organization's executive director). If you are eligible to apply for Law Foundation funding, you will receive an activation email to the email address you provided with your contact information.

The SmartSimple Portal is optimized for use with the Google Chrome browser.

CREATING A NEW ON-TRACK OR CONTINUING APPLICATION

Once you have logged into your SmartSimple Portal, you will be presented with the Home Screen. To create a new grant application, click on the **Funding Opportunities** button

Funding Opportunities
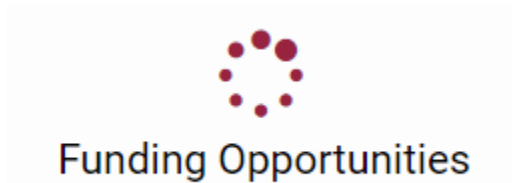
On the Funding Opportunities screen, select **On-Track Program Grants** if you have been invited to apply for on-track program funding, or **Continuing Program Grants** if you have been invited to apply for continuing program funding. Please ensure to select the correct grant type – if you are unsure, please contact the Law Foundation to confirm.

If you are applying for an **on-track program grant**, click on **Apply Now**, and you will immediately be taken to a draft on-track grant application.

Ontrack Program

BY INVITATION ONLY: Applications for programs under consideration for continuous annual funding.

Apply Now

If you are applying for a **continuing program grant**, click on **Apply Now**, and you will immediately be taken to a draft continuing grant application.

Continuing Program

BY INVITATION ONLY: Applications for programs granted continuous annual funding.

Apply Now

Please note that the questions for on-track and continuing program grant applications are the same.

COMPLETING THE APPLICATION FORM

Important: You can save your application in progress at any time, and return to it later, by clicking on the **Save** button

Save

Please note that if you do not save your work within a 60-minute period, the system's "time-out" function will sign you out of your application and any unsaved work will be lost. Please also make sure to save your application before signing out of the Portal, because any unsaved information will be lost.

To return to your application, log back into your organization profile at lawfoundationbc.smartsimple.ca, and on the home screen, there will be a button for draft applications

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Draft Applications
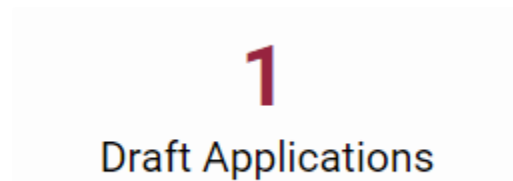
Clicking on this button will take you to a list of your draft applications. Click on the **Open** button next to the application you wish to resume.

Formatting & Review

The portal uses Rich Text Format (RTF) to allow for formatting inside most text fields. The RTF features are controlled using the RTF bar
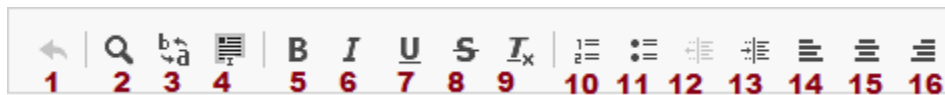
The features (numbered above) are as follows:

1. Undo
2. Find
3. Replace
4. Select All
5. Bold
6. Italics
7. Underline
8. Strikethrough
9. Remove Formatting
10. Numbered List
11. Bulleted List
12. Decrease Indent
13. Increase Indent
14. Left Justify Text
15. Centre Text
16. Right Justify Text

Please note that RTF allows basic formatting, and you may need to adjust formatting copied from other word processing programs.

Important: Please note that you can review a PDF version of your application, before or after submission, by clicking on the Application Document button

If you save any changes to an application, it is immediately updated in the document. We recommend that you check the Application Document periodically to note formatting or other issues that may affect the presentation of your application.

Please note that you can copy-and-paste text from another document into the fields of the application, including bullet lists and numbered lists; however tables will not retain their formatting when pasted into the application. If you wish to provide information concerning one or more of the application questions in table or grid format, please attach the table or grid in the Additional Information section.

The Application Document contains links to the attachments uploaded as part of your application.

APPLICATION QUESTIONS

As you go through the application process, choose the headings arranged horizontally near the top of the screen. You can switch between headings as needed.

PROGRAM DETAILS

Requested Amount

Please enter the amount your organization has been invited to apply for.

Start Date / End Date of Program

Select the start and end dates of the grant period.

Project Title

Enter the name or title of the program.

List all Prior Law Foundation Grants over the past 5 years

Please list all Law Foundation grants your organization has received over the last 5 years.

ORGANIZATION

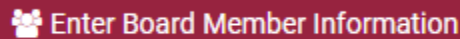**Question 1: What is the purpose of your organization? Describe your organization's activities, its members, its clients and its staff.**

Provide a brief description of your organization. Include information about membership, community/client groups you serve, how may staff are employed and how many volunteers are involved in the delivery of your programs. Tell us how often the organization's board meets.

Enter Board Member Information

Enter the list of your current board members by clicking on the Enter Board Member Information button

Constitution / Bylaws

Use the **Upload** button to upload a copy of your organization's constitution and bylaws. The upload screen allows you to drag-and-drop files from your computer, rename files, and delete files. If you wish to find files for upload on your computer, click on the **Browse Files** button.

PROGRAM

Outcomes Measurement Framework

Use the link to the **Outcomes Measurement Framework Worksheet** to download a template, along with the other documents that are available, as applicable.

Use the additional documents linked in the application to help you complete the Outcomes Measurement Framework:

a) *Outcome Measurement Definitions*
b) *Advocacy Programs - Approved Outcomes and Indicators.* At a minimum, all Law Foundation funded programs should contain these indicators that have been approved by the Law Foundation.
c) *Public Legal Education Programs – Approved Outcomes and Indicators.* These are specific to Public Legal Education programs.

If you have any questions generally about your outcome measurement framework please contact your Law Foundation program director.

Use the **Upload** button to upload the completed Outcomes Measurement Framework for the proposed program that lists the purposes of the program and outcomes sought.

Question 2: Describe your organization's proposed program for the coming year and tell us what you will do.

An overview of the program, including important milestones for each of the program's objectives.

Question 3: Briefly outline the work plan and schedule of events (if applicable).

Please provide us with a work plan that includes the following:

a) the major activities of the program;
b) a time schedule for completing these activities; and
c) information about who is to be responsible for each of the activities.

Question 4: Summarize what your program has accomplished in the current grant year to date   (outputs and outcomes).

Note: We define grant year as the beginning and end date of the program grant for example, April 1 to March 31, January 1 to December 31, July 1 to June 30. Please refer to the most recent Law Foundation Funding Guidelines letter for the dates of your specific grant year. In summarizing your program accomplishments list number of clients assisted; types of assistance given; outcomes achieved, etc.

If this is the first time you have submitted an application for your program, you may enter "N/A".

Question 5: Describe any changes to the program since the last application.

This could include changes in staff, clients served, services provided, and other funding sources. If this is the first time you have submitted an application for your program, you may enter "N/A".

Question 6: How will you assess whether or not you have achieved the outcomes, or made progress towards achieving the outcomes, identified in your Outcome Measurement Framework?

The Law Foundation's perspective is that both formal evaluation and ongoing assessment of outcomes tells you if you are achieving or making progress toward achieving your outcomes, and that it helps you to check on the accuracy of assumptions you make in planning. Evaluation also provides information to help make decisions during the course of the program and gives feedback to staff. As you may be aware,

there are many ways of evaluating a program: questionnaires, evaluation forms, verbal feedback, file reviews, etc.

The appropriateness of the method of evaluation or assessment will depend on the outcomes of the program, the cost and staff time involved, and the type of person who the program is intended to benefit. Please discuss your assessment approach with your Law Foundation program director.

Question 7: Describe how this program relates to the Law Foundation's mission statement and to one or more of its program objectives. Identify what percentage of the program fits into each of the Law Foundation's mandate areas.

The mission statement, mandate, vision, values and program objectives of the Law Foundation can be found at https://www.lawfoundationbc.org/about-us/mandate-mission-and-strategic-priorities/ Explain how your program relates to one or more of these mandate areas and priorities.

Question 8: Why do you think this program is needed, who will it serve and how will it benefit them?

This is an opportunity for you to tell us why you think this work needs to be done. If applicable, comment on past or present efforts by your organization or others to address this need.

Tell us about the target population and describe the number and types of people who you expect the program will serve. Identify the geographic scope of the program and tell us how you will inform the target audience about the program.

Question 9: Explain how your program serves the diverse public of BC.

Your program may serve one or more of the diverse populations in BC. Describe the population your program currently serves. Include an estimate of the number of individuals served.

The Law Foundation's working definition of diversity is:

Diversity includes age, different abilities, socio-economic level, education, ethnicity, language, family, gender, marital/relationship status, race, religion, work experience, geographic size and location, and sexual orientation.

The Foundation has compiled a Diversity Profile of British Columbia. It includes demographic information for British Columbia to show the population diversity within each geographic region. The Diversity Profile is available for downloading from the Foundation's website, www.lawfoundationbc.org.

Question 10: If applicable, outline your plan to promote the program and distribute program materials produced.

Things to consider:

a) what type of outreach activities you will carry out;
b) who will be in charge of promotion/distribution;
c) who you intend to reach with the program/materials;
d) how will you let your audience know about the program/materials;
e) how will you get the materials to your audience; and
f) what, if anything, will you charge for the materials, and what will you do with any revenues generated from such sales?

ORGANIZATION CAPACITY

Question 11: Briefly describe the skills and qualifications you believe your organization has that will enable you to carry out this program.

Include information about your organization and about specific individuals who will be working on the program. Explain why your organization is the most appropriate group in your community to undertake this program.

Question 12: Describe the staff for this program, listing the primary responsibilities and qualifications of each person.

What staff will be employed to carry out this program? List the primary responsibilities and qualifications of each person. Outline your plan to supervise and regularly evaluate each program staff.

Question 13: Describe the professional development activities that are planned for each staff person working on this program.

List professional development activities that your organization will carry out internally, in addition to any courses program staff will take.

Question 14: If applicable, list the number of volunteers involved in this program. Describe what the volunteers do, and what their qualifications are. Describe how your organization recruits, trains and supervises these volunteers.

Question 15: If applicable, describe the legal supervision arrangements for this program, and tell us the name of the lawyer who will provide the supervision.

Describe how you will assure the quality of the legal work done by the program. If your program will use staff or volunteers who are not lawyers to prepare or deliver legal information and assistance, outline your plan for a lawyer to supervise their work to

ensure its legal accuracy. If you have any questions, please contact the Law Foundation staff regarding legal supervision requirements.

Question 16: List the organizations in your community that provide similar services and/or similar resources to those proposed in this program.

Describe how your organization plans to coordinate the delivery of this program with these organizations. If applicable, describe what other resource materials exist on the same topic.

FINANCIAL INFORMATION

The Law Foundation board has established a policy on administrative costs. Please refer to the Administrative Costs Guidelines (linked in the application) when developing your budget.

Use the **Upload** button to upload the following financial information:

a) Your organization's prior fiscal year budget
b) Your organization's current fiscal year budget
c) Your organization's upcoming fiscal year budget
d) Your program's current fiscal year budget
e) Your program's upcoming fiscal year budget
f)   Your organization's most recent audited financial statements

Please try to separate each year's budgets into different files. Please make sure your budgets include a breakdown of all the main sources of funding for your organization, as well as how Law Foundation funding will be spent.

For organizational budgets, please include

a) main funding sources e.g. bingo/casinos $27,000; United Way $32,000, etc.; and
b) all grants received from the Law Foundation as well as the Continuing Program grant you are requesting this year from the Law Foundation.

For project budgets, please include:

a) At the top of the budget, state the time period to which this budget relates.
b) Round off all line items to the nearest dollar.
c) Itemize all of the program expenses and revenues.
d) Your itemized budget should include three separate columns:

   i.   The first column should estimate your current year's actual expenditures and revenues for the program to the end of the current fiscal or grant period.

    ii. The second column sets out your <u>current year's program budget</u> (revenue and for expenses).

    iii. The third column itemizes your <u>proposed program budget</u> (revenue and expenses) for the upcoming year.

e) On a separate page following the itemized budget, provide explanatory notes to support the various expenditures, as necessary.

f) Your explanatory budget notes should explain any significant increases or decreases in income or expenditures from the previous year.

<u>Revenue</u>

a) Under Revenue, list each source of anticipated income. Indicate for each, under "Assured" the amount that is confirmed at the time of application; under "Potential", the amount that has been requested, but not approved, or in the case of fundraising, an anticipated amount. Total both "Assured" and "Potential" funding, and provide the name and telephone number of each funding representative with whom you are dealing.

b) Under "Organization's Contribution", indicate separately income from donations/ fundraising and in-kind donations or volunteer time. Only put a cash value on those in-kind donations for which you can clearly assess a market value.

Example:

Source	Assured	Potential	Total	Contact	Telephone
Law Foundation		5,000	5,000		
Organization's Contribution					
Cash (fundraising)	3,000	1,000	4,000		
In-kind Donation	1,000		1,000		
Volunteer Time: 100 hours					
Ministry of Attorney General	4,000		4,000	M. Green	(604)555-1111
Dept. of Justice		1,000	1,000	L. Chan	(604)555-3333
Casino	3,000	5,000	8,000		
Total:	11,000	12,000	23,000		

<u>Expenses</u>

a) Your personnel expenses should be broken down to indicate: salaries for full-time staff and salaries for part-time staff, indicating positions for which funding is requested; contract payments or honoraria; employer contributions (EI, CPP, etc.).

b) Other expenses to think about include: office rental, utilities, maintenance, insurance, equipment rental or purchase, stationery, photocopying, printing, telephone, postage or courier, travel, advertising, professional fees, audit, training, resource materials, legal supervision fee, etc.

c) If your expenses include travel, your budget notes should explain your agency's travel expense guidelines, e.g. mileage rates; meal allowances, etc.

For audited financial statements, please also upload your organization's most recent audited financial statements, signed by 2 board members. If audited financial statements are not available, please include the most recent unaudited financial statements. Applications without these statements will be considered incomplete.

Question 17: Who will prepare and who will audit the financial reports for this program?
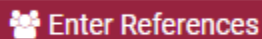
Please indicate the name of the service provider who will perform the audit.

REFERENCES

Enter a list of 7 – 10 individuals (not to include Law Foundation Governors or staff) who are familiar with your organization and its programs.

These individuals should be able to verify the need for your program and its impact on your target groups. Please ensure these individuals know that the Law Foundation may contact them as references for your program. List the name, telephone number, e-mail address and/or fax number, address, and organization (if applicable).

Please do not attach or send letters of support.

ADDITIONAL INFORMATION

Question 18: Please provide any additional information you wish to be considered as part of this application.

This section allows you to include information that you feel is important to your application that is not already included in another section. You may also include additional documents using the upload button.

CERTIFICATION

Please enter the date when your board of directors or governing body approved the submission of the application.

Please enter the name, position, and date submitted, before submitting your application.

Please note that submitting an application is not a guarantee of funding.

SUBMITTING THE APPLICATION

Once you have completed all sections of the application form, click on the **Submit** button

✔ Submit

Important: <u>Please ensure that your application is complete before submitting it</u>. Once it is submitted, you will not be able to change any of the content or add any additional information without first contacting your Law Foundation program director.

Once your application is submitted, the system will send a PDF copy of your completed application to your registered email address, for your records. A PDF copy of the application will also remain available under the submitted application, within your organization's grant profile.

You should know that if asked, the Law Foundation staff will disclose the name of an organization applying for a grant, the amount requested, and the purpose for which the funds have been requested. In the course of preparing their report on a grant application for Foundation Board members' review, the Law Foundation staff may circulate the application to external reviewers and discuss the merits of the proposed program with individuals in related fields.