

# Financial Inclusion Granting Program Application

## APPLICANT INFORMATION

Title	First Name	Last Name	
Position		Preferred Contact Email	Phone

## ORGANIZATION INFORMATION

Organization Legal Name		Address	
City	Province	Postal Code	Phone
Organization Email		Organization Website	
Organization Social Media Handles:			
Facebook	Instagram	LinkedIn	X

Other (please specify)

Is the organization currently a member of Alterna Savings?      Yes      No

Is the individual filling out this application currently a member of Alterna Savings or a client of Alterna Bank?      Yes      No

Which of the following best describes the applicant organization's legal structure?

Registered Charity CRA #

Incorporated Nonprofit

Co-operative without Share Capital

Unincorporated Association

**ABOUT YOUR ORGANIZATION**

Describe what the organization does. Highlight the organization's vision/mission/goals. (200 words maximum)

What is the organization's annual operating budget?

What is your organization's impact region?

When was the organization founded?

How many individuals does the organization employ (FTE)?

How many volunteers support the organization?

Do you prepare audited financial statements?      Yes      No

**DETAILS OF GRANT REQUEST**

Project/Program Name

Start Date	End Date	Amount Requested	Program/Project Budget
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Total Program/Project Budget	Proposed Program/Project Impact Region
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Detail any other significant funders of the organization/program/project which the grant request will support.

Describe your grant request and proposed Program/Project support. Highlight the community need and intended beneficiaries, including number of intended beneficiaries. (500 words maximum)

How does this proposed Program/Project align with the Financial Inclusion Granting Program criteria as outlined on Alterna's website? (200 words maximum)

Describe the financial education objective for the proposed Program/Project. (200 words maximum)

What opportunities exist for Alterna Savings' employees to volunteer with your organization and support your proposed Program/Project? (100 words maximum)

Outline how/if your organization's proposed Program/Project could run if the organization did not receive the full requested funding amount. (100 words maximum)

Any additional information for Financial Inclusion Granting Program Committee consideration. (100 words maximum)

## SUBMISSION PROCESS

### Step One: Financial Inclusion Granting Program Application

Applicant organizations must submit the following information before the indicated deadline to: [community.grants@alterna.ca](mailto:community.grants@alterna.ca).

A complete application submission, depending on the organization's legal structure, will include:

#### 1. Completed Application Form

#### 2. Proof of Entity

- A copy of the organization's Articles of Incorporation or Letters Patent

*Note: Certificate of Incorporation is not considered comprehensive as Proof of Entity*

- **Letter of Support (unincorporated associations only)**

- A Letter of Support from an incorporated organization is required, along with the submission of the sponsor organization's Proof of Entity and any additional subsequent documentation.

*Note: If selected as a recipient of the Community Granting Program, the cheque will be issued to the sponsoring incorporated organization. Alterna will only issue cheques to incorporated groups.*

#### 3. Proof of Charitable Status (if applicable)

- CRA number
- Notification of Registration Letter and Annual Information Returns (T3010) as proof of charitable status (requested).

*Note: Proof of Entity is not considered Proof of Charitable Status.*

Members and non-members of Alterna are required to submit the necessary documentation as outlined above depending on the applicant organization's legal structure. A **Letter of Recommendation** can be submitted and will be reviewed with the application as an optional addition to your submission.

Organizations that do not submit the required documentation or have incomplete applications will not be considered for funding through the Financial Inclusion Granting Program.

Funds must be used by the organization that is applying for the granting stream. For unincorporated associations, cheque will be issued to sponsoring incorporated organization.

### Step Two: Request for Proposal

Once submitted to [community.grants@alterna.ca](mailto:community.grants@alterna.ca), your application and subsequent documentation will be reviewed by Alterna Savings' Community Impact Department. Applications will be evaluated on several criteria including but not

limited to timeline of the initiative, alignment with the Financial Inclusion Granting Program criteria, and measurable results. The Community Impact team will invite a selection of organizations to submit full Proposals for Financial Inclusion Granting Program Committee consideration.

### Step Three: Proposal Submission

Alterna Savings will only consider Proposals from organizations that have been selected to submit a full Proposal based on their previously submitted Financial Inclusion Granting Program Application.

In addition to expanding on the content requested within the application form, organizations will be asked to elaborate on the following topics in their Proposal:

- Detailed budget for your proposed Program/Project.
- Opportunities for Alterna Savings to be represented, collaborate, or have Alterna employees participate through your proposed Program/Project.
- Opportunities for program replication and/or impact to additional regions.
- Partnership opportunities with Alterna Savings that would allow for relationship fostering and program longevity.
- Any additional information for the benefit of the Financial Inclusion Granting Program Committee, including supporting information/documentation relevant to the submission.

Please note that the Financial Inclusion Granting Program Committee will review the Application Form and the Proposal Submission. It is strongly recommended to elaborate on the questions within the Application Form and the submission points noted above when compiling the organization's Proposal. We ask that Proposals do not exceed 3-pages in length.

Submit your completed Proposal in PDF format before the deadline to [community.grants@alterna.ca](mailto:community.grants@alterna.ca).

### Step Four: Proposal Review

Once submitted to [community.grants@alterna.ca](mailto:community.grants@alterna.ca), your application, Proposal, and any supporting documentation will be reviewed by Alterna Savings' Financial Inclusion Granting Program Committee. Proposals will be evaluated on several criteria including but not limited to potential for replication or scale of the initiative, the proposed Program/Project impact, and measurable results.

### Step Five: Approval

Alterna will inform all applicants of their submission status before recipient announcements. Successful applicants will be announced during Financial Literacy Month in November on all Alterna platforms. Funds must be used by the organization that is applying for the granting stream.

