

Instructions for CSP Returning Applicants

Instructions

Welcome! You are in the CSP form for returning applicants with currently funded programs. You will use this form to:

- update the contact information for the organization and the primary and secondary contacts,
- update key information about your organization and program in areas needed for us to prepare your summary sheet,
- request that your funding continue at the current level (flatline request), or
- request an increase for your program to maintain or increase service levels.

If you want to apply for funding for a new program not currently funded by CSP, you will need to complete a full program request. Use the form "CSP 2012 New Program Funding Request" for any new programs. Instructions on how to access the form can be downloaded from the upper left corner of the screen.

Navigate the form

Click on the menu bar items on the left side of the page to reach different sections (pages) of the form you want to work on.

Click on "Summary" to see a list of the form sections, and your progress. You can reach the sections you want to work on from this list, or from the left menu bar.

Instructions for each section are included at the beginning of the section, or near the question they relate to.

Save information

Press "Save" at the bottom of every page to save your information before you move on to the next page.

You can fill in part of the questions on a page and save the information that you have entered. You can come back later to the same page to make changes and/or to continue your work.

Please always press the "save" button at the bottom of the page to save your information before you go away from the electronic form to attend to other business issues in your office such as picking up a phone call. The online screen will expire after being left idle for a while (approximately 10 minutes). Any unsaved information will be lost while the screen expires.

If you have any problem in saving your information, please read the "Saving Problem - Quick Solution" which can be downloaded from the top-left corner of your screen.

Budget information

Budget information will be collected as up-loaded Excel files. You can find instructions for completing the budget information forms in the Excel files.

Download the budget Excel spreadsheet for returning programs (and budget Excel spreadsheet for core administration if needed) from the top of the menu bar on the left side of the screen and save it on your computer. Fill in your information and save them. Then upload the file(s) from your hard drive to the Attachments page.

Required documents

Please read the CSP checklist which can be downloaded from the upper left corner of the screen (or at www.toronto.ca/grants/csp/index.htm). The checklist includes all the documents that you need to provide to make your application complete.

You can provide the required documents as on-line attachments. If the required document needs signatures, please provide the document with signature images included when you provide it as an on-line attachment. Please read the instructions on the CSP checklist for details.

Attachments

You will submit your program budget (and core administration budget if needed) by uploading the budget Excel file(s) to this section.

This section is also the place where you can upload and submit the required documents. For a complete list of the required documents and how to provide them, please read the CSP checklist which can be downloaded from the upper-left corner of the screen (or at www.toronto.ca/grants/csp/index.htm).

(Note: in this section, when you open the Attachments page, you will see a column with the title "Required". If it says "Yes" in this column to a document, it is mandatory for you to upload the document as an electronic attachment. If it says "No", you still need to provide it if it is listed as a required document on the CSP checklist. You either upload it or mail or hand deliver it.)

Templates and instruction documents

The top of the menu bar on the left side of the screen is the place where you can download the templates and instruction documents such as:

- Budget Template (Excel)
- Organization Authorization Template (Word)
- How to Access Electronic Forms (Instructions)
- Checklist (Instructions)

The templates are provided for you to download and use. You cannot fill out the Word or Excel template online. To use the templates, you need to

1. Download and save the template to your own computer,
2. Fill the template out on your own computer and save,
3. After you complete the template file, you will upload it to the attachment page (If the document requires signature images, please refer to the CSP checklist for instructions).
4. After you upload the Word/Excel file, you can open it from the "Attachments" page and view it online. Please don't edit it. Any edits you make online to the uploaded Word/Excel file won't be saved.
5. If you want to make changes after you upload the file, you need to delete the uploaded file from the "Attachments" page. Make changes to the file which you saved on your hard drive and re-upload the edited file.

Export to PDF and print

At any time, you can extract the contents of this electronic form into a PDF file and save it to your own computer. It gives you a copy of the information you saved online for printing and review.

The PDF file is read only. You still need to fill out the electronic form online, make changes online, and submit your form online.

To export to PDF, please use the "Export to PDF" link on the menu bar. You can select the pages which you would like to export.

If you do not have the PDF viewer, select "Get PDF Viewer" on the left menu bar and install this free software on your computer.

Submit your application

Each part of the form will tell you if there is still mandatory information to fill in. Look for the red message at the bottom of the page.

When you have filled out all the mandatory fields, the "Submit" button will show on the "Summary" page. When you are satisfied that your information is complete, press the "Submit" button.

Make sure you are satisfied with your information before you "Submit". Information can only be changed by the funder after this time, not by the applicant organization.

Please submit your application before the deadline. Late applications or those submitted substantially incomplete will not be considered for funding.

Organization Name

Organization Legal Name: Text is brought forward

Organization Legal Name Used in 2011:

Street number and street name: Text is brought forward

For example: 100 Queen street west

Suite/Room/Floor/Unit/P.O.Box etc.: Text is brought forward

For example: 15th floor East Tower

City: Text is brought forward

Province: ON

Postal Code: M1M 0N0

Organization Ward: Ward 1 Etobicoke North

Phone: (000) 000-0000

Phone extension: 0

Fax: (000) 000-0000

E-mail: email@brought.forward

First date of service: 11/01/2009

Date of incorporation: 11/01/2009

Incorporation #: Text is brought forward

Revenue Canada Business Registration #: Text is brought forward

The organization has a fiscal year from:

Organization Summary:

This is the organization summary presented in your most recent year's CSP summary sheet.
Please correct any errors/omissions.

Text is brought forward

Contact List

This information will be used to contact you for conducting organizational business.

Last Name	First Name	Contact Type	Address	Post Code	Phone
Text is brou...	Text is brou...	Primary...	--	M1M 0N0	(000) 000-0000

Service Locations

Location Name	Location Address	Postal Code	Location Phone
Text is brought f...	Text is brought f...	M1M 0N0	(000) 000-0000

Financial summary

Organization Financial Summary

Please enter the following budget information for your organization. For definitions and instructions please refer to the budget Excel spreadsheet for organization which can be downloaded from the upper left corner of the screen (or at www.toronto.ca/grants/csp/index.htm).

	Audited Year	Current Year	Budgeted Year
Total Organization Income	\$0.00	\$0.00	
Total Organization Expenditures	\$0.00	\$0.00	
Operating Surplus/Deficit	\$0.00	\$0.00	
Unrestricted Reserves	\$0.00	--	--
Reserve Month	0.00	--	--

Anticipated Sources of Funding:

Unrestricted Reserves

Definitions

Unrestricted reserves are those funds that have not been restricted by an external donor and whose use is therefore at the discretion of the Board of Directors of the organization, or one of its affiliated organizations (such as a trust fund, property corporation or foundation).

These may be called a "fund", a "reserve" or a "surplus", or by another name in your audited financial statement. For each reserve, please indicate whether there is a Board Policy governing the use of the reserve.

In-kind support is any gift other than money, such as space, supplies or services.

Use the table below to provide details of unrestricted reserves identified in your most recent audited financial statement

Name of Unrestricted Reserve	Balance, End of Audited Year	Balance, End of Current Year	Board Policy Yes / No
Text is brought forward	\$0.00	\$0.00	
TOTAL UNRESTRICTED RESERVES	\$0.00	\$0.00	N/A

List the in-kind support that your organization received in the past year, using the chart below

Type of support	Source	Estimated value
Example: space for workshops	Example: Community organization	Example: \$2,000.00
Text is brought forward	Text is brought forward	\$0.00
Total	--	\$0.00

Organization Service Summary

	Audited Year	Current Year	Budgeted Year
Total Client Contacts	0	0	
Total Individual Served	0	0	
Total Participants	0	0	
Total Volunteer Resources	0	0	
Number of FTE	0.00	0.00	

Governance

Voting members Definitions

Voting members of your organization are defined in your by-laws.

Governance

Governance	Audited Year	Current Year	Budgeted Year
Number of Board members who are currently service users	0	0	
Number of voting members in the organization (membership)	0	0	
Maximum number of Directors as stated in by-laws	0	0	

A variance is an increase or a decrease from one year to the next. Please explain any variances of 20% or more between years:

Give the date of your last Annual General Meeting (AGM).

How many voting members were at the last AGM?

Please list your current Board members on the list below.

As part of the eligibility criteria for City of Toronto Grants, organizations must be based in the City of Toronto. One indicator is that 50% or more of Board members reside in the City of Toronto.

The personal information on this form is collected under the authority of the Section 83 of the City of Toronto Act, 2006 (S.O. 2006, c.11). The information is used to verify residence. Questions about this collection can be directed to Policy and Research Consultant, Community Partnership and Investment Program, 15th Floor, East Tower, 100 Queen Street West, Toronto ON, M5H 2N2. Telephone: 416-392-0104.

Board Member's First Name	Board Member's Last Name	Home Address Postal Code	Position On the Board	Years on the Board
Text is brou...	Text is brou...	M1M 0N0	Text is brought f...	--

CSP Program List

CSP Funded Programs

This page shows a list of currently funded CSP programs for your organization. Please do NOT DELETE any of these programs.

Currently funded programs: Click on the magnifier icon next to the program name to open the form to request 2012 funding for these programs. Use this form to request a flatline grant (same amount as last year) or increased funding. The form will bring forward essential information about your program from last year. If required, you can edit this information before you submit the form.

Changes in currently funded programs: If you do not plan to request funding for one of your current programs, please put "0" in the field "CSP budgeted year request". If you want to transfer funds, or if you have merged programs or re-structured a program into new programs, please talk with your Agency Review Officer to determine the best way to present the changes in the forms.

New Program requests: Do not use this form for new program requests. Use the "CSP 2012 New Program Funding Request" form for all new program requests. Instructions on how to access the form can be downloaded from the upper left corner of the screen.

Program name	Request type	Approved	Request	Category (only for increase)
Text is brought f...	--	--	--	--

CSP Flatline Or Increase Request Details

Read this first:

Currently funded programs: Use this form to request a flatline grant (same amount as last year) or increased funding.

Changes in currently funded programs: If you want to transfer funds, or if you have merged programs or re-structured a program into new programs, please talk with your Agency Review Officer to determine the best way to present the changes in the forms.

New program requests: If you would like to apply for a new program which is not currently funded by CSP, please fill out a "CSP 2012 New Program Funding Request" form for each of the new program(s) by following the instructions which can be downloaded from the upper left corner of the screen. New program requests cannot be submitted on the CSP Flatline or Increased request form.

Instructions for program name:

"Program summary sheet name" is the name of the program used in your most recent CSP summary sheet when the funding was approved.

If the name you use for this program is different, please provide it in the field "program name". Otherwise, please leave the "program name" the same as the "program summary sheet name".

Program summary sheet name:

Program Name: Text is brought forward

Instructions for request type:

If you are requesting the same amount as last year, please select "flatline".

If you are requesting a funding increase, please select "increase".

Please select "flatline redistribution" if the overall organization amount will not change and the program amount is different than last year due to a merger, request to move funding to/from another program, or program re-organization.

Request type:

CSP current year approved:

CSP budgeted year request:

If you are applying for an increase, the CSP budgeted year request should be the total requested amount (flatline amount plus increased amount = total request). If you are applying for a redistribution of funding between two or more CSP funded programs, the CSP budgeted year request should be the actual requested amount for this program (flatline amount, plus or minus the redistributed amount).

Program Overview

Program description:

This is the program description presented in your most recent year's CSP summary sheet for this program. Please correct any errors/omissions.

Text is brought forward

List your service location(s) for this program.

Please select your program service location(s) from the drop down list. If the service location you want to select does not appear in the drop down list, please click on the link "Service Locations" in the left hand menu bar and add the location to the main organization list. Then you can come back to this form and select the new location from the drop down list.

Service Location Name

Your program serves:

If this program does not provide City-wide services, please specify the ward(s) this program serves.

Program Categorization

This information will help demonstrate the impact of CSP funded programs in the community. Please select the program category that best describes this program's activities.

Program Category

Community Development (CD): In the context of the Community Service Partnerships program, "community development" refers to a program that works with vulnerable communities and neighbourhood stakeholders in a participatory and inclusive way, identifies needs and opportunities, plans, organises and takes action, and evaluates the effectiveness of action.

Community Supports (CS): In the context of the Community Service Partnerships program, "community supports" refers to a program that works with vulnerable communities and neighbourhoods to meet their needs for information, inclusion, resources, social support and personal development. Community Support programs use participatory program models that build inclusion and resilience.

Program category:

Program Model

For Community Support programs, please select the program model which best describes your activities. If you have a variety of activities and models within one program, please select the model that describes the majority of your activities.

If this program is a Community Development program, please select CD.

Program model:

Instructions:

Neighbourhood means that your program primarily serve the local neighbourhood(s). (For example: after-school drop-in program)

City-wide means that your program functions to serve the City of Toronto as a whole. (For example: youth helpline program)

Equity seeking group: All CSP programs are assumed to serve marginalized equity seeking groups. How do you describe the marginalized equity seeking group your program works with? Please select the equity seeking group which best reflect your program activities.

Geographic category:

Equity seeking group:

Equity seeking group specify: Text is brought forward

Program Statistical Summary

Program Statistical Summary Definitions

Client contacts means all the separate times your services are used. Each time a person uses a service, count this service use as one client contact. Each enquiry or referral should also be counted as one client contact.

Individuals served means the separate individual people who use your services. Even if someone participates in more than one program activity, count that person only once.

Participants means the number of people that attend your events, public meetings, conferences, workshops, or that receive publications, etc.

Volunteers are unpaid people who work in this program, give administrative support, and help with special events in this program.

Full-Time Equivalent (FTEs): To calculate FTEs, add up the hours of your paid staff for this program and divide by the number of hours in your work week. Example: one person working full time and three people working half time for a 35 hours work week is calculated as follows, $87.5 / 35 = 2.5$ FTE. For seasonal staff, divide the number of full-time work weeks by the number of weeks in the year. Example: seven full-time staff for a ten week leadership program is calculated as follows, $70 / 52 = 1.3$ FTE.

Variance is an increase or a decrease from one year to the next.

All programs should fill out the question on Client Contacts.

Client contacts

Client contacts	Audited Year	Current Year	Budgeted Year
Total client contacts for program activities	0	0	

Complete the question on Individuals Served if your organization provides direct services (you provide one-on-one or group services to identifiable clients).

Individuals served

Please use the age definitions given below. For example, if you have a program for seniors that is open to people 60 and up, count only those who are 65 or older as seniors. Count the remainder as adults.

Individuals served	Audited Year	Current Year	Budgeted Year
Pre-school children served (0 - 4)	0	0	
School children served (5-14)	0	0	
Young Youth served (15-19)	0	0	
Older youth served (20-24)	0	0	
Adults served (25-64)	0	0	
Seniors served (65+)	0	0	
Total individuals served	0	0	0
% total individuals served who live in Toronto	0%	0%	

Complete the question on Participants if your program provides planning, community development, or public education activities.

Participants

Participants	Audited Year	Current Year	Budgeted Year
Public Events/Meetings	0	0	
Workshops	0	0	
Conferences	0	0	
Publications (Number of recipients)	0	0	
Other (please specify below)	--	--	--
Text is brought forward	0	0	
Text is brought forward	0	0	
Total number of participants for all activities	0	0	0

Volunteer resources

Service volunteers	Audited Year	Current Year	Budgeted Year
Number of volunteers in this program	0	0	

Staff

Staff	Audited Year	Current Year	Budgeted Year
Number of paid staff	0.00	0.00	
Number of Full-Time Equivalents (FTEs)	0.00	0.00	

Please explain any variances of 20% or more between years for client contacts, individuals served, participants, volunteer resources or staff:

The program will target the following priority communities:

Target priority communities	Select	Specify
Aboriginal		Text is brought forward
Disability		Text is brought forward
Ethno-racial Community		Text is brought forward
Ethno-racial Seniors		Text is brought forward
LGBT		Text is brought forward
Youth		Text is brought forward
Other		Text is brought forward

The program will target an under-resourced No geographic community:

The program target an under-resourced geographic community specify:

Text is brought forward

If you have any other important information about this program, please provide it.

(For example: If the issue this program addresses changes or if the program model changes, please describe. If you have requested flatline redistribution amount, please describe the change.)

Text is brought forward

Program Budget Summary

Please enter the following budget information for this program. For definitions and instructions please refer to the budget Excel spreadsheet for returning programs which can be downloaded from the upper left corner of the screen (or at www.toronto.ca/grants/csp/index.htm).

Information on the CSP funding in the last line is "read only". The CSP approved amounts for audited year and current year are provided. The CSP request amount shows the funding request you entered at the top of this page.

Complete budget information should be provided on the Excel spread sheet and uploaded onto the "Attachments" page.

	Audited Year	Current Year	Budgeted Year
Program income	\$0.00	\$0.00	
Program expenditures	\$0.00	\$0.00	
Operating surplus / deficit	\$0.00	\$0.00	
CSP funding (Approved/Request)			
	(Approved)	(Approved)	(Request)

Please answer the following questions if you are requesting an increase

The funding increase is:

(please select one that applies best.)

How will the additional funds be used? How will the additional funds improve the effectiveness of the program?

(be specific e.g. for rent, staff salaries, etc.).

How did your organization work with others in the community (organizations, residents, etc) to determine the local needs and program priorities?

How did your organization determine that this program was a priority for a funding increase request?

What in-kind support is available for this program for the budgeted year?

Type of Support	Source	Estimated Value
Example: space for workshops	Example: community organization	Example: \$2,000.00

Applicant: Sample_Applicant_Name
Project: Sample_Program_Office_Project_Name

Sample_Applicant_Number
Sample_Project_Number

Type of Support	Source	Estimated Value
Total	--	

Core Administration

Instructions for request type:

If you are requesting the same amount as last year, please select "flatline".

If you are requesting a funding increase, please select "increase".

If you are requesting funding for core administration which is not currently funded, please select "new".

If the core administration is not currently funded and you are not requesting funding for the core administration for the budgeted year, please select "N/A" and put "0" in the "CSP core administration budgeted year request" field.

Please select "flatline redistribution" if the overall organization amount will not change and the core administration amount is different than what was funded last year due to a merger request, to move funding to/from another program, or program re-organization.

Request type:

CSP core administration current year approved:

CSP core administration budgeted year request:

If you are applying for an increase, the CSP budgeted year request should be the total requested amount (flatline amount plus increased amount = total request). If you are applying for a redistribution of funding between two or more CSP funded programs, the CSP budgeted year request should be the actual requested amount for this program (flatline amount, plus or minus the redistributed amount).

Instructions for Filling out the Core Administration request

Complete this form only if your organization is requesting CSP funds for core administrative costs. Applicants can apply for up to \$75,000 or 25% of the total grant amount (whichever is larger) for core administration costs.

Organizations must clearly demonstrate the need for this type of support. The review of these requests will include an assessment of other sources of core administration funds, and the existence of organizational and community infrastructure serving the target community.

- Requests for support for core administration will be considered an equal priority along with program funding requests in the allocation of new or available grant dollars;
- Requests to transfer funds from a CSP-funded program to a CSP-funded administration budget will be eligible.

Core Administration Expenses

Requests are assessed to determine if resources are used effectively and efficiently to meet the CSP goal of building organizational capacity, and if CSP funds will significantly contribute to the effectiveness of achieving this goal.

What administrative functions will the CSP core administration funding be used for?

(For example, recording keeping, book keeping, volunteer development, cost of Annual Financial Audit?)

Text is brought forward

What are the administration priorities of your organization for the next 3 years? How do your priorities improve organization capacity building in governance, membership and volunteer development? How does the CSP core administration funding contribute to meeting these priorities?

Text is brought forward

What other resources and activities will help you address these priorities?

Text is brought forward

Core Administration Budget Summary

Please enter the following budget information for this program. For definitions and instructions please refer to the budget Excel spreadsheet for core administration which can be downloaded from the up-left coner of the screen (or at www.toronto.ca/grants/csp/index.htm).

Information on the CSP funding in the last line is "read only". The CSP request amount shows the funding request you entered at the top of this page. If you received core administration funding, the CSP approved amounts for audited year and current year are provided.

Complete budget information should be provided on the Excel spread sheet and uploaded onto the "Attachments" page.

	Audited Year	Current Year	Budgeted Year
Core administration income	\$0.00	\$0.00	
Core administration expenditures	\$0.00	\$0.00	
Operating surplus / deficit	\$0.00	\$0.00	
CSP funding (Approved / Request)			
	(Approved)	(Approved)	(Request)

Required Documents - Attachments

Document Type	Required?	Document Description	Date Attached
On-line attachment - Core administration budget	No		
On-line attachment - Organization budget	Yes		

On-line attachment - Program budget	Yes		
Optional document - Anti-racism policy	No		
Optional document - Anti-racism supporting documents	No		
Optional document - Constitution (by-laws)	No		
Optional document - Letters Patent	No		
Optional document - Organizational Chart	No		
Optional document - Reserve policy	No		
Other document 1	No		
Other document 2	No		
Other document 3	No		
Required document - Audited Financial Statement	No		
Required document - Declaration of a Non-Discrimination Policy	No		
Required document - Organization Approval	No		

Attachment Details

Document Description:

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Required Documents-Mail / Hand Delivery

Mail or Hand Deliver the Required Documents

To make your application complete, you need to provide the following required documents either by uploading the electronic files to the Attachments page or by mailing or hand delivering them to us.

- A signed copy of Organization Authorization (Application Approval)
- A signed copy of the 2012 City of Toronto Declaration of Non-Discrimination Form
- Your most recent audited financial statement signed by the auditor and two Board members
- A management letter from your auditor, if you received one, and your organization's response.

Please indicate below the required document(s) that you will mail or hand deliver to us

If you have attached all the required documents to the Attachments page, please select "All required documents are attached".

Mail or Hand Delivery Address

CSP 2012 Application-Community Funding Programs
15th Floor, East Tower, City Hall
100 Queen Street West
Toronto, ON M5H 2N2

Mail or Hand Deliver the Optional Documents

Please select the documents you will mail or hand deliver because they have changed since your last submission.

- If there are no changes to these documents since your last submission, please select "No changes to the above documents".
- If you have attached the updated document(s) to the Attachments page, please select "Electronic documents attached".

CSP summary

Part	Last Updated
Organization Name	Please Complete
Contact List	Please Complete
Service Locations	11/17/2011
Financial summary	Please Complete
Governance	Please Complete
CSP Program List	Please Complete
Core Administration	Please Complete
Required Documents - Attachments	Please Complete
Required Documents-Mail / Hand Delivery	Please Complete
CSP summary	No Input Required

Notes:
Contact List list contains 1 incomplete item.
Governance list contains 1 incomplete item.
CSP Program List list contains 1 incomplete item.