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OPERATING GRANT APPLICATION FORM

Name, Mailing Address, Telephone, Fax, and Email Address

Incorporation Date _____ Charitable Reg # _____

Under which objective of the Foundation does your program fall? I II III IV

Short description of the program

Application Period _____ to _____.

Grant Request \$_____

Total Budget \$_____

The following conditions of the grant are understood and accepted:

1. All grants are made subject to the availability of funds.
2. Program expenditures will be segregated in the organization's accounts.
3. Any unexpended grant funds must be returned to the Foundation.
4. All material produced on grant funds must be made available to the public.

Application Authorized By:

Name:

Position:

Signature

Contact Person:

Position:

Telephone:

Date:

BUDGET SUMMARY

	Projected Actual	Current Budget	Proposed Budget	Variance \$ and %
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Salaries				
Benefits				

Sub-totals _____ _____ _____ ___/___

Contracts				
Honoraria				

Sub-totals _____ _____ _____ ___/___

Premises				
Equipment				
Insurance				
Other				

Sub-totals _____ _____ _____ ___/___

Supplies				
Printing				
Telephone				
Postage				
Advertising				
Travel				
Board Exp				
Staff Dev				
Prof Fees				
Other				

Sub-totals _____ _____ _____ ___/___

TOTALS _____ _____ _____ ___/___

BUDGET ANALYSIS

Column 1 requires that actual expenditures be projected to year-end, Column 2 refers to the current budget for the program, and Column 3 refers to the proposed budget. The variance analysis in Column 4 is based on a budget to budget comparison.

On a separate page titled Budget Analysis, provide additional details as requested below. Be sure to explain the reasons for significant year to year variances.

Salaries and Benefits

Salaries List all full and part-time staff positions.

Benefits Explain the benefits package provided to staff.

Contracts/Honoraria

Provide the details of contracts, honoraria, or similar payments.

Premises Costs

Premises Specify all costs such as rent, operating, utilities, maintenance, parking, etc.

Equipment This category includes purchase, rental, maintenance, etc.

Insurance This refers to insurance carried on premises, equipment, etc.

Other Specify any other premises related costs.

Program Costs

Supplies This refers to office supplies and program delivery supplies.

Printing Include all printing and photocopying costs.

Telephone Refers to basic service costs and long distance charges for telephone, fax, internet connections, email, etc.

Postage Includes postage and courier.

Advertising Refers to program related advertising.

Travel Explain the nature of and reasons for all travel costs.

Board Exp Includes travel, accommodation, meetings, and honoraria.

Staff Dev Refers to the costs of seminars, workshops, conferences, and courses.

Prof Fees Includes audit fees, professional association fees, legal disbursements, etc.

Other Specify other program related costs and give the rationale for any administration allocation.

PROGRAM BUDGET

The Alberta Law Foundation requires that organizations include a program budget in addition to the line item budget on the application form.

Revenue, direct costs, and attributable indirect costs are allocated to specific programs. It is recommended that the administration costs and the fundraising costs of the organization be separately identified.

The key factor in determining whether a particular cost is direct or indirect is traceability. If a cost can be positively linked to a program, then it is traceable and becomes part of the direct cost for the program. Indirect costs are attributable to several programs and an equitable share is allocated to each program on some reasonable basis. The full cost of the program is the total of the direct costs traced to it and the indirect costs allocated to it.

Be clear as to the rationale for the allocation of indirect costs (sometimes referred to as “administration” or “overhead”). Are these allocated costs incremental or would this portion of the grant contribute to existing costs in your organization's budget?

It is expected that the program budget will identify the portions of the Foundation's grant which will be allocated to each of the programs (including administration). In this way, the Foundation will be able to determine how its funds are being utilized to further the objectives of the organization. This will also enable the organization to make evaluative statements about the program output resulting from Foundation funding. In addition, the organization will be able to determine whether any of its surplus funds at year end are properly due to the Foundation.

GENERAL FINANCIAL INFORMATION

The Alberta Law Foundation has a policy of funding programs, parts of programs, and projects, not just contributing to a global budget. Your application must include a program budget which clearly indicates the allocation of Foundation funds along with a completed budget form and funding history. A global budget and your most recent audited financial statements will be included as appendices.

If the grant request is for less than the total cost, then be very clear as to the sources of the funds necessary to balance the budget. Describe your overall funding strategy including other potential sources of funds and revenue projections.

It is very important to provide a complete financial picture of your organization. This enables the Foundation to determine its place in your overall funding structure.

Be explicit in your explanation of any funds on hand at year end including identifying the sources and application of any surplus or reserve funds.

Supporting Documents: *Global Budget, Program Budget, Audited Statements, etc.*

FUNDING HISTORY

Fiscal Year					
Total Budgeted Revenue					
ALF Grant(s) Received					
Other Budgeted Funding					
Total Actual Revenue					
Over/Under Revenue Budget					

Notes:

The Directors of the Alberta Law Foundation have requested that organizations provide the above historical information as an addendum to the Foundation's budget summary, budget analysis, and program budget. This will provide the Directors with a picture of the program's recent funding history in order to assess the Foundation's role in the financial health of your organization. If your actual revenue is materially under or over the budgeted revenue, explain the reasons.

This form is inserted just after the program budget in the application materials.

PROGRAM DETAILS

Even though every organization and its programs are different, there are certain general areas that should be addressed. It is not expected that all of the supporting documents will be submitted by every organization (especially if the organization is an annual recipient of operating funds from the Foundation).

Introduction

Briefly describe the purposes and structure of your organization. Give details as to the composition of your Board of Directors and staff.

Provide the background for your proposal and outline the reasons for approaching the Alberta Law Foundation for funding. Explain how your program fits within the Foundation's legislated objectives.

Supporting Documents: Board of Directors, Certificate of Incorporation, Mission Statement and Goals, Annual Report, etc.

Marketplace

Describe the market that this program is intended to serve and give details as to how the program objectives meet the marketplace need. Outline the program's impact (or expected impact) on the target market.

There may be other programs in the community addressing this need. Outline the similarities and differences and explain how your program fits into the picture. Describe any cooperative work between you and the other organizations. Describe community involvement and support for this program.

Supporting Documents: Program Objectives, Letters of Support, etc.

Program

Describe in detail the nature of the proposed program. Provide highlights of the past year's activities and the plans for the coming year. Provide program output data which indicates that the program is addressing community needs and is achieving program objectives. This data should include the definition of terms used, analysis of the data, identification of benefits, etc. In short, how do you evaluate the program's success?

Supporting Documents: Program Statistics, Evaluation Summaries, etc.

Organization

Describe the manner in which your organization utilizes personnel in program delivery and provide information as to their qualifications.

Briefly outline the role played by the Board of Directors in policy and management, program delivery (if applicable), and senior staff performance evaluation.

Planning

Provide information regarding your organization's long range plan, strategic plan, business plan, goals and objectives, etc. Describe the review and update process for these plans.