**

**Community Impact Investments: Proposal Cover Page**

Send your cover page and attachments to [LFrosst@CalgaryFoundation.org](mailto:LFrosst@CalgaryFoundation.org)by email or using an easily accessible file-sharing program such as Dropbox.Save all your files as .PDFs with your organization’s name, a brief title of the attachment and CII – for example, CalgaryFoundation\_CoverPage\_CII.pdf.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. **ORGANIZATION INFORMATION** | | | | | | | | | | |
| Registered organization name | | | |  | | | | | | |
| CRA registration number *(if applicable)* | | | |  | | | | | | |
| First name (primary contact) | | | |  | | Last name | | |  | |
| Title |  | | | | | Phone | | |  | |
| Email |  | | | | | Website | | |  | |
| Mailing address | |  | | | | | | | | |
| City | |  | | Province |  | | | Postal code | |  |
| Organization vision and mission | | | | | | | | | | |
|  | | | | | | | | | | |
| 1. **INVESTMENT INFORMATION** | | | | | | | | | | |
| Desired start date *(mm/dd/yyyy)* | | |  | | Repayment date *(mm/dd/yyyy)* | |  | | | |
| Investment amount | | | $ | | | | | | | |
| Briefly summarize the investment opportunity (include ideal investment terms, financial information and desired community impact). | | | | | | | | | | |
|  | | | | | | | | | | |
| Summarize any risks associated with the investment and your plans to mitigate those risks. | | | | | | | | | | |
|  | | | | | | | | | | |

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| --- | --- | --- | --- |
| 1. **ORGANIZATION’S LEADER *(i.e. CEO, Executive Director or Board Chair)*** | | | |
| Full name |  | | |
| Title |  | | |
| Phone |  | | |
| Email |  | | |
| Signature |  | Date |  |

**Checklist for written proposals**

|  |  |
| --- | --- |
|  | A complete version of the proposal cover page |
|  |  |
|  | The written proposal should provide: |
|  | 1. A brief description of your organization, the cause for which it works and its audience 2. A description of the investment opportunity including cash flow forecast for the term of the loan with clear assumptions, a list of partnerships, a timeline, and plans for risk mitigation 3. An outline of the investment’s community impact and outcomes with a plan for tracking and measuring impact and outcomes |
|  |  |
|  | Audited financial statements for the past five years |
|  |  |
|  | Brief resumes for the members of the organization’s leadership team |
|  |  |
|  | Board of directors list including name, position, length of service and profession |
|  |  |
|  | Organization chart with roles and reporting relationships and that identifies vacancies |
|  |  |
|  | Any additional material applicable to the investment |

Investments will be considered if they:

* Provide measurable community return for Calgary and area by advancing the Calgary Foundation’s mission, vision and priority areas;
* Demonstrate a feasible repayment plan with financial return proportional to risk;
* Demonstrate readiness, good planning, financial accountability, and secure leadership; and
* Have a proven track record of stable unrestricted revenue sources such as individual donations and earnings from programs or services.

**Who to contact with questions about Community Impact Investments:**

Lauren Frosst, Community Investment Associate

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[www.CalgaryFoundation.org](http://www.CalgaryFoundation.org)