

# The Coast Sustainability Trust

## Community Matching Fund

### STAGE 2 – Detailed Project Proposal Guidelines

**Note: Only Applicants that have been invited to proceed from Stage 1 should complete a Stage 2 application. If you have been invited to proceed to Stage 2, either Option A, below, or Option B, starting on Page 3, is an acceptable format for a Stage 2 proposal.**

#### Option A

In preparing your application, please use the following headings, format and sequence to assist you and to ensure that all the relevant issues are addressed in the proposal so the project can be properly analyzed. Please provide sufficient detail to ensure you have a complete proposal.

**Include two copies** of your proposal package. Please also send an electronic copy of as much of the proposal as possible to the CST Trustee at [eric@vansoeren.net](mailto:eric@vansoeren.net)

#### 1. Applicant Information

Please provide information on the names of the applicants, their postal address, telephone, fax, and email address and ensure that the information on the cover sheet of your proposal package is accurate and consistent with the Stage One proposal. This will identify the project clearly, and streamline the screening and evaluation process.

#### 2. Project Objectives

- What are the specific objective(s) of your application? What problem are you trying to resolve, what new opportunity do you wish to exploit or what issue do you wish to address?
- State in simple terms how your proposal will meet the objectives of the Coast Sustainability Trust as outlined in the Community Matching Fund Guidelines.

#### 3. Partnerships and Support

Briefly describe who the partners are in the project, those groups and organizations that support the project and the nature of their support. Attach any relevant letters, Band Council Resolutions, Municipal Council Resolutions or other evidence of support. Ideally, the CST is looking for 3 or more partners in the proposal and broad based support from the community.

#### 4. Business Plan

Present your detailed business or project plan, including:

- **Project Summary** – provide a concise one-page summary of the nature of the project, activities to be undertaken, project team, costs and implementation schedule.

- **Work Plan** – describe in some detail how your project will be implemented. The work plan should outline the various project elements, describe the key activities to be undertaken in each element, and provide timelines for completing each element. (Note: It is important that the work plan display sound methodology and logic) The work plan should identify the number of people to be employed on the project in various elements or phases and the degree of utilization of underutilized local facilities, workers or services.
- **Management Plan** – identify the project leader; define the roles and responsibilities of any partner members; demonstrate that your group has the ability to carry out your operating plan and ensure that your project team members are eligible to receive funding under the CST. If the applicants do not have all the required expertise, show how you plan to acquire that expertise.
- **Financial Plan** – present a detailed budget and show how it relates to the amount you are requesting from the CST. Show how much funding will be provided by the project applicants and from other sources. Clearly identify contributions. For revenue generating proposals, include financial forecasts for at least two years. Note: It is necessary for you to document confirmation of other funding sources, including names, phone numbers of key contacts and letters of support. As well, it is essential that the financial plan contain information as to how the project will be sustained over the longer term.
- **Legal and Environmental Implications** – provide information to demonstrate that the project will comply with all legal and regulatory requirements and if necessary, that an initial environmental evaluation has been prepared.

## 5. Background Studies

Provide details of any technical, feasibility or marketing studies or any pilot projects you have undertaken or researched that you can provide to confirm the merits of your proposal.

## 6. Benefits

How will the project create long term sustainable development and diversification in coastal communities and what benefits will be achieved by the project? For example:

- Increased sales of what, to whom
- Increased harvest, production
- Increased employment, i.e. # of new jobs (full/part time), extended season
- Improved utilization of local workforce and facilities
- Improved product utilization (yields, waste utilization)
- Value-added product (number, increase in value)
- New markets (domestic/export)
- Reduced environmental pollution
- Other (please explain)

**Note:** Applicants are reminded they will be required to keep records and submit reports. As such, you will be held accountable to demonstrate benefits claimed. Further funding will be contingent on your documentation. Your contract will be subject to financial and performance audits.

## 7. Risks

- What are the most likely obstacles to the success of your project? How will you deal with these?
- What is the “market” situation – demand, supply, price, competition, and distribution?
- Who else is affected by your project? Are you creating new benefits or simply transferring products, jobs, and business from others? What competitors will be affected and how?
- Identify any legislative or regulatory issues that may affect your proposal. How do you plan to deal with these?

## 8. Attach the Acknowledgment and Authorization Document

Ensure that the applicant(s) have carefully read and understood the terms and conditions outlined in the acknowledgment and authorization document, and signed the application form confirming their participation in the project.

**Note:** Not all projects will contain all of the elements outlined above. If you deem that one or more of the above items is not applicable to your proposal, please include the heading and simply state “not applicable” with a very brief explanation of why.

## Option B

1. **Title Page** – Project title or name; Proponent; contact person name, address, phone, fax, email; submission date.
2. **Executive Summary** – Stands by itself on the second page. In less than a page, the summary should briefly describe the project, its principal goals and objectives; location; how it addresses the CST criteria; jobs created/maintained; total estimated cost; amount of other funding; amount requested from CST; project start and completion dates.
3. **Table of Contents and List of Appendices** – For larger applications.
4. **Proponent Information** – Identify the nature of the proponent – society, municipal government, band council, or? A list of the key members – directors or elected persons – should be provided. Give official address and incorporation number where appropriate. Describe any personal or organizational experience that is relevant to the success of the project. Append Constitution or other relevant materials.
5. **Project Description** – Briefly describe the project. The goals and objectives as well as how the project addresses the guiding principles, areas of investment and eligibility criteria should be included

here. Describe any background studies undertaken in preparation for the project, i.e. feasibility studies, marketing studies, etc. Append drawings, renderings, etc. where appropriate.

6. **Work Plan** – Describe the tasks or elements of your project in detail. What are the principal milestones? How will each of the tasks be conducted and completed? Who will manage the project and/or its elements? What role do partners play? Include other information that may be specific to your project.
7. **Schedule** – Give the starting and ending dates for each task and for the overall project. For larger more complex projects, a graphic presentation of this information would be helpful. Identify where time specified for an element should be flexible.
8. **Financial Plan** – Give a detailed budget for the project. Sources of funding should be identified, including cash, material contributions, other funding proposals in progress, etc. The application of the funding should be fully detailed. That portion of the funding requested from CST will be given. The nature and rationale of the request will be given. A cash flow estimate should be prepared for project operation. In instances where a project is expected to continue on its own after the completion date, a cash flow projection should be prepared. Append cost estimates from suppliers or sub-contractors. Append most recent financial statement for co-ops and societies.
9. **Legal and Regulatory** – What legal and regulatory requirements apply to your project? How are you addressing them? Are there environmental implications to your project? How are you addressing them? Append permits or letters of understanding where appropriate.
10. **Community Support** – Describe the community support you have for your project. What partnerships have been developed to support the project? What measures have been or will be taken to solicit support? Append letters of support from community groups, government representatives, businesses and individuals. The requirement for letters of support will vary with project scope. However, at least 3 relevant letters of support are usually required.
11. **Benefits** – How many jobs will be created or maintained? Will there be increases in production or sales? Are there spin-off benefits? Other?
12. **Risks** – What are the principal risks to the success of your project? How will you address them?
13. **Signature Page**
14. **Appendices**
15. **Authorization and Acknowledgment Document**

## AUTHORIZATION AND ACKNOWLEDGEMENT DOCUMENT

By submitting this application for funding assistance to The Coast Sustainability Trust the applicant(s) authorized to sign this agreement acknowledge and agree:

1. to work cooperatively and in partnership to meet our contribution obligations, and accept full responsibility for the activities of the group and outcome of the activities
2. acceptance of this application by The Coast Sustainability Trust does not constitute project approval
3. any funds received as a result of this application are solely for the purposes of the project activities approved by the Regional Steering Committee of the Coast Sustainability Trust and the applicant(s) shall abide by the terms and conditions of the Contribution Agreement signed by our group's authorized parties
4. any work undertaken or expense incurred prior to the signing of a formal Contribution Agreement with The Coast Sustainability Trust is not eligible for funding
5. all project costs and expenses are subject to audit
6. The Coast Sustainability Trust is not liable for the actions of any parties to this agreement, individually or collectively, nor is it accountable for the results or recommendations generated by our project activities
7. at the discretion of The Coast Sustainability Trust, the applicant(s) may be required to purchase indemnity insurance.

The information on this form will be used to evaluate applications for funding and, on an aggregate basis, may be used for statistical and program evaluation purposes. All documents, reports and materials submitted to The Coast Sustainability Trust (CST) become the property of the CST and as such will be kept confidential.

Co-Applicants (One Signature per co-applicant):

|                     |              |           |      |
|---------------------|--------------|-----------|------|
| NAME (please print) | ORGANIZATION | SIGNATURE | DATE |
| NAME (please print) | ORGANIZATION | SIGNATURE | DATE |
| NAME (please print) | ORGANIZATION | SIGNATURE | DATE |
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