



Growing communities one idea at a time.

Community Futures - Rural Diversification Initiative (RDI)

RDI Project Funding

**Guidelines and Information for
Alberta Community Futures organizations**

**Prepared by the
Community Futures Network of Alberta
April 2008**

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RDI Funding Guidelines

April 2008

Description of the Rural Diversification Project Funding

The RDI initiative provides funds to Community Futures organizations for economic diversification projects in Alberta.

RDI is targeted at bigger rural diversification projects (minimum \$100,000) with clear measurable economic outcomes and strong private sector support. RDI is not a grant to business. RDI projects should provide benefits to communities and/or industries, rather than individual businesses.

The total amount available for project funding is \$3.48 million over 3 years from April 1, 2008 to March 31, 2011. Total costs for each RDI project will be at least \$100,000. RDI funding will cover a maximum of 60% of eligible project costs. This initiative is funded through Western Economic Diversification Canada and is administered by Community Futures Alberta.

Definitions

What is a project?

Project: a project is made up of incremental activities, outcomes, and benefits with a clear start date and end date. A project may be a brand new initiative or it may be a value-added endeavor that is part of an existing initiative. A project is distinct and different from on-going operational activities.

What is rural diversification?

Rural Diversification: an increase in economic activity through the introduction of a new industry or the expansion of an existing industry through new products, new markets, or new processes. Rural diversification is assisted by innovation, human capital, and cluster development.

Innovation: happens at the level of the business firm and refers to both product/service innovation (new products or services) and process innovation (efficiency or productivity enhancements like adopting new technology, computerization, using new materials, introducing lean manufacturing, etc). RDI can be used to assist industries to become more innovative.

Human Capital: Human capital is the knowledge, skills, talents and abilities that enable people to earn a living. Increased human capital is linked to increased rural diversification. Developing human capital is not a specific target of RDI, but it could form part of an RDI project.

Cluster Development: A cluster is a geographic grouping of linked companies. Effective clusters need: good input conditions, supporting industries (like venture capitalists, market research companies, and R&D companies), demand, and rivalry. RDI can be used to facilitate cluster development.

What is a project partner?

RDI Project Partner: An organization or company that provides in-kind or cash contributions to a project funded through RDI. There are 3 types of project partners: public sector, not-for-profit, and private sector.

Public Sector Partner: a department or level of federal, provincial, or municipal government that provides in-kind or cash contributions

Not-for-Profit Partner: includes non-profits, Community Futures organizations, Alberta Women Entrepreneurs, The Business Link, the Conseil de développement économique de l'Alberta, Alberta's Rural Development Fund, other economic development organizations, or educational institutions that provide in-kind or cash contributions to RDI projects. RDI projects should include the members of the Western Canada Business Services Network where possible: other CFs, AWE, The Business Link and/or the Le Conseil.

Private Sector Partner: includes businesses, companies, Industry Associations, or Chambers of Commerce that provide in-kind or cash contributions. Normally, the private sector should cover at least 10% of project cash costs.

How can we demonstrate support for a project?

Project Support: evidence of support for a project includes inclusion in a community or organizational strategic plan, letters of support, in-kind contributions, and/or cash contributions.

What is the difference between in-kind and cash contributions?

In-Kind contribution: is a non-cash input which can be given a cash value. In-kind contributions are donations, with no exchange of cash, which would otherwise have to be purchased and paid for by the project. Examples of in-kind contributions include:

- An organization that “loans” the project meeting space or office space
- An individual who volunteers his time to sit on an advisory committee for the project
- A staff person from an organization who utilizes his/her time to assist with the project
- A company or organization that donates equipment or supplies to the project
- A company that gives the project a price break on a good or service. The difference between the ordinary market price and the cost to the project is the in-kind contribution

Cash contribution: the provision of hard, cold cash to the project by an organization, individual, government or private sector company. Please note: for the purposes of RDI, the contribution of land or building to a project is considered to be the equivalent of a cash contribution. The value of the asset thus contributed must be supported by a current, independent verification or appraisal in terms of the net value for the project.

Goals

Rural economic diversification is a process with the long-term goal of building a community that has long-term sustainability, resiliency in the face of change, and a broad economic base with a variety of types of businesses and jobs. As a process, rural economic diversification is community-based and rooted in a strategic analysis of the community's strengths and advantages. RDI funds will be used to facilitate informed, strategic investment decisions within coherent regional development strategies with a goal of regional competitiveness. All projects funded by RDI will be rooted in a community economic development strategy that is based on the region's unique strengths and comparative advantages.

RDI will support projects under the following categories. Please note that RDI projects do not have to address all of these areas to be eligible for funding – targeting one (or more) of the following areas is fine.

Innovation

- **Support for and Promotion of Productivity Enhancement:** This includes helping firms enhance efficiency or productivity through the adoption of technology, using new materials, using new processes, introducing lean manufacturing, industry training, encouraging the mobility of skilled labour to help pass ideas from one firm to another, improved access to information, shared equipment or services through a business incubator-type project, etc.
- **Support for and Promotion of New Products/Services:** This includes the development of innovative products or services.
- **Support for and Promotion of New Technology:** Examples include assistance with commercialization, support for inventors, technology demonstration sites, exposing firms to ideas and R&D from other countries, or linking firms to university and R&D companies.
- **Import Replacement:** Examples include identification of gaps and business attraction, business expansion, reverse trade projects, and shop local projects
- **Development of New Markets:** This includes export development or developing new markets in targeted sectors like procurement.
- **Innovative Access to Capital:** This includes the development of local or cluster angel investor networks, programs that encourage innovative funding for business, and innovative access to growth capital

Cluster Development

- **Cluster Development:** This includes assistance with industry development or assistance with cluster development such as developing business incubators targeted at a sector, assisting with building demand for a cluster product, organizing support services (like venture capitalists, market research companies, R&D companies),

helping to build management expertise in a cluster, etc. Examples of emerging sectors include tourism, manufacturing, agri-food, nutraceuticals, or alternative energy production.

- **Value-Adding to Traditional Sectors:** This includes assistance with value-adding in agriculture, oil and gas, forestry, and mining

Available Funding

The total amount available for project funding is \$3.48 million over 3 years from April 1, 2008 to March 31, 2011. Total costs for each RDI project will be at least \$100,000. All eligible projects must demonstrate that 40% of project funding is from other sources, including the private sector. In-kind contributions will not be counted as part of this 40%.

An example is shown below:

Sources of Funds	Amount	Percentage
RDI Funds	\$60,000	60%
Funds from the public sector and/or non-profits	\$30,000	30%
Funds from the private sector	\$10,000	10%
Total	\$100,000	100%

RDI Project Eligibility

RDI Proposals are first assessed to ensure that they are eligible for project funding; then, they are ranked using a ranking tool. The table below contrasts eligible projects with ineligible projects.

Eligible projects	Ineligible projects
<u>Rural Diversification:</u> All RDI projects will be targeted at rural economic diversification and show clear, measurable diversification outcomes (i.e. jobs created, investment, increased profits, new business, etc)	Projects that are not targeted at rural economic diversification are ineligible
<u>Broad Benefits:</u> RDI projects will provide broad diversification benefits to a community, region, or industry. For example, RDI projects may support industry-wide or multi-company strategies to improve productivity, test or introduce new technology, or develop new markets. An individual company may receive benefit	Projects that do not provide broad diversification benefits to a number of stakeholders are ineligible. <u>Projects that are a grant to businesses are not eligible.</u>

<p>from RDI as long as the benefits to the industry or community outweigh the benefits to the individual company.</p>	
<p><u>Measurable Results:</u> RDI Projects should be of sufficient length and scope to include not just planning but also implementation. Implementation is required in order to achieve measurable diversification outcomes.</p>	<p>Projects with a primary focus on planning, fundraising or a single event such as a conference or training event are ineligible.</p> <p>Such activities, if part of the project, should be incidental and should not be the main focus of the project. RDI projects can include such activities but they must be a small part of the project with most of the effort focused on implementation.</p>
<p><u>Not Infrastructure:</u> RDI projects may include infrastructure costs but infrastructure must be incremental to the main objectives of the project. RDI is aimed at innovation and cluster development not transportation, roads, water and sewer, recreational buildings, community centres, or broadband access.</p> <p>CFs are encouraged to work with municipalities and other levels of government on infrastructure projects.</p>	<p>Projects aimed at infrastructure such as transportation, roads, water and sewer, recreational buildings, community centres, or broadband access.</p>
<p><u>Board Support:</u> All RDI projects must be supported by the Board of Director's of the lead CF. Evidence for this support is as follows:</p> <ul style="list-style-type: none"> • The RDI application shows that the project is specifically included in the CF's operational plan. If the project was not originally included in the operational plan, Boards must amend the CF's operational plan and submit it to WD. • The RDI Funding application is signed by the Board chair • The RDI Funding Application includes a motion by the Board to support the project 	<p>Projects that the Board of Director's of the lead CF are unaware of and/or do not support are ineligible</p>
<p><u>40% Matching Funds:</u> All RDI projects will show that at least 40% of cash funding for the project will come from sources other than RDI.</p>	<p>Projects with insufficient funding from other sources are ineligible.</p>
<p><u>Strong Private Sector Support:</u> All RDI projects will show strong and tangible</p>	<p>Projects with insufficient support from the private sector are ineligible.</p>

<p>industry and business support.</p> <p>Letters of support, in-kind contributions, and cash contributions are all important indicators of tangible industry and business support.</p> <p>Normally, at least 10% of funding should come from the private sector, industry associations or Chambers of Commerce.</p>	
<p><u>Appropriate Partners:</u> All RDI projects will include appropriate partners. If the project falls under the interests or mandate of another organization, all attempts should be made to invite that organization to be a partner (either through a cash or in-kind contribution) in the project.</p> <p>Projects should foster increased partnership and collaboration between Community Futures, other economic development organizations (in particular the members of the Western Canada Business Services Network), and other project partners.</p> <p>Letters of support, in-kind contributions, and cash contributions are all important indicators of tangible support from partners.</p>	<p>Ineligible projects include those where:</p> <ul style="list-style-type: none"> • Project proponents have not sincerely attempted to involve other interested government departments or organizations • Project activities fall under the funding and jurisdictional mandate of another level of government (e.g. municipal)
<p><u>Strong Work Plan and Project Management:</u> RDI projects will demonstrate good planning of activities, timelines, performance indicators, and project management</p>	<p>Projects without a clear work plan are ineligible</p>
<p><u>Complete:</u> In order to be eligible, the project proposal must be complete, including an application, signature, work plan, and letters of support (described in more detail below)</p>	<p>Incomplete applications are ineligible</p>

RDI Project Assessment

Once a project has been judged to be eligible for RDI funding, it will be assessed using the following criteria:

- **Rural Diversification Outcomes:** proposals will be reviewed based on the degree to which the project
 - Diversifies the local economy
 - Creates short-term economic impact
 - Has the potential to create long-term economic impact

- **Need and Support:** proposals will be reviewed based on the degree to which the project
 - is part of a larger strategy, backed up by inclusion in the operational plan of the lead Community Futures organization.
 - will meet identified needs
 - includes letters of support from the private sector, community organizations, other economic development groups, government, or municipalities.
 - Shows strong, tangible industry support.

- **Partnership and Collaboration:** proposals will be reviewed based on the number of active project partners from the following groups:
 - In-kind or cash contributions from other economic development organizations: other Community Futures organizations, Alberta Women Entrepreneurs, Le Conseil Economique Development de l'Alberta, or The Business Link.
 - In-kind or cash contributions from community organizations, municipalities, government, and/or the private sector.

- **Planning:** proposals will be reviewed based on the degree to which
 - Project management, structure, project terms of reference, project charters, and partner roles and responsibilities are addressed
 - The project describes the rationale for the project and links activities to project goals
 - the CF is actively involved in the project
 - Activities and timelines are achievable
 - An evaluation plan is in place
 - Performance indicators are in place

Projects will be assessed using the Project Ranking Tool below. Those with higher scores and a better impact will be given higher priority. Projects will be assessed along 4 main areas – economic diversification outcomes, community and business need and support, partnership and collaboration, and planning – and can receive a maximum of 40 points. In general, proposals should receive a score of at least 28 points in order to be considered for funding.

Eligibility	Yes	No
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Is this project eligible for RDI Funding?	yes	
Ranking	Max Score	Your Score
Economic Diversification Outcomes		
<p>Diversifies the local economy through</p> <p><u>Innovation</u></p> <ul style="list-style-type: none"> • Productivity enhancement • New products/services • New technology • Import replacement • New markets • Innovative access to capital <p><u>Cluster Development</u></p> <ul style="list-style-type: none"> • Industry development • Value-adding to traditional sectors <p>Will this project help diversify the local economy? Rank along a continuum from 1- 6 where a score of 6 = strong diversification outcomes and a score of 1 = weak diversification outcomes.</p>	6	
<p>Short-term economic impact</p> <p>Three points for a project that results in a measurable impact on the local economy <u>by the completion of the project</u> (i.e. wealth generation in local economy, increased # of jobs, improved business/industry productivity, higher profits, greater efficiency, improved ability to grow, increased # of customers, improved strategic position for the future, better strategic alliances)</p>	3	
<p>Long-term economic impact</p> <p>Three points for a project that will, in the long term, result in a measurable impact on the economy (i.e. effective plans to ensure the project continues to provide benefit, potential for long-term job creation, potential for long-term wealth generation in the community, potential for improved business/industry productivity in the future)</p>	3	
Sub-Total	12	
Community and Business Need and Support		
<p>Is part of larger community economic development strategy</p> <p>Two points if the project is included in a larger community economic development strategy (municipal or other economic development organization), in addition to being included in the CF Operational Plan</p>	2	
<p>Meets identified community strengths and opportunities</p> <p>Two points if the project clearly sets out the rationale and opportunity</p>	2	
<p>Public Support</p> <p>.5 of a point for each letter of support (<u>excluding those providing in-kind or cash contributions</u>). This can include community organizations, other economic development groups, government, municipalities, or the private sector. To a maximum of 2 points.</p>	2	
Sub-Total	6	
Partnerships and Collaboration		

Participation from Target Partners: Lead CF, other CFs, Alberta Women's Enterprise, The Business Link, or Le Conseil. Add 1 point for every target partner that provides \$. Add .5 point for every target partner that provides in-kind contributions. To a maximum of 2 points.	2	
Participation from the Public Sector or Not for Profits: This includes federal, provincial or municipal governments, educational institutions, and not-for-profits. Add 1 point for each partner who provides \$. Add .5 points for each partner who provides in-kind contributions. To a maximum of 3 points.	3	
Participation from the Private Sector: This includes businesses, industry associations, and Chambers of Commerce. Add 1 point for each partner who provides \$. Add .5 points for each partner who provides in-kind contributions. To a maximum of 5 points.	5	
Sub-Total	10	
Planning		
Project management Two points for addressing project management effectively	2	
Rationale Two points for clearly linking rationale and project activities	2	
CF Role Two points if the CF is actively involved in the project	2	
Activities and Timelines Two points if activities and timelines are achievable	2	
Evaluation Two points if the evaluation plan is effective	2	
Performance Indicators Two points for effective performance indicators	2	
Sub-Total	12	
Total	40	

Eligible Project Expenses

Community Futures organizations will be reimbursed for eligible project expenses. These include:

Incremental wages associated with the project activities. Wage costs are eligible for reimbursement as long as they are incremental and incurred by:

- a new employee hired to do the project;
- a contractor whose wages are not already paid by WD or any other organization

- or an existing part-time employee with the hours available to do the work

Full-time employees paid through WD funding or by any other organization cannot receive additional monies for doing RDI project work.

Incremental consulting fees. Consulting fees associated with the project are eligible expenses. In the event that a consultant is contracted to carry out project work, the consultant must be selected through a competitive process. The consultant selected must offer the best value that fully meets the requirements of the project. A competitive process means that

- all project partners have agreed to the process for selecting the consultant and to the contracting costs
- two or more quotes from qualified consultants have been reviewed
- if two qualified consultants cannot be found, then the recommended consultant should have unique expertise and all project partners should agree that the cost of this expertise is an effective use of project funds.

Incremental benefits. Employee benefits tied to the project are eligible expenses.

Incremental meeting and administrative costs. Meeting and associated incremental administrative costs (i.e. supplies, printing, phone) associated with the specific RDI project are eligible as long as they are supported by an invoice and receipt.

Incremental travel costs. Travel costs associated with the project are eligible as long as they are supported by an invoice and receipt.

Other project costs. Other project costs may be authorized on an exceptional basis. Such costs must be supported by an invoice and receipt.

Ineligible project costs include:

- Any costs that are already paid for by another organization including staff wages, office expenses, equipment, building rentals, etc.
- Administration fees charged by CFs or other organizations to administer an RDI project
- The costs to set up a Society, Association, or Company

Ineligible project costs will not be reimbursed.

Application Process

RDI Project Officers

It is strongly recommended that you contact the RDI Project Officer in your region to provide feedback on your idea, advice on structuring your project, and suggestions on developing an RDI proposal.

The RDI Project Officers can also discuss your project with the CFNA staff team in order to provide you with feedback on your proposal. You may also be able to access special expertise in the area of rural diversification.

Project Work Plan

The next step is to write a project work plan. It should include:

- Project Summary - including a project title, description, and partners.
- Problem Statement or Needs Assessment - document the needs to be met, opportunity to be explored, or problems to be solved by the proposed project. In other words, what is the rationale for your project? The project should be included in a broader community or CF strategic plan. Include any background research that you have gathered.
- CF Strategic Plan – quote the part of your Community Futures’s strategic operating plan that specifically mentions this project. If the plan does not yet include this project, please quote the motion made by your Board of Directors to have the project included in the Board’s amended strategic plan.
- Objectives - establish the expected benefits of the project in measurable terms. What will the project achieve?
- Link to Rural Diversification – describe how this project will assist with the implementation of an economic diversification strategy.
- Project Management – describe how the project will be managed. This should include the structure (i.e. project steering committee), development of a Terms of Reference for the project, Project Charter, and partner roles and responsibilities. If a group other than the Community Futures is responsible for the hands-on, day-to-day management of the project, describe how that group will report back to the Community Futures on activities, finances, and results.
- Role of the Community Futures organization – Describe the role the Community Futures organization will play in the project.
- Partners – list all of the partners who are making either an in-kind or cash contribution to this project
- Activities and Timelines - describe the activities to be employed to meet the desired objectives. Describe who will be responsible for leading and completing each of the activities, along with the expected timeframe. You may use a Gant chart for clarity.
- Performance Indicators - develop performance indicators for each of your objectives and the activities associated with your objectives.
- Risk Factors - Identify the major risk factors or barriers to successful completion of the project and explain how these risk factors or barriers are to be mitigated.
- Evaluation - Projects must be evaluated prior to the end of the project funding period and results included in a final report. Present a plan for determining the degree to which objectives are met, activities are undertaken, and performance indicators tracked.

- Sustainability - describe a plan for continuation beyond the grant period and/or the availability of other resources necessary to implement the project.
- Budget - clearly delineate revenues and expenditures required for the project. Please describe those that will be met by RDI project funds and those that will be met by funding from other partners. Include evaluation costs in the budget.
- Other Sources of Funding - document why you think the Rural Diversification Initiative is an appropriate source of funds for this project and describe how you have explored other sources of funding.
- Federal Visibility - include a plan for ensuring federal visibility
- Environmental Assessment - discuss whether this project will require an environmental assessment
- Letters of Support - letters from all project partners (including in-kind and cash contributors) are required. You may also include letters from other supporters. It is imperative that the letters summarize what the organization is supporting and detail the amount and kind of contribution being made.

Please contact your RDI Project Officer for examples of work plans.

Application Form

The next step is to complete the application form that is included in this package. Please note that the application must be signed by the Chair of the Board of Directors.

Before sending the application package to the Community Futures Network of Alberta, please ensure you have:

- Completed and signed the application form
- Answered all questions
- Included letters of support from all partners
- Included a work plan for the project

Submission of the Application Package

Once everything is complete, send the entire package to the Community Futures Network of Alberta. Application packages should include the signed application form, work plan, and letters of support. The package may be faxed or emailed to:

Community Futures Network of Alberta
 Rural Diversification Initiative
 Box 184
 Cochrane, Alberta T4C 1A5
 Fax: 403-851-9905
toby@cfna.ca

E-mail is preferred. If you have any questions about RDI project funds or the application process, contact either Toby Williams or Jon Close at the CFNA office.

Eligibility and Assessment

Proposals will be reviewed to ensure they meet RDI eligibility criteria. If a project is judged to be ineligible, it will be returned to the lead CF with suggestions for improvement.

Once a project has been judged to be eligible for RDI funding, it will proceed to an assessment stage and will be ranked using the Ranking Tool and submitted to the adjudication committee.

Selection Process

Project applications will be adjudicated on a quarterly basis in March, June, September, and December by the "Rural Diversification Project Committee" made up of the members of the Community Futures Network of Alberta and one representative from Western Diversification, chaired by the CFNA Executive Director. The adjudication committee will use the attached Project Ranking Tool in the selection process. Complete project applications must be received at the CFNA office by the following dates:

- March 15,
- June 15,
- September 15,
- December 1. The intake date is earlier in December because of the Christmas break.

There will be no exceptions to these deadlines. Incomplete proposals will be deferred until the next intake.

Notice of Decision

Lead CFs will receive written notice of the Committee's decision within 2 weeks of the adjudication dates.

Funding Agreement

Lead CFs for those projects that are approved must be prepared to enter into a funding agreement with CFNA. This agreement will include the ability to provide advances of up to 90% of the project value, requirements for progress reports based on the project proposal, and approval for Western Economic Diversification and/or the Community Futures Network of Alberta to use the project for communication purposes to demonstrate collaboration and/or best practices if appropriate.

Communications

Approved project proposals, final reports, and best practices may be published on the password protected "members" section of the CFNA website. Therefore successful CFs will be asked to provide electronic copies of proposals, applications, and final reports.

Lead CF organizations must ensure that projects funded by RDI provide recognition to Western Economic Diversification.

Financial Responsibility, Progress Reports, and Evaluation

CFs with projects funded through the RDI are responsible for administering funds and ensuring that the project proceeds effectively. CFs are responsible for tracking all eligible expenses and the matching revenues from project partners associated with the RDI project.

- CFs receiving RDI project funds must ensure that standards of recognition, measurement, presentation and disclosure, as set out in the Funding Agreement with CFNA, are followed.
- For purposes of each RDI project, the Community Futures organization is required to establish within their internal accounting system, a process designed to effectively manage, recognize, present and disclose RDI project revenues and expenses. For example, for those CF organizations using “Simply” accounting, they will be required to establish, maintain, and track each RDI project. This will create ease of reporting on the project internally, at year-end audit, and for purposes of any internal audits conducted by Western Economic Diversification.
- In the event that the Community Futures organization has delegated responsibility to another organization for the management of the day-to-day activities of the project, the CF must have a clear project charter in place with the organization. The project charter must specify responsibilities, decision-making processes, timelines, deliverables, revenues, and expenses associated with the disbursement of funds. **In our experience this is a crucial part of ensuring project success.**
- Community Futures organizations must complete progress report as the project unfolds as well as a final evaluation report at the end of the project. The final funding hold-back (typically 10% of project funding) will be released when the final report has been received and approved by the Community Futures Network of Alberta. Progress Report and Final Report Guidelines are attached.

RDI Project Application Form

April 2008

Contact Information for Lead CF		For Office Use Only			
Contact Name and Position: CF Name: Phone: Address including postal code: Fax: Telephone:		Project #			
		Date Received			
Part 1 - General Information					
Project Name					
Have you read the RDI Project Guidelines?				Yes <input type="checkbox"/> No <input type="checkbox"/>	
Does this project meet the eligibility requirements listed in the RDI Guidelines?				Yes <input type="checkbox"/> No <input type="checkbox"/>	
Project start date (YY/MM/DD)					
Project end date (YY/MM/DD)					
Will this specific project continue beyond March 31, 2011?				Yes <input type="checkbox"/> No <input type="checkbox"/>	
Is the REDA in your area aware of this project?				Yes <input type="checkbox"/> No <input type="checkbox"/>	
Part 2 – Funding Partners					
Please indicate the funding partners for this project including the amount of cash they are contributing, the percentage of cash they are contributing, in-kind contributions, and whether they have committed in writing to the contributions.					
Source of Funding	Name of organizations	Committed (Y/N)	Cash (\$)	% of total cash	In-Kind (\$)
RDI Project Funding	WD				\$0
CF(s)					
Other WCBSN member(s)					
Federal					
Provincial					
Municipal					
Private sector					
Other (not-for-profit, educational institution)					
Total	N/A	N/A	\$	%	\$

Part 3 - Project Proposal

Please attach your **Project Work Plan**. As set out in the Project Guidelines, it should include:

Project Summary	<input type="checkbox"/>	Risk Factors	<input type="checkbox"/>
Problem Statement	<input type="checkbox"/>	Evaluation Plan	<input type="checkbox"/>
CF Strategic Plan	<input type="checkbox"/>	Sustainability	<input type="checkbox"/>
Objectives	<input type="checkbox"/>	Budget	<input type="checkbox"/>
Links to Economic Diversification	<input type="checkbox"/>	Sources of Funding	<input type="checkbox"/>
Project management Plan	<input type="checkbox"/>	Federal Visibility	<input type="checkbox"/>
Activities and Timelines	<input type="checkbox"/>	Environmental Assessment	<input type="checkbox"/>
Performance Indicators	<input type="checkbox"/>		

Part 4 - Letters of Support

Please attach a **letter from each Project Partner** (making an in-kind or cash contribution) that:

- Supports the application;
- States the amount and type of contribution being made;
- Designates the lead CF to submit the application and conduct all communication with CFNA and/or Western Economic Diversification on behalf of the project partnership;
- Indicates agreement that the lead CF will enter into a contract with CFNA regarding receiving, allocating and accounting for funds on behalf of the project partnership.

Part 5 – Certification

We have formally included this project in our Community Futures strategic operational plan

We are prepared to enter into an Agreement with the Community Futures Network of Alberta if this application is approved.

Signature of Board Chair of Lead CF Print Name Date

RDI Progress Report Guidelines

April 2008

A quarterly Project Progress Report, as required by the Funding Agreement with the Community Futures Network of Alberta, should include sufficient information to inform the CFNA of the progress of the project in relation to the approved project plan. Progress reports are typically due March 1, June 1, September 1, and December 1.

Reports should be about 3 pages long and should be emailed to toby@cfna.ca, faxed to the CFNA office at 403-851-9905, or mailed to CFNA Box 184, Cochrane, AB, T4C 1A5 Attention: Toby Williams. The following is a guideline of the information that will be useful for developing your Progress Report. You must use "The Exceptional Assistant" (TEA) for reporting.

1. Project Number and Report Period

You can find your RDI project number at the top of the Funding Agreement. Indicate the period which the report covers, from either the project start or the date of the last progress report.

2. Background and Context

Please summarize the problem/opportunity statement and need for the project

3. Financial Information

Report your actual revenue and expenses to date. If expenses and/or income are different than what you initially proposed for RDI funding, please list the variance and explain why it has happened and what you intend to do about it.

Report your updated sources of revenue from each project partner listed in your proposal.

Report the in-kind contributions made by project partners.

If your CF is being reimbursed for incremental wages, meeting, or associated incremental administrative costs, you must provide a listing of such costs. For incremental wages, please provide a list of the hours worked by month, the cost per hour, and the name of the person doing the work. For incremental meeting or associated administrative costs, please provide a list of expense categories, dates, and costs.

This financial information does not need to be audited by an accounting firm. You do not need to attach copies of invoices to this report, but you must be able to produce copies if required by CFNA at a later date.

Please note that you are required to use project accounting so that revenue and expenses for each RDI project is accounted for as a project. For example, if you are using "Simply" accounting, you will need to establish and maintain each RDI project as a project within "Simply" to track project income and expense numbers within your Chart of Accounts. This will create ease of reporting on the project internally, at year-end audit, and for the purposes of any internal audits conducted by WD.

4. Project Activities during Report Period

Present a summary of the activities performed and results achieved during the current report period towards the accomplishment of the project objectives. Please refer to the list of proposed Project Activities and Timelines in Attachment A of your Agreement with CFNA.

Describe any major problems that you have encountered that may jeopardize or delay the project success, and your intended action plan to overcome such problems.

Describe any un-planned activities that contributed to the success of the project.

5. Changes to Project Activities

If your project activities or timelines have changed since you submitted your proposal to RDI, please list the new activities along with a new timeline for completion. If there are significant changes, CFNA may need to revise your Agreement.

6. Benefits Resulting from Project

List any measurable benefits that the project has accomplished to date. Please refer to the Performance Indicators listed in Attachment A of your Agreement with CFNA. There may be additional benefits that you want to mention such as additional project partners participating in the project, additional volunteers, additional in-kind contributions, or best practices.

If you would like to attach copies of brochures, studies, or reports that resulted from this project, please do so. You may also provide links to electronic copies if they are posted on web sites.

7. Media Coverage

Please describe any media coverage your project has received during the reporting period. Attach any media stories you would like to share. Please refer to the Attachment B in your RDI Funding Agreement and to the CF Branding protocols and Federal Visibility Guidelines at <http://www.pwcf-brand.ca/> .

8. Signature on Report

The report should be signed and dated by an authorized officer of your CF, indicating the full name and title of the signing officer.

9. Invoice

If your Funding Agreement allows for a periodic disbursement of funds throughout the life of your project, please attach an Invoice as your CF's request for disbursement of the next incremental amount. Please note: the final hold-back of project funding will not be disbursed until CFNA receives your final report.

RDI Final Report Guidelines

April 2008

A Project Final Report, as required by the Agreement with the Community Futures Network of Alberta (CFNA), should include sufficient information to inform the CFNA and WD of the results of the project in relation to the approved project plan. Final Project Reports are due no later than two (2) months after the project completion date.

Reports should be emailed to toby@cfna.ca, faxed to the CFNA office at 403-851-9905, or mailed to CFNA Box 184, Cochrane, AB, T4C 1A5 Attention: Toby Williams.

You may see examples of final reports on the “members” section of the CFNA website at www.cfna.ca. The following is a guideline of the information that will be useful for developing your Final Report.

1. Project Number and Project Start and End Dates

You can find your RDI project number at the top of the Funding Agreement. Indicate the start date of the project as indicated on the Agreement and the end date.

2. Background and Context

Please summarize the problem/opportunity statement and need for the project

3. Financial Information

Report the total project cost at completion which should consist of the actual costs incurred for each Project Activity listed in Attachment A of your Agreement with CFNA.

Report your sources of revenue from each project funding partner.

Report the in-kind contributions made by project partners.

If your CF is being reimbursed for incremental wages, meeting, or associated incremental administrative costs, you must provide a listing of such costs. For incremental wages, please provide a list of the hours worked by month, the cost per hour, and the name of the person doing the work. For incremental meeting or associated administrative costs, please provide a list of expense categories, dates, and costs.

If there are discrepancies between planned and actual costs please explain why these occurred.

This financial information does not need to be audited by an accounting firm. You do not need to attach copies of invoices to this report, but you must be able to produce copies if required by CFNA at a later date. You are required to use project accounting so that revenue and expenses for each RDI project is accounted for as a project, separate from your regular operating funds. For example, if you are using “Simply” accounting, you will need to establish and maintain a separate set of RDI project income and expense numbers within your Chart of Accounts. This will create ease of reporting on the project internally, at year-end audit, and for the purposes of any internal audits conducted by WD.

Note: In the event that project costs are reduced, CFNA shall not reimburse any amount over the actual project costs. If you have received an advance payment from CFNA in an amount greater than the project costs, you must repay that amount to CFNA.

4. Project Activities

Present a summary of the activities performed and results achieved. Please refer to the list of proposed Project Activities and Timelines in "Attachment A" of your Agreement with CFNA.

Describe any un-planned activities that contributed to the success of the project.

If the project did not undertake the activities described Attachment A, please explain why they were not undertaken.

5. Benefits Resulting from Project

List any measurable benefits that the project has accomplished to date. Please see the Performance Indicators listed in Attachment A of your Agreement with CFNA. Let us know what made your project successful.

There may be additional benefits that you want to mention, outside of those listed in the Performance Indicators. They may be quantitative (measurable) or qualitative (anecdotal or informal) results influencing the social, environmental or economic situation in the community.

Please include additional project partners participating in the project, additional volunteers, or additional in-kind contributions.

If you would like to attach copies of brochures, studies, or reports please do so. You may also provide links to electronic copies if they are posted on web sites.

7. Media Coverage

Please describe any media coverage your project has received. Attach any media stories you would like to share. Please refer to the Attachment B in your RDI Funding Agreement and to the CF Branding protocols and Federal Visibility Guidelines at <http://www.pwcf-brand.ca/>.

8. Reflections and Lessons Learned

Please describe any lessons that you learned from this project that might be transferable to other organizations doing rural diversification. This could include: innovative solutions to an opportunity or problem, things that you would do again, or things that you would not do again.

If you compiled a best practices manual as part of your project, please provide a copy or a web site link.

9. Signature on Report

The report should be signed and dated by an authorized officer of your CF, indicating the full name and title of the signing officer.

10. Invoice

Please attach an Invoice that will accompany the Final Report as your CF's request for disbursement of the project hold-back.