



Community Services Recovery Fund (CSRF)

TECHNICAL SUPPORT AND RESOURCES FOR APPLICANTS

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Community Services Recovery Fund (CSRF)

This document is to be used as a guide when applying to the Canadian Red Cross Community Services Recovery Fund Grant Program.

For full information about the program, including the Applicant Guide, FAQ and other resources for applicants, visit:

<https://communityservicesrecoveryfund.ca/>

The Canadian Red Cross application portal uses a platform called **SM Apply**

- For privacy information, relevant to how SM Apply collects and stores user data, click here: <https://help.smapply.io/hc/en-us/articles/360003749013-SurveyMonkey-Apply-Data-Privacy>

In addition to this document, you can also find support by:

- Contacting our team at CSRFgrants@redcross.ca, or by phone at 1-833-966-4225

This application is available to complete in either English or French. To change language, choose the EN button in the header and choose FR.



Cette demande peut être complétée en anglais ou en français. Pour changer la langue, cliquez sur le bouton EN en haut de la page et choisissez FR.

Completing this application may take anywhere between a few hours and a few days depending on your organization's ability to source the information required.

OVERVIEW OF APPLICATION STEPS

The **Application Form** consists of seven tasks to be completed, including:

- a. Consent
- b. Organization Information
- c. Organization Supporting Documents Form
- d. Project Details Form
- e. Project Budget Form
- f. Agreement
- g. Certification

STEP 1: CREATE AN ACCOUNT IN SM APPLY

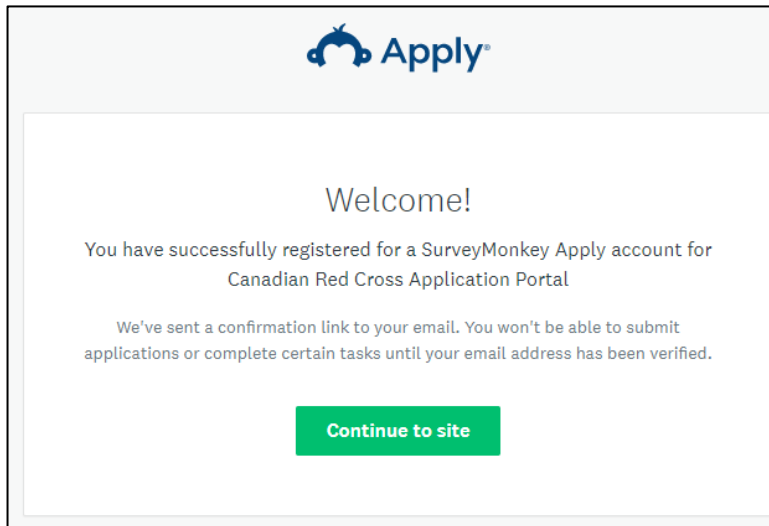
The first task is to create an account on the Canadian Red Cross Application Portal by going to <https://redcross.smapply.ca> on any web-enabled computer or mobile device. For the best user experience please DO NOT USE INTERNET EXPLORER; any other browser such as Chrome or Firefox or Edge may be used.

Choose **“REGISTER”** located at the top of your screen.

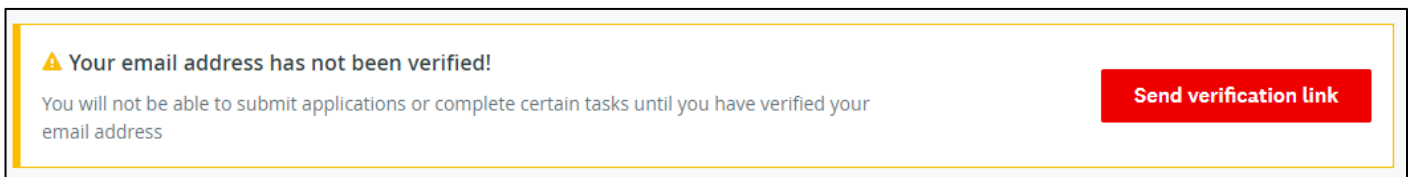


Enter your name, email, and choose a secure password, then click **“CREATE ACCOUNT”**

Once you enter your information you will receive a prompt from the system to verify your email. Upon successful verification you may continue with your application.



If you do not verify your email address, you will be unable to continue with your application. Click the red button in the header to resend the verification link.



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STEP 2: CHOOSE A PROGRAM

There may be several active programs in the menu. Choose either CSRF – Local Stream or CSRF – National Stream. If you need more help deciding which program is appropriate for your organization, visit [Community Services Recovery Fund](#).

<p>CSRF - Local Stream & Unincorporated n...</p> <p>Accepting applications from 6 Jan 2023 08:30 (EST) to 21 Feb 2023 20:00 (EST) Community Services Recovery Fund for local organizations applying for people-focused projects and for unincorporated non-profits</p> <p>MORE</p>	<p>CSRF - National Stream</p> <p>Accepting applications from 6 Jan 2023 08:30 (EST) to 21 Feb 2023 20:00 (EST) Community Services Recovery Fund for national / provincial / territorial organizations</p> <p>MORE</p>
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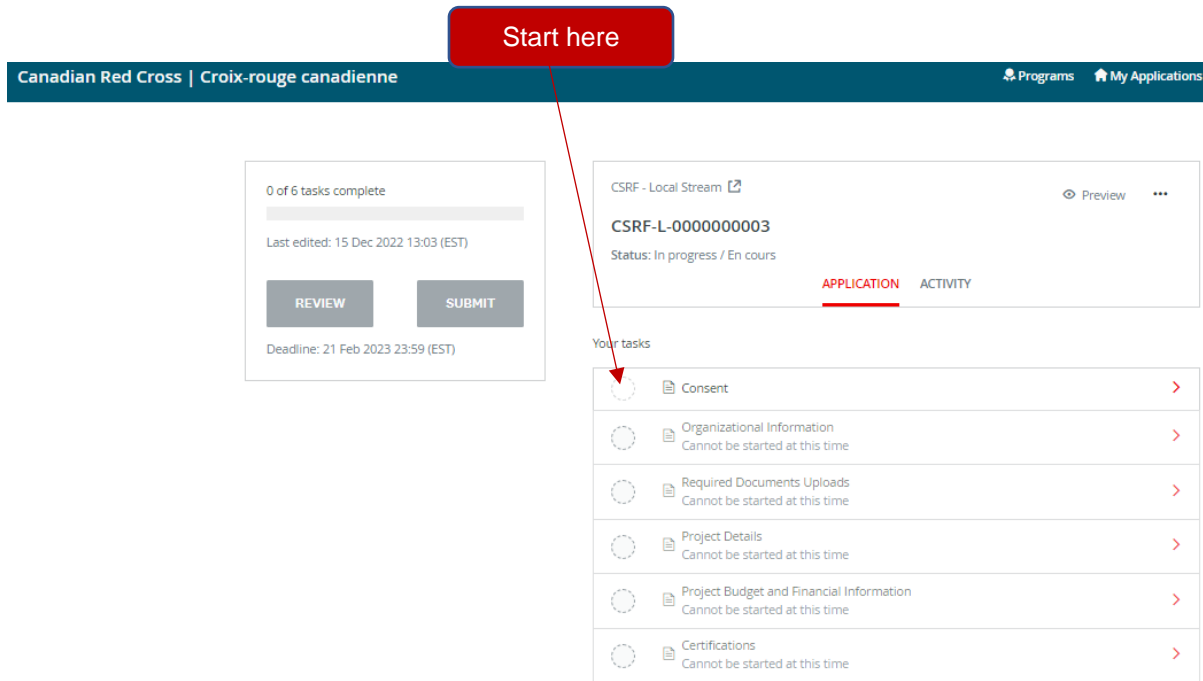
Click on the **“MORE”** button to access specific information about the program.

From the Program information page click on **“APPLY”** to begin your application.

<p>CSRF - Local Stream & Unincorporated non-profit organizations</p> <p>Community Services Recovery Fund Program – An Overview</p> <p>The Community Services Recovery Fund is a \$400 million investment from the Government of Canada to support charities and non-profits as they focus on how to adapt their organizations for recovery from the COVID-19 pandemic. Now more than ever, charities and non-profits are playing a key role in addressing persistent and complex social problems faced by all communities. The Community Services Recovery Fund responds to what charities and non-profits need right now and supports organizations as they adapt to the long-term impacts of the pandemic.</p> <p>BEFORE YOU APPLY</p> <p>You are currently on the Canadian Red Cross' Application Portal for the Local Stream. To apply through the Canadian Red Cross Local Stream you must be:</p> <ul style="list-style-type: none">• A local Community Service Organization submitting an "Investing in People" Project*• A local unincorporated non-profit submitting an "Investing in People", or "Investing in Systems and Processes", or "Investing in Program & Service Innovation and Redesign" Project <p>*Note that provincial / territorial organizations in Prince Edward Island, Newfoundland and Labrador, Nunavut, Yukon and Northwest Territories have the option of applying to the Local Stream or the National / Provincial / Territorial Stream.</p> <p>If you do not fall into either of these categories, please visit communityservicesrecoveryfund.ca to determine the most appropriate organization to apply to.</p> <p>You can also refer to the Decision Tree below and table for guidance.</p>	<p>APPLY</p> <p>Opens 6 Jan 2023 08:30 (EST)</p> <p>Deadline 21 Feb 2023 20:00 (EST)</p>
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STEP 3: STARTING YOUR ORGANIZATION'S APPLICATION FORM




Your screen will look similar to the screenshot below once you have launched into the application. You will need to complete the seven tasks that make up the Application form, marking each as Complete. Work through the steps listed on the Task List on the right side of your screen.



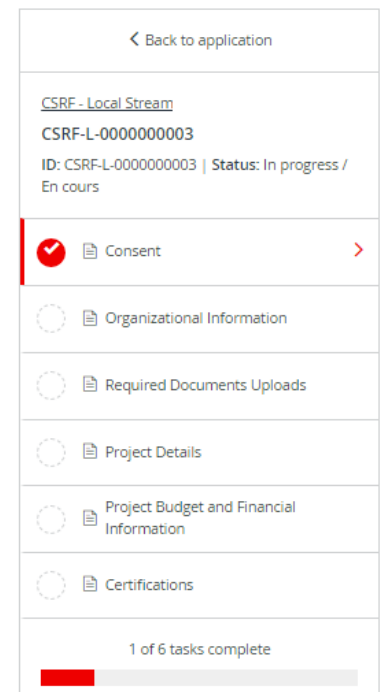
COMPLETE ALL SECTIONS OF YOUR APPLICATION

Once you begin to complete the application, the Task List from your dashboard will show on the left side of your screen, providing a roadmap of all the tasks that are required to complete the application. Use this to navigate through the steps of your application.

The icons provide the following information:

-  Task not yet started
-  Task in progress
-  Task Completed

All **mandatory sections must show a red checkmark** before you will be able to submit your application. The progress bar below the Task List (x of 6 tasks complete) will also provide a summary to gauge your progress. At any point, you can save your progress and return to complete the application at another time.



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CONSENT

The first task you need to complete is **CONSENT**. You will need to complete this form before moving forward with the remaining tasks within the application form.

Please read the language provided in the consent form and provide your agreement by choosing the button **"I AGREE"** and then clicking **"MARK AS COMPLETE"** to save and continue with the next task in your application.

Please indicate your acceptance of these terms by signing below.

I agree

SIGNATURE

Clear

PRINT NAME

SAVE & CONTINUE EDITING MARK AS COMPLETE

STEP 4: COMPLETE YOUR ORGANIZATION'S INFORMATION

ORGANIZATION PROFILE FORM

Once you have completed the Consent form, you will be taken into the **ORGANIZATION INFORMATION** form.

The screenshot displays the 'Organizational Information' form. On the left is a navigation sidebar with a 'Back to application' link at the top. Below it are several menu items: 'Consent' (checked), 'Organizational Information' (highlighted with a red bar and a right-pointing arrow), 'Required Documents Uploads', 'Project Details', 'Project Budget and Financial Information', and 'Certifications'. At the bottom of the sidebar is a progress indicator showing '1 of 6 tasks complete' with a red bar, the text 'Last edited: 15 Dec 2022 13:16 (EST)', and two buttons: 'REVIEW' and 'SUBMIT'. Below the buttons is the text 'Deadline: 21 Feb 2023 23:59 (EST)'. The main content area on the right is titled 'Organizational Information (CSRF)' and contains the following sections: 'ORGANIZATIONAL INFORMATION' (in red), 'Legal Name of Organization' (with an empty text input field), 'Common Name of Organization(optional)' (with the subtext 'If different from legal name of organization' and an empty text input field), 'Organization Status' (with five radio button options: Registered Charity, Other qualified donee, Incorporated non-profit, Unincorporated non-profit, and Indigenous Governing Body), and 'Is your organization registered federally or provincially/territorially?' (with two radio button options: Federally and Provincially/Territorially).

Choose **"SAVE & CONTINUE EDITING"** located at the bottom of the form to save your work periodically.

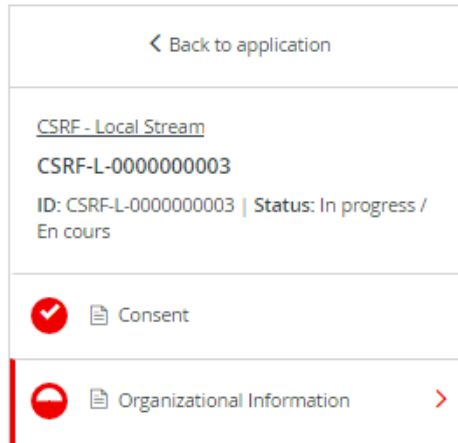


When you click **"SAVE & CONTINUE EDITING"** you will be alerted if the form contains errors (e.g., blank fields that have not yet been filled out) but the **form is still going to save with the errors.**



Community Services Recovery Fund (CSRF)

The status of your form in the Task List will turn half red to indicate it is in progress.

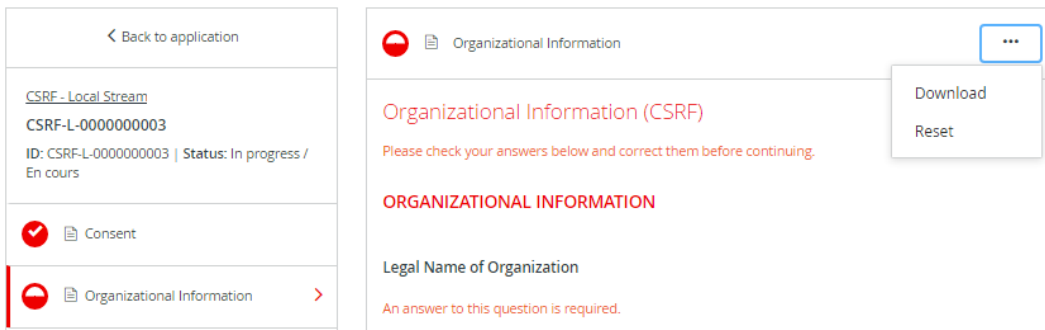


A screenshot of a task list interface. At the top, there is a link '< Back to application'. Below this, the task details are shown: 'CSRF - Local Stream', 'CSRF-L-000000003', and 'ID: CSRF-L-000000003 | Status: In progress / En cours'. The task list contains two items: 'Consent' with a red checkmark icon, and 'Organizational Information' with a red circle containing a white document icon and a red vertical bar on the left side, indicating it is in progress. A right-pointing arrow is next to the 'Organizational Information' item.

As you complete each section, choose **“MARK AS COMPLETE”** which will turn the task into a red checkmark on the Task List. If you have completed the task and would like to return to make a change, you may reopen by clicking the **“...”** menu at the top of the screen and choosing **“EDIT”**. Note you will need to click **“MARK AS COMPLETE”** again once you have completed your edits.



TIP – If you would like to print out the application to be able to gather the information offline before entering into your online application, you may obtain a copy by clicking the **“...”** menu at the top of the screen and choosing **“DOWNLOAD”**. This will open a PDF copy of the application which you may print for your own use. Note that you will still need to complete the application form online to submit it. If you need assistance with your application, please contact us at any time.



A screenshot of the 'Organizational Information' form. The left sidebar shows the task list with 'Organizational Information' highlighted in red. The main form area has a title 'Organizational Information (CSRF)' and a red warning message: 'Please check your answers below and correct them before continuing.' Below this is the section header 'ORGANIZATIONAL INFORMATION' and a question 'Legal Name of Organization' with a red note: 'An answer to this question is required.' A blue three-dot menu is located at the top right of the form, with a dropdown menu showing 'Download' and 'Reset' options.



WARNING: If you select **“RESET”** from the **“...”** menu, all the data in your form will be deleted.

STEP 5: UPLOADING YOUR ORGANIZATION’S SUPPORTING DOCUMENTS

REQUIRED DOCUMENTS UPLOAD FORM

Part of the application process requires you to upload supporting documents.

The screenshot displays a web interface for uploading documents. On the left is a vertical sidebar with a 'Back to application' link at the top. Below it, the application details are shown: 'CSRF - Local Stream', 'CSRF-L-0000000003', and 'ID: CSRF-L-0000000003 | Status: In progress / En cours'. The sidebar contains a list of steps: 'Consent' (checked), 'Organizational Information' (partially completed), 'Required Documents Uploads' (active, highlighted with a red bar and a right-pointing arrow), 'Project Details', 'Project Budget and Financial Information', and 'Certifications'. The main content area is titled 'Required Documents Uploads' and includes a 'Task instructions Show' link. The section is titled 'Financial Documents (CSRF)' with a '0%' progress indicator. Under the heading 'REQUIRED DOCUMENTS', there is a prompt 'Select your organization type' followed by two radio button options: 'Registered Charity/Other Qualified Donee' and 'Non-Profit Organization'. At the bottom right, there are two buttons: 'SAVE & CONTINUE EDITING' and 'NEXT'.

To upload the required documents, you will need to select organization type and click **“NEXT”**. From there, a list of all required documents and areas to upload the files will appear.


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Financial Documents (CSRF)


The following documentation is required as part of the application process, to validate your organization's eligibility for consideration for funding.

Required Documentation for **Registered Charities and Other Qualified Donees**


Last annual report, donor report, annual general meeting report or reporting to stakeholders on activities (such as a newsletter) (Required)


 Upload a file

Most recent financial statement

 Upload a file

Is there any other information/documentation you would like us to consider? (Optional)

 Upload a file

 Upload a file

NOTE

Ensure your statements are complete meaning that they are:

- Signed and dated by the accountant and accounting firm or approved by your Board of Directors or management committee. We cannot accept draft statements.
- Submitted on the accountant's or accounting firm's letterhead for all externally prepared statements.
- Consolidated for organizations with branches, chapters, subsidiary organizations, or any controlled entities.

PREVIOUS

SAVE & CONTINUE EDITING

NEXT

In each section, upload your document into the system by clicking **“UPLOAD A FILE”**. Upload file formats allowed include Word, PDF, or image files such as .JPG, .PNG. When finished uploading click **“NEXT”**.

STEP 6: COMPLETE THE PROJECT DETAILS FORM

The **PROJECT DETAILS** Form provides information on your project and the intended goals.

The screenshot displays the 'Project Details' form interface. On the left is a sidebar with a navigation menu. The menu items are: 'Consent' (checked), 'Organizational Information' (checked), 'Required Documents Uploads' (checked), 'Project Details' (active, highlighted with a red bar and a right arrow), 'Project Budget and Financial Information', and 'Certifications'. Below the menu is a progress indicator showing '3 of 6 tasks complete' with a red bar. It also shows 'Last edited: 15 Dec 2022 13:40 (EST)' and buttons for 'REVIEW' and 'SUBMIT'. At the bottom of the sidebar, it says 'Deadline: 21 Feb 2023 23:59 (EST)'. The main content area is titled 'Project Details (CSRF)' and contains a 'PROJECT SUMMARY' section. It includes a 'Project Title' text input field, a 'Collaboration: If this project is a collaboration, list all organizations involved' text area, and an 'Impact of the COVID-19 pandemic on your Organization' section with a text area for describing the impact. At the bottom of the main area, there is a 'Project Description' section.

Save your application regularly by clicking **“SAVE & CONTINUE EDITING”** at the bottom of the form.



STEP 7: COMPLETE THE PROJECT BUDGET AND FINANCIAL INFORMATION FORM

The **PROJECT BUDGET** Form asks you to identify budget expenses from the start of the project to June 30,2024.

The screenshot shows a web application interface for the Project Budget and Financial Information form. On the left is a sidebar with a navigation menu. The main content area displays the form title and instructions for the Project Budget section.

Navigation Menu (Left Sidebar):

- Back to application
- CSRF - Local Stream
- CSRF-L-000000003
- ID: CSRF-L-000000003 | Status: In progress / En cours
- Consent (Completed)
- Organizational Information (Completed)
- Required Documents Uploads (Completed)
- Project Details (Not Completed)
- Project Budget and Financial Information (Active)**
- Certifications (Not Completed)

Progress: 3 of 6 tasks complete

Buttons: REVIEW, SUBMIT

Deadline: 21 Feb 2023 23:59 (EST)

Main Content Area:

Project Budget Form (CSRF)

PROJECT BUDGET

Detail your project's overall budget in the table provided

When you are working on your budget, please note that:

- All expenditures must occur between May 1, 2023 (or the start date of your project) and June 30, 2024.
- If funded, you will be required to report on actual expenditures of the project and to submit documentation to support your costs.
- The Eligible Costing Guidelines explain in detail the types of costs that can be funded, the types of costs that cannot be funded and tips for completing your budget.

When you are filling out your budget below, please put \$0 in boxes where you are not requesting any funds. At the bottom of this section, you will find a summary of your budget that will update as you fill in each budget category so you can see your total budget.

Personnel- Wages & Employment Related Costs

Category	Amount
Personnel- Wages & Employment Related Costs	\$

Describe the roles that are directly contributing to the delivery of your project and how you have calculated these costs.

Enter all your project’s budget information. Once finished, choose **“MARK AS COMPLETE”**.

STEP 8: DOWNLOAD AND SIGN YOUR AGREEMENT

Click the link to download your agreement. You have the option of adding your digital signature or printing your agreement and signing by hand.

To add your digital signature, save the document to your computer and open the file using your Adobe Reader software (you must open the document outside of your internet browser for the signature feature to work). The signature box is on the third page. Save your signed document to your computer, and then upload using the **“UPLOAD A FILE”** button.

To sign by hand, print the downloaded agreement, sign on page 3, use a scanner to scan the entire agreement to file, then upload using the “upload a file” button.

The image shows two side-by-side screenshots of a web application interface. The left screenshot displays a task list for 'CSRF - Local Stream' with ID 'CSRF-L-0000000008'. The status is 'In progress / En cours'. The task list includes: Consent (checked), Organizational Information (checked), Required Documents Uploads (checked), Project Details (not checked), Project Budget and Financial Information (not checked), and CSRF Local Grant Agreement (not checked, highlighted with a red bar and a right-pointing arrow). A progress bar shows '3 of 7 tasks complete'. Below the progress bar, it says 'Last edited: 6 Jan 2023 06:52 (MST)'. At the bottom, there are 'REVIEW' and 'SUBMIT' buttons, and a 'Deadline: 21 Feb 2023 18:00 (MST)'. The right screenshot shows the 'CSRF Local Grant Agreement' page. It has a title 'Task instructions Hide' and a paragraph of text: 'This section of the Application Form is the Agreement you are entering into with the Canadian Red Cross. Please take the time you need to read through the Agreement, and if you have any questions reach out to our team at CSRFgrants@redcross.ca or by phone at 1-833-966-4225, Mon-Fri. 8:00 a.m. EST - 8:00 p.m. EST. You will need to complete each application task in the task list to submit your application. However, you do not need to complete your application in one sitting: you can click "Save" and come back to a task later. When you are finished working on a task, click "Mark Complete", to return to your task list and continue. A red check mark will appear next to the task to show it is complete. After you have completed all tasks and you are ready to submit your application, please remember to click "Submit" before the deadline. Once you have successfully submitted your application you will receive a confirmation email from the Canadian Red Cross.' Below the text is the title 'CSRF Local Grant Agreement' and the section 'Review Grant Agreement'. It says 'Please carefully review the Grant Agreement below and sign where indicated. If you are selected for funding, you will receive a copy of this Agreement with a completed Schedule A.' There is a link: 'DOWNLOAD the Grant Agreement and sign where indicated'. Below that is the section 'UPLOAD your signed Grant Agreement' with an 'Upload a file' button. At the bottom, there are two buttons: 'SAVE & CONTINUE EDITING' and 'MARK AS COMPLETE'.

Once finished, choose **“MARK AS COMPLETE”**.

STEP 9: COMPLETE THE CERTIFICATIONS FORM

Signing your document: Type your name into the Signing Authority box, and then use your mouse or touchpad to sign your name in the blank space provided. You may choose **“CLEAR”** to clear the box and try again if you are not satisfied.

Done

CERTIFICATION

Certifications & Conditions

a. I have the authority to submit this Application.

b. I have not and will not submit, nor do I know of, another application in respect of the information and activities particularized in this Application.

c. I do not know of another application being submitted to the Canadian Red Cross, in respect of the information and activities particularized in this Application.

d. I understand that additional documentation may be required in support of this Application and that additional documentation can be requested and reviewed to confirm the accuracy of the information provided.

e. I have read the applicable guidelines provided by the Canadian Red Cross in relation to the STRENGTHENING COMMUNITY CAPACITY TO SUPPORT MENTAL HEALTH AND BUILD RESILIENCE PROGRAM and acknowledge and consent to having the information provided used to determine this Application's eligibility for funding.

f. I have read the Granting Agreement Terms and Conditions provided by the Canadian Red Cross.

g. I understand that by certifying this Application, I attest that all information is true, accurate and complete.

h. I understand that any false statements or deliberate omissions may disqualify the application.

By signing below, I affirm that I have read, understand and comply with all certifications listed above.

NAME OF FIRST SIGNATORY

SIGNATURE OF PERSON AUTHORIZED TO SUBMIT THIS APPLICATION

Once you have signed electronically click **“MARK AS COMPLETE”**. If all required tasks have been completed, the **“SUBMIT”** button will become available.

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[← Back to application](#)

[CSRF - Local Stream](#)
CSRF-L-000000003
ID: CSRF-L-000000003 | Status: In progress / En cours

- ✓ Consent
- ✓ Organizational Information
- ✓ Required Documents Uploads
- ✓ Project Details
- ✓ Project Budget and Financial Information
- ✓ Certifications >

6 of 6 tasks complete

Last edited: 15 Dec 2022 13:55 (EST)

REVIEW **SUBMIT**

Deadline: 21 Feb 2023 23:59 (EST)

If you need to return to the application form to make a change (before the final submission), click the “...” button at the top right of the page and choose “**EDIT**”. This will unlock the page for editing. You will need to choose “**MARK AS COMPLETE**” again once you are done editing.

✓ Certifications
Completed 15 Dec 2022 13:55 (EST)

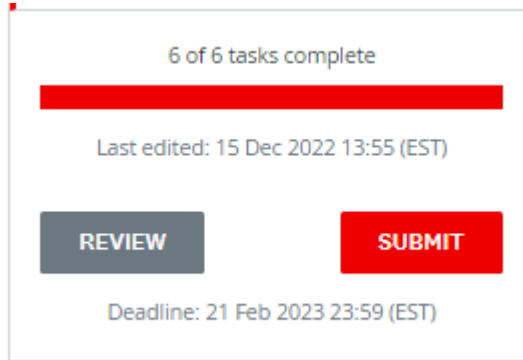
Certifications
CERTIFICATION
Certifications & Conditions

Download
Reset
Edit

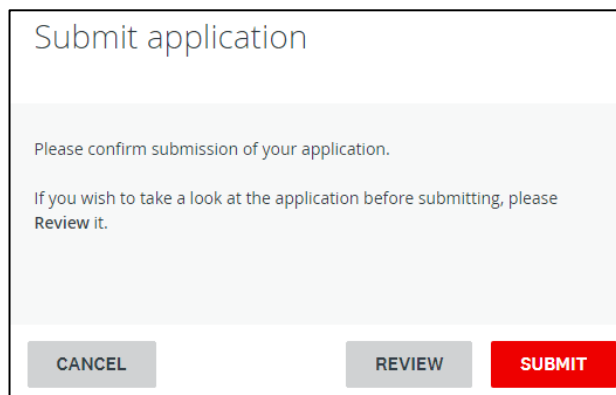
STEP 10: SUBMIT YOUR APPLICATION FOR REVIEW

Once there is a check mark against all sections in the task bar, you are ready to submit for review.

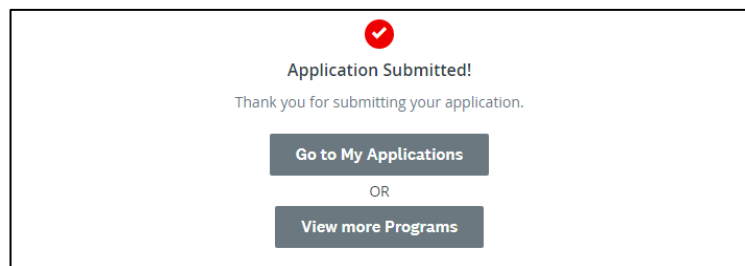
Click the **“SUBMIT”** button found at the bottom of the task bar.



You will be presented with an opportunity to review your application and documentation again before your final submission. Click on **“REVIEW”** to access. If everything is correct, select **“SUBMIT”** again and your application will be forwarded to CRC’s Grant Team for review. You will be contacted if additional information is required.



Once you have clicked the red 'SUBMIT' button, you will see the following confirmation.



ADDITIONAL INFORMATION AND TASKS

Adding another team member to your organization's application

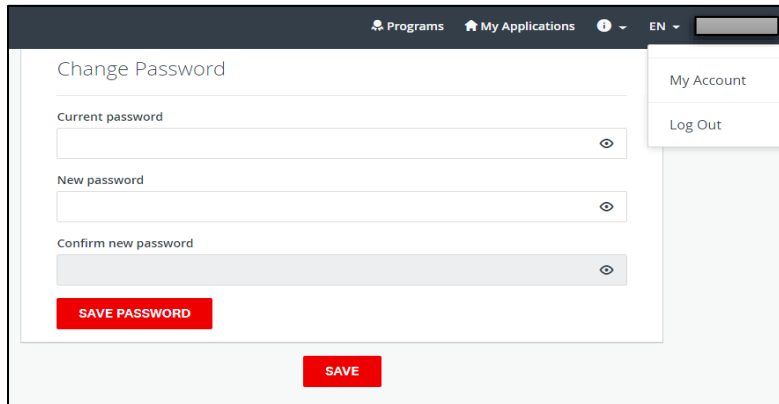
You can add additional team members to your account to enable a collaborative approach to completing your organization's application. To invite additional team members to your application, choose **"ADD COLLABORATOR"** located on the left hand side of the screen, below the **"REVIEW"** and **"SUBMIT"** buttons. This will send an email to your chosen colleague to invite them to contribute.

The screenshot shows the top navigation bar with 'Canadian Red Cross | Croix-rouge canadienne' on the left and 'Programs' and 'My Applications' on the right. The main content area is divided into two panels. The left panel shows a progress bar for '5 of 6 tasks complete', a 'Last edited' timestamp, 'REVIEW' and 'SUBMIT' buttons, and a deadline. Below this is a 'WS' label and an 'Add collaborator' button, which is highlighted by a red arrow. The right panel shows the application details for 'CSRF - Local Stream', including the ID 'CSRF-L-0000000003' and status 'In progress / En cours'. It features tabs for 'APPLICATION' and 'ACTIVITY'. Below the tabs is a 'Your tasks' list with six items: 'Consent', 'Organizational Information', 'Required Documents Uploads', 'Project Details', 'Project Budget and Financial Information', and 'Certifications'. Each item has a status indicator (checkmark or circle) and a completion time.

Change your password

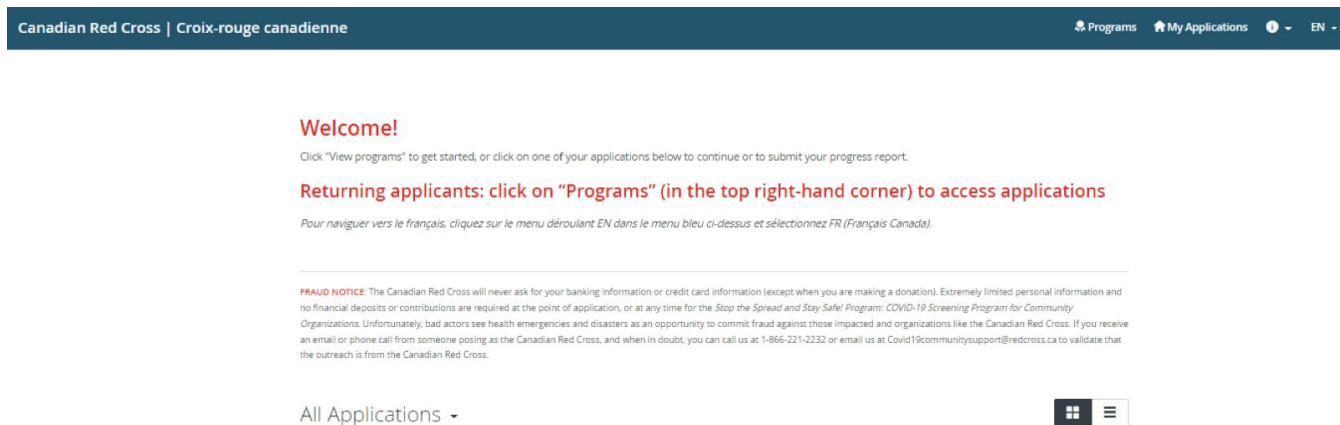
To change your password, click on your name on the top right corner of the screen and choose **"MY ACCOUNT"**. Scroll down to **"CHANGE PASSWORD"**. Click **"SAVE"** when you're done.

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Viewing your applications in progress and submitted

Clicking on the **“MY APPLICATIONS”** button will display the applications that are in progress/submitted.




Once your application is completed and submitted you may return to this page to see the status of your application.

The status will show as Application in Progress until you Submit the application (status **“SUBMITTED”**). For a list of possible statuses, you may see here please see the table on the next page.

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To view your application online, choose **“VIEW”** to enter the application, then choose **“PREVIEW”** at the top right. To download a copy of the application, click ‘...’ and **“DOWNLOAD”**.


5 of 6 tasks complete




Last edited: 15 Dec 2022 14:05 (EST)

[REVIEW](#) [SUBMIT](#)

Deadline: 21 Feb 2023 23:59 (EST)

CSRF - Local Stream 

[Preview](#) 

CSRF-L-0000000003

Status: In progress / En cours

[APPLICATION](#) [ACTIVITY](#)

Your tasks

Community Services Recovery Fund (CSRF)

Understanding the Application 'Status'

Once you complete your application, you will be able to view the status of your application(s) as it moves through the review process. The following provides more information on what each status indicates.

In Progress	Application is being completed by the applicant and has not yet been submitted.
Submitted	Application is complete and has been submitted to CRC for review.
Under Review	The application is being reviewed by CRC.
Check your email for important communication - Information Required	Additional information or documentation is required to complete review of the application. An email has been sent to the Applicant.

If you have a question regarding the status of your application, please view your application online as the status is updated as it progresses through the review process. For additional questions, please contact CRC at 1-833-966-4225 or by email at CSRFgrants@redcross.ca.