

Idea Submission Form

Opportunity Calgary Investment Fund

Sample form for information and illustrative purposes. **DO NOT complete and submit this form.**
Please complete the online application at www.opportunitycalgary.com

PROJECT SUMMARY

Project Title _____

Brief Project Description

APPLICANT INFORMATION

Legal Name _____

Operating Name (if different than above) _____

CRA Business Number _____ **Date of Incorporation** _____ **GST Number** _____

Industry Sector _____

Legal Structure (select one) For-Profit or Non-Profit, Public Institution _____

APPLICANT OVERVIEW

Provide an overview of the current business. This includes the mission, value proposition, products and services, major customers, competitors, and other information helpful in understanding the organization.

Maximum one page

Number of employees globally _____

Number of employees in Canada _____ 22018 Net Income _____

Number of employees in Calgary _____ 22018 Revenue _____

PROJECT INFORMATION

Provide a description of the project that requires funding including:

Objectives and outcomes expected from the project

Demand or market opportunity being addressed

Risks to successful outcome

Project components that require funding

List all partner organizations and describe their involvement

All competitors both inside and outside the city

Any other information that provides a better understanding of the project

Maximum one page

List the estimated start and end dates for the development or construction phase of the project.

Project Start Date _____ **Project Completion Date** _____

List project milestones, and provide a brief description of each including activities, deliverables and dates.

Maximum one page

PROJECT LOCATION

Address of Project Site: _____

Will or does the Applicant own the facility? (if applicable)

Yes No

Provide an overview of the facility and the physical location of the site and details of the lease or construction.

Maximum one page

PROJECT BENEFITS

Using the following sections to guide your answers, describe the benefits that will result from the successful achievement of the project.

Economic Benefits

Discuss the direct and indirect economic benefits of the project (e.g. direct investment, project-related revenue growth, increase in local tax revenues, and spillover effects). Quantify the results, where possible.

Total direct impact: \$ _____ **Total indirect impact:** \$ _____

Maximum one page

Innovation and Sector Benefits

Describe how the project is strategic, innovative and catalytic. This may include growth of clusters or supply chains, disruption of markets, development of intellectual property, creation of new opportunities, attraction of other businesses or initiatives, creation of better business environment, and other ways of stimulating or developing the local economy.

Maximum one page

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Social Benefits

Discuss the social or public benefits of the project (e.g. affordable housing, jobs for under-employed groups, waste reduction and other benefits to the local community). Quantify the results, where possible.

Maximum one page

Job creation

Temporary jobs during construction or development _____

Direct permanent jobs during operation _____

Indirect jobs during operation _____

Provide a breakdown of the above categories, including job title, description, job level and number of positions.

Maximum one page

SOURCES OF FUNDING

List all the sources of funding available for this project. Check the box at the side if funding is confirmed.

	Confirmed
Applicant contribution _____	<input type="checkbox"/>
Financial Institutions _____	<input type="checkbox"/>
Federal Grants Provincial Grants _____	<input type="checkbox"/>
OCIF Requests _____	<input type="checkbox"/>
Other _____	<input type="checkbox"/>
Total Project Cost _____	<input type="checkbox"/>

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Provide additional details for each of the above sources.

Maximum one page

Additional project costing information and pro-forma income statement are to be completed and attached to this application. Templates for these are available in the Attachments section at the end of the application.

PRIMARY PROJECT CONTACT

First Name _____ Last Name _____

Title _____

Organization _____

Street Address _____

Mailing Address _____

City _____ Province/State _____ Postal/Zip _____

Phone Number _____ Fax Number _____

Mobile Number _____ Website _____

Email Address _____

To the best of my knowledge and belief, the information contained in this application is true and correct. I further certify that the Applicant is in good standing under the laws of the jurisdiction in which the entity was organized, is qualified or eligible to be qualified to carry on business in Alberta, and that no delinquent taxes are owed to any taxing entity within the Government of Canada or the Province of Alberta.

Type Name _____

Date _____

(Primary Business Representative)

AUTHORIZATION

The Applicant hereby consents to the disclosure of any and all information contained in this OCIF Application, as well as the disclosure of any and all additional information that the Applicant may later provide or that Calgary Economic Development, as service provider of OCIF, may later obtain through other means relative to this application, or on a confidential basis, to its advisors and The City of Calgary, for purposes of verification and assessment of the project described in the application. Despite the foregoing, it is acknowledged that applications submitted to Calgary Economic Development may include confidential information relating to the proposed project, as well as confidential information relating to the Applicant's business plans.

Type Name _____ Date _____

(Authorized Signing Authority)

ATTACHMENTS

File	Check if completed
Articles of Incorporation	
Annual Financial Statements for the Past Three Years	
Project Budget (complete the attached template)	
Pro-Forma Income Statement (complete the attached template)	
List of Key Staff, Board of Directors and Professional Service Providers (legal counsel, auditors, financial institutions)	

TERMS AND CONDITIONS

As an express condition to using this website for the making of your online proposal application, you agree to the terms and conditions of this disclaimer and to being legally bound thereby.

It is the responsibility of the Applicant to manage the security of this account, and to ensure that unauthorized users do not gain access to it.

You shall hold Opportunity Calgary Investment Fund Ltd. ("OCIF") and its directors, officers, employees, consultants and agents harmless from any and all liability for claims, losses, damages, costs, expenses or fees incurred by you or caused to third parties out of your use of this website and your application/proposal submission and contents thereof.

The submission of an application is a response to an invitation only. It is not an offer upon which the submission creates a contract or agreement of any kind between OCIF and the Applicant.

If your application does not result in a contribution to your project or progress beyond this initial submission stage, OCIF is permitted to disclose publicly aggregated information for purposes related to statistical analysis and reporting in a manner that does not identify individual applicants or their proposal.

You, as an Applicant, are undertaking the expenditures required to prepare and submit your application entirely at your own risk and expense, and you waive any right and release OCIF from any demands, liability claim or recovery for costs, expenses, or damages

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incurred whatsoever or howsoever arising out of or relating to this application stage, whether such right or claim arises in contract, negligence or otherwise.

In no event shall OCIF, its directors, officers, employees, consultants or agents be liable for any special, direct, indirect, consequential or incidental damages or loss of profits whatsoever, whether in contract, tort or otherwise arising out of your use of this website or your making an application.

The submissions at this stage should not include any intellectual property that the Applicant considers confidential or proprietary.

The Applicant agrees that OCIF will only be obligated to take reasonable precautions, at least consistent with the precautions OCIF takes in the procedures it follows to protect its own confidential information of a similar nature, to prevent unauthorized copying, duplication, sketching, drawing, photographing, downloading, uploading, alteration, destruction, photocopying, replicating, transmitting, delivering, sending, mailing, communicating, or conveying of confidential information, and to take reasonable precautions, at least consistent with the precautions Receiving Party takes in the procedures it follows to protect its own confidential information of a similar nature, against theft, unauthorized sale, or unauthorized conveyance obtained through fraud, deception, misrepresentation, or bribery of confidential information.

Any claims you may have against OCIF, its directors, officers, employees, consultants or agents shall be resolved by confidential binding arbitration held in Calgary, Alberta before a single independent arbitrator appointed by OCIF and Alberta law shall govern. Arbitration fees and costs shall be shared equally amongst parties to an arbitration and you will be responsible for your own legal counsel costs.

Information provided in this application may be confidentially shared with Calgary Economic Development, the OCIF service provider, for purposes of providing you with information.

Notwithstanding the above, the Applicant hereby acknowledge that the Freedom of Information and Protection of Privacy Act RSA 2000, C.F-25 may apply to all information or records provided by the Applicant to OCIF and to any records which are in the custody or under the control of OCIF in connection with the application.

** By clicking "submit," the Applicant agrees to the Terms and Conditions.