



**EMPLOYMENT ONTARIO**

**LOCAL BOARD**

**2012-2013 Business Plan Guidelines**

**Ministry of Training, Colleges, and Universities**

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## Section 1 Introduction

### Context

The Ontario Ministry of Training, Colleges and Universities (MTCU) invests in the knowledge and skills of Ontarians to ensure they have maximum opportunities for success. The ministry's vision is that "*Ontario will have the most educated people and highly skilled workforce in North America in order to build the province's competitive advantage.*" There are two key strategies that support this vision by removing barriers to education and training and strengthening the links between training and employment:

- Reaching Higher, a strategy to transform Ontario's post-secondary education system; and
- Employment Ontario, a strategy to transform Ontario's labour market training and employment system.

In 2007 Employment Ontario (EO) was launched and brought together employment and training services from the federal and provincial governments into a comprehensive and integrated service delivery system.

Over the past number of years, the Ministry has focused on the transformation of the employment service delivery system and integrating and improving its programs and services. Integral to the achievement of service delivery integration is the ability to identify and respond to diverse regional and local labour market needs across Ontario.

Local Boards are part of the overall plan to achieve this goal. They facilitate a process involving local labour market partners, giving them a voice in setting local priorities in their communities. Local Boards support a community development process that identifies, assesses and prioritizes the skills and knowledge needs of the community, employers and individual participants and learners in the local labour market. The results of this process are then translated into a local labour market plan.

### Local Boards

Local Boards gather intelligence about the supply of labour and the demand side of the local labour market by working with employers to identify and meet their current and emerging skills needs. The primary role of Local Boards and other organizations engaged to do the work of Local Boards<sup>1</sup> is to help improve understanding of and coordinate community responses to labour market issues and needs. They do this by:

- i. Engaging communities in a locally-driven and evidence-informed process to identify and respond to the key local labour market challenges (and opportunities) in their local labour markets:
- ii. Facilitating a local labour market "action planning" process where community organizations, business, and institutions agree to implement joint actions to address local labour market issues of common interest;
- iii. Creating opportunities for partnerships that respond to local labour market challenges, and add value to the government
- iv. Organizing events and undertaking activities that promote the importance of education, training and skills upgrading to youth, parents, employers, employed and unemployed workers, vulnerable groups and the public in general.

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<sup>1</sup> All references to "Local Boards" in this document refer to both "Local Boards" and "non-local board areas".

## Principles of the Local Board Initiative

Several underlying principles guide the work of Local Boards:

- Local Boards are purveyors of information. They research local labour market information and provide evidence based analyses to assist the community in identifying issues and trends affecting labour supply and demand. The information and intelligence supports local decision making.
- Local Boards are local convenors. They must have sufficient flexibility to respond appropriately to sudden changes in local labour market conditions and be strategic in how they develop partnerships to address local needs.
- As organizations accountable to the community and to the Ministry, Local Boards are committed to a process of continuous improvement and performance based outcomes measurement. Although Local Boards are not client serving organizations, they have adopted a system of metrics intended to help them evaluate their overall effectiveness and relevance to the community and implement continuous improvement strategies.

## Local Board Organizational Capacity

Local Boards have a unique role in the community as they facilitate planning and coordination of labour market initiatives at the local level. The Boards' capacity to fulfill this role is dependent on their effectiveness in the four capacity dimensions listed in the chart below:

<b>Roles &amp; Responsibilities</b>	<b>Organizational Capacity</b>
Community Capacity Building	Ability to engage the community and increase understanding and commitment of the partners to local labour market planning.
Information Gathering and Analysis	Ability to gather and analyze Information as the foundation for strategic local labour market decision making.
Strategic Planning and Implementation	Ability to translate information and analysis into strategy (planning) and from strategy into action (implementation).
Underlying Organizational Capacity	Resources and expertise to take on and support the role of leading and facilitating a local planning process.

## Section 2 Changes in 2012-13

### 1. Business Planning

In 2012-13 the Ministry will be introducing changes to the Local Board funding process. The process will require the submission of a full business plan to the Ministry in application for 2012-13 funding. The dual purpose of introducing this change is to better align Local Board funding process with that of other Employment Ontario programs and to meet ministry accountability requirements. Although it may entail more effort and time initially, thoughtful business planning can lead to better outcomes for the organization itself.

At a minimum, business planning is about clearly communicating to the ministry how the organization plans to accomplish its goals within an agreed budget and timelines that end on March 31<sup>st</sup> of each year.

Business planning also represents an opportunity to review past accomplishments, to outline future goals, describe planned partnership commitments and thereby make the case for funding. It is an opportunity to demonstrate the level of expertise and ability required to undertake the type of strategic activities that impact labour market conditions at the local level. The businesses plan can be an important tool for Boards to demonstrate their capacity for responding to community needs and supporting Ministry priorities.

### 2. Business Planning Timelines

There will be minor changes made to the due dates for Local Board funding submissions. Local Board business plans will be due to the Ministry's local offices by **5:00 p.m., Monday, January 16, 2012**. This will provide the ministry with sufficient time to carefully review the business plan, assess the request and make decisions regarding allocations.

The guidelines and templates provided in this Operating Manual will guide the Boards in developing their business plans. But Local Boards are also strongly encouraged to consult with Ministry staff during the process of drafting their business plans.

It is expected that Local Board operating agreements will be completed in March. The chart below outlines the timelines in Local Board business planning for 2012-13.

Date	Timeline
Week of December 5, 2011	Local Board receive their Operating Manual and new business planning guidelines.
January 16, 2012	Completed business plans are due to MTCU local offices.
February	MTCU reviews business plans and makes funding recommendations about allocations.
March	Agreements are completed.

### **3. The Ontario Labour Market Partnership Program (OLMP)**

While Local Board activities have traditionally been funded through OLMP, for the 2012-13 year, Local Board contracts will be brought into greater alignment with the program guidelines of the Ministry's Ontario Labour Market Partnership Program.

It is important to note that from a contract management and funding standpoint, the Local Board initiative is already closely aligned with broader OLMP objectives in that:

- Both OLMP and Local Board funding support the development and dissemination of labour market intelligence and its use by community organizations, institutions and local employers.
- Both programs were designed to assist community partners in developing innovative strategies to identify and address emerging skill requirements as well as skill shortages within a local economy.
- Both are designed to promote better understanding of labour supply and demand dynamics and advance locally-responsive initiatives supporting better outcomes in the delivery of employment and training services to clients.

The key differences between OLMP and Local Board funding requirements will be addressed through updates of the Local Board operating guidelines. These are:

- The maximum length of any OLMP project is three years. Since Local Boards are an ongoing program, their contracts may be renewed annually by the Ministry beyond the three year maximum (*this does not, however, eliminate the requirement for Local Boards to submit an annual business plan*).
- OLMP eligibility includes the requirement to garner contribution commitments from other partners to the project. Local Boards on the other hand need not demonstrate preliminary financial or in kind commitments from other partners to be eligible for funding (*if partner contributions are known or expected, however, this should be estimated and included in the business plan*).

In 2012-13, the mechanism for supporting additional activities traditionally offered through the Local Partnership Fund will be incorporated into the OLMP funding process. Local Boards will have the same opportunities as other organizations in the community to apply to local MTCU offices for OLMP funding. The ministry expects to continue supporting current Local Board Special Project Fund initiatives in 2012-13.

### **4. Local Board Governance and Decision-making**

For 2012-13, the ministry will no longer prescribe the composition of Local Board governance structures; nor will it require a minimum number of Directors representing different labour market stakeholders.

Despite the increased flexibility around governance requirements, the Ministry will continue to expect the organization to ensure decisions are carried out in an inclusive and transparent manner. The Boards must ensure that they have appropriate mechanisms for decision making in place and that they continue to consult with and engage representatives of key sectors in the local labour market and economy, including education and training partners, members of community groups and local government representatives.

From a strictly contractual standpoint, this will minimize the distinction between Local Board and non-Local Board governance models and streamline the contract management process.

In 2012-13 the ministry will maintain the current number of Local Boards and non-local board areas in the network.

## **5. The Transfer of Local Board Contract Management to the Regions**

Next year, beginning April 1, 2012, responsibility for managing Local Boards will shift to MTCU's local offices. This change is consistent with the ministry's broader strategy for improving and aligning EO programs and services.

For Local Boards the shift to the regions will mean direct accountability to local ministry offices. Business plans will be submitted to, negotiated and assessed by MTCU staff at the local offices. MTCU local management teams will also have responsibility for managing contracts, evaluating the quality of the planning process and products and approving and assessing partnerships projects. Local Board financial and other reports will be forwarded to regional staff who may from time to time make on site visits and/or attend Local Board meetings.

Local MTCU staff will conduct in-year and end-of-year monitoring of Local Board activities against approved commitments outlined in Schedule A of the 2012-13 Operating Agreement. The purpose of monitoring is to determine whether or not organizations are achieving the results they have set out in their business plans. The information gathered through monitoring influences future funding decisions. Monitoring also provides opportunities for MTCU staff to provide advice and guidance to Local Boards on their work.

## Section 3 Instructions for 2012-13 Business Planning

### Business Plan Development

Your organization must submit a completed business plan to the designated MTCU regional contact by **5:00 p.m., Monday, January 16, 2012**. A list of MTCU regional contact information for submission of the Local Board Business Plan is in **Appendix E**.

Once approved, the business plan will become part of the 2012-13 Operating Agreement. The business plan should detail the activities and timelines during the fiscal year business cycle starting April 1st and ending March 31<sup>st</sup>. Your deliverables will be monitored against the commitments set forth in the business plan.

It is expected that the format will be clear and concise and relevant to the business planning process.

The ministry will review your submission and make decisions regarding the funding you will receive. Funding levels are expected to remain stable and reflect 2011-12 Local Board base operating funding amounts.

The following templates form the required components of your completed business plan:

- Appendix A – Local Board Application for Funding (Business Plan to be attached)
- Appendix B – Budget Estimates and Detailed Budget Notes
- Appendix C – Forecast of Cash Flow
- Appendix D – SPF budget estimates (if applicable) with separate proposal attached

Please do not make any changes to the templates provided and make sure to complete all relevant sections.

The ministry requires the submission of **two copies** of the business plan: one sent electronically (by email, attached as a PDF document or in MSWord) AND a signed hard copy, submitted by regular mail or fax.

Please contact your MTCU consultant if you have questions or need assistance in completing the components of the business plan.

### Local Board Application for Funding

#### Applicant Information

Please complete the organization's name and contact information as per Section 1 of the Local Board Application for Funding form (**Appendix A**).

You should list your organization's legal name, number of employees, your business number (Canada Revenue Agency), incorporation number and HST rebate number in the relevant sub-sections in Section 1

You are also required to list:

- o Names and titles of representatives authorized to commit the organization to a binding agreement.

- Names of the legal signing officers for cheque purposes.
  - Number of signatures and combination of signatures required to sign a cheque.
- Typically, these are Officers of the Board and not members of staff.

You will also be asked to identify the name of your auditing firm and a contact person within the firm.

Information is required on your organization's insurance coverage. Please note whether or not you have:

- Accident Insurance for employees
- General liability insurance
- Officers and Directors' liability insurance
- Workers' Compensation ( rate per \$100)
- Non-owned automobile insurance

## **Proposal Description**

### **2012-13 DELIVERABLES**

Please attach a separate business plan in which you describe your planned activities, outcomes and timelines for achieving the Local Board deliverables as outlined below:

1. Leading a local planning process.
2. Drafting a summary of key issues and changes through an analysis of Local Labour Market Information (LLMI) Indicators and other intelligence.
3. Engaging the community and facilitating a consultation process.
4. Establishing local priorities and developing an action plan.
5. Drafting the Local Labour Market Planning Report – a document summarizing local labour market information, consultations and action planning, due March 31<sup>st</sup>.
6. Identifying and leading a minimum of four (or six) partnerships projects.

#### **1. Leading a Local Planning Process**

Describe the various steps in the cycle, e.g. research and analysis, consultations with employers and other community stakeholders, consensus-based priority setting and action plan development.

**The business plan should include a paragraph about the overall planning process you plan to lead in 2012-13.**

Some questions to be considered in describing the process in the business plan should include:

- When you engage the community in a discussion of local labour market issues and needs, how will you ensure that the evidence used is accurate and the analysis is rigorous and reliable?
- What documents and summaries will be drafted and circulated to the community as part of the process?
- How will you involve Employment Ontario service providers, education and training groups, and MTCU in development of the plan?
- What process will be used to ensure input from employers and employer associations, labour groups and local economic development officials?

- How will these local stakeholders be involved in establishing priorities and in developing the actions?
- How will versions of the Plan be made available for community validation?

## **2. Analysis of Local Labour Market Information (LLMI) Indicators and other intelligence**

Quality provincial, regional and local labour market information and intelligence is crucial to the success of the planning process and in developing the plan. Without accurate and timely information, decisions on local issues and priorities are more likely to be based on historical practices and arbitrary opinion. The key role of the Local Board is to ensure that community decisions are fact-based and objective.

Depending on availability and geographic scope, labour market information typically includes the following elements:

- |   |   |
|---|---|
| • Occupational profiles                               | • Educational profiles                                    |
| • Local employment opportunities                      | • Workforce profiles                                      |
| • Local skill shortages                               | • Employment variables and conditions                     |
| • Skills development needs                            | • Migration patterns                                      |
| • Employer, industry and sectoral changes and issues. | • Issues related to groups facing barriers to employment. |

The ministry expects to continue investing in resources and information to improve availability of locally-based labour market information. Examples include:

- Purchase of custom census data for Local Board-based geographies. New census data comes available every five years.
- Support for purchase of annually updated data sets consisting of eight core indicators. These data are a tool for monitoring local economic and employer changes in a timelier manner.

### **Your business plan should include a paragraph about the key sources of information and research activities you plan to undertake in 2012-13.**

Some questions to be considered in describing the research phase of the process should include

- What expertise, skills and ability does the Local Board (Board or staff) bring to the analysis of data and information?
- What labour market information, indicators and intelligence will be used as evidence for the analysis of labour market issues and priorities?
- What other research, references and resources will be considered and how will they be used in development of the plan?
- What methods will you use to convey this information to employers and to community partners?

### **3. Facilitating a consultation process**

Engaging the community in a validation of the information and in decision making about priorities is a vital part of the process.

#### **The business plan should provide a brief description of your 2012-13 community engagement strategy.**

Some questions to be considered in describing the consultation phase of the process should include:

- What role does the Local Board play in the consultation process?
- What strategies do you use to engage the community on a year-round continuous basis?
- What experience and expertise (Board or staff) enables the Boards to lead an effective community engagement process?
- How will you:
  - Consult with MTCU and Employment Ontario programs?
  - Strengthen linkages with local Employment Ontario service providers?
  - Learn more about how Local Board products are relevant to local EO service providers.
- How will you identify employment and training needs of individuals, employers and communities and determine gaps in service?
- What methods will be used to engage the community, i.e. mailings, email, web-based input and decision making tools, hosting local meetings?

### **4. Establishing local priorities and developing an action plan.**

Community engagement and consultation is the primary vehicle for community priority-setting. The Local Board is tasked with responsibility for ensuring that employers, industry sectors, economic development and community partners are included in the priority setting process.

#### **Your 2012-13 business plan should mention the strategies that will be used to help the community identify and rank priority employment and training needs and develop an action plan.**

Please also include a description of how you plan to obtain input from local ministry staff in establishing local priorities and an action plan

Some questions to be considered in describing the priority setting and action planning phase of the process should include:

- How will you ensure that priority needs are established in a fact-based, inclusive and transparent process, including input from a range of stakeholders?
- How will you ensure that actions reflect broad community input and are the right actions at the right time?
- How will you ensure that responsibility for leading and implementing the actions is shared with other partners in the community?

## 5. Drafting the Local Labour Market Planning Report

The 2012-13 Local Labour Market Planning Report should be a clear, well written and concise narrative explaining current conditions, changes, issues, needs and challenges in the local economy and labour market. It should include:

- A description of labour market demand and supply issues and economic changes and an explanation of why they are important based on an analysis of indicators, other data and local intelligence.
- A set of local priorities and needs based on employer, MTCU and community consultations.
- Strategies and actions that partners will undertake in 2012-13.
- A progress report on actions in the previous year's action plan.
- An overview of the process, partners involved, references and methodology.

**In your 2012-13 business plan, you should estimate the document's expected length and briefly outline how you plan to assemble its components and complete the report, keeping in mind the latest date for a draft to be submitted to the ministry is February 18, 2013 and the latest date for submission of a final translated version is March 31, 2013.**

Some questions to be considered in describing how you will draft the report should include:

- How will the Board ensure that the report is a quality document (clear, well written, and user-friendly)?
- How will MTCU be involved in vetting the report prior to its release?
- How will the report be distributed and to whom?
- What would you like the reader to get out of the report?
- How will the Board ensure there is adequate follow up and reporting back to employers and the community on the plan strategies?

## 6. Partnership Projects

**In your 2012-13 business plans, you should outline how you will identify the proposed projects that your organization will lead in the coming fiscal year.**

In previous years, Local Boards submitted their annual partnership plans to MTCU at the end of June. This allowed the Board to complete the planning process, finalize the report and consult with partners prior to identifying specific partnership projects. Given the January due date of the 2012-13 business plan, you will not have available all the information needed to develop a full project plan.

For that reason you are not expected to submit a detailed partnership plan to the ministry by January. But you should use the business plan as an opportunity to convey information about how your organization will determine its partnerships for the coming year. The business plan should focus on the four (or six) key partnerships that will be approved by the ministry.

Some questions to be considered in developing your partnership project proposal should include:

- What are the ongoing key labour market issues from previous planning cycles that need to be addressed in the upcoming year?
- What are some of the issues you see emerging from the current process?

- Are there partnership projects from last year that require a next phase or additional steps?
- In what way will you involve MTCU local staff in development of project ideas?
- How will you identify potential partners, roles and responsibilities connected to the identified partnerships?
- How will you determine expected results?
- How will you estimate the duration of the activity?
- How will you estimate project cost that needs to be set aside for this activity?
- How will you ensure that project activities are specific, achievable and measurable within a budget and timeline (March 31<sup>st</sup>)?

**Once the planning report is completed by March 31st, your organization will be in a position to identify the (four or six) specific partnership projects it will lead in 2012-13 and to develop a detailed work plan for each.**

**This information must be recorded in the Partnership Database. You may do this at any time, but please keep in mind that the latest date for creating 2012-13 partnership records is June 30, 2012. Please inform the ministry when your partnership records are ready to be approved.**

Please note the following mandated list of criteria for implementing partnerships:

- ✓ The project must be led or co-led by the Board.
- ✓ 50% of the partnerships must engage employers.
- ✓ Partnerships should address issues identified during the local labour market planning process.
- ✓ As much as possible, partnerships should align with and support Employment Ontario priorities.
- ✓ Where relevant and appropriate, partnerships should involve Employment Ontario service providers.

#### Eligible Partnership Activities

To be eligible for approval, Local Board partnership activities must address a local labour market issue or gap, supported by evidence and identified as a priority by community partners, under one or a combination of the following categories:

- Local economic development - advancing local economic development priorities with a focus on the labour market
- Human resource planning – working with employers to identify and meet their employment and skills needs.
- Employment Ontario – working with MTCU to engage and support the local EO service provider network.
- Reflect regional and/or local priorities - including where possible MTCU regional and local strategic priorities.
- Involve a partnership – where at least two or more parties with compatible goals form an agreement to advance the local labour market.

#### **Budget Submission**

Traditional cost categories for Local Board budget estimates have been changed to better align them with the OLMP funding framework.

**In the 2012-13 business plan, the Local Board should submit budget estimates and budget notes using these four major cost categories.**

- Capital
- Human Resource
- Other Direct Operating expenditures, including consulting
- Special Project Fund (if applicable)

Please complete the budget template form provided by MTCU (**Appendix B**). A breakdown of estimated costs and **detailed budget notes** should be included with the business plan and submitted to the ministry by **Monday, January 16, 2012**.

Budget estimates and budget notes should include any expected and/or committed revenue from other sources. The budget breakdown will be subject to monitoring by the ministry.

**Please note: Movement WITHIN approved cost categories is allowed. Movement BETWEEN the four cost categories is NOT allowed, without prior and written MTCU approval.**

Local Board budget estimates and budget notes should include the following:

### **1. Capital**

Please include any planned capital purchases or leasehold improvements.

### **2. Human Resources (HR) costs**

#### **Staff Salaries and Benefits**

The budget submission should include HR costs, including costs associated with staff wages & benefits, and the employer's portion of mandatory employment-related costs<sup>2</sup>.

You should list each position that will be supported in whole or in part through the Ministry's contributions under the 2012-13 Operating Agreement. A rationale for salary levels is required. For each position, please include the position title, the number of hours worked per week, the position's total annual salary & benefits, and where necessary, indicate what portion of the salary and benefits is to be covered by the 2012-13 Operating Agreement.<sup>3</sup>

#### **Professional/Consulting Fees**

The costs associated with professional/consulting fees will also be requested on the HR budget line, and discussed in the budget notes section of the proposal packet to be submitted to MTCU.<sup>4</sup>

**A copy of the Board's procurement policy should be enclosed with the business plan and submitted to MTCU.**

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<sup>2</sup> HR policies should restrict the Board's liability for payouts in the case of staff turnover. For example, limits should be placed on carrying forward overtime leave, vacation days and sick time from year to year. Ministry funding cannot be used to cover severance pay.

<sup>3</sup> The Ministry reserves the right to negotiate its contribution to salary levels if, in the opinion of the Ministry, the proposed salary levels exceed 'fair market value' for individual positions.

<sup>4</sup> The Board should have a procurement policy in place that ensures consulting contracts are awarded based on a fair and transparent process.

### 3. Other Direct Operating Expenses

Direct operating cost estimates should include:

Overhead:	Rent, equipment leases, phone/internet, materials + supplies, staff travel, training, printing, conference attendance, data purchase, marketing, audit, IT, insurance etc.
Partnership/project costs:	Incremental project or sponsorship estimates, not including staff time.
Governance costs:	Director/Committee travel, meeting costs, training & development etc.
Translation costs:	For reports, products or services
Other	

#### Ineligible costs

The following costs are **NOT** eligible for funding:

- Costs related to the purchase of liquor,
- Entertainment costs
- Personal charges such as movies, bar services, etc.;
- Interest charged on personal or business credit cards statements
- Severance or termination pay in lieu of notice.

It is important to note that writing of the business plan is the responsibility of the applicant. You may, however, seek the guidance and advice of ministry staff in formulating your budget estimates.

### 4. Special Project Funding (SPF) – if applicable

This budget category is reserved for projects that are initiated by MTCU and undertaken by one local board area on behalf of the entire network. Examples of SPF projects are: maintenance of Local Boards' provincial website and partnerships database, coordinated purchase of local labour market information and data sets and support for and evaluation of the local labour market planning process and products.

**An SPF application must include budget estimates using Appendix D**

**Please submit a separate proposal outlining planned SPF activities, outcomes and timelines.**

A Special Project Fund proposal must meet all of the following requirements:

- Project idea and potential costs must be discussed ahead of time with MTCU;
- Project idea and planned outcomes must respond to a need that benefits the Local Board network as a whole;
- Project must include an evaluation component;
- Project must be completed within the fiscal year in which it is being funded unless otherwise approved by MTCU.

**Please note that the ministry expects to continue supporting existing SPF projects but will not entertain additional SPF proposals for 2012-13.**

## Forecast of Cash Flow

Please complete a projected cash flow using **Appendix C** and attach to the business plan. The cash flow projections are used to calculate the quarterly payments that will be outlined in the Terms of Payments for the Operating Agreement.

## The Local Board Business Plan Submission

Applicants are required to submit one electronic and one signed hard copy of the business plan to the Ministry contact noted in **Appendix E** by **5:00 p.m. Monday, January 16, 2012.** The forms included with these instructions should be completed and attached to the Business Plan:

- Appendix A - Application for Funding
- Appendix B – Budget Estimates (with detailed Budget Notes attached)
- Appendix C– Forecast of Cash Flow
- Appendix D – (if applicable) SPF budget estimates (with separate SPF proposal attached)

## Supporting Documents

You should submit the following supporting documents with your business plan:

- ✓ A cover letter stating the organization's intention to enter into an Operating Agreement with MTCU, and its commitment to follow through on all deliverables;
- ✓ A list of the Corporation's Board of Directors
- ✓ Most recent bylaws, code of ethics and conflict of interest guidelines;
- ✓ Copy of your certificate of insurance;
- ✓ Copy of Letters Patent;
- ✓ Copy of the organization's procurement policy for consultant contracts.