



For Official Use Only:

CSGC # _____ RC No. _____

Expression of Interest Form

Completing the form

You must read the Applicant Guide that is specific to this Call for Expression of Interest.

Unless otherwise indicated in the Applicant Guide or on this form, you must complete all parts of the Expression of Interest. Employment and Social Development Canada (ESDC) may refuse applications that are incomplete or contain errors. We will contact you to request any mandatory information if it is missing from your form.

If your response exceeds the space allowable in the form, a separate document may be provided to add information to sections of the application, up to the maximum page count indicated in the applicant guide for the total response (with the portion in the form counting for one page). This document should specify the question number for each response. This document should include all wiring diagrams, figures, tables, etc. that cannot be included within the Expression of Interest form. Text should be 12 point font with normal margins.

If a closing date is posted, you must submit your Expression of Interest Form by that date. We will not accept expressions of interest received after the closing date.

This document includes the following sections:

Notice to Applicants

Part 1 – Organization

- A. Organization Information
- B. Organization Contact
- C. Profile of Organization(s)

Part 2 – Social Finance Wholesaler Proposal

- A. Proposal Identification
- B. Investment Strategy
- C. Other Market-Building Activities
- D. Governance
- E. Impact Measurement and Management

Part 3 – Past Experience

- A. Experience in Investment Management
- B. Experience with Canada's Social Purpose Sector

Part 4 – Operational Information

- A. Human Resources
- B. Financial Model

Part 5 – Attestation

How to submit the form and supporting documents

Consult the Applicant Guide for instructions on how to complete the Expression of Interest Form.

Once completed, please send your Expression of Interest Form and supporting documents by email to the address posted in the Applicant Guide.

Notice to Applicants

Attestation

In order for your application to be eligible, you must have the authority:

- to submit project proposals for the applicant organization
- to enter into contracts and agreements on behalf of this organization
- to certify that the information in the application form is true, accurate and complete

You must provide:

- your name
- your title
- the date

No signature is required.

Information in the form and supporting documents

The completion of this Expression of Interest Form and provision of supporting documents is voluntary. Should you apply, note that there are some fields in the application form that are mandatory and required in order to submit a completed application. Please refer to the Applicant Guide for instructions.

We may also use or disclose your application information:

- to share information with others outside the government as a part of the review process
- for policy and research analysis

Note that these additional uses or disclosures of your personal information will not affect your relationship with this department or any other government organization.

Personal information

We ensure to manage personal information according:

- to the [Department of Employment and Social Development Act](#)
- to the [Privacy Act](#)
- other applicable laws

You have the right:

- to protect your personal information
- to access or change your personal information

If you have privacy concerns, contact the [Office of the Privacy Commissioner of Canada](#).

Access to information

Basic information on successful applications will be available on [Open Government](#).

Your application is also subject to the [Access to Information Act](#) (ATIA). The ATIA gives every person a right to access information under the department's control, except for some [exemptions](#).

Find [instructions for accessing this information](#). You can also visit a Service Canada Centre.

Part 1 - Organization

A. Organization Information					
1. Legal Name *		2. Operating (Common) Name * (mandatory field if different from legal name)		3. Business or Registration Number *	
4. Organization Type *		5. Organization Category *		6. Year Established *	
7. Organization Address *					
8. City or Town *		9. Province or Territory *		10. Country *	
11. Postal Code *					
12. Telephone Number * Ext.		13. Fax Number		14. E-mail Address *	
15. Mailing Address * (mandatory field if different from Organization Address)					
16. City or Town * (mandatory field if different from Organization Address)		17. Province or Territory * (mandatory field if different from Organization Address)		18. Country * (mandatory field if different from Organization Address)	
19. Postal Code * (mandatory field if different from Organization Address)					
20. Telephone Number * Ext. (mandatory field if different from Organization Number)				21. Fax Number (if different from Organization Number)	

B. Organization Contact		
Primary contact - This should be your primary contact person with respect to this Expression of Interest.		
22. Given Name *		Surname *
23. Position Title		24. Preferred language of communication *
		Written: ☐ English ☐ French Spoken: ☐ English ☐ French
25. Telephone Number * Ext. (mandatory field if different from Organization Number)	26. Fax Number	27. E-mail Address
Secondary contact - This should be your secondary contact person with respect to this Expression of Interest in case we cannot reach the primary contact.		
28. Given Name *		Surname *
29. Position Title		30. Preferred language of communication *
		Written: ☐ English ☐ French Spoken: ☐ English ☐ French
31. Telephone Number * Ext. (mandatory field if different from Organization Number)	32. Fax Number	33. E-mail Address

C. Profile of Organization(s)

34. Provide an overall profile of your organization(s) *

Part 2 – Social Finance Wholesaler Proposal**A. Proposal Identification**

35. Proposal Title *

36. Proposal Summary *

37. Planned Start Date (yyyy-mm-dd) *

38. Planned End Date (yyyy-mm-dd) *

B. Investment Strategy

39. Please describe your vision and investment strategy *

C. Other Market-Building Activities

40. Please describe any proposed market-building activities and expected outcomes

D. Governance

41. Please describe the planned governance and structure for the proposed social finance wholesaler *

E. Impact Measurement and Management

42. Please describe your planned impact measurement and management approach *

Part 3 – Past Experience**A. Experience in Investment Management**

43. Please describe your investment management experience *

B. Experience with Canada's Social Purpose Sector

44. Please describe your experience with Canada's social purpose sector *

Part 4 – Operational Information**A. Human Resources**

45. Please describe the human resources required to deliver the initiative *

B. Financial Model

46. Please describe the funding structure and high-level budget for the social finance wholesaler *

Part 5 - Attestation *

In order for your application to be eligible, an official representative who has the capacity and the authority to submit proposals and enter into contracts and agreements on behalf of your organization(s) must complete this section of the form. By doing so, you are attesting to the following three points:

I have the capacity and the authority to submit this Expression of Interest Form on behalf of the applicant organization(s).

I certify and warrant on behalf of the organization(s) and in my personal capacity that the information provided in this Expression of Interest Form and any supporting documentation is true, accurate, and complete.

I have read the Applicant Guide and understand the program's requirements.

Official Representative Name (print) *	
Title (print) *	Date (YYYY-MM-DD) *
Official Representative Name (print)	
Title (print)	Date (YYYY-MM-DD)
Official Representative Name (print)	
Title (print)	Date (YYYY-MM-DD)