APPLICATION GUIDE

This guide identifies the types of projects that are eligible for the Social Connections Initiative (Initiative) and provides information on how to apply.

Questions? Contact us at 1.800.505.8998 or socialgrants@cbt.org

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WHAT IS THE SOCIAL CONNECTIONS INITIATIVE?

We're looking for community organizations that want to implement local solutions that connect Basin residents across all ages and stages of life.

The goal for the Initiative is to support projects that create opportunities for Basin residents experiencing, or at risk of experiencing, social isolation to:

- have timely access to resources and help when they need it;
- increase participation in community activities; and
- connect in meaningful ways with other community members.

Projects should fit at least one of the following categories:

- Reduce barriers to accessing services, activities and events;
- Develop and facilitate programs and activities that are culturally appropriate and inclusive (e.g., intergenerational, intercultural, accessible to all residents regardless of socio-economic status);
- Connect neighbours with one another to build strong relationships, improve safety, and expand social support networks;
- Create or improve transportation networks, including coordinating volunteers, to help people get places where social connections can grow; and
- Bring services to people who need them, where they need them.

WHO CAN APPLY?

Registered non-profits, public organizations, municipalities, regional districts and Indigenous organizations delivering services in the Columbia Basin Trust region (ourtrust.org/map) are eligible to apply.

HOW DOES THE TRUST SELECT PROJECTS FOR FUNDING?

Projects that incorporate the following operating principles (Operating Principles) may be prioritized for funding support:

- Foster community partnerships across sectors and organizations, which could include schools, social and community service agencies, local governments, community centres, etc.;
- Include the perspectives of people with lived experience in developing and delivering solutions;
- Promote volunteerism and broad public involvement;
- Promote innovation and collaboration;
- Adapt and create efficiencies within existing social and community service programs;
- Incorporate Indigenous perspectives and culturally relevant approaches to creating social connections and addressing social isolation;
- Attract funding from other sources that share common objectives and desired outcomes; and

- Document lessons learned and share results with stakeholders from across the Basin to catalyze similar projects.

WHAT TYPES OF PROJECTS ARE NOT ELIGIBLE?

Projects are not eligible if they:

- Take place outside of the Basin;
- Relieve any level of government of its obligations; or
- Will undertake activities of political parties, advocacy or lobby groups, or organizations that are exclusive or discriminatory in nature.

HOW CAN I LEARN MORE ABOUT THE INITIATIVE?

The Trust will be hosting two information meetings to review the goals of the Initiative and answer questions about the application, selection and contracting processes. **The same content will be covered at both information meetings**.

The information meetings will be hosted by teleconference:

December Information Meeting:
Date: December 19, 2018
Time: 1:00 p.m. PT/ 2:00 p.m. MT

Dial-In: 1-877-806-9883
Passcode: 217886

January Information Meeting:
Date: January 15, 2019
Time: 1:00 p.m. PT / 2:00 p.m. MT

Dial-In: 1-877-806-9883
Passcode: 217886

If you have questions and can't join us for an information meeting, call us at 1.800.505.8998 or email socialgrants@cbt.org.

WHAT IS REQUIRED OF PARTICIPANTS IF OUR PROJECT IDEA IS SELECTED?

Interested organizations will first submit an Expression of Interest to share their Project idea. If selected, the Trust may ask you to provide additional information related to your Expression of Interest. Selected participants will be asked to deliver and evaluate their own Project.

HOW MANY APPLICATIONS WILL BE CONSIDERED PER COMMUNITY?

There is no limit to the number of applications that can be funded in any one community; however, demonstration of community support and collaboration are factored in to decision making.

WHAT KINDS OF PROJECT COSTS ARE ELIGIBLE?

Eligible Project costs include:

- Project coordination costs;
- Minor capital purchases related to delivering the Project activities;
- Reasonable and necessary Project administration fees of up to 15% of the total project Cash budget; and
- Costs related to delivering programs and services.
-

WHAT TYPES OF PROJECT COSTS ARE NOT ELIGIBLE?

The following Project costs are not eligible to receive Trust funding through the Initiative:

- core or ongoing administrative operating expenses of an organization;
- costs related to preparing and submitting this Expression of Interest;
- existing program costs unless it demonstrates significant enhancements to current programming; and
- fee-based programs and services.

HOW MUCH CAN I APPLY FOR AND HOW MUCH OF MY PROJECT WILL THE TRUST FUND?

The Social Connections Initiative has $300,000 available. We strive to distribute these funds equitably across communities, organizations and Project types.

There is no maximum amount for grant requests; however, we anticipate that many successful Projects will be in the range of $30,000 - $70,000.

Applicants can request up to a maximum of 85% of the total Project costs from the Trust.

While the Trust prioritizes Project applications that have other confirmed cash revenue sources, in-kind contributions may be considered as part of the applicant's 15% contribution if the organization:

- is primarily volunteer-driven;
- has a limited operating budget;
- demonstrates a sustainable Project plan;
- meets all other eligibility criteria; and
- is making reasonable efforts to raise additional funds.

Note: if you are requesting a large amount of funding, your Project **must** demonstrate significant regional impact, confirmed community-wide collaboration and additional confirmed funding contributions from other funders.

WHEN CAN MY PROJECT START?

Projects can start after you receive funding approval from the Trust. Trust funds can only be put toward approved Project expenses that occur *after* you receive funding approval.

Applicants should plan to start Projects no earlier than April 1, 2019 and no later than November 1, 2019.

Once a Project receives final approval, we will be in touch to discuss payment and reporting schedules and begin the contracting process.

WHAT IS THE TIMEFRAME FOR IMPLEMENTING APPROVED PROJECTS?

Project funding is limited to 24 months.

Your Project budget should reflect the total cash required to complete the Project over the entire timeframe listed in your Expression of Interest.

HOW WILL THE TRUST SELECT PROJECTS?

Expressions of Interest will be adjudicated by an internal evaluation committee.

The Trust retains the discretion to determine Project eligibility.

Projects will be selected to move forward based on:

- their potential alignment with the Initiative categories and Operating Principles as outlined above;
- the potential impact and outcomes of the Project;
- community support, including community partnerships, cash & in-kind contributions and/or community involvement;
- demonstrated capacity and expertise to deliver the Project;
- Project budget and cost-effectiveness; and
- equity in the geographic distribution of the Trust's funds.

WHAT ELSE DO I HAVE TO KEEP IN MIND?

Even if an Expression of Interest appears to meet the eligibility criteria, it may not be selected to proceed.

The Trust retains the discretion to determine Project eligibility, to determine the amount of funding it will allocate to a Project, and to fund requests in part or in whole.

WHEN IS THE APPLICATION DEADLINE & HOW DO I APPLY?

This Initiative has a two-stage application process.

Stage 1 – Expression of Interest

Deadline: **January 31, 2019 at 2:00 p.m. PT/3:00 p.m. MT.**

Trust staff may contact you to discuss your project idea.

Stage 2 – Decision, Project Scoping and Contracting

Applicants will be notified of funding decisions by email by the end of February 2019.

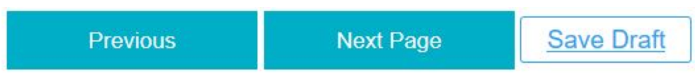
If your Project idea has been selected, Trust staff will be in contact with you to enter into a Contribution Agreement and to finalize Project planning and scoping details prior to releasing funds.

HOW TO APPLY

USING THE ONLINE APPLICATION FORM

The Trust's online application system allows you to apply to various programs offered by the Trust. You will need to create an account to access application forms, save drafts and submit completed forms. Here are some tips for using the system:

- When logged in you can only work on one draft application. You must submit an application before you can begin another application under a particular grant or expression of interest. Submitted applications can be edited up until the deadline.
- Drafts and submissions can be viewed once you have logged in.
- To ensure that your edits are saved, click the **Save Draft** button at the bottom of each page often, especially before navigating away from the page.
- **DO NOT CLICK YOUR BROWSERS BACK BUTTON**: your application form will not auto-save and you will lose your work. However, the application form will auto-save when you click the **Next** and **Previous** buttons to navigate between pages.



- Keep your entries precise and clear. It is important to note that space in some sections is limited. Space allotment is identified in each section.
- You have the option to use a worksheet to prepare your application entries and/or collaborate with others involved in your project. The worksheet is a Word document and will not be accepted as your application. All the questions you will be asked on the online application form are included on the worksheet.

COMPLETING THE APPLICATION FORM QUESTIONS

APPLICANT INFORMATION

Organization Legal Name and Information
Enter the full legal name of your non-profit, public organization, municipality, regional district or Indigenous organization.

BC Registry Incorporation/Registration
Registered non-profits must be in good standing with the BC Registry Services. Enter your number here.

Signing Authority Contact Information
This person is authorized to sign financial documents on behalf of the organization and will be the signatory of the Application Agreement found on the last page of the online application.

Check if Signing Authority information is the same as Project Contact information.

Primary Contact Information
Identify the person who will be leading the project, or if they are not in place at this time, identify someone in your organization who can be contacted about your project either at the application stage or if your application is successful.

Organization Mandate (120 words)
Briefly describe your organization's purpose and mandate. Include the types of projects, programs and services you deliver and your operating budget.

PROJECT DETAILS

Project Title
What is the title of your project? Limit of 5 words.

Project Location
You will be asked to select location(s) from a drop-down menu which represents all municipalities, regional district areas and First Nation communities in the Basin area. Identify the geographical location(s) that will benefit from this project.

Estimated Start Date & Completion Date
Tell us when the project will begin and end.

The end date should be when you anticipate all expenses will be paid for and final reports are ready.

Grant funds cannot be allocated to any project expenses before you have received funding approval.

Project start dates should be no earlier than April 1, 2019 and no later than November 1, 2019.

Project end dates should be a maximum of 24 months after the project's projected start date.

What will your project do? How will this be achieved? (220 words)
Provide a brief description of your project and the shorter-term impacts or effects your project aims to achieve. List the services or activities to be developed, delivered or completed.

What issues or opportunities will be addressed? How were they identified? (150 words)
Describe the issues or opportunities that the project will address. How were they identified and who was involved in that identification?

Where will the project take place? (100 words)
Be specific about where the project will take place. For example, you may say it takes place:

- in a specific area (e.g. community hall) or community (e.g. Burton);
- in a geographic region (e.g. Regional District of East Kootenay Electoral Area B); or
- Basin-wide (if your project will take place across the entire Columbia Basin Trust region).

Who will be involved in implementing the project? (100 words)
Describe the organization(s), staff or consultants, partners or individuals, and their relevant experience and expertise that they are bringing to the project.

Explain why this project is important to your community. (150 words)
"Community" may refer to a community of interest, specific sector, professional community or a geographic location. Explain why this project is important to your community and highlight how it was identified as a priority. Describe how your community will be supporting and/or participating in your project's development and/or delivery.

How many people will directly benefit from the project and who are they? (150 words)
Who is the project aimed to support? How many people will participate or receive support because of completing the project? Are they experiencing, or at risk of experiencing, social isolation?

How will the project be evaluated and how will you know if it has been successful? (150 words)

Indicate a clear plan for evaluating and reporting on results as they are related to the shorter-term impacts or effects that your project aims to achieve. Include how you will make use of monitoring and evaluation tools. The budget should include an allocation specifically for evaluation.

Why is your organization best suited to deliver the project? (150 words)
Describe past successes of your organization as it relates to this project. Projects that have received funding previously should include a summary report of results to date. You can summarize details here and/or include supporting documentation as attachments.

How will your project build social connections in your community? Please demonstrate how your project meets at least one of the Initiative Categories outlined in the Application Guide. (220 words)
Tell us how your project meets one or more of the Initiative Categories.

How does your project incorporate the Operating Principles outlined in the Application Guide? (220 words)
Review the Application Guide. Describe if and how your project incorporates the listed Operating Principles in your project's design and/or implementation philosophy.

PRELIMINARY WORKPLAN

Recognizing that a full project plan may not yet be developed, tell us how you anticipate organizing and carrying out your project.

Please note: If your project idea is selected Trust staff may request an updated Work Plan prior to releasing funding.

ESTIMATED CASH BUDGET

Recognizing that a full project plan may not yet be developed, tell us what cash resources you anticipate needing to carry out the project.

Please note: If your project idea is selected, Trust staff may request an updated budget prior to releasing funding.

List specific budget items under each heading to identify your expenses that you require cash for. Round up values to the nearest dollar. Click the +**Add** button to add another row. Do not include any items that will be provided to the project as in-kind contributions.

Budgets that contain excessive rates or unreasonable purchases will not be considered and may jeopardize project approval.

Please note the following:

Administration
Examples would include overhead costs to deliver the project such as office expenses and supplies and administrative wages. Total administrative fees should not be more than 15% of your cash budget. If you are calculating a percentage, total your expenses first then calculate your administration amount.

Contract Fees and/or Staff Wages
Each line item should include the position's title and the hourly rate multiplied by the number of hours for the whole period of the project for which you are requesting funding, if applicable. Do not include administration wages (see above). Wages specific to the project are eligible for funding. All proposed fees, salaries and wages must be in line with the skills provided, activities proposed and regional market conditions. For more information on appropriate wages, visit the Government of Canada's Job Bank website where you can Explore Careers by Wage.

Capital Purchases, Equipment Rental and Project Supplies
We will consider capital purchases, equipment rentals or project supplies if they are necessary to the project and the costs are reasonable. Capital and equipment purchases need to be justified to be eligible for funding. If approved, we may request that others in your community can access and use the purchased equipment.

If your organization currently owns the equipment required to undertake the project, we are not able to fund the cost of renting this equipment. However, rental costs may be eligible if your organization needs to rent the equipment from another organization.

Travel Costs
Eligible travel expenses include mileage at the current reasonable per-kilometer allowance as published by the Government of Canada and any necessary accommodation.

Training Costs
Training costs will only be considered if the training is deemed to be a necessary part of the project.

CASH REVENUE SOURCES

We recommend that your organization seeks cash funding from a variety of sources. Projects that have secured multiple funding sources often demonstrate wide-ranging support and may be prioritized for funding.

The Trust has a directory of grants that may be applicable to your work which can be found in the resource section of our Non-profit Advisors Program (ourtrust.org/nonprofit).

Source

In the first line labelled *Columbia Basin Trust*, indicate what you are requesting in this grant application.

Identify your other sources for cash revenue. This may include sources such as other grants, cash donations, or workshop registration fees.

Application Submitted? (Y/N)

Indicate whether not the application has been submitted at the time of submitting this application.

Confirmed (Y/N)

Indicate whether the contribution is confirmed at the time you submit the application to the Trust. If the funder has confirmed that they will be committing resources to your project, select *yes*. If you have applied for funding, but have not yet heard back, select *no*.

Amount

Indicate the dollar amount you will receive from each cash funding source. The form will automatically calculate subtotals for you.

Total Estimated Project Cash Budget & Total Cash Revenue Sources

These boxes will auto-fill. *Total Project Revenue* must equal *Total Estimated Project Cash Budget* to show you have enough funds and/or resources to complete your project. If the numbers are not equal, recheck your entries as the form adds them automatically.

IN-KIND SOURCES & CONTRIBUTIONS

In-kind Sources & Contributions (200 words)

Describe what contributions are being made to the project other than cash.

In-kind contributions are goods or services donated to your project from another organization or individual that you would have otherwise had to pay for.

For example:

- Society Executive Director to oversee the project: $35/hour @ 4 hrs./month for 24 months = $3,360
- Storage space is being provided by a community partner – estimated value @ $200/month for 24 months = $4,800

- Local grocer to deliver produce to organization: $40 standard delivery charge @ 2 deliveries/month for 24 months = $1,920

Source
Identify your other sources for In-Kind supports & contributions.

Confirmed (Y/N)
Indicate whether the contribution is confirmed at the time you submit the application to the Trust.

Amount
Estimate the dollar amount you would have paid if these resources or contributions were not donated. The form will automatically calculate subtotals for you.

> Please note:
> Total Cash Revenue & Total In-kind sources must total a minimum of 15% of the total project budget (In-Kind and Cash contributions combined).

In other words, if the Total Estimated Project Cash Budget is $10,000, then the Total Cash Revenue *plus* Total In-kind sources must equal at least $1,500.

SUPPORTING DOCUMENTS

Supporting documents provide additional evidence that the project is viable and important.

You may upload up to six supporting documents.

Ensure your supporting documents add value to your application and are as concise as possible. We will look at the strength of the document, not the quantity.

You may wish to include documents like:

- letters of support
- outcomes of community engagement
- report executive summaries
- quotes
- approvals

1. List what you are submitting.
2. Before uploading your supporting document, ensure the file name is clear and identifies the content.
3. File size may not exceed 3MB per document.

ADDITIONAL INFORMATION

Is there anything else you would like to add that has not already been mentioned? (220 words)
Include anything else you would like to add. Be sure it is something that is not already addressed in this application.

What is the main, and first, way you heard about this Expression of Interest?
Choose only one.

Would you like to receive email correspondence from the Trust?
Select yes or no from the drop-down options.

Does your organization have social media accounts?
Share your account names and we can connect.

How do you like to receive news and hear about updates from the Trust?
Choose as many as applicable

FINAL STEPS AND SUBMISSION

DECLARATION & APPLICANT AGREEMENT

Read this section thoroughly.

Click the box and enter the date, your name and your title to indicate that you have read and understand the Declaration and Applicant Agreement.

SUBMISSION

Click Submit. You will receive an automatic reply from us shortly after clicking submit, confirming that your application has been received.