SOCIAL GRANTS | Columbia Basin trust

2019 PROGRAM GUIDE

This Guide identifies what types of projects are eligible and gives you important information on how to complete an application form.

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

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PROGRAM GUIDE

WHAT IS THE SOCIAL GRANTS PROGRAM?

Our Social Grants Program (Program) funds community-initiated and community-supported projects that strengthen the social well-being of Basin residents. Projects must take place within the Columbia Basin Trust region (ourtrust.org/map). Learn about the Trust's Social Strategic Plan 2014-2019 at ourtrust.org/social.

There is up to $500,000 available in this intake.

The Program has two funding streams:

- Requests up to $5,000 (Small Grants)
- Requests over $5,000 (Large Grants)

Projects must demonstrate the ability to address at least one of the following categories:

1. QUALITY OF LIFE PROJECTS:

- Pilot or expand community-based activities that increase quality of life for Basin residents living in poverty, facing significant barriers and/or experiencing vulnerabilities.
- Pilot or expand projects that improve access to community and social services and resources for Basin residents living in poverty, facing significant barriers and/or experiencing vulnerabilities.
- Pilot or expand initiatives that foster social inclusion and increase social connections for populations experiencing, or at risk of experiencing, social isolation (e.g., children, youth, LGBTQ2+, people with diverse abilities, seniors, visible minorities, recent immigrants).

2. CHILDHOOD DEVELOPMENT PROJECTS:

- Pilot or expand early years (ages newborn to six) or middle years (ages six to twelve) initiatives that address existing or emerging developmental needs (i.e., cognitive, socioemotional, speech and language, fine or gross motor skills) of children who have or are at risk of developing vulnerabilities.

3. SOCIAL SECTOR CAPACITY PROJECTS:

- Develop and establish shared services or other efficiencies to address operational challenges of social sector non-profit organizations, while at the same time improving the quality and availability of services for clients.

WHO CAN APPLY?

Eligible applicants include registered non-profits, public organizations, municipalities, regional districts and Indigenous organizations (Eligible Applicants). Businesses may be considered depending on the Project and its broad community impact.

Regardless of which type of Eligible Applicant you are applying on behalf of, your Project should demonstrate that it will benefit the Basin and that the primary beneficiary is not the applicant or solely the members of a membership-based organization.

Applicants operating outside the Basin need to partner with community-based organizations in the Basin to be eligible.

HOW WILL THE TRUST SELECT PROJECTS?

Our Social Grants Evaluation Committee is a group of Basin residents who have experience and expertise in the social sector. They evaluate applications requesting over $5,000 in Trust funding and make funding recommendations to Trust staff.

Projects that incorporate some of 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;
- attract funding from other sources that share common objectives and desired outcomes;
- document lessons learned and share results with stakeholders from across the Basin to catalyze similar projects;
- demonstrate capacity and expertise to deliver the Project; and
- include reasonable and cost-effective budgets for Project delivery.

Projects with larger funding requests may be required to demonstrate that they incorporate more Operating Principles than Projects with smaller funding requests.

The Trust also considers geographic distribution of Projects in its funding decisions.

WHAT TYPES OF PROJECTS ARE NOT ELIGIBLE?

The Trust retains the right to determine individual Project eligibility. Projects are **not** eligible if they:

- involve paying for core or ongoing operating expenses of Eligible Applicants;
- do not address one of the categories on page 2;
- take place outside the Basin;
- relieve any level of government of its obligations;
- will undertake activities of political parties, advocacy or lobby groups or of organizations that are exclusive or discriminative in nature; or
- are solely capital projects for construction or renovations of facilities or are solely requests for purchasing capital assets not tied to the project categories listed in this Guide.

Note: Capital projects may be eligible to apply to the Trust's Community Development Program (click here for more information).

HOW CAN I LEARN MORE ABOUT THE PROGRAM?

The Trust will be hosting two information meetings to review Social Grants and answer questions about the application, selection and contracting processes. **Potential applicants are strongly encouraged to attend an information meeting.**

Information meetings will be hosted by teleconference and the same content will be covered at both information meetings**. If you are unable to attend an information meeting via teleconference, please reach out directly to Trust staff to discuss your application at 1.800.505.8998 or email socialgrants@ourtrust.org.**

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

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

September Information Meeting:
Date: Wednesday, September 18th, 2019
Time: 6:00 p.m. PT / 7:00 p.m. MT

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

Additional Social Grants Information Sessions will be held via Facebook and Instagram Live. Like us on Facebook and follow us on Instagram for updates on the date of these information sessions.

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

There is no maximum amount for grant requests; however, we anticipate that many successful Large Grants will be in the range of $10,000 - $75,000.

Applicants can request up to a maximum of 75% 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 25% 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.

If you are requesting a large amount of funding, your Project should demonstrate significant regional impact, community-wide collaboration and additional confirmed funding contributions from other sources.

CAN I APPLY FOR MULTI-YEAR FUNDING?

Small Grants (grants $5,000 and under) are limited to a 12-month maximum project timeframe.

Large Grants (grants over $5,000) are limited to a 36-month maximum timeframe. If you're requesting multi-year funding for a Project, provide **detailed rationale** explaining why the Project requires this length of time to be successful.

Note: Your budget should reflect the cash required to complete the Project over the entire timeframe listed in the application.

CAN I APPLY FOR MORE THAN ONE PROJECT?

Yes, you may apply for more than one Project. However, we strive to distribute funds between applicants, regions and types of Projects.

If you're a non-profit organization that has been asked to sponsor a Project, let us know in the *Additional Information* section on the application— especially if you're applying for more than one Project.

WHEN WILL I HEAR THE RESULTS?

The review process usually takes *up to eight weeks.*

We will contact you *by email*, at the address on your application form, to let you know if your project has been approved for funding.

If approved, we will also let you know whether there are conditions you'll need to address and whether you'll receive full or partial funding.

If you received a Small Grant, you will receive the funding once any necessary conditions are met. If you received a Large Grant, we will send a Contribution Agreement for signature and you will receive the funding after both parties sign this and any necessary conditions are met.

WHEN CAN MY PROJECT START?

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

WHEN IS THE APPLICATION DEADLINE?

The deadline is Tuesday, October 29th, 2019 at 2:00 p.m. PT / 3:00 p.m. MT.

Late applications will not be accepted.

WHAT ELSE DO I HAVE TO KEEP IN MIND?

Even if a Project meets the eligibility criteria it may not be selected for funding as the Trust receives requests for more funding than what is available.

The Trust retains the discretion to determine Project eligibility and the amount of funding it may allocate to each Project and to offer part or all of the Trust portion of the funding request.

HOW DO I APPLY?

Applications are online and application instructions are described in the next section of this Guide.

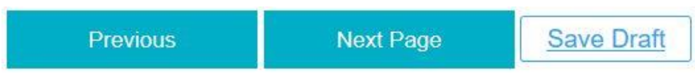
We strongly encourage all applicants to read the directions in the *Application Guide* section of this document prior to filling out the application form.

APPLICATION GUIDE – SOCIAL GRANTS

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 per program. You must submit an application before you can begin another application within that specific program. 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.
- **<u>DO NOT CLICK YOUR BROWSERS BACK BUTTON</u>**: 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 to the program. All of the questions you will be asked on the online application form are included on this worksheet.

COMPLETING THE APPLICATION FORM QUESTIONS

Grant Category

Indicate whether you are applying for a Small Grant ($5,000 and under) or Large Grant (over $5,000).

APPLICANT INFORMATION

Organization Legal Name

Enter the full legal name of your registered non-profit, public organization, municipality, regional district or Indigenous organization.

BC Registry Incorporation/Registration or Business Number (if applicable)

Registered non-profits and businesses must be in good standing with the BC Registry Services. Enter your number here.

Signing Authority Contact Information

If your application is successful, we will be sending a Contribution Agreement to this contact for signature.

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 Categories

Your Project must address one of the categories listed. Select the category(ies) that your Project will work toward.

PROJECT DETAILS

Project Title

Your Project title should be succinct, descriptive and no longer than five 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 & End 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, so it is recommended that your start date is no earlier than eight weeks after the submission deadline.

Project funding is limited to a 12-month maximum for Small Grants and a 36-month maximum for Large Grants.

What will the 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.

For example:

- *Healthy Beginnings is a family support project in Creston that will provide nutritional information and food preparation skills to first time parents of young children (0 – 5 yrs). The project will host 8 facilitated parent information sessions on healthy nutrition for children. Parents will learn by experience, including hands on opportunities preparing meals to take home.*
- *The Power of Partnerships is a collaborative initiative that will address the needs of adults living with diverse abilities in the Elk Valley by building partnerships among community agencies and improving service delivery. It will develop a community work plan with tangible actions that will improve the quality of service. Community organizations will gain a deeper understanding of service gaps and identify tangible ways to improve service for adults with diverse abilities.*

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) including an address if applicable;
- 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. With this in mind, 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 as a result of completing the Project?

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.

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 a supporting document for more information.

How does your project address the Project Categories you selected above? Please be as specific as possible. (220 words) (Not required for Small Grant applications)
Tell us how your Project meets one or more of the Project Categories you selected above.

How does your Project incorporate the Operating Principles outlined in the Program Guide? (220 words) (Not required for Small Grant applications)
Review the Program Guide. Describe if and how your Project incorporates some of the listed Operating Principles in your Project's design and/or implementation philosophy.

Will your project continue beyond the timeframe identified in this application? If so, what potential funding sources or partnerships have you identified to continue supporting the project in future? (150 words) (Not required for Small Grant applications)
Indicate whether the Project is intended to continue beyond the timeframes identified in this application. Identify potential funders and/or partners you are seeking support from or plan to in future.

Project Description (60 words or less)
After considering all the Project Details information you have provided above, provide a brief high-level summary of your Project. If possible, start with "This Project will…"

WORKPLAN

Tell us how you plan to organize and carry out your project.

Activity
List all activities you plan to complete during the Project's timeframe.

Overseen By

Indicate who will be taking the lead on each of the proposed activities. We will want to see that all components of the Project are being delivered or managed by someone with relevant experience or expertise.

Start and End Dates
Identify the date that each activity is proposed to begin and end. Any activities that occur before receiving Project approval are not eligible for funding.

PROJECT CASH BUDGET

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.

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 per cent 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 as long as 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 have the ability to 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 has to rent the equipment from another organization.

Other Costs (be specific)
If there are other Project-specific costs that are not included elsewhere, you may add them into this section with a specific line item description. Eligible travel expenses include mileage at 0.55 per km and any necessary accommodation. Training costs will only be considered if the training is deemed to be a necessary part of the Project.

Project Cash Budget EXAMPLE

This reflects the total cash required to complete the project.

CASH BUDGET ITEM	Total Amount Required
Administration	
Administrative costs for project	12,000
Contract Fees and/or Staff Wages	
Project Coordinator/Supervisor (20hrs/month @ 24 months @ $28/hr)	13,440
Outreach Workers (80hrs/month @ 24 months @ $26/hr x 2 workers)	99,840
Volunteer Coordinator (10hrs/month @ 24 months @ $21/hr)	5,040
Capital Purchases	
Outreach supplies	1,000
Other Costs (be specific)	
Advertising and outreach	750
Travel expenses (3,500km @ $0.55/km)	1,925
Recognition event for volunteers and project wind-up	500
TOTAL	**$134,495**

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 the amount 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.

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

Cash Revenue Sources EXAMPLE

This reflects who else is contributing cash to the project.

CASH REVENUE SOURCES		
Source	**Confirmed (Y/N)**	**Amount**
Columbia Basin Trust	*N*	*$45,000*
ABC Community Services	*Y*	$25,000
Community Foundation Grant	*Y*	$4,000
Local Credit Union Grant	*Y*	$2,500
Corporate Contributions	*Y*	$8,500
Local/Regional Government	*N*	$19,495
Other Foundation	*N*	$30,000
TOTAL CASH REVENUE:		**$134,495**

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 will oversee the project: $35/hour @ 4 hrs/month for 24 months valued at $3,360
- Office space is being provided by a community partner: $50/hour @ 2 hrs/week for 20 weeks valued at $2,000

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 program?
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

DECLARATION

Read this section. Click the box next to I agree, then type in your name and title.

APPLICANT AGREEMENT (For Small Grant Applications only)

Read this section thoroughly.

Click the box to indicate that you have read and understood the Applicant Agreement.

IMPORTANT NOTE: If your project is selected for funding this application will become your contractual agreement and outlines the funding and contractual requirements that go along with your grant.

SIGNATURE (For Small Grant Applications)

Draw or type your signature into the box provided.

SUBMISSION

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