2020 PROGRAM GUIDE FOR LARGE GRANTS

This Guide identifies what types of projects are eligible and gives you important information on how to complete an application form for the Large Grants intake of the Social Grants program.

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

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PROGRAM GUIDE FOR LARGE GRANT APPLICATIONS

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 2014-2021 at ourtrust.org/social.

There is up to $500,000 available this intake. There will be a second intake in 2020.

The Program has two funding streams:
- Requests up to $5,000 (Small Grants)
- Requests over $5,000 (Large Grants)

This Program Guide is for <u>Large Grant</u> applications requesting more than $5,000 from the Trust.

Visit ourtrust.org/socialgrants for information regarding <u>Small Grant</u> timelines and application process.

2020 PROGRAM UPDATES

This year, the Trust is implementing a two-stage application process for Large Grants, to provide applicants more support with and time for project and application development. Applicants will first complete an Expression of Interest (EOI) online. Projects selected to move forward will be invited to submit a full application with support and guidance from Trust staff.

Note that applications for Small Grants (requests of up to $5,000) will be open in May 2020 and will continue to have a brief, one-stage application process. More details regarding Social Small Grants can be found at ourtrust.org/socialgrants

WHEN IS THE EOI DEADLINE?

The EOI deadline is **April 7, 2020 at 2:00 p.m. PT / 3:00 p.m. MT.** We will not accept EOIs after this deadline.

If selected to move forward, you will hear from us by May 11, 2020 and your full application will be due by July 14, 2020.

WHO CAN APPLY?

Eligible applicants (Eligible Applicants) include registered non-profits, public organizations, municipalities, regional districts and Indigenous organizations.

Businesses may be considered depending on the Project and its broad community impact. Business applicants must demonstrate partnerships with community-based organizations in the design and delivery of their proposed project.

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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 must partner with community-based organizations in the Basin to be eligible.

WHAT TYPES OF PROJECTS ARE ELIGIBLE?

Projects must address at least one of the following three categories:

1. Quality of Life Projects:

- Pilot or expand community-based activities that increase quality of life for people in the Basin 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 people in the Basin 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 12) 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.

- Create or strengthen collaborative initiatives that help address systemic social issues.

In addition, projects that incorporate some of the following **Operating Principles** will be prioritized for funding support:

> **What does it mean to "pilot" or "expand" a project?***
>
> To "pilot" means to start a new initiative that has not been done before. This is a great way to test an idea, see how much benefit it generates, work out any operational kinks, and seek sustainable sources of funding.
>
> To "expand" means to build on a successful project in order to extend its influence across regions or target populations and/or to enhance the service delivery, as well as to seek sustainable sources of funding.
>
> *from external resources

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- pilot or expand initiatives that align with the Project Categories;
- provide evidence of 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;
- 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, including plan for long term sustainability, as appropriate;
- have not previously received multi-year funding from the Social Grants program;
- 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.

If your project is selected to move forward to the full application stage, you will be able upload up to six Letters of Support from partners and other organizations (e.g. non-profits, government, businesses, etc.) familiar with your organization and/or your project. Such Letters of Support are recommended.

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 project categories on page 3;
- take place outside of 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 capital projects for construction or renovations of facilities or are solely requests for purchasing capital assets not tied to the delivery of an eligible project.

Projects that have received multi-year funding from Social Grants in the past may not be prioritized.

Note: Capital projects may be eligible to apply to the Trust for support through other programs; please contact info@ourtrust.org to discuss your capital project idea.

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HOW WILL THE TRUST SELECT PROJECTS TO MOVE FORWARD TO THE APPLICATION STAGE?

The Trust will review your submitted EOI to consider how well your project aligns with the eligibility criteria, Project Categories, and Operating Principles as described above.

The Trust strives to distribute Program funds equitably across communities, organizations and project types and will consider this as part of the adjudication of the EOI.

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 sources other than the Trust. Letters of Support from partners and other organizations (e.g. non-profits, government, businesses, etc.) familiar with your organization and/or your project are required.

CAN I APPLY FOR MULTI-YEAR FUNDING?

Large Grants 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. 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 equitably between organizations, communities, and types of Projects.

If you are 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.

WHAT ELSE DO I HAVE TO KEEP IN MIND?

Even if a Project is invited to submit a full application, it may not be selected for funding as the Trust will receive 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.

WHAT ARE THE KEY DATES FOR THIS INTAKE?

- Tuesday, February 4, 2020: Large Grant EOI opens online
- Monday, March 2, 2020: Information Session by teleconference
- Tuesday, April 7, 2020: Deadline for EOIs to be submitted online
- May 11, 2020: Applicants notified regarding decision on EOIs
- July 14, 2020: Deadline to complete full application online (by invitation only)
- September 9, 2020: Final notifications to applicants

WHEN WILL I HEAR THE RESULTS?

The Trust will notify applicants regarding their Expression of Interest by May 11, 2020.

We will contact you *by email*, at the address on your EOI, to let you know if your EOI has been selected to move forward.

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. It is recommended the projects begin no earlier than September 2020.

HOW CAN I LEARN MORE ABOUT THE PROGRAM?

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

The information meeting will be hosted by teleconference**.**

Information Meeting for Expressions of Interest:
Date: Monday, March 2, 2020
Time: 2:00 p.m. PT / 3:00 p.m. MT

Dial-In: 1-877-806-9883
Passcode: 887636

We also encourage applicants to sign up for the Trust's monthly e-newsletter, like us on Facebook and follow us on Instagram for any other updates.

Social Grants staff are also available to answer questions one-on-one while you prepare your EOI. Contact us at socialgrants@ourtrust.org to set up a convenient time.

HOW DO I APPLY?

Expressions of Interest are submitted online. Prior to completing and submitting an EOI, we strongly encourage all applicants to read the directions found in the *EOI Worksheet*, and eligibility criteria found in the *Program Guide for Large Grants*.

This program has a two-stage application process:

1. Read the *Program Guide for Large Grants*.

2. Read the *EOI Worksheet and Guide*.

3. Attend the teleconference Information Session on March 2, 2020, at 2:00 p.m. PT / 3:00 p.m. MT. or email socialgrants@ourtrust.org to set-up a time to discuss your project idea.

4. Submit your Expression of Interest online by **April 7, 2020 by 2:00 p.m. PT/3:00 p.m. MT**. If selected to move forward, you will be:
   a. invited to meet by phone with a Social Grants staff member to support your project and application development; and
   b. provided access to the online application form to be completed and submitted by July 14, 2020 at 2:00 p.m. PT/3:00 p.m. MT.

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