Application Guide for LEVEL Grants

This is a step-by-step guide for completing your application for Vancouver Foundation. We recommend that you read through this guide BEFORE beginning the online application process.

This Grant Application Guide contains information relating to general questions that we ask of all applicants and specific questions that we ask of certain applicants. The questions that you need to answer will be automatically displayed to you online based on the grant type that is available for this grant and the application stage that Vancouver Foundation allows for your submission.

This Grant Application Guide is divided into several sections:

- Introduction
- Application process and grant types available
- Information collected from organizations applying for a grant
- Questions asked about the project (all applications)
- Questions asked of some applicants (specific to application type and stage)
- Questions asked about the budget (all applications)
- Information about supporting documents, and financial statements that you need to upload to your application

You may wish to prepare a draft of your application in Microsoft Word. This will allow you to check your spelling, grammar, and character counts. Similarly, you may wish to draft your project budget in Microsoft Excel. Once you're satisfied with your responses you can then copy and paste into the online application.

We appreciate the time and effort you take to prepare your submission and hope this guide will make the process easier.

Introduction

- Your application will be assessed by knowledgeable staff and volunteer advisors, all of whom have extensive knowledge and experience related to the LEVEL initiative. Although you can assume a fairly high level of technical knowledge, we recommend that you write in plain English and avoid unnecessary jargon.

- By submitting an application, you consent to and acknowledge that Vancouver Foundation may share information about the application and/or your organization with our staff, donors, advisors, and community partners.

- If you have question or comments, please contact a member of the LEVEL Grants Team at 604.688.2204.

Application process and grant types available

Vancouver Foundation has a two-stage online application process. The first stage is a Letter of Intent, which consists of a brief proposal to determine basic suitability. Once a fit has been established with Vancouver Foundation staff, a short-list of organizations will be invited to submit a full proposal.

Develop Grants are short-term grants that generate ideas and build capacity and common ground for shared action and learning by community stakeholders.

Grants may support work such as determining organizational readiness or convening stakeholders as a cohort (geographic region, sector-specific i.e. the arts; social services) in development of practice and/or policy changes.

For example, organizations could explore what decolonizing their board structure or recruitment and retention strategies might look like. Activities are typically completed within 6 months.

> **Maximum grant:** $10,000 for up to one year.

Test Grants help project teams test ideas and learn what works. Grants may support work such as piloting an initiative at the staff or board level.

For example, a board mentorship program could be used to recruit young leaders as board members or funds could go towards addressing current inequities by increasing job security for Indigenous or racialized immigrant or refugee young adults (through paying a living wage, providing benefits, full-time employment etc.) that also provides a pathway to leadership within the organization and/or sector. Activities are typically completed within 12 - 18 months.

> **Maximum grant:** $50,000 for up to one year.

Application Guide

Section A: General Information

1. Granting Program

Please select the granting program that you believe best suits the outcomes that you hope to achieve through your project.

2. Grant Type

Please select either Develop or Test.

Section B: Eligibility

1. Confirmation of Eligibility

Check the box, "I confirm that I have read the general funding guidelines and believe that both my organization and project are eligible for Vancouver Foundation funding."

2. Qualified Donee Type

The Applicant Organization must be a Qualified Donee listed by the Canada Revenue Agency.

- Select Registered Charity if applicable, and then enter the full registered charity number. (It is a 13-digit number as follows: XXXXX XXXX RR XXXX.)

- If the Applicant Organization is not a registered charity, then select Other Qualified Donee under the Income Tax Act and then select the correct donee type.

Vancouver Foundation can only grant to organizations that are included on Canada Revenue Agency's list of qualified donees. If your organization is not a qualified donee, you might consider developing an intermediary arrangement with an organization that is a registered charity or other listed qualified donee.

Section C: Applicant Organization

1. Legal Name

Provide the full legal name of the Applicant Organization, which must be a Qualified Donee. This is the name that appears on its incorporation and registration documents. If your application involves multiple partners, please ensure the organization listed here is recognized and listed as a qualified donee with Canada Revenue Agency.

2. Operating Name (if different from above)

Complete this if the Applicant Organization's operating name is different from its legal (or registered) name (e.g. "The West Coast Women's Resources Society" is the registered name, while "Birch Transition House" is the name that the organization usually uses).

3. Address / Phone Number

Provide the Applicant Organization's mailing address related to this grant, including the city, province and postal code, as well as its phone number, email and website.

4. Executive Director/Senior Staff Person (with signing authority)

Enter the salutation, first name, last name, job title and email address of the person at the Applicant Organization who has the authority to commit the organization to accepting the conditions associated with a grant. For organizations that are volunteer-operated, you may list the Board Chair or President.

5. Board Chair/Board President/Council Representative (with signing authority)

Enter the salutation, first name, last name, job title and email address of the Board member at the Applicant Organization who has the authority to commit the organization to accepting the conditions associated with a grant. For organizations that are volunteer-operated, you may list another member of the Board who has signing authority.

6. Project Contact at Applicant/Qualified Donee Organization

Enter the salutation, name, job title, phone number and email address of the contact person for this grant application. This person should be able to speak, in detail, to the project's objectives and budget, and serve as the main contact for Vancouver Foundation. Provide the person's full contact information even if this repeats information provided in a previous question.

Note: This email address will be used for all correspondence related to this application.

7. Profile or Purpose Statement

Please briefly summarize the main purpose and/or mission of the Applicant Organization.

EXAMPLE
Founded in 1958, the purpose of the Youth2Youth Society is to advocate for the safety and well-being of youth between 16 to 25 years of age, by providing supported housing and employment options.

If your project will be led by an Intermediary Organization on behalf of the Applicant Organization, then answer the following questions in Section D. If not, then skip to Section E.

Section D: Intermediary Organization

1. Legal Name

Provide the full legal name of the Intermediary Organization, if the organization intending to lead the project is different from the Applicant in Section C. Refer to Canada Revenue Agency's guidelines for more details about [intermediary organizations](#).

2. Operating Name (if different from above)

Complete this if the Intermediary Organization's operating name is different from its legal name (e.g. "The Society for Children's Advancement" is the registered name, while "Kid's Corner" is the name that the organization usually uses).

3. Address / Phone Number

Provide the Intermediary Organization's mailing address related to this grant, including the city, province and postal code, as well as its phone number, email and website.

4. Project Contact at Intermediary Organization

Enter the salutation, first name, last name, job title, phone number and email address of the contact person at the Intermediary Organization. This person should be able to speak in detail to the project's objectives and budget, and serve as the secondary contact for Vancouver Foundation. Provide the person's full address and contact information even if this repeats information provided in a previous question.

5. Profile or Purpose Statement

Please briefly summarize the main purpose and/or mission of the Intermediary Organization.

Section E: Project Details — Questions Asked of All Applicants

1. Working title for the project

State the title/name of your project, even if it is just a temporary working title. If invited to submit a full proposal you will have the option of updating the project title.

2. Anticipated Project Start and End Dates

Indicate the anticipated start and end dates for your project using the drop-down calendar option and format of mm/yyyy.

Section E: Project Details — Questions Specific to Grant Type and Application Stage

For this section of your application, you will need to answer questions that are specific the Grant Type you choose and Application Stage that you are at. Based on your responses in Section A and your current application stage, the online application form will only display the questions that you need to answer.

	Develop	Test
Letter of Intent	Page 6	Page 6
Full Proposal	Pages 7 - 8	Pages 8 - 10

Following these specific questions, you will continue to work on a broader set of questions that relate to your project budget.

Letter of Intent - Develop Grants
(Maximum 1,500 characters per question)

1. Provide a concise summary of your project.

Provide a concise summary of your project. This should include how the project idea originated, the need for the project, and what you intend to do.

2. Describe the community issue or challenge that you want to address. Indicate whether your project will focus on board or staff leadership.

Please describe the issue that you are attempting to address. Among other things, this should tell us about the gap you're trying to address and how you have established that there is a need for your project.

Letter of Intent - Test Grants
(Maximum 1,500 characters per question)

1. Provide a concise summary of your project.

Provide a concise summary of your project. This should include how the project idea originated, the need for the project, and what you intend to do.

2. Describe the community issue or challenge that you want to address. Indicate whether your project will focus on board or staff leadership.

Please describe the issue that you are attempting to address. Among other things, this should tell us about the gap you're trying to address and how you have established that there is a need for your project.

3. Describe how your project addresses racial equity to create and strengthen staff and board leadership opportunities for Indigenous and immigrant/refugee youth and young adults within the charitable/non-profit sector.

Provide a brief description of the activities you plan to undertake that will help your project contribute to strengthening Indigenous and/or racialized immigrant and refugee youth leadership within the charitable and non-profit sectors.

Full Proposal - Develop Grants
(Maximum 1,500 characters per question unless otherwise indicated)

Any responses that you provided at the Letter of Intent stage will be automatically populated into the Full Proposal online form. You will have the ability to edit your responses before you complete and submit the Full Proposal.

1. Provide a concise summary of your project.

Provide a concise summary of your project. This should include how the project idea originated, the need for the project, and what you intend to do.

2. Describe the community issue or challenge that you want to address. Indicate whether your project will focus on board or staff leadership.

Please describe the issue that you are attempting to address. Among other things, this should tell us about the gap you're trying to address and how you have established that there is a need for your project.

3. Why will developing a plan to create and strengthen staff and board leadership opportunities for Indigenous and immigrant/refugee youth and young adults within the sector be meaningful?

Tell us about the impact you hope your project will have. How do you plan to share what you learn?

4. How do you foresee this plan supporting learning and awareness of racial equity in your organization or community? What are the anticipated outcomes of your project? Be specific.

Outcomes are the results of your project. What changes do you expect as a result of this project?

Define the overall goal(s) and specific objectives of the project. TIP: Goals tend to be longer-view. Your project probably won't achieve them on your own. Objectives are more sharply focused, and short- or medium-term. They describe realistic and specific expectations of what you plan to achieve.

5. Where are you currently in the design and development process? What have you done to move your ideas forward and what activities do you still need to do? Be specific.

Provide an overview of steps you have taken so far and what you are planning next.

6. Use the table on the next page to describe the activities you will undertake to achieve above.

Provide a brief description of the timeline of activities you plan to undertake that will help your project contribute to the outcomes indicated in the LEVEL Call for Proposals.

TIMELINE	ACTIVITIES THAT ARE COMPLETED	ACTIVITIES THAT NEED TO TAKE PLACE
January 2019 – mid April 2019	Facilitate community dialogues	Jordan Smith, Community Developer
March 2019	Outreach/recruit community team	Project Assistant (TBD)
April 2019 – August 2019	Conduct environmental scan and meetings with local staff of partnering organizations	Sheila Thomas, Marketing Coordinator
September 2019 – November 2019	Host two regional cohort meeting with organizations in the region to share learnings and explore implementation strategies	Jordan Smith, Community Developer plus staff from partnering/cohort organizations.

7. How will this project support the development of intercultural fluency when working with and alongside diverse racialized communities and individuals?

Tell us about the existing policies, practices or relationships that you have, want to develop or that require strengthening in order to demonstrate intercultural fluency.

8. Who are you currently partnering with? Who else do you intend to include or collaborate with in the development process? Indicate any unlikely or non-traditional partners you plan to engage.

Describe community involvement and the extent to which you are collaborating with other agencies for this specific project, which may include the development of partnership agreements. Indicate the degree of community support that exists. Be as specific as possible. Please also attach up to three letters of support from community partners, participants, or experts in the field who endorse your project. *These are to be attached in the Supporting Documents portion of the application.*

9. What are some of the questions and learnings you hope to explore through the project?

What are you curious about? What questions are driving your work and/or approach? What would you like to learn?

Full Proposal - Test Grants
(Maximum 1,500 characters per question unless otherwise indicated)

Any responses that you provided at the Letter of Intent stage will be automatically populated into the Full Proposal online form. You will have the ability to edit your responses before you complete and submit the Full Proposal.

1. Provide a concise summary of your project.

Provide a concise summary of your project. This should include how the project idea originated, the need for the project, and what you intend to do.

2. Describe the community issue or challenge that you want to address. Indicate whether your

project will focus on board or staff leadership.

Please describe the issue that you are attempting to address. Among other things, this should tell us about the gap you're trying to address and how you have established that there is a need for your project.

3. Describe how your project addresses racial equity to create and strengthen staff and board leadership opportunities for Indigenous and immigrant/refugee youth and young adults within the charitable/non-profit sector.

Provide a brief description of the activities you plan to undertake that will help your project contribute to strengthening Indigenous and/or racialized immigrant and refugee youth leadership within the charitable and non-profit sectors.

4. What research or other evidence are you using to inform the development of your work?

Tell us about the information (formal and informal resources) that has informed your project and its development. The evidence could be formal research, statistics, white papers, information gathered through community networks or peer groups, knowledge of similar projects or work in a similar system, etc.

5. What are the anticipated outcomes of your project? What does success look like at individual, organizational, community and system levels? Be specific.

Outcomes are the results of your project. What changes do you expect as a result of this project?

Define the overall goal(s) and specific objectives of the project. TIP: Goals tend to be longer-view. Your project probably won't achieve them on your own. Objectives are more sharply focused, and short- or medium-term. They describe realistic and specific expectations of what you plan to achieve.

6. Describe the schedule of activities you will undertake to achieve these outcomes.

Provide a brief description of the activities you plan to undertake that will help your project contribute to the outcomes indicated in the LEVEL Call for Proposals.

EXAMPLE

TIMELINE	KEY STEPS	PERSON RESPONSIBLE
January 2019 – mid March 2019	Meet with staff and board to assess internal capacity	Jordan Smith, Executive Director
March 2019 – May 2019	Refine strategy plan for recruitment and orientation	Consultant or Partner Organization (TBD)
May 2019 – July 2019	Work with existing youth staff to develop leadership and governance mentorship plan	Sheila Thomas, HR Director
August 2019 – June 2020	Implement mentorship and equity retention strategies; build in 3 stages of feedback loops and check in points for review	Sheila Thomas, HR Director and Carol Lew, Program Manager

7. How do you anticipate results from this project will inform, deepen or influence organizational policy and/or practice shifts?

Highlight an existing policy or practice shift required and how your work will shed light upon, demonstrate or add knowledge to help change policy or practice.

8. How does your organization demonstrate intercultural fluency when working with and alongside diverse racialized communities and individuals? Please also describe any specific practice that supports the growth of equity and cultural connection for diverse communities.

Tell us about the existing policies, practices or relationships that you have, want to develop or that require strengthening in order to demonstrate intercultural fluency.

9. Describe how you will support the meaningful engagement of Indigenous, immigrant and refugee young people in the implementation and evaluation of the project.

Tell us how you currently engage young people in your organization or program development, implementation and/or evaluation. If you would like to increase or deepen youth engagement what additional capacities would be needed to do so?

10. What existing community strengths and assets do you see this work building on?

Briefly describe past or current work taking place in your community related to your proposed project and how your project builds upon this knowledge.

11. How will this project support and/or deepen awareness of racial equity in your community and/or region? And in the charitable/non-profit sector?

Tell us about the intended impact of your project beyond the organization(s) involved. How do you plan to share what you learn? How do you intend to share the experiences and impact of your program with others who might benefit from your wisdom? For example, if you plan to share the lessons at a conference, please indicate the name of the conference and when it will take place; if it is community forums or dialogues, indicate how often and where.

12. Identify your community partners and their specific roles in the design, implementations and evaluation of the project. Indicate any unlikely or non-traditional partners you plan to engage.

Describe community involvement and the extent to which you are collaborating with other agencies for this specific project, which may include the development of partnership agreements. Indicate the degree of community support that exists. Be as specific as possible. Please also attach up to three letters of support from community partners, participants, or experts in the field who endorse your project. *These are to be attached in the Supporting Documents portion of the application.*

Section F: Budget

1. Funding Duration

Please enter the number of years of funding you are seeking. Both Develop and Test grants are for a maximum of one year of funding.

2. Expenditures

Project budgets must be balanced and the expenses must reflect the real, incurred costs associated with the project. A full project budget is required.

- Separate your project's expenses into logical categories. Put each category on a separate line in the budget table.
- In the final column, specify the amount of funding from Vancouver Foundation you wish to allocate against each budget line. As a general rule, Vancouver Foundation does not fund more than 50% of a project's total cost; however, this does not apply to the LEVEL Develop grants. We are also willing to consider in-kind contributions for both the LEVELO Develop and Test grants.

Note: The Expenditure and Revenue budget form will automatically calculate the totals for both columns and rows, as you insert your numeric dollar values.

EXAMPLE (1 Year Project)

Budget Line Item	Year 1 Cost	Total Cost	Total Amount Requested from Vancouver Foundation
Assistant	16,000	32,000	18,000
Instructors	12,000	24,000	12,000
Marketing Coordinator	4,000	8,000	
Participant honorariums	1,000	2,000	1,000
Workshop materials and supplies	800	1,500	800
Director	2,000	4,000	
Child care subsidies for participants			
Publicity/Promotional materials	500	1,000	700
Political activities	0	0	
Facility use/Workshop room rental	25,000	50,000	
TOTAL	61,300	122,500	32,500

3. Political Activities

Vancouver Foundation understands that non-partisan political activities, as part of a larger project, can be a useful way to address complex social issues. Learn more about allowable political activities, and consider whether or not these activities will add value to your project.

- Select YES if your project will include political activities; select NO if it will not.

- Please indicate the dollar amount of Vancouver Foundation funding that will be dedicated to political activities. NOTE: this amount needs to be included on the project budget table as well.

Please provide a description of the political activities and how they support and advance the charitable purposes of this project. (Limit: 1,500 characters)

4. Revenues

List each anticipated source of revenue, and indicate the amount requested per year from them. Under the *Confirmed* column, indicate the amount that is confirmed for each source at the time of application. Finally, provide the name and telephone number of each funding contact.

- List the sources of confirmed in-kind contributions separately from cash contributions.

- Under Organization's Contribution, separately indicate contributions from donations/fund-raising and in-kind contributions. Put a cash value on those in-kind contributions for which you can assess a market value. Remember that in-kind contributions should be reflected in your expenses (i.e. overall revenue should equal overall expenses to produce a balanced budget).

- In-kind contributions relate directly to real, anticipated and essential expenses in the project budget. In-kind contributions can be in the form of cash-equivalent goods or services, which, if not donated, would have to be purchased with project funds. In-kind contributions can also include the time of individuals within partnering organizations (e.g., experts in a specific area) spent providing direction and participating in the project. In some cases, the partners may provide specialized skills and advice or access to special equipment, space, data sets, etc. (Adapted from Social Sciences and Humanities Research Council)

Vancouver Foundation must be confident that the project can be successfully completed and that all necessary resources are available before we will release funds for approved projects. When additional funding or in-kind contributions are required and are still pending, it is our practice to approve a grant on the condition of sufficient funding to proceed.

EXAMPLE (1 Year Project)

Revenue Source	YEAR 1 Requested	Total Revenue	Amount Confirmed	Contact/Tel:
Vancouver Foundation	18,500	32,500		G. Bertha: 604.688.2204
United Way of the North Valley	15,000	26,000		G. Mary: 250.999.9999
Private Donor	2,000	4,000	4,000	C. Ray: 604.222.2222
Community Organization's Contributions:				Community Housing Organization
Cash	15,000	30,000	30,000	D. Jones 604.889.0000
In-Kind gifts	10,000	20,000	30,000	D. Jones 604.889.0000
TOTAL REVENUE	65,500	122,500	64,000	

Section G: Supporting Documents

Supporting documents are only required at the Full Proposal stage.

This is a list of the required supporting documents for the Applicant Organization, as well as for the Intermediary Organization (if applicable). Please upload before you hit "Click and Submit" button.

Please note that a signature page is no longer required during application. Signatures are only required for applications that are approved.

1. Audited financial statements for last completed fiscal year (If you do not have audited financials, then please submit the most recent year-end financial statement)

Submit a full financial statement (preferably audited) for your organization's most recently completed fiscal year, including any statement of accumulated surplus or deficit (e.g. balance sheet).

2. Operating budget for the current fiscal year

Submit your organization's current fiscal year operating budget.

3. Most recent year-to-date income statement(s) or statement of activities

Submit your most recent interim (monthly or quarterly) income statement, comparing actual to budgeted expenditures, year-to-date.

4. Board of Directors List or Senior Governance Body of your organization

Attach a list of your current Board of Directors, including their names and positions. If your organization does not have a Board of Directors, please include information for an equivalent senior

governance body. We do not require information that may be considered confidential, such as home mailing addresses or telephone numbers for your Board.

5. Letters of Support (maximum 3)

You can include up to three letters from organizations that are working with you on this specific project or have endorsed your project (e.g. other funders; and community members w ho support your initiative, etc.). These letters should demonstrate genuine knowledge of and/or involvement with your project and be unique from one another.

Section H: Review & Submit

Please ensure that you upload all the required attachments and retain a full copy of your application for your files. Once you have selected the "Complete and Submit" icon on the last page of the application, you will not be able to make any changes online. You can, however, still log-in and view your application or print a copy for your records.