Application Guide for Develop Grants

vancouver foundation

> **These guidelines have been revised for applications made from April 2017 onwards.** This is a step-by-step guide for completing your application to Vancouver Foundation. We recommend that you read through this guide BEFORE beginning the online application process.

This application guide is specific to DEVELOP grants. If you are applying for a Test or Grow grant, please download the application guide for those grant types. There are variations in the questions asked and in the information requested.

This guide is divided into several sections:

- Introduction
- Application process and grant types available
- Section A: Field of Interest and Grant Type
- Section B: Confirmation of Qualified Donee Status
- Section C: Applicant Organization
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- Section E: Project Details
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You may wish to prepare a draft of your application using external software, such as Microsoft Word. This will allow you to check your spelling, grammar, and character counts. Similarly, you may wish to draft your project budget using external software, such as Microsoft Excel. Once you're satisfied with your responses, you can then copy and paste them 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 staff and volunteer advisors, many of whom have extensive knowledge and experience related to field of interest outcomes. Although you can assume a high level of technical knowledge, please write in plain English and avoid unnecessary jargon.

- For a brief video introduction to social innovation, please view https://vimeo.com/60114688. For more in-depth information, please see Social Innovation Generation's Knowledge Hub.

- 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 questions, please contact a member of the Field of Interest Grants Team at 604.688.2204.

Application process

Vancouver Foundation offers a one or two stage online application process, depending upon the type of grant you choose. Develop, Test and Grow grants are available through the Field of Interest program.

Develop grants are short-term grants available to project teams that have already worked on a social issue to some extent and need support to move the idea forward to become a viable project plan.

> **Maximum grant:** $10,000 for up to one year.
> **One stage application:** You submit a Project Overview, including a project summary and budget.

Develop grants are particularly well-suited to support teams where there may be a lack of certainty on what the systemic root causes are, what systemic behaviours should change or what the intervention should be, or when there is lack of agreement on how to move forward and with whom. These grants support teams to gather additional information, meet with key stakeholders to learn more about the system or systemic issue, and begin to form a model or prototype of the eventual project. The intended output of a Develop grant is a viable plan for a project that can then be submitted to funders for consideration.

Test grants are longer-term grants to help project teams to test and evaluate whether they can influence systemic issues as desired. Test grants are available to evaluate the effectiveness of new or existing work meant to influence systemic change.

> **Maximum grant:** $75,000/year for up to three years.
> **Two stage application:** You submit a Project Overview including a project summary and budget. Then, if you're invited to proceed, you submit a Full Proposal that builds upon the information you've already provided. You also upload or send in other documents that support your application.

Test grants are particularly well-suited to help project teams who have a clear sense of what the complex social issue is, have already identified the systemic behaviours that are the root cause(s) of this issue, know how they will work to influence change to these systemic behaviours, have confirmed the people and organizations they will partner with throughout the work, and understand how they will monitor and evaluate their efforts. These social innovations typically have well developed timelines of activities and budgets that reflect a sound knowledge of what is required to influence change to the systemic behaviours associated with one of the broad outcomes listed under each field of interest. Test grants can be used to connect your project to other projects working towards the same outcomes, and can help you to generate the evidence needed to approach sources of longer-term funding.

Grow grants are longer-term grants to help project teams to scale a successful social innovation that has been proven to influence systemic behaviours, such as changes to policy and practice guidelines.

> **Maximum grant:** $50,000/year for up to three years.
> **Two stage application:** You submit a Project Overview including a project summary and budget. Then, if you're invited to proceed, you submit a Full Proposal that builds upon the information you've already provided. You also upload or send in other documents that support your application.

Grow grants are particularly well suited to help project teams to scale an existing and successful social innovation to new geographic sites or populations (scale out), to new levels of systems or institutions (scale up), or to further embed the social innovation within existing levels of systems or institutions (scale deep). Project teams will have a clear sense of what type of scaling they would like to implement,

who they are partnering with throughout the work, and how scaling the social innovation will support the potential for greater systemic intervention and contribution to change. These social innovations have well developed timelines of activities and budgets that reflect sound knowledge of what will be required to continue to influence change to the systemic behaviours associated with one of the broad outcomes listed under each field of interest. Grow grants can be used to connect your project to other projects working towards the same outcomes, and can help you to generate the evidence needed to approach sources of longer-term funding.

Section A: Field of Interest and Grant Type

1.1 Field of Interest

Please select the field of interest that you believe best aligns with the systemic change that you hope to influence through your project.

1.2 Grant Type

Select a Develop grant. (See above for descriptions of other available grant types.)

Section B: Confirmation of Eligibility

2.1 Confirmation of Eligibility

☐ Check the box to confirm that

- you have read the general funding guidelines and/or completed the eligibility quiz and believe that both the applicant organization and this project are eligible for Vancouver Foundation funding

- you are authorized by the governing body of the applicant organization to submit this proposal on its behalf

2.2 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.

Please note: Vancouver Foundation can only grant to organizations that are included on Canada Revenue Agency's lists of qualified donees. If your organization is not listed as a qualified donee, then you must develop an intermediary arrangement with an organization that is a registered charity or other listed qualified donee in order to bring a project proposal forward.

Section C: Applicant Organization

3.1 Legal Name

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

3.2 Operating Name (if different from above)

Complete this if the Applicant Organization's operating name is different from its legal 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).

3.3 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.

3.4 Senior Staff Person (with signing authority)

Enter the salutation, first name, last name, job title and email address of the senior staff person at the Applicant Organization who has the authority to commit the organization to accept the conditions associated with a grant. (This person is commonly the Executive Director.) For organizations that are volunteer-operated, please enter the Board Chair or President instead.

3.5 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, please enter another member of the Board who has signing authority.

3.6 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 to 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.

3.7 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.

Section D: Intermediary Organization

According to the Income Tax Act, a qualified donee can only use its resources (for example - funds, personnel and property) in two ways:

- on its own activities (those which are directly under the charity's control and supervision, and for which it can account for any funds expended); and

- on gifts to other qualified donees

A qualified donee usually carries on its activities using its own human and financial resources; however, it can also use an intermediary organization to lead the activity instead. When using an intermediary, the qualified donee must still direct and control the use of the resources associated with the activity (although it may generally delegate authority to the intermediary to make day-to-day operating decisions).

For the purposes of this application form, an intermediary is the organization that the applicant works with to carry out the applicant's own activities. **An applicant cannot merely be a conduit to funnel money to an organization that is not a qualified donee.** Refer to Canada Revenue Agency's guidelines for more details about intermediary organizations.

4.1 Legal Name

Provide the full legal name of the Intermediary Organization, if there is one. Do not re-enter the organization listed as the Applicant in Section C.

4.2 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).

4.3 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.

4.4 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 to serve as the secondary contact for Vancouver Foundation. Do not re-enter the Project Contact listed in Section C.

4.5 Profile or Purpose Statement

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

Section E: Project Details

5.1 Which broad outcome is your project working towards primarily?

In order to help assess the impact of our grantmaking over time, Vancouver Foundation asks that all projects work toward at least one of the outcomes listed under each field. We don't anticipate that any one project will achieve this outcome on its own, and understand that you have project-specific outcomes that you will work and measure progress towards as well.

We also appreciate that the outcomes we've listed are not systemic changes in and of themselves, and so interpret the outcome statement you select as, "Our project is working primarily to influence and change the systemic behaviours that are creating barriers to *[Broad Outcome]* within a *[Field of Interest]* system."

Example: if you select the *Increase the Employability and Livelihoods of Artists* outcome under the *Arts and Culture* field of interest, then we'll interpret your selection to mean, "Our project is working primarily to influence and change the systemic behaviours that are creating barriers to employment and leadership opportunities within an artistic and cultural system."

5.2 Working title for the project

State the title/name of your project, even if it is just a temporary working title.

5.3 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.

Note: We may consider applications for projects that are already running, provided that the request does not include expenses that have been, will be or should be paid through other sources of funding. Vancouver Foundation does not provide bridge funding to sustain projects between grants. Project start and end dates should cover the period for which funding is being requested from Vancouver Foundation.

Submitting an application for a project that is already running does <u>not</u> increase the likelihood that it will be funded.

The Challenge and Change You're Working On

Develop grants are particularly well-suited to support teams where there may be a lack of certainty on what the systemic issue is or what the eventual systemic intervention should be, or where there is lack of agreement on how to move the idea forward and with whom.

5.4 What complex social issue are you trying to address? What are the systemic root causes of this issue that you've identified so far? *(1500 characters, including spaces)*

A social issue is an outcome/effect that is caused by how the system's different elements interact with each other to create a behavior. For example, a social issue could be displacement of people who need to move into care facility beds, and the behavior would relate to how wait lists for care facility beds work across different kinds of care facilities within BC and how that often results in people being placed in inappropriate facilities outside of their home community.

Describe the social issue that you are trying to address and the root causes of this issue. Are any of these root causes systemic? That is, are any of the root causes created by, or held in place by, one of the following systemic behaviours?

- How we act, what we do (the basic routines of a social system)
- Money, knowledge, people (the resource flows of a social system)
- Laws, policies, rules (the authority flows of a social system)
- What we believe is true, right/wrong (the beliefs of a social system)

5.5 What systemic change(s) are you working towards? Why are these changes meaningful? *(1500 characters, including spaces)*

Describe the system that you are working within. Tell us about some of the key elements within that system and how they might relate to each other to create the system's behaviour. What are your ideas at this point on how you might influence or change the system's behaviour? How will this change be transformative, and why will it matter? What's the degree of community support that exists for the systemic change you're contemplating?

The Process You Will Undertake to Create a Viable Project Plan

Develop grants support project teams to gather information, meet with key stakeholders to learn more about the system or systemic issue, and to begin to form a model or prototype of how change might come about. The intended output of a Develop grant is a viable plan for a project that can then be submitted to funders for consideration.

5.6 Where are you currently in the development and design process? What have you done to move your ideas forward, and what activities do you still need to do? *(1500 characters, including spaces)*

Summarize the development project or process that you will undertake to address the social issue and systemic behaviours you've identified. Tell us what you would like to do to transition your idea into reality. How will you recognize and monitor your progress throughout the development process, and the potential effectiveness of the ideas and plans that emerge?

5.7 Who are you currently partnering with? Who else do you intend to include in the development process? How are people affected by the issue involved? *(1500 characters, including spaces)*

Engaging a diverse group of people during the design and development process has the potential to increase the options to consider and is a great way to test assumptions. Describe the community's involvement and the extent to which you are collaborating with other organizations. What roles will people in the community who are affected by the issue have at various stages within the project, and how will they be empowered as a result of their contributions?

The Public Statement

Vancouver Foundation shares excerpts from approved grants on our website and with our donors and Board of Directors. We might also share your proposal with other funders or external reviewers that we think may have valuable insight into your work (such as your local community foundation). Many people do not have a background in your area of expertise and so please use plain, compelling language, avoiding jargon, to write a paragraph that answers the following questions.

5.8 **What is the social issue that your project is trying to address? How will your project address this issue to influence systemic change? Why is this change meaningful?** *(700 characters, including spaces)*

EXAMPLE
Wait lists for care facility beds are managed differently across health authorities and are monitored differently within each facility. Quite often, seniors and young people with disabilities are housed together because it's the only available bed known at the time of need. Our community coalition has been working with health authority staff to identify ways to manage better the overall system, and has now identified several options (including policy changes) that need further exploration with community stakeholders and patient groups. A better managed system will not only reduce wait times, but might also keep people living in their home communities longer, with other people their own age.

Section F: Project Budget

6.1 **Funding Duration**

Please enter the number of years of funding you are seeking. *Note:* Develop Grants default to 1 year.

6.2 **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. For Develop grants, Vancouver Foundation will cover 100% of the project's costs, up to the first $10,000.

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

Budget Line Item	Description	Year 1 Cost	Total Cost	Total Amount Requested from Vancouver Foundation
Salaries & Benefits	.2 FTE outreach coordinator (new, additional hours to an existing .8 FTE position) to organize project	10,000	10,000	2,250
Rent/Utilities/Phone	Mobile phone for outreach, office space for 1 days per week	2,000	2,000	0
Publicity/Promotional Materials	Translation, printing of meeting announcements	750	750	750
Transportation	bus tickets, accessible taxis to get seniors to meetings	3,000	3,000	2,000
Supplies	Supplies and materials for facilitation and leadership training, including catering	3,000	3,000	1,500

Professional fees	2 facilitators, 2 care attendants and 3 translators to attend sessions (@ $100 each for 5 sessions)	3,500	3,500	3,500
TOTAL		22,250	22,250	10,000

6.3 Revenues

List each anticipated source of revenue. 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. List the market value you used to value the in-kind contributions. Remember that in-kind contributions should be reflected in your expenses as well (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 to the project, as long as their involvement is not considered to be volunteer time. 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	10,000	10,000		
United Way of the Central City	3,000	3,000	3,000	G. Mary 250.999.9999
K Foundation	1,000			K. Hoskins 250.444.4444
Private Donor	1,000	1,000		C. Ray 604.222.2222
Organization's Contributions:				
Cash	5,000	5,000	5,000	D. Jones 604.889.0000
In-Kind gifts	2,250	2,250	2,250	D. Jones 604.889.0000
TOTAL REVENUE	22,250	22,250	10,250	

6.4 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. For multi-year grants, please indicate the dollar amount per project year. NOTE: this amount needs to be reflected within the project budget, as either a standalone expense or as part of a broader expense category (such as salaries).

Please provide a description of the political activities and how they support and advance the charitable purposes of this project.

Section G: Supporting Documents

Supporting documents are not required for Develop Grant applications.

Section H: Review & Submit

☐ Check the box to confirm that you agree with the following terms and conditions:

- Vancouver Foundation will not assess an incomplete proposal

- Vancouver Foundation may elect to assess only one proposal if more than one proposal is submitted on behalf of the same Applicant/Qualified Donee

- Vancouver Foundation requires Field of Interest grantees to openly license materials created through our grant funding (reports, videos, curriculum, and the like) under a Creative Commons Attribution license. For more information and exceptions, please refer to the full policy.

- All information and ideas submitted remain the intellectual property of the Applicant Organization. The Applicant Organization provides Vancouver Foundation the non-exclusive license to share or adapt the submission as part of our grant-making process, including sharing this proposal with community advisors or other funders at our sole discretion. A list of approved grants is made public on Vancouver Foundation's website.
- The information provided in this Project Overview is true, accurate and complete (to the best of my knowledge).

Please review and agree to the final Terms and Conditions. Once you click the "Submit" button 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.