

# 2020 Active Living & Culture Grants Community Social Development Grant Guidelines

Deadline: 3:30pm Friday, February 28, 2020

These guidelines have been revised for 2020 – previous versions no longer apply.

All registered charities and non-profit organizations interested in applying for a Community Social Development Grant are encouraged to attend an information session on January 15, 2020.

If you have questions after reviewing these guidelines, you can obtain more information from the Central Okanagan Foundation. Please contact staff well in advance of application submission:

Cheryl Miller, Director, Grants & Community Initiatives  
250-861-6160  
cheryl@centralokanaganfoundation.org  
centralokanaganfoundation.org

2020 Community Social Development Grants  
Active Living & Culture Division  
1800 Parkinson Way  
Kelowna, BC V1Y 4P9

**CITY OF KELOWNA ACTIVE LIVING & CULTURE DIVISION****CORE PRINCIPLES:**

The City of Kelowna's Active Living & Culture Division administers a number of grant programs and services for the community which

- encourage active healthy lifestyles
- build strong neighbourhoods
- nurture lifelong participation in sport
- enhance cultural vibrancy
- facilitate development of events
- enhance social sustainability
- support effective management and operation of sport, recreation, and cultural facilities

Organizations seeking funding support from the City of Kelowna through any of the grant programs administered by the Active Living & Culture Division should be aware of and aligned with one or more of these core principles.

**VALUES:**

Any organization supported by the City of Kelowna will commit to the following values:

- accessibility, diversity and inclusion: the organization will not unreasonably exclude anyone by reason of religion, ethnicity, gender, age, sexual orientation, language, income
- accountability and fiscal responsibility: using resources effectively and efficiently
- innovation: being leaders in finding new solutions
- optimizing value: generating more value and impact from existing resources
- partnerships and collaboration: working with others to leverage energy, talent and resources

Community Social Development Grants are one of many grant programs provided by the City of Kelowna. Information about other grant opportunities is available on the City's website:

[kelowna.ca/grants](https://kelowna.ca/grants)

## 1.0 COMMUNITY SOCIAL DEVELOPMENT GRANT PROGRAM OBJECTIVES AND DESCRIPTION

### 1.1 *Objectives:*

This program aims to provide assistance to community organizations for the purpose of improving the social well-being and resiliency of the community.

Organizations funded through the Community Social Development Grants will focus on an approach that is responsive to social needs, strengthens and stabilizes family and community life and improves peoples' abilities to identify and act on their own social needs.

There are two grant categories within the Community Social Development Grant program. Applicants must indicate which category they are applying for and can only apply for one Community Social Development Grant per year.

#### 1. Operational Grants

Purpose: To assist eligible organizations with core operating activities and expenses that are used to support the organization's operational sustainability and enable the development and delivery of programs and services in the community.

Funding Levels: A maximum of 25 per cent of the organization's operating budget up to \$25,000

#### 2. Project Grants

Purpose: To assist eligible organizations to stage special events or to operate short-term programs or projects (less than 12 months in duration). Projects must have clear time frames, not require permanent staff and be projects which would not normally have been undertaken without this additional resource.

Funding Levels: A maximum of 50 per cent of the costs of the project up to \$25,000.

The balance of the funds required shall be provided by the applicant or from other public or private resources.

Grant proposals that offer services or programs that cross municipal boundaries will be considered; however, grant funds may only be used for those portions of the program that are delivered within the boundaries of the city of Kelowna for the benefit of Kelowna residents.

The Community Social Development Grant program is not to be an ongoing source of support.

Organizations must have submitted the Final Report as a pre-condition for future eligibility.

### 1.2 *Organization profile:*

Organizations participating in this program are Kelowna-based, established, non-profit social service organizations which have a mission to generate, promote or accelerate socially beneficial services or programs in the City of Kelowna.

They have been incorporated and actively providing the majority of their public programs and services in Kelowna for at least two years prior to the application deadline.

They demonstrate an inclusive, diverse and welcoming approach in their operations and activities.

### **1.3 Eligibility:**

To participate in this program, the organization must:

- be a registered non-profit society or a registered charity with the Canada Revenue Agency (CRA) and be registered for at least two years at the time of the application submission
- be physically located, have an active presence and have the majority of its programs and services delivered within the city of Kelowna for at least two years at the time of the application submission
- have a social service mandate and profile which is consistent with these guidelines
- have fulfilled all reporting requirements for any previous grants or funding support from the City of Kelowna
- have a Board of Directors composed of volunteers and representative of its mission and audience. Directors must:
  - Meet the minimum statutory requirements imposed by the relevant incorporation statute (i.e. *BC Societies Act*); and
  - Not be remunerated for their services as Director (except for reimbursement of reasonable expenses) nor hold concurrent staff positions.
- provide a current year operating budget and prepared financial statements for the most recently completed fiscal year

### **1.4 Ineligible organizations are:**

- organizations whose mandates, operations and activities are not consistent with the program objectives, description and/or eligibility requirements
- organizations which have outstanding indebtedness to the City of Kelowna, or which have not fulfilled reporting requirements for any previous grants from the City of Kelowna
- unincorporated committees, groups, collectives or individuals

### **1.5 Eligible activities and expenses:**

**a) Operational grants:** Office supplies, administrative and facility costs, minor capital costs (e.g. office equipment), advertising, training, technical/material assistance, and similar items necessary to deliver existing programs.

**b) Project Grants:** To cover costs of hosting and promoting special events (facility rental, guest speakers, food, advertising, promotional items, etc.); administrative and delivery costs for short-term programs/projects (supplies and materials, facility rental, etc.); minor capital costs (e.g. office equipment) and non-permanent staffing.

### **1.6 Ineligible activities and expenses are:**

- trade shows or commercial/business activity
- fundraising activities
- programs primarily providing for recreation or leisure time pursuits

- projects which already receive financial or in - kind support (including site provision) from other City of Kelowna sources
- retroactive funding for initiatives which have already occurred
- deficit reduction
- bursaries or scholarships
- activities focused on politics, education, religion, or advocacy
- programs which offer direct financial assistance to individuals or families
- programs which duplicate services that fall within the mandate of a senior government agency
- major building or other major capital projects (limited capital costs are eligible)

## 2.0 APPLICATION PROCESS

Contact Central Okanagan Foundation to discuss eligibility for this program or to obtain more information.

Organizations considering submission of an application are encouraged to do the following:

- Review these guidelines
- Attend the information session on January 15, 2020 at the Rotary Centre of the Arts
- Contact Central Okanagan Foundation staff for more information

By the deadline of February 28, 2020, deliver the completed application form (including signatures), and required support materials, to:

2020 Community Social Development Grants  
Attn: Cheryl Miller  
Central Okanagan Foundation  
# 306.1726 Dolphin Ave. (Landmark 1)  
Kelowna, BC V1Y 9R9

Hours: Monday to Friday, 8:30 a.m. to 4:30 p.m.

Applicants are required to email an electronic copy of all grant materials to [abbie@centralokanaganfoundation.org](mailto:abbie@centralokanaganfoundation.org) and drop off the original plus six copies of the grant application.

Hard copies will be accepted through Canada Post mail provided they are received prior to the intake deadline.

Submission of an application does not guarantee funding. Obtaining a grant is a competitive process and demand often exceeds available resources.

## 3.0 ASSESSMENT CRITERIA

The criteria listed below and in Schedule 1 represent 'good' practices for program development and delivery. Assessment will be based on the degree to which organizations meet the criteria, based on the information they provide.

All organizations and projects are unique; there is no expectation that an organization must be demonstrating exceptional performance in all areas in order to receive funding support. However, the assessment criteria provides an objective framework within which the project's feasibility and impact can be considered and form the basis for constructive feedback to the organization.

1. Inform and respond to [Council's priorities](#), in particular Social & Inclusive, as outlined in Schedule 2
2. Demonstrate an innovative or unique approach to addressing social well-being
3. Respond to dynamic community needs that are clearly identified based on local research and effective planning as the basis for the services provided
4. Demonstrate collaboration with other service providers and key stakeholders in the community.
5. Promotion and demonstration of mobilizing volunteerism
6. Evidence of community support
7. Clear information on their operations and planning, demonstrating transparency
8. Clearly defined performance targets and timelines
9. Demonstrated need for funding
10. A clear plan for future funding from other sources
11. Quality of management, including the satisfactory administration of any previous City of Kelowna grant

### **Resiliency Themes**

Social policy grants are investments that contribute to a healthy city for all. They support non-profit community-based programs that facilitate the physical, spiritual, mental and emotional well-being of people. Applications which address the following Resiliency Themes will be given a higher priority for funding:

1. Create a culture of inclusivity and increase opportunities for social connections and support, particularly for residents who are isolated or vulnerable and are experiencing social, physical and/or economic disadvantages and/or who face discrimination. Applications will use one or more of the following approaches:
  - a. Identify and remove barriers and/or provide supplemental supports to reduce the effects of disadvantage to ensure equal access to services and opportunities;
  - b. Provide systemic or individual advocacy aimed at accessing and securing services and protecting rights;
  - c. Community development which empowers and involves populations experiencing marginalization in solving social problems, bringing about positive social change and extending participatory democracy.
2. Support initiatives that focus on capacity building to prevent homelessness and provide housing support, including connection to the community by:
  - a. Increasing housing retention:
    - i. People who are at-risk of housing loss are supported to retain their current adequate housing and/or to find and/or establish more adequate housing without experiencing homelessness

- ii. People have access to high quality, accessible housing stability programs and initiatives designed to support housing stability
- b. Increasing community inclusion:
  - i. People are supported to connect and participate in community life as fully as desired.

Detailed criteria are listed in Schedule 1 of these Guidelines.

#### **4.0 ASSESSMENT OF APPLICATIONS**

##### **4.1 *Committee Review:***

Applications in this program are adjudicated by a Community Social Development Grant Committee of professional qualified peer and community representatives. Adjudication by committee members is independent and at arm's length from the City of Kelowna.

##### **4.2 *Interview:***

Following completion of the staff review, applicants may be contacted to discuss the evaluation, build understanding about how the organization will address any concerns arising, and engage in a broader dialogue about the organization.

##### **4.3 *Notification and Distribution:***

Applicants will receive notification of evaluation of results by mid-April 2020.

All organizations approved for funding under the Community Social Development Grants program will be required to sign and adhere to the City of Kelowna's Letter of Agreement for Funding and have liability insurance in place, as outlined on the City's Certificate of Insurance.

Funding will commence once the Letter of Agreement and Certificate of Insurance has been received, is deemed satisfactory to the Funding Agency and signed by the Funding Agency or a qualified designate of the Funding Agency.

A three-month time period will be given for applicants to claim their grants following written confirmation of the grant to the applicant. Any unclaimed funds will be returned to the Social Development Grant Reserve.

##### **4.4 *Request for Clarification/Request for Reconsideration:***

Applicants who do not agree with a funding notification may request further clarification from Central Okanagan Foundation staff; however the decisions of the Grant Committee are final.

##### **4.5 *Final Report:***

Successful applicants must provide a Final Report to the Central Okanagan Foundation which includes the following information:

- how the agreed upon measurable performance targets were met; provide statistics and supplementary data as they relate to goals, objectives and outcomes;
- a summary of the relationships between needs and services and cost sharing with other levels of government and,
- an updated budget for the grant funds showing all revenue and expenses related to the grant funds and details on how the grant funds were dispersed. The budget must be certified correct by two of the Directors of the Agency.

Receipt of a completed report is a pre-condition for future eligibility in any City of Kelowna grant program. Final Reports may also be considered as part of the assessment of any future applications by the organization.

Final Reports for 2020 Community Social Development Grants must be submitted within 90 days of the end of the grant term.

## 5.0 TIMELINE

A typical timeline appears in the table below. The timeline is subject to change.

<b>Deadline</b>	<b>Committee Review</b>	<b>Notification</b>	<b>Distribution</b>	<b>Final Report</b>
February 28.2020	April 1.2020	Mid-April 2020	Within three months of written notification	Within 90 days of the end of the grant term

## 6.0 CONDITIONS OF FUNDING

In addition to any specific terms and conditions which may arise from the committee review, the conditions below will apply to any organization receiving funding from this program:

- Grant funds must be applied to current expenses and must not be used to reduce or eliminate accumulated deficits or to retroactively fund activities
- The organization will make every effort to secure funding from other sources as indicated in its application
- The organization will maintain proper records and accounts of all revenues and expenditures relating to its activities and, upon the City's request, will make all records and accounts available for inspection by the City or its auditors
- If there are any changes in the organization's activities as presented in its application, the Central Okanagan Foundation must be notified in writing immediately and must provide approval for such changes

- In the event that the grant funds are not used for the organization's activities as described in the application, they are to be repaid to the City in full. If the activities are completed without requiring the full use of the City funds, the remaining City funds are also to be returned to the City
- Receipt of a grant does not guarantee funding in the future

## **7.0 CONFIDENTIALITY**

All documents submitted by applicants to the City become the property of the City. The City will make every effort to maintain the confidentiality of each application and the information contained therein except to the extent necessary to communicate information to staff and assessors for the purposes of evaluation, administration, and analysis. General information about the project, including the funded amount and the organization being funded under the program may also be released. The City will not release any additional information to the public except as required under the Province of British Columbia *Freedom of Information and Protection of Privacy Act* or other legal disclosure process.

**SCHEDULE 1 – DETAILED ASSESSMENT CRITERIA**

	Does the proposed project/program align with one or more of the Resiliency Themes? See pages 6/7
/14	Comment:
	Does the proposed project/program align with City of Kelowna Council's Social & Inclusion priority and/or other Council priorities? See Schedule 2
/7	Comment:
	Has the applicant clearly identified need (financial and community)? Are support letters included? Is the budget clear?
/7	Comment:
	Is there a demonstrated collaboration with other service providers and key stakeholders in the community? partnership/ collaboration letters
/4	Comment:
	Are the identified needs based on local research and effective planning and serve as the basis for the services provided?
/2	Comment:
	Is the approach innovative or unique to addressing social well-being?
/2	Comment:
	Does it promote and mobilize volunteerism?
/2	Comment:
	Does the applicant have the financial capability to deliver the activities proposed? Is there a clear funding plan for other sources?
/2	Comment:
	Does the applicant have transparency of agency operations and planning?
/2	Comment:
	Is there clarity of measurability, evaluation of impact, effectiveness, targets and timelines?
/4	Comment:
	How many people will be impacted? If a small number, what is the impact on the individuals?
/4	Comment:
/50	

## Schedule 2: Council Priorities

These areas identify where our residents want to see a difference. These are the services, programs, and infrastructure that help create a great place to live.

### Community safety

- The property crime, petty crime and drug crime rates are decreasing.
- Residents feel safe in their communities.
- The City and its partners are using data and analysis to understand the problems and deliver targeted responses.

### Social & inclusive

- The number of people experiencing homelessness is decreasing.
- Policy is guiding where the City invests resources.
- Inclusivity and diversity in the community are increasing.

### Transportation & mobility

- Strategic transportation investments are connecting higher density urban centres identified in the Official Community Plan.
- More trips are being made by transit, carpooling, cycling and walking.
- Travel times within our current transportation network are being optimized.
- Emerging technologies are making it easier to get around.
- More opportunities to learn about transportation are provided to the community.
- People of all ages and abilities can get around the city easily.

### Vibrant neighbourhoods

- The number of current and complete urban centre development plans is increasing.
- Site design and architecture are high-quality and sensitive to context.
- The housing mix provides affordable and attainable options.
- Community amenities are accessible for residents and are multi-purpose.
- Parks and public spaces are being animated.
- Key sites in the city are being planned proactively.

### Economic resiliency

- The infrastructure deficit is being reduced.
- City policies are enabling investment.
- Top talent is living in Kelowna.
- The economic impact of key sectors is increasing.

### Environmental protection

- Neighbourhoods and city infrastructure are resilient and adaptable to climate change.
- Community and corporate greenhouse gas emissions are decreasing.
- Our predictive modelling and forecasting are improving.
- The City's response to extreme weather events minimizes disruption to delivering regular operations.