



*empowering generations to give.*

## **Guidelines for Project and Multi-Year Grants**

Thank you for your interest in applying for a grant from the Central Okanagan Foundation. Please review the information below prior to completing a grant application. We encourage applicants to contact Abbie Norrish, Coordinator of Grants & Community Initiatives at 250-861-6160 to discuss your application prior to submission.

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The Central Okanagan Foundation, in alignment with our Vision and Mission, welcomes applications from organizations serving under-represented groups including, but not limited to: Indigenous, Metis, Black, People of Colour, refugee, newcomer and immigrant persons, gender and sexually diverse, and persons with diverse-abilities.

### **What areas do we fund?**

The Central Okanagan Foundation supports registered charities within the Central Okanagan including Lake Country, Kelowna, West Kelowna and Peachland in the following areas.

- Arts & Culture
- Heritage & Historical
- The Environment
- Animal Welfare
- Children, Youth & Family
- Education
- Health & Community Services
- Global Initiatives (must have Central Okanagan involvement and/or benefits)

### **Key Goals of the Project Grant Program:**

- To support new initiatives/projects
- To support the enhancement of current program(s)
- To support organizations with sound fiscal management and diversified sources of revenue

### **Key Goals of the Multi-Year Grant Program:**

- To support day to day operations (up to three consecutive years). Operating costs include both fixed and variable costs.
- To support organizations with sound fiscal management and diversified sources of revenue.

# The Grant Application Process

## DEADLINES:

- Project Grants: 3:30 pm on October 1st
- Multi-Year Grants: 3:30 pm on May 1st

Or the closest working day after the 1st, if either of these days falls on a weekend. **Applications received after these deadlines will not be accepted**

## NOTIFICATIONS:

All organizations will be notified of the status of their application when Board approval is received, approximately six to eight weeks after the grant application deadline.

## Eligibility

### Project Eligibility:

- Requests up to **\$15,000** for up to 12 months
- Funding is available twice in a five year period for the same initiative/project or program enhancement.
- If the organization applying is not a registered charity, an **Intermediary Agency Agreement** with a registered charity, **MUST** be included in the grant application package. For the agreement template, please contact the foundation's granting staff.

### Multi Year Eligibility:

- Registered charities only
- Operating funds
- Requests up to \$15,000 a year for two or three years
- Applicants are eligible for multi-year funding twice in a ten year period.
- A registered charity may apply for a project grant (1 year), and then the subsequent year may also apply for a multi-year grant for that project.
- Funding is held with the organization for a 12 month period (June to June)

## Ineligibility

### Project Ineligibility:

Requests for the following are deemed to be INELIGIBLE:

- An organization's core or operating expenses including an annual event or performance
- Ongoing / annual contractor's fees
- Retroactive funding
- Debt retirement, reserves and mortgage pay-downs
- Activities of an organization that primarily serves their membership and/or for direct religious or political purposes
- School construction, including playground equipment
- Annual fund drives
- Third party funding
- Improvements or additions to land or property which might revert to private ownership
- Funds are not to be used for any (post-secondary) institutional overhead/administration fees.

**Multi Year Ineligibility:**

Requests for the following are deemed to be INELIGIBLE:

- Retroactive funding
- Debt retirement, reserves and mortgage pay-downs
- Activities of an organization that primarily serves their membership and/or for direct religious or political purposes
- School construction, including playground equipment
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- Improvements or additions to land or property which might revert to private ownership
- Funds are not to be used for any (post-secondary) institutional overhead/administration fees.

We encourage applicants to **contact, Coordinator, Grants & Community Initiatives, Abbie Norrish at 250-861-6160** to discuss your application prior to submission.

### Some Things You Should Know

- All submitted materials become the property of the Central Okanagan Foundation. By submitting an application, you consent to the Central Okanagan Foundation sharing information about your application and/or your organization on our website and with media, our staff and donors.
- The previous year's Central Okanagan Foundation funded project, initiative or program enhancement must be complete and project evaluation submitted prior to submitting this application. Project evaluation forms can be completed through this application portal.
- The Central Okanagan Foundation's constitution states that applications that occur within the present boundaries of School District #23 are given first priority. These boundaries are roughly from Lake Country in the north through to Peachland in the south.
- Only organizations that hold a current Revenue Canada Registration number are eligible for multi-year funding. Multi-year applications will not be accepted from organizations who require an intermediary agency.
- The Central Okanagan Foundation encourages applicants to locate other funding sources.
- 3 quotes are required for purchase of equipment, supplies, consultants, production costs or capital expenditures.