

INTRODUCTION

The Community Social Development Grant program was established in 1992. The original intent of the program was to fund initiatives that were prevention-oriented and aimed to improve quality of life. Primary prevention was favoured over secondary or tertiary services. These terms are defined below.

Purpose

The purpose of the Community Social Development Grants program is to make available funding to registered non-profit organizations and community organizations offering socially beneficial services or programs in the City of Kelowna.

The Application form, Letter of Agreement, City of Kelowna, Certificate of Insurance form and other grant-related documents may be obtained online at:
www.centralokanaganfoundation.org or contact Central Okanagan Foundation (contact information above).

AMOUNT OF MONEY AVAILABLE

Approximately \$80,000 in total is available for distribution annually from the City.

ELIGIBLE APPLICANTS

Eligible applicants for this program are defined as:

Registered Non-Profit Organizations that are registered with Canada Revenue Agency and incorporated under the Societies Act; and, **Community Organizations** that are non-profit, have established a set of working rules and regulations, a banking account in the group's name and operating for at least two years.

NOTE: Incomplete reporting on previous grants from the City may affect consideration of new grants. Please contact the Director of Grants & Community Initiatives with the Central Okanagan Foundation to complete or update year end requirements for previous grants.

RULES AND DEFINITIONS

Primary Prevention - services or programs oriented towards groups, rather than individuals and aim to create a positive social environment by strengthening and supporting the individual, family and community. A parenting course would be one example of such a program. Counseling services would not as they deal with providing health services to individuals, one on one.

Secondary and Tertiary - often more focused on individuals, and attempt to address problems that are already established from a rehabilitative or crisis-oriented perspective. Examples include (but are not limited to) support to those suffering health problems, crisis centres and rehabilitation programs.

CRITERIA

The purpose of the Community Social Development Grants program is to make available funding to non-profit organizations and community organizations offering socially beneficial services or programs in the municipality of Kelowna. The grant program requires that all successful applicants of the program must:

- (a) Give policy references as to how each proposal fits within the City's Social Policy Framework, which includes:
- Social Policy No. 360;
 - Chapter 10 of the Official Community Plan; and/or policies tagged as socially sustainable in the Official Community Plan with a person symbol;

Additional guiding grant policies are provided below:

Access Guide. Encourage appropriate local agencies to distribute and maintain a City of Kelowna Access Guide such that it is readily available and up-to-date;

Awareness. Continue to support appropriate agencies to organize and promote initiatives to raise awareness and improve accessibility in Kelowna;

Local Skills and Education. Work with other agencies to maximize knowledge of the skills and education required by local industries and businesses and communicate this information to the (local) agencies providing educational and re-training programs;

Education and Re-training. Partner with pertinent agencies to expand and increase educational and re-training opportunities to those who are unable to find work;

Food Security. Seek coordinated community initiatives that support food security in the city.

- (b) be innovative or unique in addressing social well-being;
- (c) promote and demonstrate volunteerism and provide evidence of community support;
- (d) emphasize prevention in order to enhance, strengthen and stabilize family and community life, and improve peoples' abilities to identify and act on their own social needs;
- (e) provide clear information on their operations and planning, demonstrating transparency;
- (f) use clearly identified needs and effective planning as the basis for the services provided; (needs are identified in the most recent Central Okanagan Vital Signs Report);

- (g) actively encourage and pursue collaboration with other service providers in the community; provide letters identifying potential and /or confirmed collaborations;
- (h) demonstrate clarity and ensure measure-ability of performance targets and timelines;
- (i) exhibit quality of management, including the satisfactory administration of any previous grant(s).

Review of the applications for funding under Council Policy 218 by the Grants Advisory committee will use the above criteria to evaluate the applications and derive its recommendations to Council.

EXCLUSIONS:

Community Social Development Grant funding is **NOT** available for:

- (a) programs primarily providing for recreation or leisure time pursuits;
- (b) retroactive financial support for projects and programs that occurred prior to Council's decision to award the grant;
- (c) agencies or programs that receive ongoing City of Kelowna funding within the City's Annual Budget;
- (d) activities of religious organizations that serve primarily their membership and/or for direct religious purposes;
- (e) permanent or continual funding for an organization (continual funding would be for primarily operational costs to one organization for a period of more than two years);
- (f) programs which offer direct financial assistance to individuals or families, or are primarily rehabilitative or crisis oriented in nature;
- (g) programs which duplicate services that fall within the mandate of a senior government agency;
- (h) major building or other major capital projects (limited capital costs are eligible);
- (i) assistance for an industrial, commercial or business undertaking.

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.

GRANT CATEGORIES

1. Establishment Grant

Purpose: **One-time assistance** to help eligible organizations cover expenses in their formative stages of development.

Eligible Uses: Office supplies, administrative and facility costs, minor capital costs (e.g. office equipment), advertising, training, technical/material assistance and similar items.

Funding Levels: A maximum of 50% of the establishment costs. It is your responsibility to secure any additional funds necessary.

2. Operational Grant

Purpose: To assist eligible organizations with expenditures incurred funding the operation and delivery of existing programs. **This category is not intended to provide continual/permanent operational funding (see above EXCLUSIONS (e)).**

Eligible Uses: 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.

Funding Levels: A maximum of 25% of the organization's operating budget, or 10% if it receives funding from other levels of government or other agencies. It is your responsibility to secure any additional funds necessary.

3. Special Projects Grant

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.

Eligible Uses: 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.

Funding Levels: A maximum of 80% of the costs of the special project. It is your responsibility to secure any additional funds necessary.

NOTE: The actual funding allocated under any grant category shall be at the discretion of City Council, after consideration of all recommendations from the Central Okanagan

Foundation Grants Advisory committee, the amount of funding available, and the priorities established.

TIME LINE & PROCEDURES

Application & Evaluation

1. Prior to the grants application deadline, Central Okanagan Foundation will hold an advertised public information session for Grant applicants **you are strongly urged to attend.**
2. Your completed Grant application must be received at the Central Okanagan Foundation, 225.1889 Springfield Road by 3:30 pm on the last Friday in February. **NO EXCEPTIONS.**
3. With the assistance of Central Okanagan Foundation's Director of Grants & Community Initiatives, the Grants Advisory committee of the Central Okanagan Foundation will review all applications and the recommendations will be forwarded to City Council for final approval.
4. In evaluating each application, consideration will be given to how well the application meets the criteria provided in these terms of reference, including:
 - relevance to City of Kelowna policy;
 - adherence to these Terms of Reference;
 - uniqueness of the project;
 - community need for the project and its expected impact;
 - level of community support and volunteer involvement;
 - degree of co-operation with other community service providers;
 - clarity & measurability of performance targets and timelines;
 - transparency of agency operations and planning;
 - evidence of financial need; and,
 - quality of management, including the satisfactory administration of any previous grant(s).



Claiming Your Grant

1. No public information is available until Council addresses the recommendations of the Central Okanagan Foundation's Grants Advisory committee and makes its decisions (usually in April).
2. If your organization's grant was reduced or refused you may request a re-evaluation by contacting the Director of Grants & Community Initiatives with the Central Okanagan Foundation in writing within **two weeks** of the date of the letter from the Central Okanagan Foundation.
3. If your application is approved you must sign a Letter of Agreement outlining the terms and conditions of the Grant **and** show proof of adequate liability insurance before any funds will be released. For more information contact the Director of Grants & Community Initiatives with the Central Okanagan Foundation.
4. You have three months following the date of the letter to meet the requirements for claiming your grant. If you are having difficulty meeting these requirements, contact the Director of Grants & Community Initiatives with the Central Okanagan Foundation for assistance.
5. The Central Okanagan Foundation will hold back 10% of the grant money until such time as an end-of-project report (see the Letter of Agreement for instructions) is submitted. If you are having difficulty meeting the end-of-project report requirements, please contact the Director of Grants & Community Initiatives with the Central Okanagan Foundation.

If you have any questions, concerns or comments, contact:

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