



Community Social Development Grant Project and Operating Program Guidelines

2017 – These guidelines have been revised for 2017 – previous versions no longer apply

Submit required materials to:
Central Okanagan Foundation
306.1726 Dolphin Ave. (Landmark 1)
Kelowna, BC
V1Y 9R9
(effective February 27.2017)

kelowna.ca

Community Social Development Grants

The Community Social Development Grant program was introduced by the City in 1992. The Council Policy governing this program is [Policy 218](#), Community Social Development Grant policy. It can be found online at kelowna.ca (search Policy 218) or obtained from the Clerk's Department at City Hall.

There are two categories for the Community Social Development Grants: Project Grants and Operating Grants. The City of Kelowna contracts the Central Okanagan Foundation to administer this grant program. The application form and other grant-related documents may be obtained online at kelowna.ca/grants or www.centralokanaganfoundation.org or by contacting the Central Okanagan Foundation (contact information above).

Community Social Development Grants are one of many grant programs provided by the City of Kelowna. Information about other grant opportunities is available at kelowna.ca/grants

To learn more about the principles of social sustainability, search "[Official Community Plan Chapter 10](#)," "[Social Framework](#)" and "[Social Policy 360](#)" at kelowna.ca.

Guiding Principle

The City is committed to supporting community organizations who make a direct impact on the social well-being and resiliency of the community.

Purpose

The purpose of the Community Social Development Grants is to make funding available to registered not-for-profit organizations and community organizations offering services or programs with the goal of generating, promoting or accelerating socially beneficial services or programs in the city of Kelowna.

Eligible applicants

- Registered Charity Organization that is registered with Canada Revenue Agency, a not for profit organization that is incorporated under the Societies Act; or
- Community Organization that has established a set of working rules and regulations, a banking account in the group's name and has been operating for at least two years.

Grant Details

There are two grant categories within the Community Social Development Grant program. Applicants must indicate which category they are applying for.

1. Operational Grants

Purpose: To assist eligible organizations with expenditures incurred funding the operation and/or delivery of existing programs;

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. This category is not intended to provide the basis for permanent operational funding.

Funding Levels: A maximum of 25 per cent of the organization's operating budget

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.

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 50 per cent of the costs of the special project.

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.

Ineligible for Funding

- Programs primarily providing for recreation or leisure time pursuits;
- Retroactive financial support for projects and programs that occurred prior to the decision to award the grant;
- Agencies or programs that receive ongoing City of Kelowna funding within the City's Annual Budget;
- Activities of religious organizations that serve primarily their membership and/or for direct religious purposes;
- Permanent or continual funding for an organization (continual funding would be similar dollar amounts for primarily operational costs to one organization for a period of more than two consecutive years);
- 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);
- Assistance for an industrial, commercial or business undertaking.

Application Process

The application form is available on the City of Kelowna and the Central Okanagan Foundation websites.

The information required includes, but is not limited to:

- Audited financial statements for the last two (2) years. If the organization is newer than that, the most current official financial statement must be provided;
- How the application relates to the grant criteria, including its connection to the Social Policy, Official Community Plan and Social Framework;
- A list of the Board of Directors;
- Board meeting minutes approving the application for Community Social Development Grant funding.

Eligible applicants will deliver their application form and required support materials by the program deadline: **3:30 pm Friday, March 10, 2017.**

Central Okanagan Foundation
 # 306.1726 Dolphin Ave.
 (Landmark 1)
 Kelowna, BC
 V1Y 9R9
 (effective February 27.2017)

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

NOTE: Applicants are required to email an electronic copy of all grant materials to cheryl@centralokanaganfoundation.org and drop of the original plus seven copies of the grant application.

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

Incomplete or late applications will not be accepted. Receipt of a complete application prior to the deadline does not guarantee funding. Obtaining an operating or project grant is a competitive process and demand exceeds available resources.

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. The organization must claim the grant within three months following written notification of the grant approval.

Any unclaimed funds will be returned to the Social Development Grant Reserve.

Assessment Criteria

The following criteria will be used to evaluate all applications for Community Social Development Grants:

1. Alignment with the City's Social Framework including Social Policy No. 360 and Chapter 10 of the Official Community Plan and/or policies tagged as socially sustainable in the Official Community Plan with a person symbol; 
2. Innovative or unique approach to addressing social well-being;
3. Promotion and demonstration of volunteerism;
4. Evidence of community support;
5. An approach that is responsive to social needs, strengthens and stabilizes family and community life, and improve peoples' abilities to identify and act on their own social needs;
6. Clear information on their operations and planning, demonstrating transparency;
7. Clearly identified needs based on local research and effective planning as the basis for the services provided;
8. Demonstrated collaboration with other service providers in the community; identify how other organizations will be engaged;
9. Clearly defined performance targets and timelines;
10. Demonstrated need for funding;
11. A clear plan for future funding from other sources; and
12. Quality of management, including the satisfactory administration of any previous City of Kelowna grant.

Assessment of Applications

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.

Committee members are invited to participate based on their experience, merit and familiarity with grant making practice, social issues and the local community. To the extent possible, the committee will reflect the diversity of the community at large and the range of disciplines and activities in the list of applicants.

Committee members who have a real or perceived conflict of interest regarding any application will be required to declare that such a conflict exists and will not participate in decisions relating to that application.

The Grant Committee follows the established Council Policy to evaluate each application and provide a list of grant recipients through an annual report to Council.

The Grant committee's recommendations are final and will be presented by staff to Kelowna City Council for information in May, 2017.

Notification:

Applicants will receive notification of evaluation results by mid-April, 2017.

Distribution:

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.

Final Report

Submit to the Central Okanagan Foundation within 90 days of the end of the grant term, a detailed written report that:

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

Timeline

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

Deadline	Appn Review	Council Report	Notification	Distribution	Final Report
March 10, 2017	March/April 2017	May 2017	Mid-April	within three months of written notification	A final report is submitted within 90 days of the end of grant term

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. The City will not release any of this 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.

Contact Information

Staff: Cheryl Miller, Director, Grants & Community Initiatives, Central Okanagan Foundation

Phone: 250.861.6160

Email: cheryl@centralokanaganfoundation.org

Website: centralokanaganfoundation.org

Community Social Development Grant Application Checklist

Include this completed application checklist with the original application indicating that you have done completed or included the following:

- Read and understood the Guidelines; the Letter of Agreement (**successful applicants are required to sign**)
- Answered all questions legibly and completely (check to be certain – where no answer is necessary or applicable, write N/A)
- Attached a list of your Board of Directors, including names, titles, phone numbers and/or email addresses
- Attached a copy of the minutes of the Board meeting at which your Executive approved making this application for grant funding
- Attached copies of audited financial statements for the last two fiscal years or, if your group is newer, your most recent official financial statements
- Detailed project/program description
- Attached support letters (partnerships, participants)
- Disclosed all grant funding history with the City
- Final report has been submitted for a previous City of Kelowna grant
- Completion of the "Proposed Budget" included in the application
- Application is signed and dated by two of your Directors
- Included three written quotes (if request is for equipment, publishing, renovations etc.)
- If the organization is not a registered charity; **must** have spoken with the Central Okanagan Foundation regarding an Intermediary Agency in adherence to Canada Revenue Agency's guidelines.
- Kept copies of all documents submitted for your records
- Copies of all documents sent electronically to cheryl@centralokanaganfoundation.org

If you have done all the above; you are ready to submit:

One original of the entire grant package with this completed checklist attached; plus seven additional copies of the entire grant package.