

Community

Program Guidelines 2010

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Metcalf Foundation

The George Cedric Metcalf Charitable Foundation's goal is to enhance the effectiveness of people and organizations working together to help Canadians imagine and build a just, healthy and creative society.

WE FOCUS OUR EFFORTS ON THREE AREAS:

- sustaining the vibrancy of the professional performing arts,
- ensuring the ecological integrity of our natural and working lands, and
- developing lasting solutions to issues of poverty.

Our work is grounded in the belief that change happens when we share hopeful visions of the future, work and learn collectively, think broadly in pursuit of comprehensive solutions, take a meaningful role in the decisions that affect our lives.

We believe that non-profit organizations play a critical role as catalysts, who animate and facilitate lasting change. They create space for people to connect, communicate, and participate. We are interested in organizations that are deliberately engaging communities in their work, and developing new strategies and collaborations.

WE TRY TO ENCOURAGE SUCCESS BY:

- supporting dynamic leadership – celebrating, developing, and strengthening leaders who are contributing to positive change;
- nurturing new ideas and practice – exploring and developing innovative approaches to tackling tough problems and seizing opportunities; and
- fostering integrated thinking – creating opportunities for ongoing dialogue, collaborative learning, and reflection, to build new knowledge and inform action.

In our work, we aim to be clear, open, reflective and responsive. We actively seek to learn from our experiences with funded projects, and from our ongoing exploration of issues and ideas. We expect our grant-making practices to evolve as we strive to realize the full potential of our commitment and resources.

Community Program

The Metcalf Community Program seeks to strengthen and enhance the effectiveness of people and organizations working together to address the root causes of poverty.

We believe people and communities should be able to realize their individual and collective potential. They should have the chance to succeed in education, employment, housing, health and in other dimensions of well-being. Yet the growth and persistence of poverty in Toronto diminishes human potential and the quality of community life.

We believe in the power of community – people coming together, sharing a common hopeful vision for the future while working on issues they care about today. We want to support the deep commitment of individuals and organizations in our city that are building lasting solutions to issues of poverty. These individuals and organizations are seeking ways for people to have opportunities to earn a decent living, build assets, and develop vibrant social networks. They are supporting low-income people to have a strong voice in the discussions and decisions that affect their lives. They are striving to promote positive changes in our institutional structures and policies in order to address challenging social problems. They are engaging a broad range of people to join together in this work.

The Community Program is designed to encourage opportunities and resilience in these people, organizations and the low-income communities they work with.

We hope to enrich the development of strong community voices and comprehensive, long-term approaches to issues of poverty. We focus on building success through three key Foundation strategies: supporting dynamic leadership, nurturing innovative approaches to persistent problems, and encouraging dialogue and learning to inform action.

Within the context of our program we define community broadly. It may be a geographic community – such as a neighbourhood; a community of common bond – such as ethnicity, gender, or sexual orientation; or a community of common interest – such as a group of temporary workers or parents.

We expect our program to evolve as we learn from both our experiences with projects on the ground and our exploration of emerging ideas and issues. We will also maintain flexibility in our program in order to respond to issues and opportunities as they arise over time.

Communities in Action

Across our city, nonprofits are working with low-income communities and individuals in the private and public sector in creative new ways to tackle intractable issues of poverty and marginalization in order to create a decent living for all.

This initiative aims to encourage and advance their efforts. We do this by supporting strategies that foster informed discussion and collaborative action among a broad range of stakeholders, strengthen the voice of low-income people, and enables nonprofits to enhance their capacity to address root causes of poverty.

Our geographic focus is the City of Toronto. This is not a direct services funding program as this concept is traditionally understood. Service delivery, while an extremely important strategy, cannot in isolation address the current conditions in which low-income people live. Rather, the program is designed to support both proven and innovative approaches to poverty reduction through three interrelated themes:

Making Connections – We are interested in creative community problem solving efforts that bridge and build upon differences, and leverage and connect good ideas. Strategies funded may include those that contribute to comprehensive approaches to persistent social issues that link sectors – public, private and non-profit – necessary to achieve large scale impact, promote the case for

public policies aimed at permanent solutions to poverty, help to reframe the issues and solutions, and foster network-based approaches for making change.

Nurturing Leadership– We wish to enhance the efforts of low-income communities to address underlying conditions of poverty and to connect their efforts to others. Strategies funded may include those that increase community members’ knowledge and analysis of issues, strengthen their leadership by working with the wisdom and wealth already present in people, and link their actions to broader networks, public institutions and processes to improve local conditions and systemic problems.

Strengthening Organizations – In our view, organizational capacity is linked to effective community building. We want to encourage efforts to integrate social change principles and approaches more widely into organizations. Strategies funded may include those that enhance the ability of boards to engage on public policy issues, expand staff leadership, enable the incorporation of service provision and community mobilization efforts, and foster capacity and connections across organizations.

We will consider requests for both short-term and multi-year funding to this initiative.

WHO IS ELIGIBLE TO APPLY?

As a charitable foundation registered with the Canada Revenue Agency (CRA), the Metcalf Foundation can only offer support to organizations with charitable status. If you have an idea that advances the goals and objectives of our program but your group does not qualify, please contact us. We may be able to offer support or assistance in other ways.

In addition to being a registered charity, eligible applicants must be:

- located and operate in the City of Toronto, and
- have a mission that focuses on addressing issues of poverty in Toronto.

WHAT IS THE APPLICATION PROCESS?

The Foundation will review applications for the Communities in Action program twice annually, once in the spring and once in the winter. Prospective applicants are encouraged to contact the Community Program Director in advance to discuss their proposals. Applying to this program is a two-step process.

Step One – Letter of Interest

Interested organizations must first send a letter of interest to the Foundation. This letter should briefly outline the purpose of the project and the issues the proposed project will address, project timeframe, approximate budget, and the amount being requested from the Foundation. This letter should not exceed three pages. The Metcalf Application Cover Page must be attached to the front of this letter.

Please provide **two paper copies of the proposal (printed double-sided) and submit an electronic version in Word to hdunford@metcalffoundation.com.**

Please note that we are unable to consider late or incomplete applications for funding; both hard and electronic copies must be **received at the Foundation** by 5:00 pm on the deadline date.

Foundation staff will review letters of interest, identifying compelling and appropriate proposals for further consideration.

Step Two – Full Application

Based on the letters of interest, we will invite organizations to submit full applications. **This is not a guarantee of funding.** Those organizations invited to submit full proposals should develop a typed application not to exceed 8 pages containing:

- A short summary of the organization's history, mandate and current strategies that address issues of poverty.
- A description of the change you want to see happen. (Vision and goals)
- A context analysis of what needs to be different to make the change happen and why. This should include but is not limited to: a clear articulation of the issue you are addressing; reference, where relevant, to the policy context; initiatives currently underway with the communities you are proposing to engage; and how other stakeholders are approaching this issue. (Rationale)
- How your project contributes to making the change happen. This should include a clear, well-formed description of your proposed strategy(s), and how it links to poverty reduction more broadly in Toronto. (Objectives and strategy)
- The results you hope to achieve and how you will know you are making progress. (Outcomes and evaluation)
- A description of the other groups or constituents that need to be involved to realize the project results. This should

include but is not limited to: an outline of your current working relationship with these groups or constituents; evidence of support for the project from them, if appropriate; and how they will be engaged in the project.

- How this project builds on existing work in the organization.
- A description of the potential challenges and opportunities to successfully implement your project, and how you plan to address any unforeseen factors that may arise.
- A description of what you are most interested in learning from undertaking this work.
- A project workplan that includes anticipated milestones.
- Brief bios of key project staff.

In support of the 8-page application, all full proposal applicants must also submit:

- a Metcalf Application Cover Page,
- a completed budget template provided by the Foundation,
- a list of current Board members,
- a copy of the organization's most recent annual report, and
- a copy of the organization's most recent audited financial statement.

A separate letter of introduction may be included. Additional printed material, e.g. newsletters can also be attached as

background information if you wish. Please note that we are unable to consider incomplete applications for funding.

Please provide **ten paper copies of all proposal materials (printed double-sided) and submit an electronic version in Word to hdunford@metcalffoundation.com.**

Please note that we are unable to consider late or incomplete applications for funding; both hard and electronic copies must be **received at the Foundation** by 5:00 pm on the deadline date.

We will not fund:

- direct services that focus on poverty amelioration,
- ongoing operating expenses that are unrelated to the proposed project,
- capital projects,
- endowments, and
- deficits.

HOW WILL APPLICATIONS BE ASSESSED?

Applications will be reviewed by the Foundation's Board and staff, assisted by an advisory committee from the community.

We will assess applications on the basis of:

- the track record and history of the participants involved;
- whether people affected by the organization's work are already included in its governance and other decision-making structures;

- whether the proposed project will help meet the Foundation's Program goals and objectives;
- the organization's readiness to undertake this type of work;
- the strength and clarity of the proposed strategies;
- the potential project results and its likelihood of success; and
- the potential to learn about new approaches and practice.

HOW WILL WE LEARN FROM OUR WORK?

Successful applicants set indicators of success in partnership with the Foundation at the start of the grant. They meet annually with us, so the partners can jointly discuss how we will learn from our work and monitor progress and results. We will also seek opportunities for grantees to share their work and learnings more broadly.

We reserve the right to review our ongoing commitments if circumstances arise in which the project is unlikely to be realized. These circumstances could include failure to undertake activities or to meet goals as described in the proposal or severe financial difficulties.

Innovation Fellowship

The Foundation believes that there is extraordinary potential in the provision of structured research and development time for people in the community based sector, and that this form of work could lead to pioneering ways to approach seemingly intractable social issues.

We want to give people of vision and creativity who have demonstrated outstanding talent and originality the opportunity to investigate powerful ideas, models and practices that have the potential to lead to transformational change. The focus could involve the development of new ideas, or explore new applications or contexts for existing ideas or practice. The Innovation Fellowship would enable these individuals to free themselves up from other responsibilities to pursue a course of exploration not available under normal circumstances.

This is an intentionally flexible initiative that does not prescribe a specific course of action. Individuals involved in social change work may propose any type of project they wish to pursue bearing in mind that it must contribute to the mission of the Metcalf Community Program which is: *to strengthen and enhance the effectiveness of people and organizations working together to address the root causes of poverty*. Applications will only be considered from individuals focused upon addressing systemic issues of poverty, or strengthening the nonprofit sector.

We encourage applicants to be as creative as possible in their proposal in order to push at the boundaries of knowledge and practice.

The Innovation Fellowship is designed to contribute to fostering a reflective, diverse community sector capable of responding to our complex social challenges. Upon project completion it is expected that Fellows will produce some form of publicly available work for distribution in order to share their learning with their peers and other interested constituents.

WHO IS ELIGIBLE TO APPLY?

The Innovation Fellowship is aimed at individuals with vision, a passion for their issue, intellectual rigor, and a willingness to ask questions and propose solutions that may surprise. Innovation Fellows may come from such places as nonprofits or higher education, and include policymakers, managers, academics and entrepreneurs. Eligible applicants must have a significant record of achievement and have worked in an area related to their proposed exploration for a minimum of three years.

WHAT ARE THE FUNDING PARAMETERS?

Funding can be used to support costs associated with project activities. We will consider supporting applications from more than one individual to jointly pursue a course of research and development. Awards of up to a maximum of \$40,000 will be made available for Innovation Fellowships.

WHAT IS THE APPLICATION PROCESS?

The Foundation will accept applications on an ongoing basis. Decisions will be made at quarterly Board meetings. Prospective applicants are encouraged to contact the Community Program Director in advance to discuss their proposals. Applications should not exceed 6 pages and should contain:

- A completed Metcalf Application Cover Page.
- A detailed overview of the idea, issue or model you want to explore including: what social challenge this initiative is intended to address, why it is important and innovative; a rationale for, and description of fellowship activities; a brief overview of what others are doing in this area; and how you think this fellowship will contribute to Metcalf Foundation's Community Program goals.
- A list of who you envision involving in your fellowship to advance your thinking.
- A preliminary budget of expenses associated with fellowship activities.

- A comprehensive resume including key accomplishments and career highlights.
- Three letters of reference from professional colleagues who can comment on the idea, issue or model you want to explore and your capacity to undertake the proposed work.
- A letter from the Board Chair or senior leadership of the organization, as applicable, confirming support for the initiative.

Proposed applicants associated with an organization must also submit:

- a list of current Board members,
- a copy of your organization's most recent annual report, and
- a copy of the organization's most recent audited financial statements.

A separate letter of introduction may be included. Additional print materials may also be attached as background information.

Please provide **five paper copies of all proposal materials and attachments (printed double-sided) and submit an electronic version in Word to hdunford@metcalffoundation.com.**

HOW WILL APPLICATIONS BE ASSESSED?

Applicants will be reviewed by the Foundation's Board and staff, assisted by advisors from the community. We will assess applicants based on the following criteria:

- skills, resources and expertise to undertake the proposed project;
- career history and accomplishments;
- scope of the project, its creativity and originality, and potential contribution to addressing issues of poverty;
- demonstrated willingness to learn and effectiveness in sharing ideas and knowledge; and
- organizational readiness to support the individual to undertake a fellowship.

HOW WILL THE INNOVATION FELLOWSHIP BE EVALUATED?

Each Fellow determines the goals and objectives for their project and, in consultation with the Foundation, the final deliverables. They will meet with us at the beginning of the fellowship, so we can jointly discuss how we will learn from our work and monitor progress and results. Upon completion the Fellow will prepare a publicly available form of the work. The Foundation will work with the individual to disseminate their findings. We will also seek to create opportunities for peer learning with other Fellows in the program and colleagues in the community.

Renewal Fellowship

In 2005 the Metcalf Foundation launched its Renewal Fellowship initiative. The purpose was to support, celebrate and strengthen exceptional senior leaders in the community-based sector who have demonstrated outstanding work and a long-term commitment to improving social conditions and opportunities for low-income people. It was designed as a six month sabbatical opportunity intended to provide individuals with time for intellectual and personal renewal. Many worthy leaders benefited from this unique initiative, and the Foundation learned a great deal about the role sabbaticals can play in personal and professional vitality. In the fall of 2009, the Foundation determined it was time to conclude the Renewal Fellowship program in its format.

The Metcalf Foundation remains committed to supporting exceptional individuals as they do their very best work in nonprofit organizations. In early 2010, the Foundation announced the **Metcalf Renewal Program** that will help to make opportunities for professional renewal accessible to talented individuals with a record of achievement.

Metcalf Renewal Program

The Metcalf Renewal Program will support exceptional individuals as they do their very best work in nonprofit organizations. We know that people in nonprofit professional roles feel a deep sense of responsibility and a desire to perform their roles well – to do their best work at every stage of their career and to make a substantial lifetime contribution to the sector. Through the Renewal Program, the Foundation will build on its longstanding interest in supporting these leaders by making strategic investments in the professional vitality of people who work in charitable organizations – individually and collectively.

These leaders are catalysts. They cause or accelerate change within organizations and around the issues on which they are engaged, and they attract resources, attention, and support to their work. Without them, we would have fewer creative ideas, less compelling visions of a hopeful future, and fewer innovative responses to the challenges of realizing that future. Much depends on the effectiveness of these professionals, their sense of responsibility, and the depth of their commitment.

Such commitment should not be taken for granted. There is likely to be a time in these people's careers when an infusion of fresh information, exposure to the work of others, or space for reflection will be galvanizing. This is true for people at different stages of their career and playing various roles in their organizations, since leaders are found throughout the charitable sector and not only at the top of hierarchical structures. The Foundation believes that, with a little support and encouragement, such renewal can be exceptionally generative for these individuals, their organizations, and the sector as a whole.

The Metcalf Renewal Program makes significant opportunities for professional renewal accessible to talented individuals with a record of achievement.

[The Metcalf Renewal Program has been designed as a cross-sectoral initiative, and applications are welcomed from leaders at organizations working in the performing arts, environment, and community sectors. Please refer to the Metcalf Renewal Program guidelines, available at the Foundation's website, for application requirements.](#)

Emerging Leaders:

A Middle Management and Leadership Certificate Program

SUPPORTING A NEW GENERATION OF LEADERS

The next generation of nonprofit leaders will come from a diverse group of middle managers in the social services sector. To strengthen the skills and scope of these exceptional individuals, the Metcalf Foundation and United Way Toronto created a unique certificate program – *Emerging Leaders*.

Offered in partnership with the Schulich School of Business at York University from 2005-2008, the Emerging Leaders program focused on leadership development, core management skills, and sectoral analysis. The 98 participants who went through the 23-day program over the four years:

- Built their skills to respond to complex challenges and opportunities in their workplaces today.
- Enhanced their ability to lead organizations in the future.
- Learned strategies for understanding and adapting to change.
- Strengthened skills in best management practices in financial management, project management, human resources and other key areas.
- Developed leadership tools to influence policy decisions and foster collaboration.

University faculty, subject experts and experienced practitioners led participants through hands-on workshops and peer-based learning. The program format included full day class sessions, retreats and off-site learning activities.

In 2009 an evaluation of Emerging Leaders was conducted by Imprint Consulting. If you are interested to learn more about the impact of this initiative on participants, their organizations, and the broader sector please go to our website at www.metcalffoundation.com to download the report.

Application Deadlines for 2010

APPLICATIONS MUST BE RECEIVED BY THE FOUNDATION AS FOLLOWS:

COMMUNITIES IN ACTION

Application Steps	Spring 2010 Deadlines	Winter 2010 Deadlines
Letter of interest	March 1	September 15
Foundation extends invitation to apply	March 15	September 27
Full application deadline	April 19	October 25
Board decision	June	December

INNOVATION FELLOWSHIP

Application Steps	2010 Deadlines
Deadline	No set deadline – continuous intake throughout the year
Board decision	Quarterly

METCALF RENEWAL PROGRAM

refer to separate program guidelines for application requirements and deadlines

Prospective applicants are strongly encouraged to contact the Community Program Director in advance, to discuss their proposals.

Please submit your application by mail to:
George Cedric Metcalf Charitable Foundation
Attention: Colette Murphy, Community Program Director
174 Avenue Road
Toronto, Ontario
M5R 2J1

and by email to:
hdunford@metcalffoundation.com

Please note that we are unable to consider late or incomplete applications for funding; both hard and electronic copies must be **received at the Foundation** by 5:00 pm on the deadline date.

Community Program

APPLICATION COVER PAGE

Name of Organization

Contact Name

Position

Address

City

Province

Postal Code

Telephone

Fax

E-mail

Website

Charitable Registration Number

Total Organizational Revenue (from last audited statements)

This application is for:

- Communities in Action
 Metcalf Innovation Fellowship Program

Total Amount Requested

Amount Requested per Year

Duration of Initiative

Please provide a project title and description (250 words or less).

Signature

Date

This form must be attached to your application.

METCALF
FOUNDATION

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