

Metcalfe Renewal Program 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, and 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 in order 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.

Metcalf Renewal Program

The Metcalf Foundation supports people working in the nonprofit sector over the arc of their careers to ensure their effectiveness and, through them, the health of their organizations and communities.

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.

Demographic shifts indicate that the nonprofit sector needs leaders as diverse in age, background, and experience as Canada itself and in much greater numbers than ever before. Leaders are facing a complex social, economic, and political reality that requires them to work intelligently and imaginatively. Their work can be difficult and demanding, with ambitious goals, long hours, and limited resources. Expectations for performance, accountability, and personal integrity have never been higher. They must manage their organizations and missions shrewdly, and find new and constructive ways forward. We believe that, taken together, these new realities, demands, and expectations require opportunities for leaders to experience renewal.

Our understanding of professional renewal involves the revisiting of one's core professional purpose or focus, values, commitments, assumptions, and approaches. Renewal includes building knowledge and improving skills while broadening perspectives and deepening

commitment. It encompasses the creation of professional networks to leverage learning and to build trust. Renewal generates greater maturity, vitality, and effectiveness for the individual, and builds increased leadership capacity for their organization and the charitable sector. This process could involve:

- acquiring or honing skills;
- accessing the latest thinking and research in a chosen field;
- investigating new concepts, models, and methods;
- studying with experts and master teachers;
- facilitating dialogue with colleagues across traditional boundaries;
- reflecting on experience and practice; or
- stimulating creativity.

The Metcalfe Renewal Program makes significant opportunities for professional renewal accessible to talented individuals with a record of achievement. These opportunities could include residencies, attendance at retreats, participation in conferences or workshops, periods of specialized training or study with masters in the field, research, or travel. The pursuit of post-secondary degree programs will not be supported under this program.

WHO IS ELIGIBLE TO APPLY?

This program has been designed for individuals with at least ten years' professional experience in the charitable sector. These individuals either hold a leadership position within their organization or they have been identified, within their organization or by the wider sector, as someone who is expected to make a significant leadership contribution wherever they might be situated.

As a charitable foundation registered with the Canada Revenue Agency, the Metcalfe Foundation can only provide grants to organizations with charitable status. Applications must be submitted, therefore, by the charitable organization that employs the leader. The strongest proposals will be crafted by the individual who can speak most directly to the value of the proposed opportunity for professional renewal.

The Metcalfe Foundation believes in developing, strengthening, and celebrating the diversity of leadership we have in our region. As such, this Program is a Foundation-led initiative and is not situated in any one funding program. Applicant organizations, however, need to work in one of the three areas funded by the Metcalfe Foundation.

- Under the Community Program, applications are accepted from organizations, located and operating in the City of Toronto, with a mandate that focuses on strengthening low-income communities.
- Under the Environment Program, applications are accepted from organizations working in southern Ontario that have shown a commitment to ensuring the ecological health and integrity of southern Ontario's natural and working lands.
- Under the Performing Arts Program, applications are accepted from professional theatre, dance, music, and opera organizations in the province of Ontario with a minimum of three years' history of production.

WHAT ARE THE FUNDING PARAMETERS?

Grants under this program will be awarded up to a maximum of \$10,000. Grants could include the direct expenses of the professional renewal program, tuition or training fees, living expenses, travel, and accommodation. Grant recipients may choose not to be involved in regular workplace demands, or they may elect to coordinate their renewal opportunities around their full-time commitment to their organizations.

This is an intentionally flexible program that does not prescribe a specific course of action but, instead, intends to provoke a range of responses around a broad spectrum of needs. We believe that people who set their own course of action have more meaningful professional renewal experiences. It is important to note that the program focuses on the renewal of professionals within the context of their chosen field. The Foundation expects to continue examining the critical link between professional and organizational vitality, and the role of opportunities for learning and renewal.

WHAT IS THE APPLICATION PROCESS?

Applications must not exceed four pages and should include:

- a brief biography of the individual undertaking the course of professional renewal that highlights both their past accomplishments and their future goals within the organization or sector;
- an outline of the proposed course of professional renewal, including:
 - the individual’s goals for the learning activity,
 - details regarding the planned activities,
 - how the individual believes that this opportunity will benefit their own professional development and/or career goals,
 - how this opportunity will influence the future work of the individual,
 - any benefits that the applicant organization or the sector as a whole might receive from this individual’s professional renewal, and
 - any plans that the individual has to share the learning that results from this activity with the applicant organization or the full sector; and

- a budget for the proposed course of professional renewal which indicates any financial or in-kind contributions from the applicant organization.

In addition, applications must include:

- the individual’s résumé;
- two letters of reference from professional colleagues who can comment on the value of the proposed program of professional renewal and on the individual’s capacity to undertake this work;
- a letter from the Board or the senior leadership of the organization, as applicable, confirming support for this initiative;
- evidence of acceptance, if applicable, by training institutions or master teachers;
- the Metcalf Application Cover Page;
- the organization’s most recent annual report, where published; and
- the organization’s most recent audited financial statements.

Applications are received at the Foundation on an ongoing basis and will be considered by the Board at quarterly meetings. While this is a Foundation-level initiative, individuals and organizations considering applying to this Program are encouraged to contact the Arts, Community, or Environment Program Director as appropriate to discuss their ideas in advance.

Please provide [two paper copies of the application, résumé, and letters of support \(printed double-sided\)](#) **and** submit an [electronic version of this material in Word to \[hdunford@metcalffoundation.com\]\(mailto:hdunford@metcalffoundation.com\)](#). The Metcalfe cover page, annual report, and audited statements need not be submitted electronically.

HOW WILL APPLICATIONS BE ASSESSED?

Reviewers will want to understand how this investment will make a tangible difference to the candidate at this particular time in their career, how it will contribute to their career in the future, and the broader contribution that this investment might make on the applicant organization or on the sector as a whole.

We will assess applications according to the following criteria:

- the individual's career history, accomplishments, and goals;
- the scope of the proposed program of professional renewal;
- the potential for benefits to the individual from the proposed program;
- the organization's readiness to support the individual as they undertake the proposed program; and
- the individual's potential for future contributions to the charitable sector, both within their organization and to the sector as a whole.

Funding decisions will be made by the Board of the Foundation, and such decisions are final.

HOW WILL WE LEARN FROM OUR WORK?

Each individual funded by this program must determine their own professional and personal goals for undertaking the proposed course of professional renewal. Successful candidates will provide a final report upon completion of the proposed renewal activities. These reports should describe the activities that have been undertaken and include the individual's reflection on the impact of their experiences. A financial summary is also required.

The Foundation will host an annual meeting of individuals funded through this program. At that time, these individuals will have opportunities to reflect together on the value of their development and learning plans and on the impact that their activities have had at the organizational level. In situations where more than one leader is pursuing similar types of development, the Foundation may also arrange other forums to allow these people to share their knowledge.

The Foundation reserves the right to review its ongoing commitments if circumstances arise which indicate that the proposed program of professional renewal is unlikely to be realized. These circumstances could include failure to undertake activities or to meet goals as described in the proposal; the departure of teachers or mentors; an organization's charitable registration being suspended, revoked, or annulled; or severe financial difficulties within an organization.

Application Deadlines for 2010

APPLICATIONS MUST BE RECEIVED BY THE FOUNDATION AS FOLLOWS:

METCALF RENEWAL PROGRAM

Applications are received at the Foundation on an ongoing basis throughout the year and will be considered by the Board at quarterly meetings.

Application Steps	Spring 2010	Summer 2010	Fall 2010	Winter 2010
Applications received by this date will be considered at the meetings listed below	February 22	May 17	August 30	November 1
Board decision	March	June	September	December

While this is a Foundation-level initiative, individuals and organizations considering applying to this Program are encouraged to contact the Arts, Community, or Environment Program Director as appropriate to discuss their ideas in advance.

Please submit your application by mail to:
George Cedric Metcalf Charitable Foundation
174 Avenue Road
Toronto, Ontario
M5R 2J1

and by email to:
hdunford@metcalffoundation.com

