

# Inclusive Local Economies Program Guidelines 2012

# Contents

- 1 Metcalf Foundation
- 2 Metcalf Inclusive Local Economies Program
- 3 Opportunities Fund
- 7 Renewal Program
- 8 Innovation Fellowship
- 9 Application Deadlines for 2012
- 10 Inclusive Local Economies Application Cover Page

# Metcalfe Foundation

The George Cedric Metcalfe 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
- improving low-income peoples' economic livelihoods and access to quality jobs.

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, 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.

# Inclusive Local Economies Program

The Metcalf Inclusive Local Economies Program works with people and organizations to develop long-term strategies that create sustainable economic opportunities and generate wealth for low-income people and communities in Toronto.

The world of work has changed. In the past, many low-wage jobs in Toronto were the first rung on an economic ladder that led to greater skills, meaningful vocations, and higher pay. But today's low-wage jobs are often dead-end, short-term positions that offer little chance of yielding the opportunities necessary to make a decent living for oneself and one's family.

This reality pulls at the social and economic fabric of this city – dampening aspirations, producing poverty and growing inequality, and challenging our collective conviction that Toronto should provide real possibilities for those who seek them.

Most people with low incomes place a decent job or small business near the top of their wish list but funders, service providers, and policy makers have had only sporadic success in helping them attain these goals.

Simple solutions are, unfortunately, not readily available. Local economies are complex systems; it is often hard to find the right lever to pull. One-size does not fit all. Involving key players in any significant solution is a challenge since job-seekers, workers, budding entrepreneurs, businesses, non-profits, and governments operate in different spheres and sometimes have conflicting goals.

Toronto needs new ways to both understand and respond to this complex and evolving challenge in our neighbourhoods, in our non-profits, in our businesses, in our government agencies, and in our public policies. Metcalf is seeking partners who can foster different ways to think about this problem and generate powerful solutions.

We want to build the resilience of people and communities who must adapt and respond boldly, creatively, and collaboratively to these rapid economic changes; to foster forward-thinking approaches in the non-profit sector; and to help develop real structural solutions in the private and government sectors. Whether you are developing problem-solving networks for local micro-entrepreneurs, engaging employers to improve on-the-job training practices, fighting for withheld wages for temporary workers, or advancing public policies that encourage economic inclusion for all, our Inclusive Local Economies Program which includes the Opportunities Fund, Resilient Neighbourhood Economies, and our two Foundation-wide programs, offer resources that can deepen our collective impact.

# Opportunities Fund

The Opportunities Fund is an open call for original ideas and compelling approaches that contribute to building a city where low-income people have meaningful access to, and benefit from, Toronto's vibrant economy in order to create a healthier, more equitable city.

Creating an inclusive local economy is a complex challenge; success requires multiple, well-aligned efforts from many different players including business, labour, residents, non-profits, entrepreneurs, advocates, and governments. The Opportunities Fund builds on efforts currently underway in the city and helps to catalyze new ones. It seeks to stimulate both new ways to define and understand the problems, and effective responses to improving low-income residents' livelihoods and access to quality jobs.

Metcalf is interested in efforts that approach this work with an understanding of the broader landscape, that seek to bridge and build upon the differences of multiple players, that take good ideas to others who could use them, that foster creative and imaginative action, and that enhance the participation and leadership of low-income people in addressing the conditions they face.

Successful applicants can be engaged in a wide range of activities. They might be creating shared production space or city-wide distribution networks for local micro-entrepreneurs, advancing policies and practices that support people to develop their abilities and improve their economic position, innovating new approaches to local workforce planning, negotiating a Community Benefit Agreement at a new real-estate development, exploring models of employee ownership to provide better outcomes for low-income people, or nurturing the leadership of low-wage workers organizing to improve their employment outcomes. Applicants might have a fully-developed project ready for implementation or a promising idea that needs strategic consulting to be fleshed out. If there is real commitment and a clear, compelling rationale, this fund can support a wide array of promising, unconventional efforts in whatever ways are most useful.

We will consider a range of requests to this fund from very small to more substantial grants and both short-term and multi-year funding.

### 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. In addition to being a registered charity, eligible applicants must be focused on improving outcomes for low-income people and communities, and be located and operating in the City of Toronto. 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.

Generally, we do not fund:

- direct services that focus purely on developing job skills;
- direct financial support to for-profit enterprises, social or otherwise;
- projects that do not consider how they relate to other ongoing efforts;
- ongoing operating expenses that are unrelated to the proposed project;
- capital projects;
- endowments; or
- deficits.

### WHAT IS THE APPLICATION PROCESS?

The Foundation will review applications for the Opportunities Fund twice annually, once in the spring and once in the winter.

Prospective applicants are encouraged to contact the Inclusive Local Economies

Director in advance to discuss their proposals. Applying to this fund 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 project will address, the timeframe, the approximate budget, and the amount being requested from the Foundation. This letter should not exceed three pages. The Metcalf Application Cover Page (download at [metcalffoundation.com/downloads](http://metcalffoundation.com/downloads)) must be attached to the front of this letter.

Please provide **two paper copies of the letter (printed double-sided) and submit an electronic version to [hdunford@metcalffoundation.com](mailto: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 the following.

- **Background:** A short summary of the organization's history, mandate, and current strategies concerning economic development for low-income people.
- **Goal:** A clear articulation of what you want to achieve through this project. Please be specific.
- **Rationale:** A compelling explanation of why is it important for this goal to be achieved. This should include, but is not limited to, explaining the context in which the work is situated (what else is being done already? how effectively is it being done?) and, in this context, what exactly is the unrealized or emerging opportunity that the project is addressing (how will addressing your goal improve the current system?). Relate how your project addresses the objectives of Metcalf's Inclusive Local Economies Program.
- **Strategy:** A convincing description of how your project will achieve your goal. This is your opportunity to describe the project activities, explain how these activities will lead to the achievement of your goal, and (if applicable) why these activities are superior to any alternative approaches.
- **Project Workplan:** Summarize the project's activities. Please include anticipated project milestones including what will be achieved and when?
- **Partners (if applicable):** Does your project require that you work with others to achieve your goals? If so, please include how they will be engaged in the project, a brief description of your current working relationship with them, and evidence of their interest in working on the project.
- **Outcomes and Evaluation:** What tangible results do you hope to see from this project? While the project is proceeding, how will you determine whether you are making progress? How will you make mid-course adjustments based on your learnings to date? When the project finishes, how will you assess whether you have achieved the results that you had hoped for?
- **Experience and Capacity:** Briefly explain why you believe you have the necessary experience and capacity to undertake this endeavour. Please include short bios of key project staff. If applicable, describe work already done by your organization that illustrates your capacity to succeed. If you are uncertain about whether you can achieve your goals, explain where you see potential challenges and why you believe it is still important to undertake this project even if it might not succeed.
- **Lessons for Toronto:** A short description of what others who are working on similar issues in Toronto might learn from your

project and how this learning might be shared. Why is your project significant to broader efforts in this city?

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

- a Metcalf Application Cover Page (download at [metcalffoundation.com/downloads](http://metcalffoundation.com/downloads)),
- a completed budget template provided by the Foundation (download at [metcalffoundation.com/downloads](http://metcalffoundation.com/downloads)),
- 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 to [hdunford@metcalffoundation.com](mailto: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.

#### 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 project's match with the goals of the Inclusive Local Economies Program,
- the clarity and persuasiveness of the proposed rationale,
- the credibility of the strategy,
- the likelihood of success for this organization and its partners, 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 to 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; an organization's charitable registration or incorporation being suspended, revoked, or annulled; or severe financial difficulties.

# 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 on inclusive local economies issues. Please refer to the Metcalf Renewal Program guidelines, available at the Foundation's website, for application requirements.

# Innovation Fellowship

We are living in a time of profound change, where simple solutions to the complex, interconnected issues we are facing – from growing income inequality to the rapid depletion of our natural environments – are not adequate. We need new ways of seeing and acting to tackle integrated ecological, social, economic, and cultural challenges confronting us today.

The Metcalf Innovation Fellowship is directed at supporting new “thinking and doing.” We believe fresh insights and true experimentation often happen on the edge of an issue, out beyond where organized and traditional efforts are being made. We want to create opportunities for this work to be developed, disseminated, and heard. This Fellowship gives individuals of vision and creativity, people with outstanding talent and originality, the freedom to pursue powerful ideas, models, or practices that have the potential to contribute to building a healthier, more resilient southern Ontario.

The Innovation Fellowship is aimed at individuals with vision, a passion for their issue, intellectual rigour, and a willingness to ask hard questions and propose novel solutions.

The Innovation Fellowship has been designed as a cross-sectoral initiative, and applications are welcomed from people working in the performing arts, environment, and on inclusive local economies issues. Please refer to the Innovation Fellowship guidelines, available at the Foundation’s website, for application requirements.

# Application Deadlines for 2012

APPLICATIONS MUST BE RECEIVED BY THE FOUNDATION AS FOLLOWS:

## OPPORTUNITIES FUND

Application Steps	Round One Dates	Round Two Dates
Letter of interest	December 5, 2011	September 17, 2012
Foundation extends invitation to submit a full application	December 19, 2011	October 1, 2012
Full application deadline	February 6, 2012	October 29, 2012
Board decision	March 2012	December 2012

## RENEWAL PROGRAM

refer to separate program guidelines for application requirements and deadlines

## INNOVATION FELLOWSHIP

refer to separate program guidelines for application requirements and deadlines

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

Please submit your application by mail to:

George Cedric Metcalf Charitable Foundation  
Attention: Colette Murphy  
Inclusive Local Economies Program Director  
174 Avenue Road  
Toronto, Ontario  
M5R 2J1

**and** by email to: [hdunford@metcalffoundation.com](mailto: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.

# Inclusive Local Economies 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)

Opportunities Fund Project Request:

---

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.



**The George Cedric Metcalf  
Charitable Foundation**  
174 Avenue Road  
Toronto, Ontario M5R 2J1  
TEL 416 926 0366  
FAX 416 926 0370  
www.metcalffoundation.com