

METCALF FOUNDATION

INCLUSIVE LOCAL ECONOMIES

Opportunities Fund

2016/2017 Program Guidelines

METCALF FOUNDATION

The George Cedric Metcalf Charitable Foundation's mission 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:

- improving economic livelihoods for low-income people in Toronto;
- building a low-carbon, resource efficient, and resilient Canada; and
- leveraging opportunities for new approaches and shared learning in the performing arts.

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 encourage success by:

- supporting dynamic leadership — celebrating, developing, and strengthening leaders who are contributing to positive change;
- nurturing new ideas and practices — 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

In Toronto — the richest city in Canada — prosperity is not shared by all. Over the past decade, poverty has been increasing in the city and decent work is getting harder to find. The increasing numbers of working poor in Toronto is straining the social and economic fabric of the city. Growing income inequality, the vulnerability of workers in a low-wage economy, and the need for responsible economic development all underscore the need for stakeholders to work in collaboration to improve the economic livelihoods of low-income people. Income inequality especially impacts women, communities of colour, people with disabilities, aboriginal people, and newcomers.

The Foundation's Inclusive Local Economies program is designed to support the development of long-term strategies that can create sustainable economic opportunities and generate wealth for low-income people and communities in Toronto. We move forward on these issues through investments in robust research, innovative community practice, and collaborative learning. We do this by seeking alternative models, bold ideas, creative partnerships, and promising public policies that can:

- help increase access to quality jobs,
- protect precarious workers, and
- strengthen local neighbourhood economies.

Real impact requires multiple, well-aligned efforts by many partners including business, labour, residents, non-profits, entrepreneurs, academics, advocates, and government. Through our Inclusive Local Economies Program we seek partners who respond boldly, creatively, and collaboratively to these challenges and who can develop and implement promising strategies and comprehensive solutions.

OPPORTUNITIES FUND

The Opportunities Fund is an open call for innovative ideas and compelling approaches that can contribute to building a healthier, more equitable city where low-income people are able to have access to Toronto's vibrant economy.

The goal of the Opportunities Fund is to improve the economic livelihoods of low-income people through strategies that:

- make precarious jobs better (raise the floor) and support the upward mobility of workers (build ladders);
- reduce barriers for low-income entrepreneurs and alternative business models; and
- leverage the capacity of neighbourhoods to improve the economic livelihoods of low-income residents.

These strategic areas comprise the focus of our funding and align with our long-standing commitment to advance pragmatic approaches in support of bold visions. Applicants must address one or more of the three strategic focuses listed above, in their proposals.

Metcalf is interested in approaches that: encompass an understanding of the broader landscape of public policy, research, and community action; include an analysis of equity and inclusion; and enhance the participation and leadership of low-income people in addressing the conditions they face.

Eligibility

Organizations may apply individually or in collaboration with others. Lead applicants must be:

- committed to improving outcomes for low-income people and communities,
- based and active within the City of Toronto; and
- registered as a charity through the Canada Revenue Agency.

Generally, we do not fund:

- direct services that focus purely on developing job skills;
- direct financial support to for-profit enterprises – social or otherwise;
- ongoing operating expenses that are unrelated to the proposed project;
- capital projects;
- endowments; or
- deficits.

Application Deadlines

Deadlines for 2016/2017 are:

	Round 1	Round 2
Receipt of letters of interest (electronic copy only)	November 21, 2016, 5:00pm	June 8, 2017, 5:00pm
Receipt of full application (both electronic and hard copies)	February 1, 2017, 5:00pm	July 26, 2017, 5:00pm

Applicants will be informed within three weeks of submitting a letter of interest whether they are invited to submit full applications.

The Foundation is unable to consider late or incomplete applications for funding. Both paper and electronic copies **must be received at the Foundation** by the time and date listed above.

Funding Decision

Applications will be reviewed by the Foundation’s Board and staff, assisted by an advisory panel with knowledge of the sector. Notifications of the Board’s funding decisions will be sent out in early April 2017 for Round 1 and early October 2017 for Round 2. We will assess applications on the basis of:

- the project alignment with the goals of the Inclusive Local Economies program and the Opportunities Fund;
- the clarity of your proposal, the credibility of the strategy, the rationale for the work, and likelihood for success;
- the potential for impact, contribution to systems change, and analysis of equity; and
- the potential for learning about new approaches and practices for both the project partners and the Foundation.

Application Requirements – Letters of Interest

Prospective applicants are strongly encouraged to contact the Inclusive Local Economies Program Director, Adriana Beemans, to discuss their proposals in advance of applying:
abeemans@metcalffoundation.com or 416-926-0366 x 224

PART A: General Information – maximum ½ page

Lead Organization:

Project Partners (if applicable):

Primary Contact Name and Position:

Mailing Address:

Telephone:

Email:

Website:

Charitable Registration Number:

PART B: Project Summary – maximum ½ page

Project Title:

Total Amount Requested (per year if multi-year request):

Project Duration:

Please provide a summary of the proposed work (maximum 200 words):

PART C: Project Details – maximum 3 pages total

Please address the following points in your letter of interest, using no smaller than 11-point type and 1.5 line spacing.

1. **Organizational Overview:** Brief summary about the organization(s), history of its work related to the themes of the Inclusive Local Economies Program, and why you are well positioned and motivated to lead this project.
2. **Overview of Project:** Please describe the purpose of the project, what you aim to achieve, your strategy to achieve these goals, and how it aligns to the Opportunities Fund strategic focus areas. Share any research, experience or underlying rationale that has led you to this approach.
3. **Collaboration:** How are you collaborating with others in this project? What roles will they take and how have they been engaged thus far?

Letters of interest are to be submitted in **electronic form only**. Submit **one pdf file** of all parts listed above to hdunford@metcalffoundation.com.

After submitting your letter of interest electronically, you should receive an email confirmation of its receipt. If you do not receive confirmation within three business hours of making your submission, please contact Foundation staff.

Application Requirements – Full Application

Based on letters of interest, the Foundation will invite organizations by letter (sent both electronically and by mail) to submit full applications to the program. Note that an invitation is not a guarantee of funding. Metcalf will not consider full applications from organizations that did not receive an invitation following their letter of interest submission.

PART A: General Information – maximum ½ page

Lead Organization:

Project Partners (if applicable):

Primary Contact Name and Position:

Mailing Address:

Telephone:

Email:

Website:

Charitable Registration Number:

PART B: Project Summary – maximum ½ page

Project Title:

Total Amount Requested (per year if multi-year request):

Project Duration:

Please provide a summary of the proposed work (maximum 200 words):

PART C: Project Details – maximum 8 pages total

Please address the following points in your letter of interest, using no smaller than 11-point type and 1.5 line spacing. Proposal details longer than 8 pages will not be reviewed.

1. **Organizational Overview:** Provide a brief summary about the organization(s), history of its work and current strategies related to the themes of the Inclusive Local Economies Program, and why you are well positioned and motivated to lead this project.
2. **Project Overview:** Please describe the purpose of the project, what you aim to achieve, and why this work is important to your organization, sector, and community. What are the anticipated short and long term results of this project? How does this project advance the strategic goals of the Opportunities Fund?
3. **Project Strategy:** Please describe the plan for achieving your goal(s). What research, experience, or underlying rationale has led you to this approach? How have issues of equity informed your proposed strategy? How will this project contribute to the current policy landscape, leverage other resources, and complement existing leadership in this area?
4. **Project Workplan:** Please describe the key activities that will be undertaken both by staff and consultants, the anticipated deliverable and timeline, and the project lead responsible for the work.

5. **Project Evaluation and Learning:** What does success look like and how will you be evaluating progress for the duration of the project? What metrics will you use to inform success? What do you foresee as potential challenges in achieving your results, and how will you address these? What are you hoping to learn through this project and how will you share your outcomes and learning with others?
6. **Collaboration and Leadership:** Please describe who has been engaged in the planning of this project. What partnerships and networks will support the implementation of this project and what will their work entail? Please provide short bios of the key project leads for this initiative. If new positions are being created please provide a description of the roles.

PART D: Budget

Complete the project budget template found at <http://metcalffoundation.com/downloads/>. Please identify whether other funding is pending or confirmed, and make sure that budget items correlate with your strategy and workplan.

PART E: Additional Information

In addition to the above parts, please include one paper copy and an electronic version of the following materials.

- The organization(s) most recent audited financial statement (if the organization does not have audited statements include the organization's current budget with revenues and expenses)
- Organization's most recent annual report
- List of current board members
- Letters of support from partners identified in the proposal

Please mail or deliver **four** paper copies (printed double-sided and collated) of Parts A to D – General Information, Project Summary, Project Details, and Budget; and **one** paper copy of Part E – Additional Information to:

Metcalf Foundation
Attention: Adriana Beemans
Inclusive Local Economies Program Director
38 Madison Avenue
Toronto, Ontario M5R 2S1

and submit an electronic version of all proposal parts by email to: hdunford@metcalffoundation.com

Please note that we are unable to consider late or incomplete applications. Both paper and electronic copies **must be received at the Foundation** by the date and time listed above.

Note: The Full Application Requirements section is available in a Word document at <http://metcalffoundation.com/downloads/>