METCALF FOUNDATION

2021/22 Metcalf Opportunities Fund Information Session Webinar Transcript

Please note: This video webinar recorded on October 15, 2021 was transcribed using auto-transcribing software. The transcript was edited to improve readability and clarity.

Metcalf Foundation Overview

Adriana Beemans [02:51] Welcome to the Metcalf Foundation. Metcalf is a private foundation. We invest in people, ideas, and actions to build a just, healthy, and creative society, and we focus in three areas. We focus in the area of the environment, performing arts, and poverty reduction. Each one of those areas has their own programs strategy that's focused. And so, my program is committed to poverty reduction, but focused on inclusive local economies. How can we create sustainable economic opportunities for low income people and communities in Toronto? So, while the foundation works in three areas, this webinar and my program focuses on inclusive local economies. And that's important because sometimes in applications, organizations start talking about the environment or the arts, but it's really important to recognize that this grant opportunity falls under the criteria of the Inclusive Local Economies program. So, as mentioned, the foundation is a private foundation, and this program, Inclusive Local Economies, is just under 10 years old, and it came out of the foundation's commitment to poverty reduction. And part of that is how can we think about how can work and how can work help move people out of poverty? Good jobs are the foundation for prosperity and moving out of poverty. Our strategy is really focused on the labor market and the economy.

Inclusive Local Economies Program Overview

Adriana Beemans [04:31] The Inclusive Local Economies program is a 10-year old program, and it's focused on supporting the development of long-term strategies that can create sustainable economic opportunities and generate wealth for low income people and communities. And I emphasize long term because we know that this is hard work and this takes a long time and there's no cookie cutter answer that will solve the challenging and complex issues of poverty and working poverty in the city of Toronto. We advance this program vision in three key areas. Our grantmaking, which is the one that most people know us for the opportunity fund, which is the focus of this webinar. But we also do some other things as a Foundation outside of grantmaking. We invest in research and public policy primarily through our innovation fellowships, but also through some other funding to really focus on deepening the research and analysis and policy recommendations around these areas. But we also play a catalytic role on systems change initiatives. We see ourselves in philanthropy. This is an amazing, privileged space. And how can we leverage our role as a systems player and how can we help inform and influence the broader system on systems change initiatives that will improve economic livelihoods for low income people? And two of the strategic initiatives that we've helped undertake as one a workforce development leadership academy that we catalyzed and run, which is the Toronto Sector Skills Academy, and you can find some info on our website. And the second one is the Toronto Workforce Funders Collaborative, a collaboration of seven foundations that have come together and pooled funds to support and support workforce development systems

change. So those are the broad things that we do under the Inclusive Local Economies program.

Opportunities Fund Strategic Areas

Adriana Beemans [06:32] But as mentioned, our primary activity is our grant making, and that's the Opportunities Fund. We work in three key areas and our opportunities fund making precarious jobs better, raising the floor, and supporting the upward mobility of workers. How can we improve the quality of low wage work? And how can we enable access to good jobs that move people out of working poverty? The second area is to reduce barriers for low income entrepreneurs and alternative business models, and finally, leverage the capacity of neighborhoods to improve the economic livelihoods of low-income residents, and I'll go into each one of those areas. I think some key things that are important to know that we recognize there's a range of interventions. There's a range of strategies that can improve economic livelihoods of low-income people. But we don't focus on all of those things. That's why we have these concentrated areas. And I think part of that is because part of it, like it's we don't focus so much upstream. We're really focused on the labor market and work, and I use the example often of early childhood education. We know that if we invest in early childhood education, it's one of the number of ways of improving economic outcomes for people. It's about starting with as children and moving upwards. But we don't invest in early childhood education, so we're not that upstream to this framing around economic livelihoods. However, we do, for example, fund the Association of Early Childhood Education Ontario to advocate for better working conditions and access to decent work by recruiting and building new leadership among early childhood workforce. We think that labour and decent work is a sort of a theme that comes out through a lot of other areas. Even though we wouldn't, for example, fund early childhood education programs, we definitely recognize that early childhood workers are often low wage workers. And so, we do fund around that area, but again around the issues of work in the economy. On the Opportunities Fund, you'll see that it's an open call. We do this once a year and it's always usually around this time of year, and we focus on these three areas and I encourage you to speak in your application to which one of those three areas. Sometimes some applications are referring to both. There might be two out of these three bucket areas, but it's really important in the letter of intent to say, how does your project speak to this? I'll give you an example of each in each kind of bucket area. What a project would be.

For making precarious jobs better, how do we improve low wage work? An example of the recent grant is the Migrant Workers Alliance for Change. It's a member led organization that supports the self-organization of migrants focused on economic and immigration justice, and through our investment, they're building the capacity of migrant workers who are on college student permits to learn about their employment rights, learn about their experiences of precarious work and expand the public conversations about decent work and migrant students' workers. And they're going to form eight college chapters and choose many chapters to share this information, support student workers in accessing their rights, and advocate for the removal of a 20-hour limit on study permits. Creating study permits for private college students. Making post-graduate work permits renewable and making low wage work or gig work count towards residency hours so you can see how

Opportunities Fund Webinar Transcript

there's these policy areas that they're focused on that will raise the floor and improve the quality of migrant workers who are students who are working in low wage work.

An example of supporting the upward mobility of workers is a recent grant that we funded to NPower Canada, a workforce organization that launches underserved young adults into meaningful and sustainable digital careers. Through our investment, they're partnering with the Native Child and Family Services of Toronto, where they're adapting their model and are co-creating an Indigenous centered approach that will provide young Indigenous learners with their GED certificate and digital skills training, wraparound support, and mentorship to build pathways from high school graduation to sustainable employment in the IT sector. And I think part of this adaptation of their model is recognizing that in working with their Indigenous partner, they need to start earlier on in the process, not after high school graduation, but working with this community throughout that whole process. And so those are two examples that speak to that first area and reducing barriers for low income entrepreneurs and alternative business models. It's important to note that we wouldn't be necessarily providing, like social enterprise business planning. We're really focused on what are those barriers that low-income entrepreneurs face. An example of that is a recent grant that we gave to Mothercraft, a nonprofit charitable organization, to adapt their existing home care, child-based training model for women and men who run home-based child-care programs at home. They are working to adapt it to be accessible and affordable online and to test their online model and develop partnerships with loan providers and licensed child care networks to help these low-income entrepreneurs build out their business.

And then the last area, leveraging the capacity of neighborhoods to improve economic livelihoods of low-income residents. This is sometimes a hard area because it's really neighborhood focused and at a neighborhood level, and that can mean lots of different things. But this area has two grants that I thought would help highlight this. One is with Black Urbanism Toronto (BUTO) that was founded a few years ago to advance the social, cultural and economic interests of black communities in the local neighborhood. In local neighborhoods, including heritage preservation in place keeping and in partnership with the Jamaican Canadian Association. BUTO, through our funding, will explore community control and ownership models that could enable Little Jamaica to retain and expand a diverse range of Black businesses. You could see how at a neighborhood economy if one can support Black businesses to stay in Little Jamaica and to expand Little Jamaica's Black business businesses that will strengthen this neighborhood economy. Another grant that demonstrates kind of that neighborhood economy and neighborhood lens is a recent grant with the Parkdale Neighborhood Land Trust that is a community-controlled organization that acquires and owns and stewards land and housing for a specific purpose and providing community benefits to equity seeking members. And with our funding, they're entering a growth phase, and so we're supporting them as they increase their residential unit portfolio significantly to develop and strengthen long term partnerships that will enable them to embed social procurement, workforce development and long-term partnerships around climate resilience and housing operations and social finance into their model. So how to operationalize those strategies? So that gives you kind of a sense and on our website, we have a grant database that has a list of every grant that we've issued across

the foundation, but that gives you a sense of kinds of grants that speak to each one of those areas.

Process Timeline

Adriana Beemans [14:24] I'll now go into what makes a successful grant, speak to the letter of intent and start off with the process. Because the process is really helpful, both in thinking about how you're conceptualizing your project application and to a vision, if it was successful, when would it start? We start off the process with something like this. It's great that you're on this webinar. We don't do a webinar every year, so talking to me is often helpful at this point. You get more to listen to me, but I definitely suggest reaching out to me if there's questions after this that are unclear, or if you kind of want to talk through your ideas some more, and I'll raise the kind of questions we would ask as we review a letter of intent. I suggest you don't reach out to me necessarily like a few days before the deadline, because it's a very busy time of booked conversations. The letter of intent is November 18th. There's about two weeks we review all the letters of intent, and then we invite organizations for a full application after we've reviewed the letter of intent. And I'll go more in this process at the end as well the letter. The full applications are due at the end of January and then our advisory committee reviews those applications. And then from that, we make recommendations to the board for approval, and then we set up the grants and the board meeting is in March, and so organizations that are approved can expect that they would here in early April and that any work plan would begin no earlier than April. Things can start after the fact. They don't have to start like right in April because sometimes strategies don't align up with our timelines.

Letter of Intent

Adriana Beemans [16:08] So that's a little bit about the process and now all zoom into the letter of intent. This is a really critical component. This is a three-page summary, and we do it in three pages for a two-step process of letter of intent and full application for a couple of reasons. One, it's a lot of work on your end to write a full application, and it's important to know, like, is this something that would go forward? What feedback would be helpful to make something stronger? And also, for us to review all these things, we want to make sure that we have sufficient funding for the amount that's being requested and ideas asked. The letter of intent is also a helpful way on our end to begin to scope down what is a very competitive process. As mentioned in the letter of intent, our first area is about the project summary of the organization. Who are you? Why do you want to do this work? How have you done this work and around local economies? What we find is that we're curious and that's part of like an understanding. How did you come about this idea? Or how does idea fit in with your mission? What other work have you done around this area? Whichever strategic area that is where really an important part is describing us the strategy of the project. One of the first things I say when organizations ask me, like what makes a successful application or when I have a one on one with someone one their things is to keep in mind that we fund strategy. We're not necessarily the funder to come to you if you want programing, if you want to work with X amount of people over X number of weeks. We know that work is really important, but that's not what we fund. We try to be the unique dollars that enable you to advance strategy, focus on partnerships, deal with some of those complex or complicated issues that you're encountering and say, how would you

be able to overcome this hurdle or barrier to your project strategy is sometimes an abstract thing to kind of see how you describe in your project. We encourage you to say what is the issue you're focused on? What are you trying to solve or work on, if not solve? And how will you go about doing that? If it's like we're trying to successfully place people in good jobs, what do you need to be able to do that it's more than just a training program. Do you have relationships with employers? What are the barriers you're facing in trying to maintain contact or perhaps with graduates or understanding what other supports or other challenges they have in their life? We don't fund programing, but we fund strategy. It's about model development, model testing, partnership development, relationship building, collaboration forming. Sometimes research to further ground the idea. And then how are you collaborating with others? A lot of times in the work we know because we see lots of different applications, and we've been working in this space for 10-years, specifically on the city of Toronto as a place-based funder focused solely on the city of Toronto is how are you collaborating with others? How have other people's ideas helped feed into yours? What have you learned from other work? Who else is doing this work and how are you making sure that we're the sum of our parts that we're not only duplicating, but we're leveraging and enhancing and amplifying? In a letter of intent, we don't expect to you get deep and all of those things, but it's really important to understand the broader scope because in the full application is an opportunity to go into that, but in a letter of intent. Keep in mind, we want to know your strategy, how you're collaborating with others and who you are, and you don't have to give us a described budget. Just say how much money you're asking over how much time and then in the full application, we'd be able to go into that.

Full Application

Adriana Beemans [20:18] So I'll move us into the full application. Once you submit a letter of intent, it's reviewed and those that are invited for a full application that are strongly aligned to our project criteria we then have a full application. Now we've had a page limit before and then we didn't. And then when we did, it turned into really long like 20 plus page applications, which I think is a lot of work, both for applicants, but also, it's a lot of work for an advisory committee to review. And we felt that it could be much clearer and more concise, and part of my job is getting to understand the application of things are unclear and asking very pointed questions after a full application to understand that. We've brought back the page limit when we review applications. You don't need to repeat information from one section to the other. It's not like one of those things where everything's scored in a different area. We see the application as a full story, and so we encourage you to look at your application and say, how does it tell you the full story? Starting from letters of support, sometimes we get letters of support from partners saying they like this project and it's a cut and paste of, you know, the same letter of support for each of those. That's fine. It shows collaboration, but I encourage you that successful applications have used the letter of support to help hear from other partners voices on why they think it's important, why this will make a difference in their work, or why they're excited to collaborate on it. See your letters of support as a strategic opportunity to let us hear other voices from other key players in your work on why this is important. In the organizational overview, you don't need to submit your board of directors or your steering committee, but we're really curious to understand who are you? We work with charitable organizations, nonprofit organizations, grassroots organizations that are unincorporated.

5

Opportunities Fund Webinar Transcript

But what's key with all of them is that they have a constituency, they have a community. It's not one person who has a cool idea. It's someone who as a funder and as a privileged funder in philanthropy, it's really important that we're advancing like the common good and the public good and the commons. And so how does community feed into the organizational overview and how is the organization grounded, rooted, informed, accountable to its constituency? We're very interested in hearing organizations that have different kinds of constituencies. Some are again, board members, some are workers, some are place based. But we want to hear about the organization and have a sense about who you are. And if you're unincorporated or a nonprofit that doesn't have charitable status, then we also want to hear about your charitable partner that you work with. As a foundation, we fund charities, but we work with a lot of organizations that work in collaboration with charities in in support of their project. So that's the organizational overview in the project overview and project strategy again. As mentioned, this is where I encourage you to spend a lot of time and articulating what's important and what are the issues? Why do you think this will work? And I see applications as kind of like a three-legged stool. You got strategy, work plan and you have budget and all those three things. If one is more lopsided than the other, then the school's not really like sitting straight. I look at how in an application, all three of those things help me understand what the project and the strategy is about. How does the work plan help me understand? What are you planning to do? How does the strategy articulate and reinforce why you're making those choices in the budget and the work plan? And finally, an important part is the budgets. How does the budget give confidence to know that you're going to likely to be successful? I would encourage you to think of making sure that workers have living wages so that you don't have turnover. In multi-year projects, there can be turnover because it's a fairly low wage thing. So that's something we ask for in the grant. We say, what is the wage and how many hours of work is this a project that requires kind of full-time work and consulting? Is this a project that it's going to be divided up among a range of employees? Because not always all strategies need one person. Sometimes it's like 20 percent of a whole bunch of people working on a certain project. We're really interested at this point in understanding the budget on how you're going to do it.

Finally, evaluation and learning, what does success look like for you at the end of this one-year project or two-year projects, where do you want to land? And again, we get that, you know, some of the challenges and problems you're trying to solve might be really complicated and not achievable in two years. But where do you want to be two years ahead from now or one year ahead? How are you moving forward? What are your guiding stars that are helping direct this project? What do you hope to learn and how are you going to apply that learning? Is that learning going to help you as an organization or in other projects? And how is that going to move you forward and continuing this project? A big part for us, how we understand strategy is that after this project, things will continue going. Maybe it's because we continue to fund the strategy going forward, but also, perhaps you've identified a new partnership that now you're able to move forward with your other kind of programing dollars. But that partnership has made enhanced its own outcomes. It's really interesting to see what are you hoping to learn and what success works. So that's a full application. And in the application, there are some prompter questions that we

encourage you to answer. But we also recognize that you don't need to repeat the same answer in different places because we remember all of that.

What Does Success Look Like?

Adriana Beemans [26:43] One of the key things that I will share that we like to give feedback and I think we give feedback for a couple of reasons. Because even if you're not successful with Metcalf, we think it's really helpful to have feedback on your idea of what we think is curious, interesting, and perplexing. We try to give you feedback because hopefully this work happens. Toronto has really challenging problems. Working poverty is a significant issue. Our economy is growing, but that is not benefiting everyone. We don't want to become a city people who work in our city can't afford to live in our city. We need to be able to focus on applications that are dealing with strategies that are addressing those systemic root issues. We know that they will take time. Success for us looks at how are they aligned to the inclusive local economies program. Again, as mentioned, there are a lot of really good ideas out there. There are a lot of really important needed things, but we really focus on that issues around the labour market, the economy and work, and those three strategy areas. The focus enables us to apply our own learning of what we've learned from all the other grants that have worked in this area. And that enables us to give better feedback, but also stronger assessment of a great idea. By concentrating on these areas, what we do is we get a little bit of the sum of their parts. How can we connect branches to others who are working perhaps on other ends of the city around similar questions or maybe working in the same areas, but around different elements that could reinforce one another? As we look at our whole body of grants we're strengthening our local economies ecosystem including some that gets funded by Metcalf, others that gets funded by other organizations. These questions about how can we make sure that our economy works for all, that there are good jobs, and that we're putting our efforts into jobs that will move people out of poverty.

Success is competitive. We usually get about 40 letters of intent, the year of a webinar. I'm sure we always get more. We invite about 50 percent of the letter of intents, depending on how much we get, sometimes a third for a full application, and then depending on how much money is available and how much money is requested, we usually fund about two thirds of the full application. It's a bit of a ratio based on what organizations are asking and how much dollars we have, but it gives you a sense of kind of like the funnel process. I'd say those who are successful have a key emphasis on strategy. I keep on saying strategy and specificity, as you'll see on at the end when we list our most recent grants, there's a lot of specificity who they're working with. A neighborhood is very big and vast. Low income people are a very broad segmentation of people. I encourage you to share specificity and then finally, how does your strategy fit in the broader ecosystem of this work? What's the origin story? How did you get here of this idea? How did you test out these assumptions? And that's a really important part to it is being like, we've done this, we've learned this, and now we're requesting funding to apply this learning or we've done this and we've encountered this barrier and challenge. And now we're requesting funding to figure out how to overcome that challenge.

Opportunities Fund Webinar Transcript

Then finally, what's really important is that it's relevant and it's informed, and ideally, it has strong engagement and leadership from the people who experience the inequities of our economy. That is a really important part. We think about power, who holds power, and how is the grant leveraging power and partnership to move forward. We fund some things that are on community organizing, focused on public policy and building worker voice and worker power. We fund things that are focused on developing strong partnerships to ensure that inclusion and racial equity are embedded in program strategy. We fund projects and strategies that are looking at issues in neighborhoods that will directly enable low income people to benefit. Systems change is the last thing because that means a lot of different things, sometimes different people. But for us, we see systems change as what will happen at the end of this grant. How does this project benefit? What is the long-lasting impact of this project? What will happen after that? What will be the residue or the remains after this project, of which new strategies or the continued strategy will grow? How does this project help think about systems change in the way of eliminating barriers that change outcomes? And those barrier systems can be macro systems like we see in public policy, but also, we have systems in our own organization. So sometimes how do we change our internal systems or how do we change our neighborhood systems, our coordination systems and our collaboration? All of those things are examples of systems change.

The last thing I'll mention on success is that I encourage you, especially if you're going to reach out and talk to me, that it's not just the fundraiser or the fund developer. We like to talk to the people who are doing the work because we want to know the origin of the story and how this work is going to be done. What do they think? We know it's not easy. We know it's not linear and things will change. Covid changed everything, but also other things will change. And we're a funder that's comfortable with changing the budget. We're comfortable with adapting the work plan, changing the work plan and we're comfortable with pivoting. We really want to talk to the person who's thinking about this project. We know that might include the fundraiser or the fund developer. But success is having a good point is having a contact person who we can talk to that will also help or bringing the people in that are going to be in the implementation seat or in the strategy seat. I think that's what success looks like. And keep in mind that as we said at the very beginning, that we are focused on long term strategies. We know this work takes time. We usually fund in one to two-year grants, not because we think it's going to be done in two years. They've worked on it and something has come from it, or it's a two-year grant because they don't know what's going to happen in year three. So instead of kind of writing something, saying, maybe we'll do a toolkit or maybe we'll do a train the trainer, we fund them for two years and then we try to be present and as an active learner to say as that two-year time period comes up, what do you need to do next based on what you've done in these first two years? On strategies and long-term strategies, a lot of them, we continue over time with them in relationship. We're interested in learning about how your project contributes to long term strategies for sustainable economic opportunities and generates wealth. And how are your projects, as we've talked about at the very beginning, Is it a bold idea? Is it a create a partnership? What makes it an alternative model a different way of doing things? Or is it important kind of pushing for promising policy? Those are the four main approaches we see organizations in their applications of moving forward on those three bucket areas.

Opportunities Fund Webinar Transcript

Eligibility

Adriana Beemans [35:38] So I'll move to eligibility now and then make sure I have enough time for questions. The lead applicant must be based and active in the city of Toronto. We're also a flexible funder. We recognize that people work in Toronto and live elsewhere. We're primarily a place-based funder. We also recognize that we shouldn't be locked into anything because sometimes innovation happens on the blurry edges of boundaries. We're really focused on how organizations themselves are committed and their mission and mandate are focused on improving economic opportunities for low-income people or communities that have those relationships, constituency, and insight. As a foundation, we fund charities, but we also work closely with non-charitable organizations and encourage them if they have partnerships to work in partnership with an organization that's charitable. If that becomes a barrier, that's not an issue in the letter of intent, because we know sometimes it takes a while to kind of secure those things. And it's hard if you don't know if you're going to be funded to go through all that. But by the time at full application, it's important to identify who your charitable partner is. And that's something we can talk about as we go through and as we get feedback on your letter of intent. Keep in mind, we generally do not fund direct services. For example, programing for an x amount of people or x number of weeks, direct financial support to a for-profit. We're not a funder for individual entrepreneurs. We fund nonprofits that are focused on the public and the common good. We recognize that administration and overhead is a component of any stable organization such as ongoing operating expenses unrelated to the project. Usually we see between 10-15% that goes towards admin and overhead expenses. Sometimes some projects have components of capital and not endowments and not deficits. We also do not fund sponsorships for conferences.

Equity for us is more than just racial equity. Racial equity is really important in diversity in organizations. We recognize that these issues are about power and how are we trying to shift power? How does public policy? That's why we focus on the systems and the systemic issues and how are those that are farthest or most? How are those that most experience the inequities, whether that's labour market inequities, racism, discrimination, neighborhood, how do those participate and are engaged and are centered in this project? How do we center those that are on the margins and the margins can be defined in this project? How are you centering those voices, their leadership in their activities? How much and how long?

Our smallest grant is probably about, most recently, about ten thousand dollars. Our largest grant is probably about one hundred thousand. We're not a huge funder and it's very competitive. Our grants are usually depending on their multi-year, but no more than usually two years, because as mentioned, it's hard to know what's going to happen after year two if you're trying to figure out how to advance your strategy. But we definitely have continued on with some grantees. We have relationships that have we started funding that have lasted seven years, 10 years continually to move forward these grants. We look at your financial statements, we'd probably not be the funder that would match your own organizational funding. If you're a small organization with maybe a budget of 50K or

$10,0000, keep in mind of how much you're asking versus how much money your organization currently manages.

Finally, what does the relationship look like? I work in relationships. That's how I learn and work best. I like to develop relationships with grantees. Those things take time. We try to be flexible and adapt. We get feedback at different times. But we also take the lead from the grantee, some want us to be more engaged involved and others are like, we'll see you in a year and that's okay. And we know that that relationship builds over time. But we're definitely someone that if you want to reach out once you get funding and say, I need to make these changes, this come up, feel free to do so. And usually we say yes, we understand what you need to do. We just ask some probing questions and we like to learn from reports and then share that learning across one another.

The deadline is on November 18th. It's at 2:00 p.m. The 2:00 p.m. is important so that you get an email back the same day saying We got your application because we know sometimes people worry and so that we can do that by the end of the day. If you're worried about that, 2:00 p.m. Send it in the day before invitation and full application. After the letter of intent, there is about two weeks we review the letters of intent, and we reach out within two weeks to those that were invited to get a full application. And we'll also give you feedback on the letter of intent. We might say that budget is really high. We suggest you lower down or we think we're really interested in what you described in your letter of intent around A and B, probably less so. We might encourage you for the full application to focus on A and B, or we might say this is this is super interesting. Sometimes we have no questions or we're a little curious about X or Y or how are you going to do this or we've learned this from a previous grant. What do you think you're going to? How are you going to account that challenge? We give feedback on the letter of intent, then a full application is received at the end of January. We send it off to our advisory committee. I read all the full applications and again, I might reach out to you if I'm not quite clear about this in the application because I know the kind of questions the advisory committee might ask. I try to be well positioned to ask those questions to know the answer to the questions they might ask or to probe the applicant, which is why we say it's important to have a contact person who's the program lead or to probe the applicant to be like. Can you explain me a little bit more? Just in case someone asks this during the advisory committee? Then we make recommendations to the Board and our March Board meeting and grant start April onwards. And again, we have a set up grant where we provide feedback from the advisory committee and feedback from ourselves on the grant and we see what has changed from when something's been submitted in January to April because we know things are move on a regular basis.

Q&A with Adriana Beemans, Inclusive Local Economies Program Director and Heather Dunford, Grants Manager

Heather Dunford [43:34] Thank you, Adriana. That was a great presentation. Just a reminder to folks to if you have a question for Adriana, please type it in the Q&A box. If you see a question that you also want answered that somebody has already typed in. Please click on the thumbs up icon below the question, and that will let us know that it's a popular question. And just overall, a reminder will be sending out these slides and a copy of the

recording, hopefully sometime next week. We'll start with some basics because I get this question a lot... I'm at an organization and we have a bunch of ideas. Can I submit more than one application? What do you suggest?

Adriana Beemans [44:41] I mean, you can, but it is very unlikely that it will be more than one application will be funded, so your kind of competing against yourself. And I think part of that is one, as mentioned, it's a really competitive process. We focus on applications at that organizational strategy level. Not always that a program strategy. We would look at like multiple applications being like, Wow, this is this is a lot of heavy lifting or a lot of heavy pushing of an idea. So that can be something. Sometimes it's a very large organization. I get that, like some organizations are so large that it's like I've organizations under one or they used to be. I kind of encourage you to reach out to me and help us understand that. But usually both from a sense of building an ecosystem, but also from the level of like leadership to run a successful project that we know is one we encourage.

Heather Dunford [45:42] So a popular question here. Do you fund research in early stages, i.e. just starting, which will lead to recommendations to address the issues? And do you fund Francophone proposals?

Adriana Beemans [45:57] We do fund Francophone proposals. So again, it would be speaking to the elements in the themes of low-income people, but for sure, and in regards to the other question, I think part of it is understanding what research you don't know the answer to or known. There's a lot of research out there. There's a lot of community-based research. There's a lot of like public policy research. Part of it is, why is this research important? How is this research going to be done and how is this research going to be used? And I think, more importantly, we'd probably be like research that is used intentionally. Four years ago, we funded a grant on the working conditions of personal support workers. And so that was a research study, but the whole point of it wasn't funding research for research sake. It's about how does that research then inform public policy focus on improving the quality work of precarious personal support workers and organizing personal support workers through that research process to be the voices and speaking to that? Research has to have a strong intention. It has to be something that we understand that there is a need for it. There's lots of interesting things that people should know, and there's a lot of interesting information already out there. We might not fund research just for your organization to figure out, you know, X or Y. But we do see that sometimes it is important how early on in the stage and how you choose to use it and how it fits with your organizational strategy is a really important component.

Heather Dunford [47:46] If you've received granting before from the Opportunities Fund, are we able to submit another proposal for the same program/projects?

Adriana Beemans [48:01] We definitely have repeat grantees. About a third of our grants are continued strategies. You have two parts, I hear organizations that have applied once. Can they apply again? For sure. We know that you've been thinking about local economies. We see you as part of our community. But I think also part of that is can you hold more than one grant at a time? If you already have a Metcalf Opportunities Fund

grant again I wouldn't suggest applying for this upcoming round because you currently have Metcalf funds. But if you have a project where the funding has ended and you want to renew it, I would say renewal is a good internal word. I'd say more. The question is, how does this track? What's the next step of your strategy? Because we don't fund programing. If you' ran through and tested out this model or had this cohort, and now you want to continue and run the cohort. We're not a funder for that. In fact, most of the time if you were going to run a cohort, we're going to say, how are you going to keep this going? And that's part of your strategy to say we've thought about this model. This funding will help us build these partnerships that will enable this ongoing thing to go. We wouldn't be a funder to continue funding programing, but we definitely continue funding strategy. For example, the NPower Grant is working with Native Family and Child Services, which is like the second part of a grant. The first one was about building the relationship of trust and collaboration and understanding how their model needs to be changed. And now that they've built that, they're moving forward to, how do we integrate the learning that we've gained in the partnership and the trust to move forward? We definitely have grants that continue because, as mentioned, we recognize that this word is about long-term strategies.

Heather Dunford [50:12] How does the foundation define decent work as an employment social enterprise? We are curious about what ladders or raising the floor look like for enterprises that employ extremely marginalized communities.

Adriana Beemans [50:28] I'd say the question is, how do you define decent work for us? We're focused on poverty reduction. And so how does what you're proposing help move people out of poverty? That's not necessarily every kind of project, and that's really hard work. We recognize that. And so, decent work is definitely above minimum wage that someone should be able to. If you're working full time, you should not still be below the poverty line. And so that's a key component. We also recognize, though, that those that are farthest removed from the labor market and face a lot of challenges and are extremely marginalized have a lot of there's a lot of strategies that are in place. Sometimes our work is about the coordination and the orchestration or creating like flow of the strategy and how do we keep all these inputs and create a pipeline of efficiency? If you're working with people who, for example, on OW or on ODSP, and there is a big challenge about the clawback that they have, if they make over a certain amount of income and your model is trying to explore how supplemental income can be part of a strategy for improving the livelihoods, we're open to that. We try not to be cookie cutter, but we do know that we're trying to get good jobs, jobs that can move people out of poverty. I would say that a lot of times sometimes that's like maybe for someone, a new job neutral like work experience is important. We have you help us understand why you think this is a good jobs strategy approach. What is it about this model that's going to help again address the economic livelihoods of low-income people?

Heather Dunford [52:43] Can you provide a concrete example of the difference between an organizational strategy versus a program strategy?

Adriana Beemans [52:52] For an organizational strategy, is our work with the Workers Action Center that's focused on supporting low wage and minimum wage workers in

understanding their rights and advocating for employment standards and decent work and an increase to the minimum wage. And that is at the heart of this organization. That is their mission, and we help fund their strategy advance that mission. A program strategy would be a recent grant that we gave last year with culturally in Jane Finch. They have a bicycle hub and they run bicycle programing and bicycle training. They're not asking us for the training dollars, but what they've realized is that, especially for young people, is their first job. The bicycle industry can be a good first job and you get experience and all those things. At a program level, because that's not what cultural link as a whole, but a program level, we're funding them to develop partnerships with the biking industry to help strengthen both their training model and their placement opportunities. To be able to make sure that this training program can actually have the impact of placing people and keeping them in the jobs in the cycling industry. So that's an example of program versus organizational.

Heather Dunford [54:10] We get this question a fair amount. What if we are a nonprofit but do not have do not yet have charitable status so their nonprofit doesn't have a charitable status? What can they do? Can they apply?

Adriana Beemans [54:25] You can apply through the letter of intent first. Not having a charitable status won't be a barrier. But in a full application, you would then have about two months to identify a charitable partner that will work with you. A charitable partner is important one, because as a foundation and held by charity law, we give funding to charities. Sometimes for organizations, there's a lot of learning, collaboration, mentorship, partnership. We're definitely looking at charitable organizations that you would work with that are also in the space. It's not just a path through of dollars, but there is like a logical relationship there. It would be interesting because if someone's like if I if you can't find a charitable partner, then I'd want to know more, because one of the questions is why doesn't any? Why no collaboration? That's why letters of support and those collaborative partners help give signals what that others think. If this is a good idea, too why are they excited and why do they want to work with you on it.

Heather Dunford [55:52] How important is involving grassroots groups?

Adriana Beemans [56:00] I think how important is it to your strategy? Grassroot groups are really important in community organizing and are really important in understanding depending on what your work is. Grassroots groups are a key component. Part of that is in your strategy. How are you engaging leadership or how have you asked community who are experiencing these challenges? Why do they think this is a good idea? How do you know? How have you tested out your assumptions that people want to do this? Grassroots groups are a key part of that systems analysis.

Heather Dunford [56:38] How do you share the research funded by your grant? Interested in knowing if anyone will be submitting this year to look at how to mitigate the disproportionate impact of job loss during the pandemic on racialized women in Toronto?

Opportunities Fund Webinar Transcript

Adriana Beemans [57:02] We don't fund a lot of research, but when we do fund research, we share it, you can look on our web page for examples. One of our research is in collaboration, funded through a discretionary grant, the Public Policy Forum's research on precarious work and the future of brave new world, the messy middle of between your first job and the last job, directly informing again how we need to think about precarious work in public policy so we don't fund a lot of research. Perhaps someone will be exploring that issue. But again, I would keep in mind the question is how to do research with strategy? We're not a we're not a large foundation that funds university research, academic research, even community-based research, unless it's directly feeding into something that will come from it.

Heather Dunford [58:05] Do you prefer a project on a growth stage or on a stage of developing and testing model?

Adriana Beemans [58:14] I think we have a range, we know that this work is non-linear. For example, one grant took two years. They worked on it and then we didn't hear from them for five years because it needed to percolate and build. Or sometimes, we fund something and its early stage. Through our grant, there are some that did not work out. And that's ok too, because we get that these things don't happen from paper to practice. And there's so much learning that can happen when sometimes something doesn't work out. And it's almost like the, you know, like the things that come from the ashes of a previous project can really be fertile. It really depends on the range of it. But throughout all of them, we want to know why you why your organization, why this and why now? And I think the why now is important, especially under Covid. This will be, I'm sure, a competitive round. We're looking at things that are timely, and again focused on the immediate challenges that Toronto has ahead of them.

Heather Dunford [59:17] Just a reminder to everybody. We'll be sending out the slides and hopefully barring technical difficulties. A copy of the recording will be available on our website, and our guidelines can be found on our website as well.

Adriana Beemans [59:52] I wanted to say thanks for posting the definition of decent work. The International Labour Organization (ILO) help guides it around like scheduling and standards, but we also recognize the challenge which is how do you take something on policy and conceptual and embedded into practice? What does decent work look like in the actual project and work capital projects like if it was capital would be like a small C capital and part of something much broader a strategy versus just we wouldn't fund capital on its own. We encourage you to talk to that and the question around combo of strategy and some programing. You need to test out some things and that's part of the conversation. But the point isn't to run the programing. The point is to refine the model and to test it and that's a key part of programing, but we really encourage you to reach out to me and to talk about it. And for those that came late, I know that a lot of your questions that you asked have been spoken to or answered. Yu can watch the recording that we're going to post, but also feel free to reach out to me. Thanks. Thanks again. And thanks Heather, Niko and Jennie for helping me breathe and keeping me on track. Thanks, everyone.