

METCALF INNOVATION FELLOWSHIP

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:

- supporting long-term strategies that create sustainable economic opportunities for low-income people and communities in Toronto;
- working at the intersection of climate, biodiversity, and sustainable livelihoods; and
- supporting leadership and innovation 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.

METCALF INNOVATION FELLOWSHIP PROGRAM

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 concerns regarding climate change and resource scarcity – 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 supports 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 Canada.

Typically, Innovation Fellowships explore policy issues or systemic aspects in one or more of the Foundation’s three areas of interest: environment, inclusive local economies, and performing arts. Fellowships act as intellectual companions to our granting and program work, often directly informing program strategies.

As such, the proposal should amplify and help advance the goals of one of the Foundation’s three program areas.

- Through our **Inclusive Local Economies Program**, we support the development of long-term strategies that create sustainable economic opportunities for low income people in Toronto.
- Through our **Environment Program**, we are working at the intersection of climate, biodiversity, and sustainable livelihoods.
- Through our **Performing Arts Program**, we support leadership and innovation in the performing arts in Ontario.

Eligibility

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

Innovation Fellows may be associated with non-profits or with institutions of higher education; they can be policymakers, managers, academics, or entrepreneurs. Applications can be received either directly from the prospective Fellow, who, upon receipt of an Innovation Fellowship, would enter into a contract for services with the Foundation, or from the registered charitable organization with whom the individual is associated. Metcalf welcomes collaborative submissions that marry the experience and expertise of a variety of perspectives, including practitioner, consultant, funder, academic, and/or organization.

Eligible applicants must have a significant record of achievement, be recognized within their field, and have worked in an area related to their proposed exploration for a minimum of ten years.

Project Parameters and Funding Limits

Typically, Metcalf Innovation Fellowship opportunities result in the publication of formal papers, which are expected to be approximately 20-35 pages in length (up to 15,000 words). We will however consider other outputs.

The Foundation invests significant resources in the editing, formatting, and presentation of our Innovation Fellowship papers, and the writers should anticipate a significant investment of time around the editing process. A typical rule-of-thumb regarding the creation of these papers is that one third of time is spent in planning and research, one third in development and writing, and one third in review and revision. We anticipate that a Fellowship typically takes up to one year to complete.

Funding can be used to support costs associated with project activities; awards of up to a maximum of \$30,000 will be made available. Typical awards are in the range of \$15,000-\$25,000; one third paid upon execution of a contract and agreement of terms, one third paid on delivery of the final completed draft to the Foundation, and the final third paid upon participation in events surrounding the release of the paper.

All payments under this program will be contingent upon the Innovation Fellow producing materials according to a mutually agreed upon schedule. Metcalf reserves the right to reconsider its commitment to the project, and to all unissued payments, if the Fellow cannot adhere to this schedule.

While Metcalf will work with Innovation Fellows to determine appropriate means of dissemination, authority regarding such decisions remains with the Foundation. The goal of the Foundation is to use these papers to stimulate as much discussion and action on the topic as possible.

All rights related to the publication of any research paper or study created under contract to the Metcalf Foundation shall remain with the Foundation. That being understood, the intellectual capital shall remain the property of the Innovation Fellow, and Metcalf would encourage that individual to continue their work in this area subsequent to the completion of the paper.

Application and Review Process

Applications will be considered on a rolling intake basis. Prospective applicants should contact the Metcalf Program Director for their focus area to discuss their proposed fellowship in advance of submission. Applicants should submit a brief (three pages maximum) Expression of Interest (EOI) as outlined below.

Expressions of Interest will be reviewed by Foundation staff to determine if more information is required. Applicants may be asked to expand on, or clarify, the content outlined in their EOI. Once all requested information is submitted, the proposal will then be reviewed by the Foundation's Board and staff. We will assess applications according to the following criteria:

- the background and qualifications of the applicant(s);
- the alignment between the proposed work and one or more of Metcalf's program areas;
- the likelihood that the ideas expressed could gain traction in the context of current practice and policy;
- the proposed methodology for your study/work;
- the scope of the project, its creativity, originality, and rigour, and its potential contribution to longstanding or systemic issues; and
- the quality of the submitted written materials.

Learnings

Fellows determine the goals and objectives for their projects and, in consultation with the Foundation, the final deliverables. They will meet with Foundation staff at the beginning of the Fellowship, to jointly discuss how we will learn from the work and monitor progress and results. Upon completion, each Fellow will be expected to work with the Foundation in order to advance or disseminate those findings.

The Foundation will also seek to create opportunities for peer learning with other Metcalf Fellows, with the staff or Board of the Foundation, and with colleagues in the community.

Innovation Fellowship Application Requirements – Expression of Interest Stage

Prospective applicants should contact the Metcalf Program Director for their focus area to discuss their Expression of Interest in advance of submission.

PART A: General Information – maximum ½ page

Primary Contact Name and Position:

Lead Organization (if applicable):

Project Partners (if applicable):

Mailing Address:

Telephone:

Email:

Website (if applicable):

Charitable Registration Number (if applicable):

PART B: Project Summary – maximum ½ page

Project Title:

Total Amount Requested:

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 expression of interest, using no smaller than 11-point type and 1.5 line spacing.

1. Give a short overview of the idea, issue, or model you want to explore including:
 - the challenge or opportunity this work will address and why this work is important and innovative;
 - a rationale for, and description of, Fellowship activities (e.g. research, convenings, travel);
 - a brief overview of what others are doing in this area; and
 - how you think this Fellowship will contribute to the Metcalf Foundation's goals.
2. Include a list of the people and organizations you envision engaging in your Fellowship in order to advance your thinking.
3. Explain the projected output or deliverables from your Fellowship and your plans to disseminate or to advance the ideas investigated.
4. Please provide a preliminary budget for your Fellowship activities.

Expressions of Interest are to be submitted in **electronic form only**.

Please email **one pdf** file of all parts listed above to **hdunford@metcalffoundation.com**.

Applications will be accepted on a rolling intake basis.