

INCLUSIVE LOCAL ECONOMIES

Opportunities Fund

2024 Application 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:

- advancing economic dignity and prosperity for low-income people and communities in Toronto;
- working at the intersection of climate, biodiversity, and sustainable livelihoods; and
- supporting individuals, organizations, and field building 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 nonprofit 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

Working poverty, precarious employment, and neighbourhood inequities are complex issues that require multiple well-aligned efforts by many to address — including business, labour, residents, nonprofits, entrepreneurs, academics, advocates, and government. Metcalf's Inclusive Local Economies program is focused on fostering a dynamic ecosystem of organizations, leaders, ideas, and strategies that advance economic dignity and prosperity for low-income people and communities in Toronto.

We concentrate our efforts and resources on:

- increasing access to good jobs;
- improving low-wage work; and
- strengthening neighbourhood economies.

We do this by:

- investing in organizations and collaboratives that focus on building innovative models, influencing policy, and exploring ideas and solutions;
- strengthening community leadership and sector capacity to advance collective efforts;
- nurturing partnerships through relationship-based grantmaking and enabling sustained commitment to promising strategies;
- collaborating with partners to change and influence systems; and
- broadening awareness and understanding by enabling community voices to contribute to inclusive economies discourse.

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, comprehensive solutions, and sustained social changes. We prioritize initiatives that are informed by community voices and rooted in an analysis of equity and inclusion.

OPPORTUNITIES FUND

The Opportunities Fund is an open call for innovative ideas and compelling approaches that improve the economic livelihoods of low-income people in Toronto, through strategies that:

- improve low-wage work and support the upward mobility of low-wage workers;
- increase access to good jobs for low-income people; and
- leverage neighbourhood assets to improve the economic livelihoods of low-income residents.

These strategic areas comprise the focus of our funding for the Opportunities Fund 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 areas** listed above in their proposals.

Metcalf encourages applications that:

- clearly describe the issue or opportunity that needs to be addressed and how it is aligned to the Opportunities Fund;
- identify how community experience, public policy, research, and/or community action informs its strategy;
- focus on collaborative approaches that can achieve durable changes and long-term impact;

- embed an equity analysis throughout its strategy; and
- share how the organization is responsive to the ideas, experiences, and leadership of low-income people in addressing the conditions they face.

Eligibility

Organizations may apply individually or in collaboration with other organizations. 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.¹

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 2024 are:

Receipt of letters of interest	February 27, 2024, 2:00pm ET
Receipt of full application	April 16, 2024, 2:00pm ET

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

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

Funding Decision

Letters of interest are reviewed by staff, and full applications are reviewed by staff, an advisory committee, and the Metcalf Foundation Board of Directors. Notifications of the board's funding decisions will be sent out in June 2024.

We will assess applications on the basis of:

- the project alignment with the goals of the Inclusive Local Economies program;
- the clarity of your proposal, the credibility of the strategy, the rationale for the work, and the likelihood of success;
- the potential for impact, contribution to systems change, and advancement of equity; and
- the potential for learning and collaboration for project partners, grantees, and the Foundation.

¹ The Opportunities Fund accepts application from grassroots groups and nonprofits that work in partnership with a charitable organization or through a shared charitable platform.

Opportunities Fund 2024 – Letter of Interest Requirements

Prospective applicants are strongly encouraged to contact the Inclusive Local Economies Program Director, Adriana Beemans at abeemans@metcalffoundation.com, to discuss their proposals in advance of applying.

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:

Amount Requested (show the request for each year if a multi-year request):

Project Duration:

Please provide a project summary (maximum 150 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:** Provide a brief summary about the organization(s), history of its work related to the Inclusive Local Economies program, and why you are well positioned and motivated to lead this project.
2. **Project Overview:** Please describe your proposed project, what you aim to achieve and why it is important. Share how it is aligned to the Opportunities Fund's strategic focus areas. Outline any research, experience, or underlying rationale that has informed your strategy.
3. **Collaboration:** Please describe what networks, partnerships, and/or organizations are engaged in the planning of this project and are needed for its success.

Letters of interest are to be submitted in **electronic form only**. Please email **one pdf file** of all materials to hdunford@metcalffoundation.com by **February 27, 2024 at 2:00pm ET**. Please note that we are unable to consider late or incomplete applications.

After submitting your letter of interest, you will receive an email confirmation of its receipt. If you do not receive confirmation within three business hours of making your submission, please contact Heather Dunford at hdunford@metcalffoundation.com.

Opportunities Fund 2024 – Full Application Requirements

Based on letters of interest, the Foundation will invite organizations by letter to submit full applications to the Opportunities Fund. 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:

Amount Requested (show the request for each year if a multi-year request):

Project Duration:

Please provide a summary of the proposed work (maximum 150 words):

PART C: Project Details – maximum 10 pages

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

- 1. Organizational Overview:** Provide a brief summary about the organization(s), history of its work, and why you are well-positioned and motivated to lead this project. Explain why this work is important to your organization, sector, and community.
- 2. Project Overview:** Please describe your proposed project including the issue or opportunity you seek to address, what you aim to achieve, and why it is important. Share how it is aligned to the Opportunities Fund's strategic focus areas. How does this project contribute to the current policy landscape and complement existing leadership in this area?
- 3. Project Strategy and Workplan:** Please tell us your project goal(s) and describe your strategy to achieve them. What potential challenges do you foresee and how will you address these? Outline any research, experience, or underlying rationale that has informed your strategy. How does your project contribute to and advance equity? Describe the key activities that will be undertaken, and the anticipated deliverables and timeline.
- 4. Collaboration and Leadership:** Please describe what organizations, partnerships, and/or networks will support the implementation of this project and what their work will entail. How is this

project informed by the ideas, experiences, and leadership of low-income people? Please provide short bios of the key project leads (staff and/or consultants).

5. **Project Evaluation and Learning:** What does success look like at the completion of this project? How will you be assessing progress during the project and what metrics will you use to inform your strategy? What are you hoping to learn through this project and how will you share your outcomes and learning with others?

PART D: Budget

Complete the project budget template found at <https://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 provide the following materials.

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

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After submitting your full application, you will receive an email confirmation of its receipt. If you do not receive confirmation within three business hours of making your submission, please contact Heather Dunford at hdunford@metcalffoundation.com.

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