

## **Community Social Development Grants TERMS OF REFERENCE**

### **INTRODUCTION**

In 1996, social policy direction was incorporated into the City's Official Community Plan (OCP), based on the Social Plan that was approved by Council the same year. Since then, social policy direction has been updated and expanded to many areas of the OCP. Social policy direction for the City is now found in Chapter 10 of the OCP, and the policies cross-referenced in Policy 360 found in Council Policies.

The Community Social Development Grant program is one vehicle used by the City to help the community in achieving the directions set by the City's social policies set out in the OCP. This grant program was established in 1992, prior to the present social policy framework, and the original intent of the program was to fund initiatives that were prevention-oriented and aimed to improve quality of life. Primary prevention was favoured over secondary or tertiary services. These terms are explained on Page 2 of this document.

Application forms, Letters of Agreement and other grant-related documents may be obtained online at [www.centralokanaganfoundation.org](http://www.centralokanaganfoundation.org) or by contacting the Central Okanagan Foundation at 861-6160.

Copies of the OCP can be obtained online. Go to [www.kelowna.ca](http://www.kelowna.ca), select "City Hall" and then click on '**Official Community Plan**', and select the desired chapter. *You will need Adobe Acrobat or Acrobat Reader to access the online OCP.* Copies of **Policy 360** can be obtained at <http://www.kelowna.ca/CityPage/Docs/PDFs/Council%5CPolicies/Social%20Policies%20-%20Pol-%20360%20.pdf>

### **AMOUNT OF MONEY AVAILABLE**

Approximately \$80,000 in total is available annually from the City for this program.

### **ELIGIBLE APPLICANTS**

Eligible applicants for this grant program are defined as:

**Registered Non-Profit Societies**, which are registered and incorporated under the Societies Act, and

**Non-Profit Community Organizations**, which must have an established set of working rules or regulations and a banking account in the group's name.

NOTE: Incomplete reporting on previous Community Social Development Grants from the City may affect consideration of new grants. Please contact Central Okanagan Foundation to complete or update year end requirements for previous grants.

### **RULES AND DEFINITIONS**

**Primary Prevention** programs are oriented towards groups, and attempt to reduce the incidence of social breakdown by strengthening and supporting the individual, family and community. A parenting course would be one example of such a program.

**Secondary and Tertiary** programs are often more focused on individuals, and attempt to address problems that are already established from a rehabilitative or crisis-oriented perspective. Examples include (but are not limited to) support to those suffering health problems, crisis centres and rehabilitation programs.

1. Proposals that offer services or programs that cross municipal boundaries will be considered.
2. Grant funds may only be used for those portions of the program that are delivered within the boundaries of the City of Kelowna for the benefit of Kelowna residents.
3. Proposed programs **must**:
  - clearly fit within the City's social policy framework (see first page of Terms of Reference). Policy references must be provided;
  - be primary prevention programs;
  - be innovative in addressing social concerns
  - promote volunteerism;
  - improve people's ability to identify and act on their own needs;
  - clearly identify needs and be based on effective planning;
  - provide citizens with clear information about their planning and operation; and
  - promote co-operation and coordination among community service providers.
4. Grants **may not** be used for programs that:
  - primarily provide for recreation or leisure time pursuits;
  - offer direct financial assistance to individuals or families;
  - are secondary or tertiary (e.g. rehabilitative or crisis oriented) in nature;
  - duplicate services that fall within the mandate of a senior government agency;
  - are essentially capital projects; or
  - are for the purpose of assisting an industrial, commercial or business undertaking

## GRANT CATEGORIES

### 1. Establishment Grant

Purpose: **One-time assistance** to help community organizations and non-profit societies cover expenses in their formative stages of development

Eligible Uses: Office supplies, administrative and facility costs, minor capital costs (e.g. office equipment), advertising, training, technical/material assistance and similar items.

Funding Levels: A maximum of 50% of the establishment costs. It is your responsibility to secure any additional funds necessary.

### 2. Operational Grant

Purpose: To assist established community organizations and non-profit societies, community organizations, and registered non-profit societies with expenditures incurred funding the operation and delivery of existing programs. **This category is not intended to provide continual/permanent operational funding.**

Eligible Uses: Office supplies, administrative and facility costs, minor capital costs (e.g. office equipment), advertising, training, technical/material assistance, and similar items necessary to deliver existing programs.

Funding Levels: A maximum of 25% of the organization's operating budget, or 10% if it receives funding from other levels of government or other agencies. It is your responsibility to secure any additional funds necessary.

### 3. Special Projects Grant

Purpose: To assist community organizations and non-profit societies to stage special events or to operate short-term programs or projects (less than 12 months in duration). Projects must have clear time frames, not require permanent staff, and be projects which would not normally have been undertaken without this additional resource.

Eligible Uses: To cover costs of hosting and promoting special events (facility rental, guest speakers, food, advertising, promotional items, etc.), administrative and delivery costs for short-term programs/projects (supplies and materials, facility rental, etc.), minor capital costs (e.g. office equipment), and non-permanent staffing.

Funding Levels: A maximum of 80% of the costs of the special project. It is your responsibility to secure any additional funds necessary.

**NOTE: The actual funding allocated under any grant category shall be at the discretion of City Council, after consideration of all requests received, the amount of funding available, and the priorities established.**

## TIME LINE & PROCEDURES

### Application & Evaluation

1. Prior to the grants application deadline, Central Okanagan Foundation will hold an advertised public information session for Grant applicants **you are strongly urged to attend.**
2. Your completed Grant application must be received at the Central Okanagan Foundation by 3:30 pm on the last Friday in February. **NO EXCEPTIONS.**
3. With the assistance of Central Okanagan Foundation's Grant Manager, an Advisory committee of the Central Okanagan Foundation will review all applications, short-list and interview the applicants in March, and the recommendations will be forwarded to City Council.
4. In evaluating each application, consideration will be given to:
  - relevance to City of Kelowna policy;
  - adherence to these Terms of Reference;
  - uniqueness of the project;
  - community need for the project and its expected impact;
  - level of community support and volunteer involvement;
  - degree of co-operation with other community service providers;
  - clarity & measurability of performance targets and timelines;
  - transparency of agency operations and planning;
  - evidence of financial need; and,
  - quality of management, including the satisfactory administration of any previous grant(s).

### **Claiming Your Grant**

5. No public information is available until Council addresses the recommendations of the Central Okanagan Foundation Advisory committee and makes its decisions (usually in April).

6. If your organization's grant was reduced or refused you may request a re-evaluation by contacting the Grants Manager with Central Okanagan Foundation in writing within **two weeks** of the date of the letter from Central Okanagan Foundation.

7. If your application is approved you must sign a Letter of Agreement outlining the terms and conditions of the Grant **and** show proof of adequate liability insurance before any funds will be released. For more information contact the Grants Manager with Central Okanagan Foundation.

8. You have three months following the date of the letter to meet the requirements for claiming your Grant, or the Grant will be cancelled. If you are having difficulty meeting these requirements, contact the Grants Manager with Central Okanagan Foundation for assistance.

9. The City of Kelowna will hold back 10% of the grant money until such time as an end-of-project report (see the Letter of Agreement) is submitted. If you are having difficulty meeting the end-of-project report requirements, please contact the Grants Manager with Central Okanagan Foundation.

If you have any questions, concerns or comments, contact:

Cheryl Miller  
Grants Manager  
Central Okanagan Foundation  
250.861.6160  
[cheryl@centralokanaganfoundation.org](mailto:cheryl@centralokanaganfoundation.org)