



## Corporation of the Municipality of Temagami

**Memo No.**  
2018-M-009

### Memorandum to Council

☒ **Staff**  
☐ **Committee**

<b>Subject:</b>	Ontario Trillium Foundation Seed Grant Workshop
<b>Agenda Date:</b>	<b>February 13, 2018</b>
<b>Attachments:</b>	Critical Path, Index of Wellbeing, Investment Streams, Grant Results & Metrics

#### **RECOMMENDATION**

This memorandum is:

☒ To be received for information

#### **INFORMATION**

OTF provides services to the community; Workshops to help organizations run better; Community investments through the Core Grants; Support staff is available by phone and email; Youth Opportunities Fund; Poverty Reduction Fund.

Website has all the information, resources and tools you will need. The information and resources on the website can also help you with applying for grants from other organizations. Review all of the reports as there is a lot of helpful data here to use in your grant applications. OTF is using the Canadian Wellness Index for all granting purposes. All of the grant outcomes must be measurable to the outcomes the OTF grants have identified. Not to your organizations desired outcomes.

#### **Grant Streams & Information – Brief Overview**

Applicants are required to have a good Anti-Discrimination policy. Any acts of discrimination will result in your funding being revoked. 1 (one) application can be submitted to each stream in each yearly cycle. If you have documents you are supposed to have in place but are not required to submit up front, make sure they are complete and ready - if requested you have 48 hours to supply them. REVIEW very thoroughly each stream you are applying for. Make sure you are applying in the right section for each stream. Your idea may fit into more than one or all of the sections, find the best fit to give you the best chance to succeed. Suit your project accordingly. Goal is to fulfill the OTF desired outcomes, not your groups. The Apply for a Grant link is like a roadmap, use it as a guideline to apply for the grant. VERY IMPORTANT - The PDF's of the forms have links to what they are looking for in the word or the area of the form, so be sure to use these PDF forms.

**Seed** – \$5,000.00 min to \$75,000.00 max (10% holdback) 1 year period. Disqualified if not in these parameters. Seed is about starting projects at the idea or conceptual stage. It is about new. Need measurement ability to know if feasible. It is about learning. It is about developing.

**Grow** – \$50,000.00 min per year to \$250,000.00 max per year over 2-3 years. Must follow these guidelines. This is the most complex grant. Grow is about building on the success of a proven model or program. Something that is existing (here/anywhere). Scale-up or improve an existing program. Must be measurable.

**Capital** – \$5,000 min to \$150,000.00 max over 1 year period. Capital is about broadening access to & improving community spaces. It is for buying equipment, new construction, and renovating or repairing community spaces. Quotes and pictures of space to be renovate are required. Use the financial workbook.

**Transform** – Launch soon. Transform is about tackling complex community issues & creating lasting change  
**Youth Opportunities Fund** – Annual program provides grants & capacity building supports to youth-led grassroots groups and community-based organizations serving young people who face multiple barriers.

**Prepared by:**

**Reviewed by:**

**Roxanne St. Germain, Administrative Assistant**  
Name, Position

**Elaine Gunnell, Clerk**  
Name, Position

**On behalf of: Council**  
Name of committee if applicable

# Critical Path

This critical path provides an overview of the key granting dates for 2017-2019. Note that applicants will be informed by email of the final decision.

## 2018-2019 / Seed Grants

Date	Organization registration deadline: <b>January 31, 2018, 5 p.m. ET.</b>
February 21, 2018	Seed Application Deadline
June 22, 2018	<ul style="list-style-type: none"><li>A list of approved grants is sent to Ontario Members of Provincial Parliament (MPPs) and Cabinet Ministers to give them the opportunity to congratulate recipients directly, when possible. All applicants are then notified of the final decision by OTF.</li><li>Shortly after June 22, 2018, successful applicants will be sent an email with their Grant Contract.</li></ul>
July 2018	Public Grant Announcement

## 2018-2019 / Grow Grants

Date	Organization registration deadline: <b>April 25, 2018, 5 p.m. ET</b>
May 16, 2018	Grow Application Deadline
October 5, 2018	<ul style="list-style-type: none"><li>A list of approved grants is sent to Ontario Members of Provincial Parliament (MPPs) and Cabinet Ministers to give them the opportunity to congratulate recipients directly, when possible. All applicants are then notified of the final decision by OTF.</li><li>Shortly after October 5, 2018, successful applicants will be sent an email with their Grant Contract.</li></ul>
October 2018	Public Grant Announcement

## 2018-2019 / Capital Grants

Date	Organization registration deadline: <b>July 25, 2018, 5 p.m. ET.</b>
August 15, 2018	Capital Application Deadline
December 14, 2018	<ul style="list-style-type: none"><li>A list of approved grants is sent to Ontario Members of Provincial Parliament (MPPs) and Cabinet Ministers to give them the opportunity to congratulate recipients directly, when possible. All applicants are then notified of the final decision by OTF.</li><li>Shortly after December 14, 2018, successful applicants will be sent an email with their Grant Contract.</li></ul>
January 2019	Public Grant Announcement

CONTINUED

## 2018-2019 / Transform Grants

Date	Organization Registration Deadline: <b>October 17, 2018, 5 p.m. ET.</b>
November 7, 2018	Transform Application Deadline
March 29, 2019	<ul style="list-style-type: none"><li>• A list of approved grants is sent to Ontario Members of Provincial Parliament (MPPs) and Cabinet Ministers to give them the opportunity to congratulate recipients directly, when possible. All applicants are then notified of the final decision by OTF.</li><li>• Shortly after March 29, 2019, successful applicants will be sent an email with their Grant Contract.</li></ul>
April 2019	Public Grant Announcement

There are other funding opportunities from OTF on the website.



[Home \(/\)](#) » [What We Fund \(/what-we-fund/\)](#) » Canadian Index Of Wellbeing

# CANADIAN INDEX OF WELLBEING



The **Canadian Index of Wellbeing (CIW)** (<https://uwaterloo.ca/canadian-index-wellbeing/>) is a study that measures the wellbeing of Canadians. Launched in 2009, the CIW uses rigorous research to determine whether Canadians are making progress towards sustainable wellbeing in eight inter-connected domains, or categories – Health, Living Standards, Community Vitality, Environment, Leisure and Culture, Education, Time Use, and Democratic Engagement. A total of 64 indicators, taken from over 130 data sources, are used to monitor these domains.


Each annual report provides timely, accurate information that anyone, including policy makers, investors and funders, nonprofit and charitable organizations and government, can use to get a clear picture of the quality of life of Canadians at a given moment in time.

It is a much-needed tool for informing the development of programs and activities that are most

likely to move Canadians closer to achieving wellbeing. As such, in early 2014, OTF commissioned the CIW to produce a provincial report entitled **How Are Ontarians Really Doing? [//sites/default/files/ontario-report-accessible 0.pdf](https://otf.ca/sites/default/files/ontario-report-accessible-0.pdf)** (pdf) <https://otf.ca/sites/default/files/ontario-report-accessible-0.pdf>

Spanning a 17-year period (1994 to 2010), this report tells the story of Ontario’s successes and challenges in each of the CIW’s eight domains of wellbeing and makes comparisons to the rest of the country. It provides insights based on trends over those years, and offers innovative policy options to build on strengths and address areas of concern.

As a result of this collaboration, the Foundation made the decision to base its six **Action Areas** ([/node/141](#)) – the areas in which we focus our investments – on 12 of the CIW’s measurement indicators.

OTF Action Area	CIW Indicator(s)
 <a href="http://otf.ca/what-we-fund/action-areas/active-people">http://otf.ca/what-we-fund/action-areas/active-people</a>	<ul style="list-style-type: none"><li>• Average monthly frequency of participation in physical activity is greater than 15 minutes</li><li>• Percentage of Ontarians with self-reported diabetes</li></ul>

OTF Action Area	CIW Indicator(s)
 <a href="http://otf.ca/what-we-fund/action-areas/connected-people">http://otf.ca/what-we-fund/action-areas/connected-people</a>	<ul style="list-style-type: none"><li>• Percentage of Ontarians reporting participation in organized activities</li><li>• Percentage of Ontarians reporting a 'very' or 'somewhat strong' sense of belonging to the community</li></ul>
 <a href="http://otf.ca/what-we-fund/action-areas/green-people">http://otf.ca/what-we-fund/action-areas/green-people</a>	<ul style="list-style-type: none"><li>• Ecological Footprint</li><li>• <u>Canadian Living Planet Index</u> (<a href="http://www.wwf.ca/newsroom/reports/living-planet-report-2014.cfm">http://www.wwf.ca/newsroom/reports/living-planet-report 2014.cfm</a>)</li></ul>

OTF Action Area	CIW Indicator(s)
 <p><a href="http://otf.ca/what-we-fund/action-areas/inspired-people">http://otf.ca/what-we-fund/action-areas/inspired-people</a></p>	<ul style="list-style-type: none"><li>• Average percentage of time spent on the previous day in arts and culture activities</li></ul>
 <p><a href="http://otf.ca/what-we-fund/action-areas/promising-young-people">http://otf.ca/what-we-fund/action-areas/promising-young-people</a></p>	<ul style="list-style-type: none"><li>• Percentage of children doing well on five developmental domains</li><li>• Average of five social and emotional competence scores among 12-13 year olds</li><li>• Percentage of 20-24 year olds completing high school</li></ul>

OTF Action Area	CIW Indicator(s)
<div><p>(<a href="http://ottf.ca/what-we-fund/action-areas/prosperous-people">http://ottf.ca/what-we-fund/action-areas/prosperous-people</a>)</p></div>	<ul style="list-style-type: none"><li>• Percentage of persons in low income</li><li>• Scaled value of the <b><u>Centre for the Study of Living Standards</u></b> (<a href="http://www.csls.ca/">http://www.csls.ca/</a>) economic security index</li></ul>

Although influenced by many other factors, these indicators are the best measure of OTF's accumulated impact over the next decade. Changes – as measured and reported by the CIW – will signal whether our investments are having the impact we are striving for.





ACTIVE  
PEOPLE



CONNECTED  
PEOPLE



GREEN  
PEOPLE



INSPIRED  
PEOPLE



PROMISING  
YOUNG PEOPLE



PROSPEROUS  
PEOPLE

ACTION AREAS

Fostering more active  
lifestyles

Building inclusive and  
engaged communities  
together

Encouraging people to  
support a healthy and  
sustainable environment

Enriching people's lives  
through arts, culture and  
heritage

Supporting the positive  
development of children  
and youth

Enhancing people's  
economic wellbeing

PRIORITY OUTCOMES

Higher quality programming and infrastructure to support physical activity

More people become active

Diverse groups work better together to shape community

Reduced Social Isolation

More ecosystems are protected and restored

People reduce their impact on the environment

Better quality programming and infrastructure to experience culture, heritage and the arts

More people connect with culture, heritage and the arts

More children and youth have emotional and social strengths

More youth are meaningfully engaged in the community

Increased economic stability

Increased economic opportunity

Trained and certified coaches, officials and volunteers

Infrastructure is accessible and available for physical activity

People have a say shaping the services and programs that matter to them

People who are isolated have connections in their community

People participate in ecosystem conservation and restoration efforts

People connect with the environment and understand their impact on it

Arts, culture and heritage have appropriate spaces

Access to arts-based learning opportunities and compelling artistic, cultural and heritage experiences

Parents, caregivers and adult allies have the skills to support children and youth who are facing barriers

Youth facing barriers volunteer and are in leadership roles

People who are economically vulnerable have access to community services that enhance financial stability

People have the skills and knowledge to achieve greater financial independence

Programs are safe, inclusive, fair, and age- and ability-appropriate

Ontarians participate in an active lifestyle

People who are marginalized take on leadership roles in their communities

People who are isolated have connections in their community

Conservation and restoration efforts are better planned and more sustainable

People and resource users take deliberate actions to benefit the environment

Skills and knowledge are transferred to the next generation of artistic leaders

People are engaged in community-based arts creation

Children and youth who are facing barriers develop strong emotional and social skills

Youth are involved in creating solutions for challenges facing their communities

People who are economically vulnerable are able to meet their basic needs

People become and stay employed

People become entrepreneurs

Infrastructure for unstructured and structured physical activities

Diverse groups work together to improve community life

Conservation and restoration efforts are better planned and more sustainable

People and resource users take deliberate actions to benefit the environment

Skills and knowledge are transferred to the next generation of artistic leaders

People are engaged in community-based arts creation

Children and youth who are facing barriers develop strong emotional and social skills

Youth are involved in creating solutions for challenges facing their communities

People who are economically vulnerable are able to meet their basic needs

People become and stay employed

People become entrepreneurs


GRANT RESULTS



# INVESTMENT STREAMS



An agency of the Government of Ontario  
Un organisme du gouvernement de l'Ontario

INVESTMENT STREAM	TYPES OF PROJECTS	AMOUNT AND TERM	DEADLINES	THINK ABOUT YOUR IDEA
<div> Starting projects at the idea or conceptual stage</div>	<p><b>For projects that:</b></p> <ul style="list-style-type: none"><li>• Research a new concept, idea or approach</li><li>• Develop, launch or test a new idea, approach or event</li><li>• Convene around an emerging issue</li><li>• Conduct a feasibility study</li></ul>	<p><b>\$5,000 - \$75,000</b> Term: Up to 1 year</p>	<p><b>Organization registration deadline:</b> January 31, 2018, 5 p.m. ET.</p> <p><b>Application deadline:</b> February 21, 2018, 5 p.m. ET.</p>	<ul style="list-style-type: none"><li>• Is it new and untested?</li><li>• In need of research and study?</li><li>• Do you need one year to experiment?</li></ul>
<div> Building on the success of a proven model or program</div>	<p><b>For projects that:</b></p> <ul style="list-style-type: none"><li>• Launch or replicate a new, evidence-based program</li><li>• Scale up a program currently being delivered, thus impacting more people</li><li>• Improve the quality of a program currently delivered to increase impact</li></ul>	<p><b>\$50,000 - \$250,000 per Year</b> Term: 2-3 years</p>	<p><b>Spring 2018</b></p>	<ul style="list-style-type: none"><li>• Is it based on an existing and successful project?</li><li>• Is the research done and project ready to go?</li><li>• Are the outcomes measurable and predictable?</li></ul>
<div> Broadening access to and improving community spaces</div>	<p><b>For:</b></p> <ul style="list-style-type: none"><li>• Equipment</li><li>• New construction</li><li>• Renovations or repairs to community spaces</li></ul>	<p><b>\$5,000 - \$150,000</b> Term: Up to 1 year</p>	<p><b>Summer 2018</b></p>	<ul style="list-style-type: none"><li>• It is solely for infrastructure?</li></ul>

# OTF INVESTMENT STREAM: SEED GRANTS

## OVERVIEW

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**OTF provides Seed funding to develop new ideas and different approaches to achieving results. Projects must align with an OTF Priority Outcome and broadly align with a Grant Result.**

The purpose of OTF Seed funding is to:

- Come up with new or better ways of doing things (more efficiently or effectively), leading to greater impact
- Develop an evidence base, through the testing or piloting of new or unproven approaches
- Allow an organization to learn as a result of testing ideas or concepts that have not been tried before
- Respond to emerging issues in a community
- Experiment with innovative approaches without knowing what the results might be
- Explore the feasibility of ideas or things that are new or unproven

### Types of projects funded

All projects need to be focused on seeding new ideas or approaches that will drive at achieving greater impact in their community by:

- Researching a new concept, idea or approach
- Developing, launching or testing a new idea, approach or event; Piloting a new program or running a demonstration project
- Conducting a feasibility study
- Convening around an emerging issue

### Amount and term

**Amount range:** \$5,000 to \$75,000

**Duration:** Up to 1 year

**Hold back:** 10% of the funding will be held back, to be paid upon satisfactory review of the final report



Seed projects must align with one of the following Seed-specific Grant Results associated with an Action Area:



## GRANT RESULTS

- Trained and certified coaches, officials and volunteers
- Programs are safe, inclusive, fair and age- and ability-appropriate
- Ontarians participate in an active lifestyle



## GRANT RESULTS

- People have a say shaping the services and programs that matter to them
- People who are marginalized take on leadership roles in their communities
- Diverse groups work together to improve community life
- People who are isolated have connections in their community



## GRANT RESULTS

- People participate in ecosystem, conservation and restoration efforts
- Conservation and restoration efforts are better planned and more sustainable
- People connect with the environment and understand their impact on it
- People and resource users take deliberate actions to benefit the environment
- Mechanisms are developed to promote responsible resource stewardship



## GRANT RESULTS

- Skills and knowledge are transferred to the next generation of artistic leaders
- Access to arts-based learning opportunities and compelling artistic, cultural and heritage experiences
- People are engaged in community-based arts creation
- Preservation and animation of cultural heritage



## GRANT RESULTS

- Parents, caregivers and adult allies have the skills to support children and youth who are facing barriers
- Children and youth who are facing barriers develop strong emotional and social skills
- Youth facing barriers volunteer and are in leadership roles



## GRANT RESULTS

- People who are economically vulnerable have access to community services that enhance financial stability
- People who are economically vulnerable are able to meet their basic needs
- People have the skills and knowledge to achieve greater financial independence
- People become and stay employed
- People become entrepreneurs

## TYPES OF COSTS FUNDED

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All costs funded by OTF must be eligible and necessary to carry out the described project.

### Direct Project Costs

- Direct personnel costs: Salaries, mandatory employment-related costs and employee benefits of new or maintained staff positions funded specifically to carry out the project

### Direct non-personnel costs

- Purchased services (from contractors or subject experts) specifically related to the delivery of the program/service
- Workshop, meetings, convening costs incurred relating to the delivery of the program/service
- Supplies and materials purchased to use in the delivery of the program/service
- Travel costs incurred by employees, volunteers and participants that are directly related to the project
- Evaluation costs: Up to a maximum of 10% of the total OTF Budget Request can be used for planning and executing an evaluation of your grant project. This amount is only for the evaluation of your grant project
- Other costs: Other costs directly related to the delivery of the program/service but not captured in the categories provided

### Overhead and Administration

OTF will support overhead and administrative costs directly associated with the funded project **to a maximum of 15% of the total OTF Budget Request**. These do not include the direct costs to run or deliver a project, including the staff associated with the program. These are eligible expenses that are part of separate budget categories.

Overhead and administration costs can include a portion of regular operational expenses that can be attributed specifically to the funded project.

Please refer to the [Overhead and Administrative Costs Policy](#) for further details.

### Types of costs and projects not funded

- Requests to fund a previously/currently offered program or project
- Requests that do not clearly align with an OTF Priority Outcome and a Seed-specific Grant Result
- Renovations, repairs, new buildings
- Activities completed or costs incurred prior to the approval of the OTF grant application
- Taxes, such as GST and HST, for which the recipient is eligible for a tax rebate, and all other costs eligible for rebates
- Contingency costs

## SEED GRANT APPLICATION

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Grant applicants will be required to:

- Identify an OTF Priority Outcome and one Seed-specific Grant Result. Learn more about the Priority Outcomes, Grant Results and Metrics associated with all Action Areas
- Clearly describe what idea, challenge or opportunity they will be exploring in relation to an OTF Priority Outcome and a Seed-specific Grant Result
- Describe the community need that will be addressed through the project
- Describe the activities required to complete the project
- Provide pictures/diagrams to support the request
- Describe what they are hoping to learn from the project
- Complete a Financial Workbook outlining the request budget

View the Seed grant application questions and applicant advice, as well as the Financial Workbook Instructions.

### Assessment Criteria

Seed grant applications will be assessed on three criteria: Strategy, Process and People.

#### Strategy

- The project must align with an OTF Priority Outcome and a Seed-specific Grant Result
- The idea, challenge or opportunity being explored is well understood
- The type, level, and urgency of the community need is described
- The way the project will impact the community is clear (e.g. breadth and depth)
- There is a link between the community need, how the project will address it and achieve the Grant Result

#### Process

- The application must show a reasonable timeline and describe links between the project activities and the project objective

#### People

- The expected learnings for the organization, community or sector are clear and demonstrate alignment with the Grant Result
- The application indicates how the learnings will be used and the next steps

## Documentation Requirements

Applicants are not required to submit the following items with their application, however, these documents must be in place and available by the application deadline. OTF may request them at any time including during the assessment process or once the grant is approved.

### Quotes

When you are requesting OTF funds for goods and/or services individually valued above \$10,000, OTF asks your organization to show that it sought the best value for money. The amount requested must be reasonable and supported by competitive bids. OTF requires two or more written quotes for purchases of individual goods and/or services valued above \$10,000.

Multiple sub-contracts with the same organization/supplier on the same project will be considered as a cumulative total. This means if the total of these goods and/or services exceeds \$10,000, competitive bids of two or more written quotes are required.

Applicants may be requested to provide copies of quotes at any time after the application is submitted.

### Collaborative Agreement

Collaborative applicants must have a formal agreement in place when the application is submitted. The agreement must detail the purpose and nature of the collaborative, and must be signed by all members making a collaborative application for OTF funding. For more information, please read the Collaborative Applicants Policy.

### Reporting on your grant

OTF asks for a final report that provides the following information:

- Whether the project achieved the chosen Grant Result
- The costs incurred were in accordance with approved budget
- What was learned from the results of the project and what will be done with the learnings
- Next steps
- Compliance with the terms and conditions of the Grant Contract and full (100%) expenditure of project costs. Please note that 10% of the grant will be held back, to be paid upon satisfactory review of the final report. Please refer to the Payment Release for Grantees Policy.

### Learning

Upon request, the grantee will provide OTF access to relevant documentation of products that resulted from the project for purposes of OTF analysis and aggregation of information.

Learnings from completed Seed projects will help build the OTF knowledge base and allow applicants, other organizations, staff and volunteers to learn from these projects. In some cases, successful Seed projects that produce meaningful evidence with proven results could potentially be used by a grant recipient to subsequently apply for a Grow or Capital Grant for funding for a large, implementation-oriented project.

## DEFINITIONS AND RESOURCES

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**Concept:** A concept is an abstract idea, a general notion.

**Emerging issue:** An emerging issue is one that is newly created or noticed and growing in strength or popularity; becoming known or established.

**Feasibility study:** A feasibility study is a study aimed to objectively and rationally uncover the strengths and weaknesses of an existing process or proposed undertaking including opportunities and threats, resources needed to carry through, and ultimately the prospects for success.

**New:** For OTF purposes, this includes things that are new for an organization, a community or a sector; piloting a new program or approach; undertaking research that has not been previously undertaken by that organization, community or sector, etc.

**Project:** A project is an initiative proposed by an OTF applicant for funding. For OTF purposes, a project or initiative has a defined beginning and ending and a specific objective. The term 'project' is frequently used in the OTF online application and may sometimes be used interchangeably with the term 'initiative'.

**Unproven:** For OTF purposes, "unproven" means that there isn't an existing evidence base to demonstrate that this idea, approach or program does or does not work. The Seed stream is the place for organizations to try out or test a *new approach*, to prove, or create evidence, that the approach works or even that it doesn't, allowing the organization to learn from its efforts.

### Related Documents

[POL-INV-01 Eligibility Policy](#)

[POL-INV-06 Overhead and Administration Costs Policy](#)

[POL-INV-09 Recognition Policy](#)

[POL-INV-10 Payment Release for Grantees Policy](#)

[POL-INV-11 Reallocation of Grant Funds Policy](#)

[POL-INV-13 Grant Rescind and Recovery Policy](#)



# SEED FINANCIAL WORKBOOK INSTRUCTIONS

Before completing the Financial Workbook, please read these instructions carefully.

Taxes, such as GST and HST, for which the recipient is eligible for a tax rebate, and all other costs eligible for rebates are **not** eligible OTF request items.

When you are requesting OTF funds for goods and/or services (including equipment, consulting services and non-consulting services) valued above \$10,000 OTF asks your organization to show it sought the best value for money. The amount requested must be reasonable and supported by competitive bids. OTF requires two or more written quotes when purchasing such goods and/or services valued above \$10,000. Multiple sub-contracts with the same organization/supplier on the same project will be considered as a cumulative total. This means if the total of these goods and/or services exceeds \$10,000, competitive bids of two or more written quotes are required.

Contingency costs are **not** eligible expenses. Please do not include contingencies in your Financial Workbook.

Adding notes is **required** in the Financial Workbook, so be clear about your funding needs by providing a breakdown of the costs associated with your OTF Budget Request. Only include eligible costs and costs associated with your OTF request.

OTF BUDGET REQUEST	DESCRIPTION	NOTES (example)
Direct Personnel Cost	Salaries, mandatory employment-related costs and employee benefits of new or maintained staff positions funded specifically to carry out the project.	<ul style="list-style-type: none"> <li>1 Full Time Workshop Coordinator: Salary, mandatory employment-related costs, and employee benefits at 40 hrs/week x 52 weeks x 1 year = \$50,000</li> </ul>
Direct Non-Personnel Costs	All non-personnel costs directly attributable to the project, for the delivery of the program/service.	
Purchased service	Services purchased from contractors/subject experts specifically relating to the delivery of the project.	<ul style="list-style-type: none"> <li>Consultant for six Board development sessions: \$8,000</li> <li>Translation of Materials: \$6,000</li> <li>Sound &amp; Lighting Fee for Service Contract: \$25,000 (quotes received)</li> <li>Workshop facilitator: \$2,000</li> </ul>
Workshops, Meetings, Convening	Meeting/convening costs incurred relating to the delivery of the project.	<ul style="list-style-type: none"> <li>Space rental (6 sessions): \$4,000</li> <li>Marketing and promotional costs: \$10,000</li> </ul>

		<ul style="list-style-type: none"> <li>Childminding for evening workshops: \$200 x 12 sessions x 1 year = \$2,400</li> <li>Healthy snacks for participants: \$3 x 5 sessions x 50 participants = \$750</li> </ul>
<b>Supplies And Materials</b>	Items purchased to use in the delivery of the project.	<ul style="list-style-type: none"> <li>Art supplies for youth program: \$10,000</li> <li>Notebooks for seniors program: \$6,000</li> </ul>
<b>Equipment</b>	Capital purchases that are <u>not</u> construction or renovation. Equipment only which must be directly related to the project	<ul style="list-style-type: none"> <li>Purchase of sports equipment including soccer balls, nets and cones for five locations: \$5,000</li> <li>Purchase of 10 computers: \$10,000</li> </ul>
<b>Travel</b>	Travelling costs incurred by employees, volunteers and participants, that are directly related to the project.	<ul style="list-style-type: none"> <li>Mileage for employees travel to visit youth in their homes: \$8,000</li> <li>300 participants x 10 transit fares at \$3 = \$9,000</li> </ul>
<b>Evaluation</b>	Up to a maximum of 10% of the total OTF Budget Request can be used for evaluation of your grant project.	<ul style="list-style-type: none"> <li>Hire a contractor to administer a pre- /post-study of our project: \$11,000 (quotes received)</li> <li>Conduct a focus group on the effectiveness of our convening activities: \$2,500</li> </ul>
<b>Other</b>	Other costs directly related to the delivery of the project but not captured in the categories provided.	<ul style="list-style-type: none"> <li>Costs directly related to the delivery of the project, but not captured in the categories provided</li> </ul>
<b>Overhead And Administration</b>	OTF will support Overhead and Administrative costs directly associated with the funded project, to a <b>maximum of 15% of the total OTF Budget Request</b> . These do not include the direct costs to run or deliver a program, including the staff or equipment associated with the program. These are eligible expenses that are part of separate budget categories.  Overhead and Administration costs can include a portion of regular operational expenses that can be attributed specifically to this project. Please refer to the <b>Overhead and Administrative Costs Policy</b> for further details.	<ul style="list-style-type: none"> <li>Incremental (new) costs generated such as rent, utilities, insurance, audit: \$3,000</li> <li>Pro-rata of apportioned costs of existing rent, utilities, insurance, audit: \$2,000</li> <li>Salaries, mandatory employment-related costs and employee benefits of Executive Director: ½ day per week x 52 weeks x 1 year = \$10,500</li> </ul>
<b>Total OTF Budget Request</b>	<b>Total funding requested from OTF must be between \$5,000 and \$75,000, for up to one year</b>	

# SEED GRANT APPLICATION QUESTIONS

1.

What is the **idea, challenge or opportunity** that your organization will explore in this project?

Example: "There is a population of 2,500 youth housed in shelters who have low levels of literacy who would benefit from a new-to-Canada reading program that will help them gain employment."

2.

What is the **need or opportunity** in the community that this project will address?

How **pressing** is the need or opportunity? How will you **address** that need or opportunity through the project and how does the need and project **align with the Grant Result?**

Please describe the community or population that the program is focused on. If appropriate, identify (ideally, with numbers or percentages) any gaps in the community's wellbeing that this project will address.

Describe how you identified the need or demand (focus groups, research, needs assessment, etc.)

# SEED GRANT APPLICATION QUESTIONS

**3.**

Provide a **brief description** of the activities you will undertake to complete this project and that contribute to the Grant Result.

**4.**

**What are you hoping to learn from this project?**

What does your organization, the community or sector expect to learn as a result of this project?

Please also outline how your organization will use new skills, understandings or changes in attitudes on an issue, or changes to ways of working.

What do you expect your next steps will be as a result of this grant ?

# SEED ASSESSMENT

SCORE: -2 (SD: Strongly Disagree) -1 (D: Disagree) 0 (N: Neutral) +1 (A: Agree) +2 (SA: Strongly Agree)

Weight	Assessment Area	Score					Assessment Questions and Supporting Questions	Assessment Consideration
		SD	D	N	A	SA		
50%	Strategy	-2	-1	0	+1	+2	The strategy is appropriate for achieving the expected learning that broadly aligns with the Grant Result	The idea, challenge, and opportunity being explored is well understood.  The type, level, and urgency of the community need is described. The way the project will impact the community is clear (e.g. breadth or depth). There is a link between the community need, how the project will address it and achieve the Grant Result.
							What is the idea, challenge or opportunity that the organization will explore in this project?	
							What is the need in the community that this project will address? How pressing is the need? How will they address that need through the initiative?	
25%	Process	-2	-1	0	+1	+2	The processes to be employed are appropriate for achieving the expected learning	The application must show a reasonable timeline and describe links between the project activities and the project objective.
							Did they provide a brief description of the activities that they will perform to complete this project?	
25%	People	-2	-1	0	+1	+2	People will learn and grow from this endeavor	The expected learnings for the organization, community or sector are clear and demonstrate alignment with the Grant Result. The applicant indicated how the learnings will be used and the next steps.
							What are they hoping to learn from this project?	
N/A	Value for Money							
N/A	Infrastructure							
100%	Total							



## OTF INVESTMENT STREAM: GROW

### PURPOSE:

OTF recognizes that building healthy and vibrant communities takes time and resources. The Grow Investment Stream supports projects that are based on evidence and deliver on specific Grant Results in order to contribute to the longer-term goal of the related Priority Outcome. Projects funded in the Grow Investment Stream are based on robust planning, and deliver positive change which is achieved by replicating, adapting, or scaling existing proven programs.

### TYPES OF PROJECTS:

All projects need to drive at achieving greater impact in their community by:

- Increasing the reach of an existing, proven project of the applicant organization, or
- Replicating or adapting a proven, successful project that is new to the applicant organization, or
- Adapting an existing proven, successful project of the applicant organization

### AMOUNT RANGE: \$50,000 to \$250,000 per year

- Grow application funding requests cannot exceed \$750,000 in total, including the capital costs.
- Grow application funding requests must include at least \$50,000/year for non-capital items. Once your project meets the minimum requirements, you may add up to a total of \$150,000 for capital costs associated with and necessary for the success of the project.
- The focus of a Grow application is not intended to be capital in nature. If your project has a large capital component, it may be better suited to a Capital grant application.

### DURATION: 24 to 36 months

### TYPES OF COSTS FUNDED:

All costs funded by OTF must be eligible and necessary to carry out the described project.

#### Direct Project Costs

- Direct personnel costs: Salaries, mandatory employment-related costs and employee benefits of new or maintained staff positions funded specifically to carry out the project.

#### Direct non-personnel costs

- Purchased services (from contractors or subject experts) specifically relating to the delivery of the program/service
- Workshop, meetings, convening costs incurred relating to the delivery of the program/service
- Supplies and materials purchased to use in the delivery of the program/service
- Travel costs incurred by employees, volunteers and participants, that are directly related to the project
- Evaluation costs: **Evaluation is a requirement for Grow applications.** Up to a maximum of 10% of the total grant request budget can be used for planning and executing an evaluation of your grant project. This amount is only for the evaluation of your grant project.
- Other costs: Other costs directly related to the delivery of the program/service but not captured in the categories provided.

- Capital costs for repairs, renovations or construction costs, as well as equipment costs. Total capital costs may not exceed \$150,000 for the project. Capital costs must be associated with, and necessary for, the success of the Grow project. Grow grant requests cannot exceed \$750,000 in total, including the capital costs. Please refer to the Capital Backgrounder and Capital Grants Policy.

### Overhead and Administration costs

- OTF will support overhead and administrative costs directly associated with the funded project, **to a maximum of 15% of the total grant request budget**. These do not include the direct costs to run or deliver a project, including the staff or equipment associated with the program. These are eligible expenses that are part of separate budget categories. Overhead and administration costs can include a portion of regular operational expenses that can be attributed specifically to the funded project. Please refer to the Overhead and Administrative Costs Policy for further details.

Please note: When you are requesting OTF funds for goods and/or services (including equipment, construction, consulting services, and non-consulting services) valued above \$10,000, OTF asks your organization to show that it sought the best value for money. The amount requested must be reasonable and supported by competitive bids. OTF requires two or more written quotes when purchasing such goods and/or services valued above \$10,000. Multiple sub-contracts with the same organization/supplier on the same project will be considered as a cumulative total. This means if the total of these goods and/or services exceeds \$10,000, competitive bids of two or more written quotes are required.

### TYPES OF COSTS/PROJECTS NOT FUNDED:

- Core operating funding
- Replication, adaptation, scaling-up of programs *that lack an evidence base*
- Maintaining currently existing programs without growing or improving on the impact of the program, as measured through an OTF Grant Result
- Simple changes to program purposes without growing or improving on the impact of the change, as measured through an OTF Grant Result
- Taxes, such as GST and HST, for which the recipient is eligible for a tax rebate, and all other costs eligible for rebates are not eligible OTF request items
- Contingency costs are not eligible expenses

### OVERVIEW OF THE APPLICATION:

Applicants will be required to:

- Identify one Priority Outcome and one OTF Grant Result (and the associated metrics) that strongly align with the change being sought. Learn more about the Priority Outcomes, Grant Results and Metrics associated with all the OTF action areas. OTF requires some Grantees to survey their program participants using standardized survey tools. View the Grow Grant Survey Tools that corresponds to each Grant Result
- Describe and submit the **evidence base** that supports the proposed change and Grant Result. Your project's design (the processes you employ), should be based on good evidence that demonstrates the initiative will achieve the grant result you selected. Evidence may include research, successful examples of existing programs, pilots, models, etc. You must upload evidence and/or provide links to the evidence that supports your project's design.
- Complete a Financial Workbook outlining the request budget.
- Complete a detailed supporting Grow Workbook that outlines the approach you intend to take to complete your endeavor. This workbook includes four components:

- **Project Plan:** The project plan is where you will be required to tell us about how you plan to implement or carry out your project. The detail requested in the project plan must demonstrate a link with the evidence you provided, as well as how you plan to achieve your identified grant result. The number of project objectives OTF asks for is tailored to the level of funding you are requesting. If you are asking for \$250,000 or more, you must describe four or five key project objectives for each year of funding requested. If you are asking for less than \$250,000, you must describe two or three key project objectives for each year of funding requested.
- **Risk Management Plan:** The risk management plan is where you will be required to think about your project and what could potentially go wrong with it. Specifically thinking about factors that could prevent you from achieving your project's objectives and the grant result selected.
- **Recognition Plan:** If your project is approved, you must public recognize OTF's investment in your project. Refer to OTF's Recognition Policy for further details.
- **Additional evaluation considerations:** OTF requires some Grantees to survey their program participants using standardized survey tools. View the Grow Grant Survey Tools that corresponds to each Grant Result. Grantees will be required to use those tools once the grant is approved (with resources and supports available). In addition to tracking the metrics you selected as part of your application, you are expected to evaluate your grow grant in a way that is beneficial to you. The questions in this section will provide information on your plan for the evaluation.
- Your answers in the Workbook section, including your project plan, should show how your **project plan is viable, reasonable and appropriate** for the intended project. Your workbook should:
  - Describe how you will execute the project and define the project's deliverables, including how you plan to achieve the Grant Result (e.g. viable)
  - Describe who will do the work, and how and where the work will be done (e.g. reasonable)
  - Explain how this is an appropriate project for your organization to undertake, given your experience, the strength of the evidence and the project risks you identified (e.g. appropriate)

## WHAT DOES "EVIDENCE-BASED" MEAN?

OTF considers evidence as strong indication that something works. The evidence you provide OTF can come from your organization or from an external source. Examples of evidence must:

- Provide reasoning that speaks to the potential positive change being proposed in a project
- Include documented research and/or evaluations (the applicant's own or those of others) where measured results demonstrate that the approach being proposed will produce the Grant Result selected in the Grow grant application.
- A Seed project with proven results could form the evidence required for an organization to then apply for a Grow grant.

View the complete application questions, including the financial workbook and workbook as well advice for key questions.

## ASSESSMENT CRITERIA:

The Assessment of your application is based on four assessment areas: Strategy, Process, People and Value for Money.

- The project must strongly align with one OTF Grant Result and deliver against the associated metrics.
- The idea, challenge and opportunity being explored is evidence-based and well understood.
- The type, level and urgency of the community need is described.
- The way the project will impact the community is clear (e.g. breadth and depth). There is a link between the community need and how the project will address it to achieve the Grant Result.



- It is clear that the project will have a long-term impact for the community. The project considers what resources (e.g. financial, people, infrastructure) need to be in place for long-term success
- The project is based on proven tools or techniques, and demonstrates how the grant result will be achieved. The way these tools and techniques will be used is clear.
- Your application describes a feasible process to accomplish the project and has clearly defined the project deliverables. Areas for risk are identified and ways to manage them are addressed.
- Your application demonstrates your capacity to successfully complete the project and achieve the grant result.
- The competency of the people involved aligns with the project objectives.
- The cost seems reasonable to achieve the identified grant result.

View the detailed [assessment criteria](#).

## GRANTEE ENGAGEMENT AND REPORTING:

OTF staff will engage on a regular basis with the grantee to support the success of the investment. Reporting will be conversational (call, email correspondence, meetings) and at intervals of at least every six months. Reports will be submitted each year of the project, and again upon completion. Reporting will include:

- Progress to achieving the Grant Result and associated targets
- Costs incurred, in accordance with approved budget
- Project challenges/issues and unexpected outcomes, where relevant
- As part of our outcomes-based investment strategy, it is important that we learn about our grantees' outcomes and the progress made towards the selected grant result. Grantees will be required to report on their key learnings to help us learn what does, or does not work, and why. OTF will use the information provided, and the project evaluation, to learn about the impact of our investment strategy.
- Some Grow grantees will be required to conduct surveys of program participants during the course of the grant. Please see [Grow Grant Survey Tools](#) for requirements as they apply to specific Grant Results.
- For grants with satisfactory reviews, the final grant holdback funds will be released (all or part). The final report must demonstrate achievement of the Grant Result, compliance with terms and conditions of the Grant Contract and full (100%) expenditure of project costs.

Please note that 10% of the final year of funding will be held back, to be paid upon satisfactory review of the final report. The final report of your grant must demonstrate the full expenditure of project costs. Please refer to the [Payment Release for Grantees Policy](#).

## DEFINITIONS:

**Evaluation:** A review of the results of a grant, with the emphasis upon whether or not the grant achieved its outcomes.

**Project:** A project is an initiative proposed by an OTF applicant for funding. For OTF purposes, a project or initiative has a defined beginning and ending, and a specific objective. The term 'project' is frequently used in the OTF online application and may sometimes be used interchangeably with the term 'initiative'.

**Replicate:** Replicate (a program) is to duplicate, recreate or repeat it.

**Scale up:** Scale-up (of a program) is the process of increasing a program's size, amount or quality of services amount of programming offered, number of locations, or people served.

**Grow Workbook:** A mandatory, supporting document for Grow grant applications. The workbook details the applicant's intended approach to complete their endeavor. In the workbook, the applicant describes in detail how they plan to carry out their project, such as deliverables, resources, timeframes and potential risks. In addition, the Grow Application Workbook is where the applicant describes a Recognition Plan and plans to evaluate the project.

**RELATED DOCUMENTS:**

POL-INV-01 Eligibility Policy

POL-INV-03 Capital Grants Policy

POL-INV-06 Overhead and Administration Costs Policy

POL-INV-09 Recognition Policy

POL-INV-10 Payment Release for Grantees Policy

POL-INV-11 Reallocation of Grant Funds Policy

POL-INV-13 Rescinding Grant Policy

## GROW FINANCIAL WORKBOOK INSTRUCTIONS

**Before completing the Financial Workbook, please read these instructions carefully.**

Your request must meet the minimum requirements for a Grow grant application. Grow grant application funding requests must include at least \$50,000 per year for non-capital items. Once your project meets the minimum requirements, you may add up to a total of \$150,000 for capital costs associated with, and necessary for, the success of the project. Grow grant application funding requests cannot exceed \$750,000 in total, including the capital costs. The focus of a Grow grant application is not intended to be capital in nature. If your project has a large capital component, it may be better suited to a Capital grant application.

Taxes, such as GST and HST, for which the recipient is eligible for a tax rebate, and all other costs eligible for rebates are **not** eligible OTF request items.

When you are requesting OTF funds for goods and/or services (including equipment, construction, consulting services, and non-consulting services) valued above \$10,000, OTF asks your organization to show it sought the best value for money. The amount requested must be reasonable and supported by competitive bids. OTF requires two or more written quotes when purchasing such goods and/or services valued above \$10,000. Multiple sub-contracts with the same organization/supplier on the same project will be considered as a cumulative total. This means if the total of these goods and/or services exceeds \$10,000, competitive bids of two or more written quotes are required.

Contingency costs are **not** eligible expenses. Do **not** include contingencies in your Financial Workbook.

Adding notes is **required** in the Financial Workbook. Be clear about your funding needs by providing a breakdown of the costs associated with your OTF budget request. Only include eligible costs and costs associated with your OTF request.

<b>Evaluation</b>	<p><b>Evaluation is a requirement for Grow grant applications.</b> Up to a maximum of 10% of the total grant request budget can be used for planning and executing an evaluation of your grant project. This amount is only for the evaluation of your grant project.</p>	<ul style="list-style-type: none"> <li>• Hire a contractor to administer a pre-/post-study of our project: \$10,000 (quotes received)</li> <li>• Conduct a focus group on the effectiveness of our convening activities: \$2,500</li> </ul>
<b>Other</b>	Other costs directly related to the delivery of the program/service but not captured in the categories provided.	<ul style="list-style-type: none"> <li>• Costs directly related to the delivery of the project, but not captured in the categories provided.</li> </ul>
<b>Capital</b>	Capital repairs, renovations or construction costs, as well as equipment costs. Total Capital costs may not exceed \$150,000 for the project. Capital costs must be associated with, and necessary for, the success of the Grow initiative. Grow grant requests cannot exceed \$750,000 in total, including the Capital costs.	<ul style="list-style-type: none"> <li>• Renovation of kitchen: \$65,000 (quotes received)</li> <li>• Purchase of 1 van: \$45,000 (quotes received)</li> <li>• Purchase of sound and lighting equipment: \$80,000 (quotes received)</li> <li>• Renovation of community hall - contractor cost for labour and materials: \$100,000; furnishings: \$30,000 (quotes received)</li> </ul>
<b>Overhead and Administration</b>	<p>OTF will support overhead and administrative costs directly associated with the funded project, to a <b>maximum of 15% of the total grant request budget.</b> These do not include the direct costs to run or deliver a program, including the staff or equipment associated with the program. These are eligible expenses that are part of separate budget categories.</p> <p>Overhead and Administration costs can include a portion of regular operational expenses that can be attributed specifically to this project. Please refer to the <u>Overhead and Administrative Costs Policy</u> for further details.</p>	<ul style="list-style-type: none"> <li>• Incremental (new) costs generated such as rent, utilities, insurance, audit: \$3,000</li> <li>• Pro-rata of apportioned costs of existing rent, utilities, insurance, audit: \$2,000</li> <li>• Salaries, mandatory employment-related costs and employee benefits of Executive Director: ½ day per week x 52 weeks x 2 years = \$21,000</li> </ul>
<b>Total OTF Budget Request</b>	<b>Total funding requested from OTF must be between \$100,000 to \$750,000 (\$50,000 to \$250,000 per year for 2 to 3 years)</b>	



Weight	Assessment Area	Score					Assessment questions and supporting questions	Assessment Consideration
		SD	D	N	A	SA		
40%	Strategy	-2	-1	0	+1	+2	<b>The Strategy is appropriate for achieving the grant result</b>	
							What is the idea, challenge or opportunity that the organization will explore in this project?	The idea, challenge, or opportunity being explored is evidence-based and well understood.
							What is the need in the community that this project will address? How pressing is the need? How will they address that need through the initiative?	The type, level, and urgency of the community need is described. The way the project will impact the community is clear (e.g. breadth or depth). There is a link between the community need and how the project will address it to achieve the grant result.
							What will the impact of this project be beyond the life of the grant? What will be in place to sustain the impact of this project and what will they do within the life of the grant to ensure sustainability?	It is clear that the project will have a long-term impact for the community. The project considers what resources (e.g. financial, people, infrastructure) need to be in place for long-term success.
30%	Process	-2	-1	0	+1	+2	<b>The processes to be employed are appropriate</b>	
							Did they provide a summary of the evidence that supports the design of their program? (represents 10%)	The program is based on proven tools or techniques and demonstrates how the grant result will be achieved. The way these tools and techniques will be used is clear.
20%	People						Grow Application Workbook (represents 20%)	The applicant has described a feasible process to accomplish the project and has clearly defined the project deliverables. Areas for risk are identified and ways to manage them are addressed. The applicant has demonstrated the capacity to successfully complete the project and achieve the grant result.
		-2	-1	0	+1	+2	<b>The right people are in place to lead the endeavor, and they will learn and grow through the project</b>	
							What are they hoping to learn from this project?	The intended learnings for the organization, community or sector are clear and demonstrate alignment with the grant result. The applicant indicated how the learnings will be used and the next steps.
10%	Value for money						Did they provide a description of the core team members leading and/or supporting the project?	The competency of the people involved aligns with the project objectives.
		-2	-1	0	+1	+2	<b>The cost per output is appropriate for achieving the grant result.</b>	
N/A	Infrastructure						Does the cost seem reasonable to achieve the identified grant result?	\$/Metric
100%	Total							

# OTF INVESTMENT STREAM: CAPITAL

## Purpose:

OTF provides capital funding to improve the infrastructure required for communities to thrive. Funding is delivered through a process that allows OTF to respond flexibly and effectively to the broad and deep need for community-oriented capital funding across Ontario.

The purpose of OTF capital funding is to:

- Enhance access to community spaces, programs, activities and services, and facilitate community members' full participation in the life of the community
- Enhance and build community spaces
- Enhance the efficiency and effectiveness of programs
- Make better use of technological resources

The Capital Investment Stream is for capital-specific projects that align with one of the OTF Priority Outcomes and its related Grant Result. There are nine Grant Results for capital focused projects:

- Active People: Infrastructure for unstructured and structured physical activities
- Active People: Infrastructure is accessible and available for physical activity
- Connected People: Diverse groups work together to improve community life
- Connected People: People who are isolated have connections in their community
- Green People: Conservation and restoration efforts are better planned and more sustainable
- Inspired People: Arts, culture and heritage have appropriate spaces
- Promising Young People: Children and youth who are facing barriers develop strong emotional and social skills
- Promising Young People: Youth are involved in creating solutions for challenges facing their communities
- Prosperous People: People who are economically vulnerable are able to meet their basic needs

## Types of projects funded

- Equipment
- New Construction
- Renovations or repairs to community spaces
- Purchase of land or building

## Amount and term

- **Amount range:** \$5,000 to \$150,000
- **Duration:** Up to 1 year
- **Hold back:** 10% of the funding will be held back, to be paid upon satisfactory review of the final report.

## Types of costs funded

OTF provides capital funding for:

- Construction/Renovation: Repairs, renovations or construction costs, as well as permanent equipment costs.
- Equipment: Capital purchases that are not part of a building, and are directly related to the project.
- Land/Property Purchase: The direct purchase cost of land or property.
- Developmental Costs: Costs associated with construction, such as the development of plans, legal fees or survey costs. These costs can be **up to a maximum of 20% of the total grant request**.

All costs funded by OTF must be eligible and directly attributable to the project.

OTF limits capital funding to \$150,000 for any single eligible project to effectively respond to the broad need for capital funding in Ontario's voluntary sector.

## Types of costs/projects not funded

- Contributions to annual funding drives and capital campaigns
- Activities completed or costs incurred prior to the approval of the request by OTF
- Staff salaries, benefits and wage costs
- Taxes, such as GST and HST, for which the recipient is eligible for a tax rebate, and all other costs eligible for rebates
- Contingency costs

## Overview of the Application

Applicants will be required to:

- Identify one Priority Outcome and one Grant Result (and the associated Metric, unless your funding request is primarily for equipment, then a Metric is not required). Learn more about the Priority Outcomes, Grant Results and Metrics associated with all the Action Areas.
- Quantify the impact of the project (e.g. square feet, kilometres of trails) unless the funding request is primarily for equipment
- Explain the purpose of the project and the community need that it will address
- Demonstrate or outline how the project team members have the skills, knowledge or competencies needed to execute the project successfully
- Provide pictures/diagrams to support the request
- Describe the activities required to complete the project
- Complete a Financial Workbook outlining the request budget

View the application questions and applicant advice, as well as the Financial Workbook.

## Assessment Criteria

Capital grant applications will be assessed on five criteria: Strategy, Process, People, Infrastructure and Value for Money.

- The project must strongly align with one Grant Result and deliver against the associated Metrics, where applicable
- The idea, challenge and opportunity being explored is evidence-based and well understood
- The type, level and urgency of the community need is described
- The way the project will impact the community is clear (e.g. breadth and depth). There is a link between the community need and how the project will address it to achieve the chosen Grant Result
- It is clear that the project will have a long-term impact for the community. The project considers what resources (e.g. financial, people, infrastructure) need to be in place for long-term success
- Your application demonstrates your organization's capacity to successfully complete the project and achieve the chosen Grant Result
- The competency of the people involved aligns with the project's objectives
- The cost seems reasonable to achieve the identified Grant Result

## Documentation Requirements

Applicants are not required to submit the following items with their application, however, these documents must be in place and available by the application deadline. OTF may request them at any time including during the assessment process or once the grant is approved.

**Quotes:** When you are requesting OTF funds for goods and/or services (including equipment, construction, renovations, land/property purchase, developmental costs) valued above \$10,000, OTF asks your organization to show that it sought the best value for money. The amount requested must be reasonable and supported by competitive bids. OTF requires two or more written quotes for purchases of goods and/or services valued above \$10,000.

Multiple sub-contracts with the same organization/supplier on the same project will be considered as a cumulative total. This means if the total of these goods and/or services exceeds \$10,000, competitive bids of two or more written quotes are required.

Applicants may be requested to provide copies of quotes at any time after the application is submitted.

**Proof of ownership or a five-year lease agreement** is required for all renovations or improvements. If an existing lease expires prior to the end of the five-year term required, OTF requires a letter from the lessor documenting the commitment to renew the existing lease.

**Collaborative Agreement:** Collaborative applicants must have a formal agreement in place when the application is submitted. The agreement must detail the purpose and nature of the collaborative, and must be signed by all members making a collaborative application for OTF funding. For more information, please read the Collaborative Applicants Policy.



## Reporting on Your Grant

OTF asks for a final report that provides the following information:

- How the project achieved the chosen Grant Result and associated Metric (unless the primary focus of the grant is to purchase equipment)
- The costs that were incurred, in accordance with the approved budget
- What was learned from the results of the project and what will be done with the learnings
- Photographs of the completed work
- Compliance with the terms and conditions of the Grant Contract and full (100%) expenditure of project costs. Please note that 10% of grant will be held back, to be paid upon satisfactory review of the final report. Please refer to the Payment Release for Grantees Policy.

## Definitions

**Capital Expenses:** A capital expenditure is an asset such as a building, machinery, equipment, etc., that has a useful life of more than one year and is subject to depreciation over its useful life.

**Community Spaces:** Includes physical spaces (e.g. buildings or outdoor venues such as community centres, offices, recreational facilities, sports facilities, trails, fields or parks) or virtual (online) spaces for communities to gather and connect (e.g. the equipment, such as servers or computers, required to enable communities to connect and interact online).

**Renovations:** A repair or improvement to an existing structure or building.

**New Construction:** A new building/facility or addition to an existing facility which adds square footage needed to deliver programs/services.

## Related Documents

- [POL-INV-01 Eligibility Policy](#)
- [POL-INV-02 Financial Need and Health of Applicants Policy](#)
- [POL-INV-03 Capital Grants Policy](#)
- [POL-INV-04 Collaborative Applicants Policy](#)
- [POL-INV-09 Recognition Policy](#)
- [POL-INV-10 Payment Release for Grantees Policy](#)
- [POL-INV-11 Reallocation of Grant Funds Policy](#)
- [POL-INV-13 Rescinding Grant Policy](#)
- [POL-INV-15 One Application Per Cycle](#)

# CAPITAL FINANCIAL WORKBOOK INSTRUCTIONS

Before completing the Financial Workbook, please read these instructions carefully.

Taxes, such as GST and HST, for which the recipient is eligible for a tax rebate, and all other costs eligible for rebates are not eligible OTF request items.

When you are requesting OTF funds for goods and/or services (including equipment, construction, renovations, land/property purchase, and developmental costs) valued above \$10,000, OTF asks your organization to show it sought the best value for money. The amount requested must be reasonable and supported by competitive bids. OTF requires two or more written quotes when purchasing such goods and/or services valued above \$10,000.

Multiple sub-contracts with the same organization/supplier on the same project will be considered as a cumulative total. This means if the total of these goods and/or services exceeds \$10,000, competitive bids of two or more written quotes are required. Applicants may be requested to provide copies of quotes at any time after the application is submitted.

Contingency costs are **not** eligible expenses. Please **do not include** contingencies in your Financial Workbook.

Adding notes is **required** in the Financial Workbook, so be clear about your funding needs by providing a breakdown of the costs associated with your OTF budget request. Only include eligible costs and costs associated with your OTF request.

OTF BUDGET REQUEST	DESCRIPTION	NOTES (EXAMPLES)
<b>Construction/Renovation</b>	Repairs, renovations or construction costs	Contractor costs to renovate the community centre kitchen: \$55,000 (quotes received), <u>or</u> repairs to the Sports Hall gymnasium: \$10,500 (quotes received), <u>or</u> costs associated with new construction of visitor's centre: \$100,000 (quotes received)
<b>Equipment</b>	Purchase of fixed and non-fixed equipment directly related to the project	Purchase of kitchen fridges and stoves x 4 = \$7,000, <u>or</u> purchase of basketballs, hoops, bleachers: \$11,000 (quotes received), <u>or</u> purchase of 8 tables and 32 chairs: \$3,200
<b>Land/Property Purchase</b>	The direct purchase cost of land or property	Direct cost only. Do not include extra costs associated with the purchase such as transaction costs (registry, legal, insurance, etc.).
<b>Developmental Costs</b>	Developmental costs associated with construction, to a <b>maximum of 20% of the total grant request</b>	Development of plans, legal fees or survey costs. (Salaries and benefits for your organization's staff are not eligible as part of a Capital grant request)
<b>Total OTF Budget Request</b>	<b>Total funding requested from OTF must be at least \$5,000 and at most \$150,000, for up to one year</b>	

# CAPITAL ASSESSMENT

SCORE: -2 (SD: Strongly Disagree) -1 (D: ☐ agree) 0 (N: Neutral) +1 (A: Agree) +2 (SA: Strongly Agree)

Weight	Assessment Area	Score				Assessment questions and supporting questions	Assessment Consideration
		SD	D	N			
20%	Strategy	-2	-1	0	+1	+2	The strategy is appropriate for achieving the Grant Result
							What is the idea, challenge or opportunity that the organization will explore in this project?
							What is the need in the community that this project will address? How pressing is the need? How will they address that need through the initiative?
20%	Process	-2	-1	0	+1	+2	The idea, challenge, or opportunity being explored is evidence-based and well understood.
							The type, level, and urgency of the community need is described. The way the project will impact the community is clear (e.g. breadth or depth). There is a link between the community need, how the project will address it and achieve the Grant Result.
20%	People	-2	-1	0	+1	+2	The application shows a reasonable timeline and describe links between the project activities, the project objective, and the Grant Result.
							The team has the skills, knowledge or competencies needed to lead/steward the endeavour.
20%	Infrastructure & Equipment	-2	-1	0	+1	+2	The team is qualified to lead/steward this endeavor
							Did they provide a description of the core team members leading and/or supporting the project?
							The infrastructure design and/or equipment selected is appropriate
20%	Value for Money	-2	-1	0	+1	+2	The infrastructure and/or equipment identified is appropriate for achieving the Grant Result, and the work to be undertaken is conveyed clearly by the applicant.
							Did they upload up to five (5) supporting pictures or diagrams, or provide a link to pictures, to provide greater explanation of their funding needs? Did they include a short description of each picture?
100%	Total	-2	-1	0	+1	+2	The cost per output is appropriate for achieving the Grant Result
							Does the cost seem reasonable to achieve the identified Grant Result?
							\$/Metric

## 9. UNDERSTAND THE ASSESSMENT

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### Here's what you'll have to do:

- Identify a Priority Outcome and a Grant Result
- **Strategy:** Clearly describe what idea, challenge or opportunity you will be exploring, and the community need that will be addressed through the project *50% of score*
- **Process:** Describe the activities required to complete the project *25%*
- **People:** Describe your hypothesis and what you, your organization and/or team is hoping to learn from the project *25%*

*100%*

40

# SEED VS GROW

SEED	GROW
New and untested	Existing and successful
Needs research and study	Ready to go or “research complete, ready to go”
Outcomes unknown: may be measured	Outcomes predictable: <u>must</u> be measured
One year to experiment	2 to 3 years to launch, improve, scale or expand an existing, proven program
Smaller investment that allows for some risk	Major investment in a known quantity

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	ACTIVE PEOPLE			
Priority Outcomes	Higher quality programming & infrastructure to support physical activity			
Grant Results	Trained & certified coaches, officials & volunteers	Programs are safe, inclusive, fair & age and ability appropriate	More people become active	
Metrics	Focus area of program: <input type="text"/> (pick-list) Headcount: People trained	Headcount: People trained Program count: Programs offered Focus area of program: <input type="text"/> (pick-list) Headcount: People impacted Inclusion domain: <input type="text"/> (pick-list)	Ontarians participate in an active lifestyle	
Survey Tools	N/A	N/A	Headcount: People participating in an active lifestyle	
			International Physical Activity Questionnaire	



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	ACTIVE PEOPLE		
Priority Outcomes	Higher quality programming & infrastructure to support physical activity		
Grant Results	Trained & certified coaches, officials & volunteers	Programs are safe, inclusive, fair & age and ability appropriate	Ontarians participate in an active lifestyle
	N/A	N/A	N/A
Metrics			

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



CAPITAL  
GRANTS



ACTIVE  
PEOPLE

### Action Area

ACTIVE PEOPLE

### Priority Outcomes

Higher quality programming & infrastructure  
to support physical activity

More people become active

### Grant Results

Infrastructure for unstructured & structured  
physical activities

Infrastructure is accessible & available for  
physical activity

### Metrics

Amount of new/renovated space  
(total sqft, km)

Amount of new/renovated space  
(total sqft, km), Number of additional hours  
available



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	CONNECTED PEOPLE			
Priority Outcomes	Diverse groups work better together to shape community			
Grant Results	People have a say shaping the services & programs that matter to them	People who are marginalized take on leadership roles in their communities	Diverse groups work together to improve community life	Reduced social isolation
Metrics	Head count: People engaged Program count: Program updates	Head count: People who are marginalized (pick-list)	Groups count: Groups engaged (10% to counties a group) Head count: Number of people in each diverse group (pick-list)	Head count: Isolated people
Survey Tools	N/A	Day and Sin's Leadership Effectiveness Measure	Intergroup Contact Scale	The Social Provisions Scale

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	CONNECTED PEOPLE			
Priority Outcomes	Diverse groups work better together to shape community			
Grant Results	People have a say shaping the services & programs that matter to them	People who are marginalized take on leadership roles in their communities	Diverse groups work together to improve community life	People who are isolated have connections in their community
	N/A	N/A	N/A	N/A
Metrics				

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



### Action Area

CONNECTED PEOPLE

### Priority Outcomes

Diverse groups work better together to shape community

Reduced social isolation

### Grant Results

Diverse groups work together to improve community life

People who are isolated have connections in their community

### Metrics

Amount of new/renovated space  
(total sqft, km)

Amount of new/renovated space  
(total sqft, km)

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area		GREEN PEOPLE
Priority Outcomes	More ecosystems are protected & restored	People reduce their impact on the environment
Grant Results	<div>People participate in ecosystem conservation &amp; restoration efforts</div> <div>Conservation &amp; restoration efforts are better planned &amp; more sustainable</div> <div>People connect with the environment &amp; understand their impact on it</div> <div>People &amp; resource users take deliberate actions to benefit the environment</div> <div>Mechanisms are developed to promote responsible resource stewardship</div>	
Metrics	<div>Head count: People participating in the initiative</div> <div>Type of implementation: <input type="text"/> (pick-list) Area impacted through the ground implementation (km, km<sup>2</sup>) Area covered by planning (km, km<sup>2</sup>)</div> <div>Head count: People taking deliberate actions Deliberate actions: <input type="text"/> (pick-list) Business count: Resource users</div> <div>Size of the industry/ sector/ group (enter the GDP amount for the industry)</div>	
Survey Tools	N/A	N/A
	N/A	Nature Relatedness Scale



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



GREEN PEOPLE				
Action Area				
Priority Outcomes	People reduce their impact on the environment			
Grant Results	More ecosystems are protected & restored	People connect with the environment & understand their impact on it	People & resource users take deliberate actions to benefit the environment	Mechanisms are developed to promote responsible resource stewardship
Metrics	People participate in ecosystem conservation & restoration efforts	Conservation & restoration efforts are better planned & more sustainable	N/A	N/A
	N/A	N/A	N/A	N/A

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



### Action Area

GREEN PEOPLE

### Priority Outcomes

More ecosystems are protected and restored

### Grant Results

Conservation & restoration efforts are better planned and more sustainable

### Metrics

Type of implementation:

Area impacted throughon the ground implementation (km, km<sup>2</sup>)



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area		INSPIRED PEOPLE	
Priority Outcomes	Better quality programming and infrastructure to experience culture, heritage and the arts	More people connect with culture, heritage and the arts	
	Skills and knowledge are transferred to the next generation of artistic leaders	Access to arts based learning opportunities and compelling artistic, cultural and heritage experiences	People are engaged in community based arts creation
Grant Results	Head count: People who gain skills and knowledge	Preservation and animation of cultural heritage	
		Head count: People who experience the work	
Metrics	Head count: People who experience the program	Head count: People who experience the work	
		Head count: People who create new work	
Survey Tools	N/A	N/A	
		N/A	

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	INSPIRED PEOPLE			
Priority Outcomes	Better quality programming and infrastructure to experience culture, heritage and the arts	More people connect with culture, heritage and the arts		
Grant Results	Skills and knowledge are transferred to the next generation of artistic leaders	Access to arts based learning opportunities and compelling artistic, cultural and heritage experiences	People are engaged in community based arts creation	Preservation and animation of cultural heritage
Metrics	N/A	N/A	N/A	N/A



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



### Action Area

INSPIRED PEOPLE

### Priority Outcomes

Better quality programming & infrastructure  
to experience culture, heritage & the arts

### Grant Results

Arts, culture & heritage have appropriate  
spaces

### Metrics

Amount of new/renovated space (total sqft, km)  
Number of additional hours available

Primary focus of the initiative:

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



PROMISING YOUNG PEOPLE	
More children & youth have emotional & social strengths	More youth are meaningfully engaged in the community
Parent, caregivers & adult allies have the skills to support children & youth who are facing barriers	Youth are involved in creating solutions for challenges facing their communities
Children & youth who are facing barriers develop strong emotional & social skills	Youth facing barriers volunteer and are in leadership roles
Head count: Parents, caregivers & adult allies Head count: Children & youth	Head count: Youth volunteers
Child Reading Practices Report	Head count: Youth involvement and interaction Rating Scale
Strengths and Difficulties Questionnaire	Active and Engaged Citizenship

Metrics



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	PROMISING YOUNG PEOPLE			
Priority Outcomes	More youth are meaningfully engaged in the community			
Grant Results	Parent, caregivers & adult allies have the skills to support children & youth who are facing barriers	Children & youth who are facing barriers develop strong emotional & social skills	Youth facing barriers volunteer and are in leadership roles	Youth are involved in creating solutions for challenges facing their communities
	N/A	N/A	N/A	N/A
Metrics				

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



CAPITAL  
GRANTS



PROMISING  
YOUNG PEOPLE

	PROMISING YOUNG PEOPLE	
Priority Outcomes	More children & youth have emotional & social strengths	More youth are meaningfully engaged in the community
Grant Results	Children & youth who are facing barriers develop strong emotional & social skills	Youth are involved in creating solutions for challenges facing their communities
Metrics	Amount of new/renovated space (total sqft, km)	Amount of new/renovated space (total sqft, km)



# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



Action Area	PROSPEROUS PEOPLE			
Priority Outcomes	Increased economic stability	Increased economic opportunity		
Grant Results	People who are economically vulnerable are able to meet their basic needs	People who are economically vulnerable have access to community services that enhance financial stability	People have the skills & knowledge to achieve greater financial independence	People become and stay employed
	People become entrepreneurs			
Metrics	Vulnerable populations: (pick-list) Community services – basic/essential services: (pick-list) Headcount People who access programs	Vulnerable populations: (pick-list) Community services – mid-level types: (pick-list) Headcount People who access programs	Headcount People trained and/or developed	Headcount People trained and/or developed Headcount People who start their own businesses
Survey Tools	Self Sufficiency Matrix	Self Sufficiency Matrix	Brief Financial Capability Inventory	Employment Precarity Index
				N/A

Action Area	PROSPEROUS PEOPLE		
Priority Outcomes	Increased economic stability	Increased economic opportunity	
Grant Results	People who are economically vulnerable are able to meet their basic needs	People who are economically vulnerable have access to community services that enhance financial stability	People have the skills & knowledge to achieve greater financial independence People become and stay employed People become entrepreneurs
Metrics	N/A	N/A	N/A

# GRANT RESULTS & METRICS

## BY ACTION AREA & STREAM



### Action Area

PROSPEROUS PEOPLE

### Priority Outcomes

Increase economic stability

### Grant Results

People who are economically vulnerable  
are able to meet their basic needs

### Metrics

Community Services: Basic/essential services  
(pick-list)

Amount of new/renovated space (total sqft, km)

Exercise to show how ideas can fit more than one action area

## DEVELOPMENT OF A RECREATIONAL MULTI-USE TRAIL

YOUR LONG-TERM GOAL	ACTION AREA	GRANT RESULT
Plan and build an accessible multi-use trail	ACTIVE PEOPLE	Infrastructure is accessible and available for physical activity
Develop an interpretive trail and boardwalk through a natural area, to ensure ecological values of sensitive habitats are not impacted by public use and enjoyment <i>green</i>	PROMISING YOUNG PEOPLE	People become and stay employed
Provide trail planning and development apprenticeship opportunities to local people living in low income communities <i>prosperous</i>	INSPIRED PEOPLE	Conservation and restoration efforts are better planned and more sustainable People become and stay employed
Engage community youth to lead the design and development of a trail, ensuring relevance for young people <i>promising young</i>	GREEN PEOPLE	Youth are involved in creating solutions for challenges facing their community
Community members work with professional artists to create permanent art installations along a multi-use trail <i>inspired</i>	PROSPEROUS PEOPLE	People are engaged in community-based arts creation

ACTIVITY 1

MATCH BEST GRANT RESULT TO  
APPLY 4 BEST GRANT

Jan 2018