

Community Program Guidelines 2009

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The Metcalf Foundation

The George Cedric Metcalf Charitable Foundation's goal is to enhance the effectiveness of people and organizations working together to help Canadians imagine and build a just, healthy and creative society.

WE FOCUS OUR EFFORTS ON THREE AREAS:

- sustaining the vibrancy of the professional performing arts
- ensuring the ecological integrity of our natural and working lands
- developing lasting solutions to issues of poverty

Our work is grounded in the belief that change happens when we share hopeful visions of the future, work and learn collectively, think broadly in pursuit of comprehensive solutions, take a meaningful role in the decisions that affect our lives.

We believe that non-profit organizations play a critical role as catalysts, who animate and facilitate lasting change. They create space for people to connect, communicate, and participate. We are interested in organizations that are deliberately engaging communities in their work, and developing new strategies and collaborations.

WE TRY TO ENCOURAGE SUCCESS BY:

- supporting dynamic leadership – celebrating, developing, and strengthening leaders who are contributing to positive change
- nurturing new ideas and practice – exploring and developing innovative approaches to tackling tough problems and seizing opportunities
- fostering integrated thinking – creating opportunities for ongoing dialogue, collaborative learning, and reflection, to build new knowledge and inform action

In our work, we aim to be clear, open, reflective and responsive. We actively seek to learn from our experiences with funded projects, and from our ongoing exploration of issues and ideas. We expect our grant-making practices to evolve as we strive to realize the full potential of our commitment and resources.

The Community Program

The Metcalf Community Program seeks to strengthen and enhance the effectiveness of people and organizations working together to address the root causes of poverty.

We believe people and communities should be able to realize their individual and collective potential. They should have the chance to succeed in education, employment, housing, health and in other dimensions of well-being. Yet the growth and persistence of poverty in Toronto diminishes human potential and the quality of community life.

We believe in the power of community – people coming together, sharing a common hopeful vision for the future while working on issues they care about today. We want to support the deep commitment of individuals and organizations in our city that are building lasting solutions to issues of poverty. These individuals and organizations are seeking ways for people to have opportunities to earn a decent living, build assets, and develop vibrant social networks. They are supporting low-income people to have a strong voice in the discussions and decisions that affect their lives. They are striving to promote positive changes in our institutional structures and policies in order to address challenging social problems. They are engaging a broad range of people to join together in this work.

Our Program is designed to encourage opportunities and resilience in these

people, organizations and the low-income communities they work with. We hope to enrich the development of strong community voices and comprehensive, long-term approaches to issues of poverty. We focus on building success through three key Foundation strategies: supporting dynamic leadership; nurturing innovative approaches to persistent problems, and encouraging dialogue and learning to inform action.

We have two interrelated program themes:

- [Communities in Action](#)
- [Leadership in Action](#)

Within the context of our program we define community broadly. It may be a geographic community – such as a neighbourhood; a community of common bond – such as ethnicity, gender, or sexual orientation; or a community of common interest – such as a group of temporary workers or parents.

We expect our program to evolve as we learn from both our experiences with projects on the ground and our exploration of emerging ideas and issues. We will also maintain flexibility in our program in order to respond to issues and opportunities as they arise over time.

Communities in Action

Across our city, nonprofits are working with low-income communities and individuals in the private and public sector in creative new ways to tackle intractable issues of poverty and marginalization in order to create a decent living for all.

This initiative aims to encourage and advance their efforts. We do this by supporting strategies that foster informed discussion and collaborative action among a broad range of stakeholders, strengthen the voice of low-income people, and enables nonprofits to enhance their capacity to address root causes of poverty.

Our geographic focus is the City of Toronto. This is not a direct services funding program as this concept is traditionally understood. Service delivery, while an extremely important strategy, cannot in isolation address the current conditions in which low-income people live. Rather, the program is designed to support both proven and innovative approaches to poverty reduction through three interrelated themes:

Making Connections – We are interested in creative community problem solving efforts that bridge and build upon differences, and leverage and connect good ideas. Strategies funded may include those that contribute to comprehensive approaches to persistent social issues that link sectors – public, private and non-profit – necessary to achieve large scale impact, promote the case for

public policies aimed at permanent solutions to poverty, help to reframe the issues and solutions, and foster network-based approaches for making change.

Nurturing Leadership– We wish to enhance the efforts of low-income communities to address underlying conditions of poverty and to connect their efforts to others. Strategies funded may include those that increase community members’ knowledge and analysis of issues, strengthen their leadership by working with the wisdom and wealth already present in people, and link their actions to broader networks, public institutions and processes to improve local conditions and systemic problems.

Strengthening Organizations – In our view, organizational capacity is linked to effective community building. We want to encourage efforts to integrate social change principles and approaches more widely into organizations. Strategies funded may include those that enhance the ability of boards to engage on public policy issues, expand staff leadership, enable the incorporation of service provision and community mobilization efforts, and foster capacity and connections across organizations.

We will consider requests for both short-term and multi-year funding to this initiative.

WHO IS ELIGIBLE TO APPLY?

As a charitable foundation registered with the Canada Customs and Revenue Agency (CCRA), the Metcalf Foundation can only offer support to organizations with charitable status. If you have an idea that advances the goals and objectives of our program but your group does not qualify, please contact us. We may be able to offer support or assistance in other ways.

In addition to being a registered charity, eligible applicants must be:

- Located and operate in the City of Toronto
- Have a mission that focuses on addressing issues of poverty in Toronto

WHAT IS THE APPLICATION PROCESS?

The Foundation will review applications for the Communities in Action program twice annually, once in the spring and once in the winter. Prospective applicants are encouraged to contact the Community Program Director in advance to discuss their proposals. Applying to this program is a two-step process.

Step One – Letters of Interest

Interested organizations must first send a letter of interest to the Foundation. This letter should briefly outline the purpose of the project and the issues the proposed project will address, project timeframe, approximate budget and the amount being requested from the Foundation. This letter should not exceed three pages. The Metcalf Application Cover Page must be attached to the front of this letter. Foundation staff will review letters of interest, identifying compelling and appropriate proposals for further consideration. Please provide [two paper copies of the proposal \(printed double-sided\)](#) and submit an electronic version in word to emurphy@metcalffoundation.com.

Step Two – Full Application

Based on the letters of interest, we will invite organizations to submit full applications.

This is not a guarantee of funding. Those organizations invited to submit full proposals should develop a typed application not to exceed 8 pages containing:

- A short summary of your history, mandate and current strategies and services that address issues of poverty.
- A description of the change you want to see happen. (Vision and goals)
- A context analysis of what needs to be different to make the change happen and why. This should include but is not limited to: a clear articulation of the issue you are addressing; reference, where relevant, to the policy context; initiatives currently underway with the communities you are proposing to engage; and how other stakeholders are approaching this issue. (Rationale)
- How your project contributes to making the change happen. This should include a clear, well-formed description of your proposed strategy(s), and how it links to poverty reduction more broadly in Toronto. (Objectives and strategy)
- The results you hope to achieve and how you will know you are making progress. (Outcomes and evaluation)
- A description of the other groups or constituents that need to be involved to realize the project results. This should

include but is not limited to: an outline of your current working relationship with these groups or constituents; evidence of support for the project from them, if appropriate; and how they will be engaged in the project.

- How this project builds on existing work in the organization.
- A description of the potential challenges and opportunities to successfully implement your project, and how you plan to address any unforeseen factors that may arise.
- A description of what you are most interested in learning from undertaking this work.
- A project workplan that includes anticipated milestones.
- Brief bios of key project staff.

All full proposal applicants must also submit a:

- Metcalf Application Cover Page
- Completed budget template provided by the Foundation
- List of current Board members
- Copy of the organization's most recent annual report
- Copy of the organization's most recent audited financial statement

A separate letter of introduction may be included. Additional printed material, e.g. annual reports or newsletters can

also be attached as background information if you wish. Please note that we are unable to consider incomplete applications for funding. Please provide **ten paper copies of all proposal materials (printed double-sided) and submit an electronic version in Word to cmurphy@metcalffoundation.com.**

We will not fund:

- Direct services that focus on poverty amelioration
- Ongoing operating expenses that are unrelated to the proposed project
- Capital projects
- Endowments
- Deficits

HOW WILL APPLICATIONS BE ASSESSED?

Applications will be reviewed by the Foundation's Board and staff, assisted by an advisory committee from the community.

We will assess applications on the basis of:

- The track record and history of the participants involved.
- Whether people affected by the organization's work are already included in its governance and other decision-making structures.

- Whether the proposed project will help meet the Foundation's Program goals and objectives.
- The organization's readiness to undertake this type of work.
- The strength and clarity of the proposed strategies.
- The potential project results and its likelihood of success.
- The potential to learn about new approaches and practice.

HOW WILL WE LEARN FROM OUR WORK?

Successful applicants set indicators of success in partnership with the Foundation at the start of the grant. They meet annually with us, so the partners can jointly discuss how we will learn from our work and monitor progress and results. We will also seek opportunities for grantees to share their work and learnings more broadly.

We reserve the right to review our ongoing commitments if circumstances arise in which the project is unlikely to be realized. These circumstances could include failure to undertake activities or to meet goals as described in the proposal or severe financial difficulties.

Leadership in Action

The people working in the community-based nonprofit sector are its most crucial resource. They are creative, committed individuals working in challenging environments to address complex social issues and realize bold visions for the future. However, time and resources for these individuals are often very limited to support personal and professional development, generative learning or exploration of fresh approaches to issues.

The goal of this program is to enhance the skills and scope of exceptional individuals within this sector. Our initiative is based on the belief that nonprofits play a critical role in imagining and building an equitable, just, and caring society. The sector is often the space where people connect and make an impact on issues of local and national importance.

We seek to foster a strong, reflective, diverse community-based nonprofit sector by supporting people who work in it at various stages of their careers:

- Innovators who have an exciting new idea they want to investigate to address systemic issues of poverty or strengthening the nonprofit sector.
- Seasoned senior leaders who seek an opportunity for intellectual and personal renewal.
- Middle managers who are the next generation of non-profit leaders.

Through this program we offer three distinct learning and leadership opportunities:

Innovation Fellowship – a research & development fellowship for innovators in the nonprofit sector.

Renewal Fellowship – a sabbatical program for mid-career senior leaders.

Emerging Leaders – a Middle Management and Leadership Certificate Program.

Innovation Fellowship

The Foundation believes that there is extraordinary potential in the provision of structured research and development time for people in the community based sector, and that this form of work could lead to pioneering ways to approach seemingly intractable social issues.

We want to give people of vision and creativity who have demonstrated outstanding talent and originality the opportunity to investigate powerful ideas, models and practices that have the potential to lead to transformational change. The focus could involve the development of new ideas, or explore new applications or contexts for existing ideas or practice. The Innovation Fellowship would enable these individuals to free themselves up from other responsibilities to pursue a course of exploration not available under normal circumstances.

This is an intentionally flexible initiative that does not prescribe a specific course of action. Individuals involved in social change work may propose any type of project they wish to pursue bearing in mind that it must contribute to the mission of the Metcalf Community Program which is: *to strengthen and enhance the effectiveness of people and organizations working together to address the root causes of poverty.*

We encourage applicants to be as creative as possible in their proposal in order to push at the boundaries of knowledge and practice.

The Innovation Fellowship is designed to contribute to fostering a reflective, diverse community sector capable of responding to our complex social challenges. Upon project completion it is expected that Fellows will produce some form of publicly available work for distribution in order to share their learning with their peers and other interested constituents.

WHO IS ELIGIBLE TO APPLY?

The Innovation Fellowship is aimed at individuals with vision, a passion for their issue, intellectual rigor, and a willingness to ask questions and propose solutions that may surprise. Innovation Fellows may come from such places as nonprofits or higher education, and include policymakers, managers, academics and entrepreneurs. Eligible applicants must have a significant record of achievement and worked in an area related to their proposed exploration for a minimum of three years.

WHAT ARE THE FUNDING PARAMETERS?

Funding can be used to support costs associated with project activities. We will consider supporting applications from more than one individual to jointly pursue a course of research and development. Awards of up to a maximum of \$40,000 will be made available for Innovation Fellowships.

WHAT IS THE APPLICATION PROCESS?

The Foundation will accept applications on an ongoing basis. Decisions will be made at quarterly Board meetings. Prospective applicants are encouraged to contact the Community Program Director in advance to discuss their proposals. Applications should not exceed 6 pages containing:

- A completed Metcalf Application Cover Page.
- A detailed overview of the idea, issue or model you want to explore including: what social challenge this initiative is intended to address, why it is important and innovative; a rationale for, and description of fellowship activities; a brief overview of what are others doing in this area; and how you think this fellowship will contribute to Metcalf Foundation's Community Program goals.
- A list of who you envision involving in your fellowship to advance your thinking.
- A preliminary budget of expenses associated with fellowship activities.
- A comprehensive resume including key accomplishments and career highlights.

- Three letters of reference from professional colleagues who can comment on the idea, issue or model you want to explore and your capacity to undertake the proposed work.
- A letter from the Board Chair or senior leadership of the organization, as applicable, confirming support for the initiative.

Proposed applicants associated with an organization must also submit a:

- List of current Board members.
- Copy of your organization's most recent annual report.
- Copy of the organization's most recent audited financial statements.

A separate letter of introduction may be included. Additional print materials may also be attached as background information.

Please provide **five paper copies of all proposal materials (printed double-sided) and attachments and submit an electronic version in Word to emurphy@metcalffoundation.com.**

Innovation Fellowship (continued)

HOW WILL APPLICATIONS BE ASSESSED?

Applicants will be reviewed by the Foundation's Board and staff, assisted by advisors from the community. We will assess applicants based on the following criteria:

- Skills, resources and expertise to undertake the proposed project.
- Career history and accomplishments.
- Scope of the project, its creativity and originality, and potential contribution to addressing issues of poverty.
- Demonstrated willingness to learn and effectiveness in sharing ideas and knowledge.
- Organizational readiness to support individual to undertake a fellowship.

HOW WILL THE INNOVATION FELLOWSHIP BE EVALUATED?

Each Fellow determines the goals and objectives for their project and, in consultation with the Foundation, the final deliverables. They will meet with us at the beginning of the fellowship, so we can jointly discuss how we will learn from our work and monitor progress and results. Upon completion the Fellow will prepare a publicly available form of the work. The Foundation will work with the individual to disseminate their findings. We will also seek to create opportunities for peer learning with other Fellows in the program and colleagues in the community.

Renewal Fellowship

Toronto is graced with a dynamic and diverse community based nonprofit sector which is one of its greatest assets. Over the course of their careers, senior leaders in this sector have made an enormous contribution. They have been developing new programs, delivering essential services, mentoring younger staff, building organizations, and influencing public policy to improve social conditions for low-income people. Their work has been a personal and professional investment in the organizations they serve, and the vibrancy of the sector and city as a whole.

In most cases, this work is carried out in challenging circumstance – with limited resources in a difficult and rapidly changing environment. Stress, burnout, and attrition are real human resource concerns. Investing in the health and productivity of those who work at all levels in the community based nonprofit sector is essential for its continued success.

Through the Renewal Fellowship, the Foundation wishes to support, celebrate and strengthen exceptional senior leaders and recognize how much they can benefit from periods of professional development and replenishment. This sabbatical provides people with time for intellectual and personal revitalization. Individuals can pursue goals, ideas, and practices that will enable them to return to their work with a

renewed sense of purpose, creativity, and enhanced capacity to contribute to making transformational change. Through this Fellowship, the Foundation also hopes to focus attention on the critical link between leader renewal and organizational and sectoral health and viability.

This is an intentionally flexible initiative that does not prescribe a course of action but instead aims to enable a range of responses from outstanding leaders that support their own reflection and renewal. Fellows are not required to produce a formal work product for the Foundation. However, they will be asked to articulate a plan for how they will integrate renewal practices in the workplace upon their return in order to sustain their effectiveness and that of the organization over time.

We will accept applications for a wide range of activities including but not limited to: residencies, specialized training or study, research, and travel. The pursuit of post-secondary degree or diploma programs will not be supported under this program.

During the sabbatical, the Fellow will not be involved in regular workplace demands or decision-making in their organization devoting their full attention to Fellowship activities. In most circumstances, they will not undertake any other work for compensation during this period.

Renewal Fellowship (continued)

WHO IS ELIGIBLE TO APPLY?

This program is aimed at outstanding individuals with at least ten years' experience in the community-based charitable sector who currently hold a senior level position within their organization, or who have senior management responsibilities. Eligible applicants must have been in their current position for a minimum of two years and their organization's mandate must focus on strengthening low-income communities. Eligible applicants must work in an organization that is located and operates in the City of Toronto.

WHAT ARE THE FUNDING PARAMETERS?

We see the Renewal Fellowship as a collaboration between the Foundation and participating organizations to support the replenishment and reengagement of extraordinary individuals in the field. During the term of the Fellowship, the Foundation will provide financial support up to a maximum of \$40,000 to cover costs associated with living expenses and sabbatical activities. The employer will continue to be responsible for the Fellow's benefits throughout this period. Fellowships may range from 3-12 months in length. Successful applicants must start their fellowship within 12 months of it being awarded.

WHAT IS THE APPLICATION PROCESS?

We will review Renewal Fellowship applications once in 2009, in late spring. Please provide **six paper copies of the proposal (printed double-sided) and submit an electronic version, in Word, to cmurphy@metcalffoundation.com.**

The application should include:

- A completed Metcalf Application Cover Page.
- A comprehensive resume including key accomplishments and career highlights.
- A letter that describes why you are applying for a fellowship and how you propose to use your sabbatical including:
 - Details of any activities you propose to undertake (including evidence of acceptance if you are applying to a training institution as part of your sabbatical).
 - How you believe the fellowship will benefit you personally and why it is important at this point in your career.
 - How you think this sabbatical will influence your work going forward and where you would like to be professionally in five years.
 - How this sabbatical connects to your personal vision.
 - How your organization will be affected by, and will accommodate your absence.
- A statement of your current salary and benefits.

Renewal Fellowship (continued)

- A preliminary budget of expenses associated with sabbatical activities.
- Three letters of reference assessing your appropriateness for the Renewal Fellowship (one must be from your Board Chair and two from professional colleagues).

Proposed applicants must also submit a:

- List of current Board members.
- Copy of your organization's most recent annual report.
- Copy of the organization's most recent audited financial statements.

We strongly encourage applicants to discuss their intention of applying for a fellowship with their Board of Directors or direct supervisors. They will need to be involved in developing a leadership transition plan for the organization if your fellowship application is successful. Executive Directors applying to this initiative can go to Renewal Fellowship on our website for more information on how to assess your own and the board's readiness to embrace a Renewal Fellowship.

HOW WILL APPLICATIONS BE ASSESSED?

Applications will be reviewed by the Foundation's Board and staff, assisted by advisors from the community. We undertake

both a paper review and invite eligible applicants to an interview with staff and advisors. Reviewers want to understand how this investment will make a tangible difference to the candidate at this particular time in his/her career and how it will contribute to his/her career, and broader contribution to society in the future.

We will assess applicants based on the following criteria:

- Career history and accomplishments.
- Fellow's potential for future contributions to the community-based sector and issues of poverty reduction.
- Scope of proposed sabbatical activities.
- Potential benefits to the individual from the sabbatical.
- Organizational readiness to support the individual to undertake a sabbatical.

HOW WILL THE RENEWAL FELLOWSHIP BE EVALUATED?

Each fellow determines their personal and professional goals and objectives. We will meet with each fellow at the start and upon completion of the sabbatical to reflect on and assess the experience and how we will learn from this opportunity. A financial summary and final written report is required. We will also seek to create learning opportunities for fellows who are part of this initiative.

Emerging Leaders:

A Middle Management and Leadership Certificate Program

SUPPORTING A NEW GENERATION OF LEADERS

The next generation of nonprofit leaders will come from a diverse group of middle managers in the social services sector.

To strengthen the skills and scope of these exceptional individuals, the Metcalf Foundation and United Way of Greater Toronto present a unique certificate program – *Emerging Leaders*.

Offered in partnership with the Schulich School of Business at York University, the Emerging Leaders program focuses on leadership development, core management skills, and sectoral analysis. Participants in the 23-day certificate program will:

- Build their skills to respond to complex challenges and opportunities in their workplaces today
 - Enhance their ability to lead organizations in the future
 - Learn strategies for understanding and adapting to change
 - Strengthen skills in best management practices in financial management, project management, human resources and other key areas
 - Develop leadership tools to influence policy decisions and foster collaboration
- Receive a York University Management and Leadership Certificate upon successful completion of the program
- Connect with a dynamic Emerging Leaders Alumni Network

University faculty, subject experts and experienced practitioners will lead participants through hands-on workshops and peer-based learning. The program format includes full day class sessions, retreats and off-site learning activities.

Through a generous funding opportunity, United Way of Greater Toronto and the George Cedric Metcalf Charitable Foundation have partnered to offer financial support to this program. This financial support will cover the program cost, valued at \$8,400 per participant.

WHAT IS THE APPLICATION PROCESS?

The Foundation will not be operating the Emerging Leaders Program in 2009 while we investigate alternative ways to support leader development in the sector.

Application Deadlines for 2009

Applications must be received by the Foundation as follows:

COMMUNITIES IN ACTION

Application Steps	Spring 2009 Deadlines	Winter 2009 Deadlines
Letter of interest	March 4	September 16
Foundation extends invitation to apply	March 23	September 23
Full application deadline	April 27	October 28
Board decision	June	December

LEADERSHIP IN ACTION

Innovation Fellowship	Spring 2009 Deadlines	Winter 2009 Deadlines
Deadline	No set deadline – continuous intake throughout the year	
Board decision	Quarterly	

Renewal Fellowship	Spring 2009 Deadline
Deadline	June 1
Board decision	September

Emerging Leaders	2009 Deadline
Deadline	No deadline in 2009

Prospective applicants are strongly encouraged to contact the Community Program Director in advance, to discuss their proposals.

Please submit your application by mail to:
The George Cedric Metcalf
Charitable Foundation
174 Avenue Road
Toronto, Ontario M5R 2J1

and by email to:
cmurphy@metcalffoundation.com

