Grow grants support the delivery of evidence-based community projects

Offering $50,000 to $250,000 per year with a 2 to 3 year term

As one of Canada’s leading granting foundations, we are committed to providing applicant focused resources to assist your organization in understanding what and how we fund. This manual provides an overview of the Grow Investment Stream as well as the requirements, assessment criteria and important tips specific to this Investment Stream.

Before applying for an OTF grant, it’s important to ensure your organization and project are eligible for funding based on our Eligibility Policy and can meet the application deadlines published on our grant application deadlines page.

We are continuously looking at ways to improve our work so that organizations can apply for grants more efficiently. In doing so, we review our grant applications to ensure they reflect the communities and non-profit sector they are meant to support. Please ensure you review our 2019 Grow grant application and assessment criteria, and the accompanying manuals for the most up-to-date information.

If you require further information after reading through this manual, please contact our Support Centre at otf@otf.ca or 1 800 263-2887 or book a coaching call with a Program Manager in your area through our online booking tool.
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SECTION 1
PURPOSE OF A GROW GRANT

The Grow Investment Stream supports projects that are evidence-based and deliver on specific Grant Results to contribute to the longer-term goal of the related Priority Outcome and Action Area.

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 evidence-based programs.

1A. GRANT COMPARISONS

It is helpful to compare the different types of grants that we fund through our Investment Streams.

<table>
<thead>
<tr>
<th>Summary</th>
<th>Capital grants support projects that improve infrastructure needed to broaden access to community spaces</th>
<th>Seed grants support projects at the idea or conceptual stage</th>
<th>Grow grants support the delivery of evidence-based community projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount funded</td>
<td>$5,000 to $150,000</td>
<td>$5,000 to $75,000</td>
<td>$50,000 to $250,000 per year</td>
</tr>
<tr>
<td>Term</td>
<td>Up to 1 year</td>
<td>Up to 1 year</td>
<td>2 to 3 years</td>
</tr>
</tbody>
</table>
| Activities funded | • Equipment  
• New construction  
• Renovations or repairs  
• Purchase of land or building | • Convene around an emerging issue  
• Conduct a feasibility study  
• Research a new concept  
• Develop or pilot a new idea | • Launch, replicate or adapt a program  
• Scale up a program currently being delivered, thus impacting more people  
• Improve the quality of a program currently delivered to increase impact |
1B. TYPES OF GROW PROJECTS

OTF funds local community projects that are evidence-based and drive at achieving greater impact in their community. The Grow Investment Stream focuses on three types of projects, which enable us to see positive change in our communities.

First, let’s define what we mean by evidence:

OTF considers evidence as strong indication that program components work. The evidence you provide in your application can come from your organization or from an external source.

Examples of evidence must:

- Demonstrate that your project will have potential positive change.
- 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.

Project Type 1: Launch, Replicate, or Adapt a program

This type of project assumes that you want to launch a new program (new to your organization), not a program that you have delivered or are currently delivering. This could be a program that has been delivered in another community, another province, or even another country.

What matters is that:

- There is evidence that the program you wish to run will deliver the impact related to the Grant Result chosen.
- You are able to demonstrate that you can successfully achieve your stated impact with this program, within your community context, and with the intended audience.
- In launching the new program, you may be replicating the program. In other words, duplicating or repeating it as it was originally designed and delivered. Or you may be adapting the program, thus ensuring that the program is a stronger fit for your community, community context, and with the intended audience.

Project Type 2: Scale up a program currently being delivered, thus impacting more people

This type of project assumes that you have already been delivering the program in some way, shape or form and that you have strong evidence in hand that the program works to achieve the intended impact and the OTF Grant Result selected.
The focus is on **increasing the reach** of the program in some way - this could mean expanding into new neighbourhoods or geographic areas. Or it could be significantly increasing the number of people who will benefit from the program or both.

**Project Type 3: Improve the quality of the program currently being delivered to increase impact**

This type of project also assumes that you have **already been delivering the program** in some way, shape or form, and that you have strong evidence that the program works to achieve the intended impact.

It also assumes that you have **evaluated this program over time**, and that your evaluation results demonstrate that if you are able to significantly adapt the program, you will affect a much **deeper change** and have a much broader impact (greater reach) for the people who are benefitting from and/or participating in the program.

When considering applying for a Grow Grant, it will be helpful to identify if your project fits under one of the project types above.
1C. TYPES OF COSTS FUNDED

It is also helpful to review the types of costs that your organization wants to include in a Grow grant application. All costs included in your application (within the OTF Grant Budget) must be necessary to carry out your project and must be one of the following eligible costs:

**Minimum and Maximum eligible costs**

Your OTF Grant Budget must meet the minimum requirements for a Grow grant application.

- Grow grants cannot exceed $750,000 in total, including the capital costs.
- Grow grants must include a minimum of $50,000 per year for non-capital costs.
- A maximum of 20% of the total OTF Grant Budget can be capital costs.

The focus of a Grow grant 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. Read our Capital Grants Policy for further details.

**Direct Personnel Costs**

Salaries, mandatory employment-related costs and employee benefits for staff positions funded specifically to carry out the project.

**Direct Non-Personnel Costs**

All non-personnel costs directly related to project delivery.

- **Purchased Services:** Services purchased including the services of consultants/contractors/subject experts specifically relating to the delivery of the project.
- **Workshops, Meetings, Convening:** Meeting/convening costs incurred relating to the delivery of the project.
- **Supplies and Materials:** Items purchased specifically for use in the delivery of the project.
- **Travel:** Travel costs incurred by employees, volunteers and participants, that are directly related to delivering the project.
- **Evaluation:** Evaluation costs such as project evaluation, survey administration, evaluation reporting can be included in your OTF Grant Budget. Up to a maximum of 10% of the total OTF Grant Budget can be used for project evaluation.
- **Capital:** Repairs, renovations, equipment purchased specifically for use in the delivery of the Grow project. A maximum of 20% of the total OTF Grant Budget can be capital costs.
**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 OTF Grant Budget**. These do not include the direct costs to run or deliver the project, including the staff or equipment associated with the project but include a portion of regular operational expenses that can be attributed specifically to this project. Please refer to the [Overhead and Administrative Costs Policy](#) for further details.

**Emerging Governance Platform (EGP) Administration Fee**

OTF will fund EGP administrative costs directly associated with the funded project to a **maximum of 10% of the total OTF Grant Budget**. For the purpose of applying to OTF, an EGP is an organization eligible for OTF funding that enters into an agreement with an unincorporated group, where the eligible organization is legally responsible for the grant application and the grant for the project that will be delivered by the unincorporated group. Refer to the [EGP Tip Sheet](#) for further details.

### 1D. TYPES OF COSTS/PROJECTS NOT FUNDED

As we’ve mentioned before, the Grow Investment Stream plays an important role in our Investment Strategy, and only specific types of projects and costs are eligible.

Below are examples of requests that are not eligible for funding due to lack of fit with the Grow Investment Stream and OTF’s Investment Strategy:

**Core Funding**

Although you can ask for funds to support overhead and administrative costs that are directly associated with your project (to a maximum of 15% of the total OTF Grant Budget), OTF cannot provide core funding or operating grants for current operations. Similarly, projects where the primary outcome or focus is to increase the capacity of the organization overall are not a fit with OTF’s Investment Strategy.

**Maintaining an existing program**

Applying to maintain an existing program is also not eligible - competitive Grow grant applications must demonstrate how the project will significantly increase the impact on people in the community.

**Programs that aren’t evidence-based**

You must be able to demonstrate that your project will achieve positive change. This means that if you want to scale up a program that you have already been delivering, you have to be able to back it up with evaluation data that demonstrates that the program works to achieve your stated impact (in relation to the Grant Result).
Adapting a program that won’t create additional impact

It’s also important to keep in mind that in adapting a program, either your own or another’s, you must be able to demonstrate that a Grow grant will help you create additional impact, whether that’s an increased number of people benefitting from the program, or people benefitting in a much deeper way that will extend or significantly enhance the change that you want to initiate.

Projects that are primarily focused on capital items (equipment, renovations, new capital construction)

Grow grant applications can include funds to purchase capital equipment, to renovate a building or physical space, or to construct something new. However, you must demonstrate in the grant application that the capital element is absolutely required in order to successfully complete the program elements of the project. For example, renovating a building to be physically accessible may be an absolute requirement in order to successfully scale up a program that has a direct impact on people with physical disabilities, while replacing the roof may not be directly connected to the specific project and Grant Result. In the latter example, a project to replace the roof might be a better fit for a Capital grant.

1E. DO YOU NEED QUOTES

Quotes are required 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 two or more competitive bids/quotes. 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.

Although quotes do not need to be uploaded with your Grow application, OTF may request them during the application assessment or once your application is approved so this means it’s important to have them on hand and ready.
SECTION 2
HOW TO SUBMIT A STRONG GROW GRANT APPLICATION

A Grow grant can be very helpful to increase your organizations' impact and is often a significant milestone in an organization's journey. However, applying for a Grow grant requires a large, upfront time investment and is quite competitive. That's why it is important to ensure your organization's project aligns with what we fund.

This section will help you identify if your project is a proper fit with the Grow Investment Stream and its intended outcomes.

First, let's define some important OTF terms and watch our Introduction to OTF Investment Strategy video.

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INVESTMENT STRATEGY

**Action Areas**
What we mean by healthy and vibrant communities

**Priority Outcomes**
The long-term change we hope to achieve in each Action Area

**Grant Results**
What grantees commit to achieve to meet the goal of the Priority Outcome

**Metric**
(Grow only)
Concrete targets that grantees set for themselves and commit to achieving for the chosen Grant Results
2A. CHOOSING THE RIGHT ACTION AREA

When your organization applies for a Grow grant, you will first need to select which Action Area your project focuses on.

Learn more about what we are trying to achieve in each Action Areas and familiarize yourself with its associated Priority Outcomes, Grant Results and metrics.

2B. CHOOSING THE RIGHT GRANT RESULT

Based on the Action Area you select, you will also need to select one of the associated Priority Outcomes and Grant Results. A successful Grow project will have demonstrated a strong fit with a particular Grant Result for the connected Priority Outcome and Action Area.

- Think about this project in particular, rather than your work in general
- Focus on goals vs. activities
- Ask yourself why you want to do this project and what will it achieve

Grow grant applications must demonstrate:

- Growth/increased impact in relation to the Grant Result
- Evidence that the growth/increased impact can be achieved, in relation to the Grant Result
- That the project is ready to go. This means that partners are in place, project components are determined and that evidence is in place

It’s important your project fits with a Grant Result that is based on the main purpose or end goal of your project. That purpose or goal must drive the Grant Result you choose. All of your application information must link back to that long-term end goal.
What if your project fits with more than one Grant Result?

Often, project outcomes could align with more than one Grant Result. If that is the case, you need to identify which of the Grant Results is the best fit with your project, even if more than one Grant Result may apply.

The Grant Result is what you commit to achieving, so it’s important to choose one that’s a good match with the specific project you’re asking us to fund. Thinking about the change you are trying to achieve may help you distinguish between two Grant Results.

2C. CHOOSING THE RIGHT METRIC

The Grow Investment Stream requires organizations to report on specific metrics, which are the concrete targets (i.e. a head count of 500 coaches trained) that are directly tied to Grant Results.

The metrics we have identified allow us to track and measure the impact of our work, and the work of our grantees. Your organization is accountable for all the metrics associated with the Grant Result you select.

Tip: Metrics are directly tied to Grant Results.

Pick lists/drop-down

Certain metrics require you to get more specific about your project. For these metrics, there is a predetermined list. This mean that in the grant application, you will be prompted to select from those lists while entering your metric information. Review these lists [here](#).

Example

In the Prosperous People Action Area, the “People who are economically vulnerable are able to meet their basic needs” Grant Result requires you to:

1. Select the vulnerable population your program will benefit (pick list)
2. Select the community services your program will provide (pick list)
3. Enter the head count of people who access your program (numeric target)
**Prosperous People**

- Increased economic stability
- People who are economically vulnerable are able to meet their basic needs

**Pick list/drop down**

- Vulnerable populations
- Community services - basic/essential services
- **Numeric Target**
  - head count - people who access programs

### Action Area | Priority Outcome | Grant Result | Metrics
---|---|---|---

**Numeric targets**

In the metric section of the Grow application, we also require you to choose numeric targets, based on your chosen Grant Result, which reflect your projects expected positive impact.

**Using the ‘RAM’ formula, pick metrics that are:**

- **R: Relevant**
  - Choose metrics that are relevant to the impact you plan to achieve.

- **A: Attainable**
  - Choose metrics that are attainable with your group's current capacity.

- **M: Measurable**
  - Metrics must measure the impact made during the life of the grant - so build your evaluation plan to ensure you'll have the ability to quantify and track the impact for the whole term of the grant.
Be realistic and choose metrics you think you can achieve with your organization's current capacity. Think about the future, not the past.

**Tip:** If the metrics associated with your Grant Result aren't in line with your project, this is a sign that your project does not fit with the Grant Result.

**Pre/Post Surveys**

OTF will require all Grow grantees working towards 13 of the 28 Grant Results to conduct standardized surveys of program participants. We're not talking about your own surveys you may be conducting, but a particular pre/post participation survey that OTF will provide if your grant is approved.

We have selected standardized survey tools that will help us get the full picture of the impact of our investments. Each survey that you administer for your project will become part of a larger story, highlighting OTF's impact across the province.

If your application is approved, OTF and its external evaluation partner will contact all relevant grantees and invite them to an orientation webinar. We’ll have support available and resources to help you understand the process of survey administration. The survey also becomes part of your Grow grant’s evaluation plan. But this in no way prevents you from doing your own evaluation as well.

- Learn more about our [Grow grant survey tools](#) and which Grant Results requires a pre/post survey.
- Read the [FAQs about the Standardized pre/post surveys for Grow Grant results](#).
- Grow grantees can use our [Grow Grant Standardized Survey Planning Worksheet](#) to plan how and when to survey program participants.
2D. Submitting the Right Evidence

The design of your Grow project must be supported by an evidence-based model that demonstrates you will be effective in achieving the Grant Result you have selected.

Evidence may include: project evaluations, research studies, statistical analysis and traditional knowledge. The evidence can come from your organization and/or external sources.

In your Grow application, tell us why the evidence you are providing proves your project's process and components will successfully deliver the chosen Priority Outcome and Grant Result. Be sure to link your evidence cited to the Grant Result you are choosing.

- Name the sources, and provide a one-line description of their contents
- Connect them back to the Grant Result you've chosen

For more information on what OTF requires Grow grant applicants to submit, visit our Evidence resources.
SECTION 3
HOW ARE GROW GRANT APPLICATIONS ASSESSED?

During the decision-making process, we carefully read each submitted grant application. Each grant application is evaluated on the organization's eligibility, project's eligibility and lastly, the project is scored based on four assessment areas.

For a technical look into all of our assessment criteria, read the Grow Investment Stream Application Assessment.

For a general overview of how we assess Grow grant application, read the following section.

3A. ORGANIZATION ELIGIBILITY

When your organization is writing a Grow grant application, it must first begin by completing the Organization information and submit the required attachments.

We assess an organization's eligibility using the information submitted in the Organization section.

An organization will be eligible for funding if they meet all of the following criteria:

- The organization adheres to OTF's Anti-Discrimination Policy
- The appropriate financial statements are provided based on the organization's total revenues and fiscal year end date.
- The organization has a surplus/deficit and has submitted an explanation
  - See our Financial Statement Requirements
- The Board of Directors meets OTF requirements:
  - Organization has a minimum of three board members
  - At least 50% of the board must maintain an arm's length relationship to each other
  - An 'arm's length' relationship means board members and organization executives are not married or related to each other, do not work as business partners or are otherwise in a relationship where interests may be compromised
- (If applicable) The organization has past applications, either approved or declined, and OTF has no concerns with the organization's granting history
3B. PROJECT ELIGIBILITY

The second part of the Grow grant application is where you provide your Project information. During the assessment process, Grow projects will be assessed as eligible for funding if they meet all of the following criteria:

- The project information is complete and includes all of the attachments
- The project strongly aligns with Grant Result and metric picked
- The project complies with OTF policies
- The project aligns with the Grow Investment Stream

3C. PROJECT ASSESSMENT

Lastly, Grow projects are scored by experienced staff and local volunteers based on the information submitted in the Project section of the application. The four assessment areas are: Strategy, Process, People and Value for money.

Each assessment area has a series of accompanying application questions and assessment considerations, and are scored as follows:

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-2</td>
<td>(SD: Strongly Disagree)</td>
</tr>
<tr>
<td>-1</td>
<td>(D: Disagree)</td>
</tr>
<tr>
<td>0</td>
<td>(N: Neutral)</td>
</tr>
<tr>
<td>+1</td>
<td>(A: Agree)</td>
</tr>
<tr>
<td>+2</td>
<td>(SA: Strongly Agree)</td>
</tr>
</tbody>
</table>

**Strategy**

This assessment area is weighted at 40% of the whole application.

What do we mean by strategy? We mean the coherence between the need, your proposed project, and the result you are hoping to achieve that strongly aligns with one of our Priority outcomes and one of our Grant Results.

**Ask yourself: Is the strategy appropriate for achieving the Grant Result and is the need or opportunity clearly identified?**

Additional considerations:

- Is the project clearly described and understood?
- Is the project’s need and who will benefit clearly presented and understood?
- Is there alignment between the project need, project description and the selected Grant Result?
- If applicable, are the capital components appropriate for this project?

**Process**

This assessment area is weighted at 30% of the whole application.

**Ask yourself: Are our processes well thought out and identify the steps needed to implement the Project Plan and support the Grant Result?**

Additional considerations:

- Was a strong evidence-based model used and is it appropriate for the project?
- Is the model effective in achieving the Grant Result selected?
- Is the Project Plan well thought out, does it align with the project description and evidence-based model, and will it be effective in achieving the Grant Result?
- Is it feasible to carry out the activities in the stated timelines?
- Are the resources required and project budget, appropriate to carry out the activities?
- Are the areas for risk identified and ways to manage them addressed?

**People**

This assessment area is weighted at 20% of the whole application.

**Ask yourself: Are the people involved qualified and capable of managing this project? Will the evaluation plan help people learn from the project?**

Additional considerations:

- Do the core team members have the skills, knowledge, experience and competencies needed to lead/manage the project?
- (If applicable) Can the contributions from collaborative and/or partnering organization(s) support the project implementation and success, and do the organization(s) involved have experience implementing similar projects?
- Are the expected learning and evaluation questions clearly stated and appropriate for this project?
- Is there a plan in place to collect the data, to use and share the evaluation findings, and can the people involved administer the evaluation plan for this project?
**Value for money**

This assessment area is weighted at 10% of the whole application.

**Ask yourself: Does the project demonstrate value for money?**

- Is the cost per output ($/metric) appropriate for this project?
- Is the Financial Workbook clearly presented and does it provide appropriate details of financial resources required to support project activities?

**3D. PROJECT SELECTION AND APPROVAL**

The final stage of the assessment process is when volunteers recommend the approval or decline of each application. Recommendations are considered, and then approved by the Board of Directors.