

Our Approach to Funding

Granting builds upon the strengths and responds to the needs of the community. It is the most visible aspect of the Saskatoon Community Foundation's (SCF) work with the community and is the core of our community foundation; it is simply what SCF does. As a public foundation, SCF fulfills federal regulations for community foundations by awarding grants to qualified donees as defined by the Income Tax Act. SCF's mandate is to use income from its funds for charitable purposes within the City of Saskatoon and area.

Changes in demographics, needs, funding sources and opportunities can occur rapidly. With knowledge and information, SCF can be a more effective granting organization. By reaching out and staying informed, we understand our community better. SCF staff and volunteers know our community's strengths and challenges, so they can make informed decisions regarding the best use of resources. Likewise, we strive to inform qualified donees about granting requirements and decisions in an ethical manner.

Unrestricted Grants

Within any community, there are individuals, groups and organizations with the abilities, skills and resources to respond creatively and effectively to local problems and challenges. Building community capacity means looking at a community as a place with many skills, talents and other assets to be nurtured and mobilized, rather than a place needing services to fix all its problems. SCF's Quality of Life Granting Program and Signature Grants build capacity with grants that strengthen qualified donees, the charitable sector or the community.

Principles:

The Saskatoon Community Foundation's grants must:

1. Align with the SCF Vision Statement, Mission Statement, and Guiding Principles.
2. Encourage the qualified donees to engage in activities which strengthen its ability to serve the community.
3. Empower qualified donees and those they serve, while recognizing and valuing diversity within the community.
4. Respond to the changing nature of the community by listening to community organizations, in order to identify areas of high priority as they arise.

2.1 Quality of Life Grants

The Quality of Life Granting Program is SCF's core unrestricted grants program. Unrestricted funds allow SCF to address a wide range of community issues through six areas of focus. Investment income from the unrestricted and Field of Interest portion of SCF's endowment is allocated through the Quality of Life Granting Program.

2.1.1 Areas of Focus

SCF awards grants in six areas of focus.

Social Development: Creating caring, safe and supportive environments for healthy social development of families and special needs groups.

Education: Enhancing the quality and accessibility of lifelong learning and educational opportunities for all ages.

Health: Promoting and advancing the physical and mental well-being of individuals and families.

Arts and Culture: Fostering and supporting the growth and preservation of arts and cultural activities.

Environment: Supporting and encouraging appreciation of the environment, and resolving or preventing environmental and wildlife issues.

Capacity Building: Establishing foundations for community service, developing or enhancing organizational strategy, or building capacity in our qualified donees, charitable sector, or community.

2.1.2 Criteria

SCF's Quality of Life Grants Program will:

- Consider requests for multi-year funding;
- Consider requests for new and innovative programs;
- Consider requests for ongoing core programs;
- Consider requests for operating funds in cases of emergent need where an applicant has a plan for sustainability;
- Consider requests for capital campaigns in selected cases when the impact will be larger than the amount granted (i.e. leverage other funding);
- Make available grants of varying sizes (typically up to \$20,000) with careful consideration of the impact of the amount awarded;
- Involve a Grants Committee comprised of a diversity of community volunteers (Board and non-Board members) in the grant application review process;
- Rarely provide funding to the same qualified donee for longer than three years in succession.

Preference will be given to projects that:

- Have a direct and meaningful impact on a significant number of people
- Are respectful of program users, and may involve them in planning, execution and evaluation
- Involve community partnerships
- Mobilize financial resources by utilizing such funding strategies as leveraging and partnering
- Avoid duplicating similar services
- Set measurable objectives, which will be evaluated
- Plan for future funding needs

SCF does not award grants:

- in response to annual fund raising campaigns
- to retire debt

- retroactively to projects that have already taken place
- for sectarian, religious or political purposes
- to endowment funds
- to individuals
- for marketing type sponsorships (i.e. sporting events, conferences)

2.1.3 Process for Applicants

SCF is committed to a granting process that is open, ethical and accessible to all qualified donees. The Grants Committee is made up of a diverse group of community volunteers, including Board members and representatives of the greater community, so that the review process is responsive to the needs of the community.

Online Grants System: Most applications for funding, materials to be included with funding applications, and follow-up reports are submitted via SCF's online grants system.

- **Letter of Intent (LOI):** The **Quality of Life Granting Program** uses a two-stage process. The first step in the process is to submit a "Letter of Intent" to apply. This short form allows applicants to briefly describe the project and indicate the grant funds being requested. Letters of Intent are reviewed by the Grants Committee. Some of those submitting Letters of Intent are asked to submit a full application.
- **Application:** Applications request appropriate information to assist reviewers in making decisions about the funding request. This information will usually include but is not limited to: description of project, description and history of organization, project budget, organizational budget and audited financial statements. All requested information must be submitted by the application deadline. Late applications will not be considered.
- **Review Process:** All complete applications are reviewed by the Grants Committee. During the review process, the Grants Committee may request additional information not included in the application materials. Failure or refusal to provide this informational may result in the application being denied.
- **Site Visits:** As part of the review process, the committee may request to visit the premises of a applicant or program for which funds are requested. While site visits may require some accommodation on the part of both the applicant and the Grants Committee, refusal to accommodate a site visit may result in the application being denied. This should not include situations in which a visit would violate any law or the rights or privacy of any of the individuals present at the site.
- **Grant Decisions:** Following the review of application materials and after consideration of any other information that may have been gained through site visits, the Grants Committee makes recommendations to the Board of Directors. All decisions of the Board of Directors are final.

- **Communication:** SCF staff will communicate decisions to both successful and unsuccessful applicants in a timely fashion. Any questions about grant decisions must be directed to staff.
- **Grant Agreements:** All successful applicants will be required to sign a Grant Agreement prior to receiving funds. Applicants affirm that they will deliver the project as described in their application in exchange for receiving the grant funds, and that they will submit a final report on the grant. If a grant recipient does not meet the terms of the Grant Agreement, SCF may request that the funds be returned.
- **Recognition:** SCF requires that all grant recipients provide appropriate public recognition for the grant. SCF understands that this recognition may have costs attached. Therefore, “appropriate” recognition may differ from case to case, depending on the size of the grant and the resources of the recipient. Evidence of recognition must be included in the Final Report for each grant. At its discretion, SCF may publish details of any grants in its communications materials.
- **Final Report:** All grant recipients are required to submit a final report as a condition of receiving funding. Failure to submit final reports within the agreed to time frame may result in future applications being denied.
- **Unallocated Funds:** Once the Quality of Life granting cycle has been completed in a given year, if any funds have not yet been allocated, the Executive Director and Grants Chair may recommend to the Grants Committee that funds be granted to other unfunded projects, provided that the projects in question align with the Areas of Focus (section 2.1.1).

2.2 Signature Grants

Signature Grants are the largest grants awarded by SCF. They enable SCF to have a deeper impact than is usually possible with smaller grants. Signature Grants stand out and highlight our work in the community, and are intended to draw positive attention to SCF. A Signature Grant is awarded in one of the six areas of focus also used in the Quality of Life Granting program.

2.2.1 Principles:

Provided sufficient funds are available (to be determined by the Board of Directors at the beginning of each fiscal year), one or more Signature Grants will be awarded annually based on the following principles:

- The usual amount of a Signature Grant will be \$50,000.00. Consideration will be given to larger or smaller amounts depending on the need and the nature of the project and availability of funds.
- Preference will be given to projects that will raise awareness of SCF in the community.
- Signature Grants should have a significant long-term impact on the issue being addressed.
- Preference will be given to capital projects.

2.2.2 Process:

- **Letter of Intent (LOI):** Qualified donees may submit a “Letter of Intent” to apply. This short form allows applicants to briefly describe the project and indicate the grant funds being requested. Staff may also solicit Letters of Intent when they become aware of appropriate projects. Letters of Intent will be reviewed following quarterly deadlines: March 31, June 30, September 30, and December 31st. Once Signature Grant funds are awarded for a given year, no more Letters of Intent will be accepted until December 31st of that year, for projects intended for the following fiscal year. Letters of Intent will be reviewed by the Grants and Communications Manager, Executive Director and Grants Chair to determine whether SCF is interested in pursuing the granting opportunity further.
- **Application:** If the response to the LOI is positive, SCF will request a full proposal, including but not limited to: description of project, description and history of organization, project budget, organizational budget, audited financial statements, and recognition opportunities for SCF.
- **Review Process:** Applications are reviewed by the Grants Committee. During the review process, the Grants Committee may request additional information not included in the application materials. Failure or refusal to provide this informational may result in the application being denied.
- **Site Visits:** As part of the review process, the committee may request to visit the premises of an applicant or program for which funds are requested. While site visits may require some accommodation on the part of both the applicant and the Grants Committee, refusal to accommodate a site visit may result in the application being denied. This should not include situations in which a visit would violate any law or the rights or privacy of any of the individuals present at the site.
- **Grant Decisions:** Following the review of application materials and after consideration of any other information that may have been gained through site visits, the Grants Committee makes recommendations to the Board of Directors. All decisions of the Board of Directors are final.
- **Communication:** SCF staff will communicate decisions to both successful and unsuccessful applicants. Any questions about grant decisions must be directed to staff.
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- **Recognition:** The SCF requires that all grant recipients provide appropriate public recognition for the grant. SCF understands that this recognition may have costs attached. Therefore, “appropriate” recognition may differ from case to case, depending on the size of the grant and the resources of the recipient. Evidence of recognition must be included in the Final Report for each grant. At its discretion, SCF may publish details of any grants in its

communications materials.

- **Final Report:** All grant recipients are required to submit a final report as a condition of receiving funding. Failure to submit final reports within the agreed to time frame may result in future applications being denied.

2.3 Out-of-Cycle Grants

Most grants from unrestricted funds must be approved by the SCF Board following a review of applications by the Grants Committee and staff. Outside of the regular granting cycle, the Executive Director and the Grants Committee have authority to award grants and then report these grants to the Board. “Out-of-cycle” grant requests come to us outside of SCF’s annual cycle of granting because of timing issues or emergencies. These grants are intended to address needs that arise through external or uncontrollable emergencies, or present a compelling story of an unmet and urgent need. Out-of-cycle requests are very rarely granted.

2.3.1 Executive Director’s Authority

The Executive Director is empowered to make grants totaling \$10,000.00 in a fiscal year, with individual grants of up to \$3,000.00, subject to the availability of unrestricted funds at the time of the request. Such grants will be reported at the Board meeting immediately following each grant.

2.3.2 Grants Committee Chair’s Authority

The Grants Committee Chair is empowered to make grants totaling \$20,000.00 in a fiscal year, with individual grants of up to \$5,000.00 subject to the availability of unrestricted funds at the time of the request. Approval for such a grant requires assent of the Grants Committee Chair as well as at least one of: the Board Chair or other Director currently sitting on the Grants Committee. Such grants will be reported at the Board meeting immediately following each grant.

Any application for an emergency grant will be accompanied by a letter indicating the emergency nature of the grant request.

Grants from Restricted Funds

When awarding grants from restricted funds, SCF will endeavour fulfill the wishes of those establishing the funds, in accordance with the Gift Acceptance Policy. All grants must be provided to qualified donees as defined by the Income Tax Act. Generally, grants from Restricted Funds do not require recommendation or adjudication by the Grants Committee. Should a Fund Agreement call for adjudication by SCF, SCF will call for applications, and recommendations will be made to the Board by the Grants Committee or other appropriate advisory panel, such as the Youth Advisory Council

3.1 Field of Interest Funds

Donors determine the Field of Interest they wish to support with grants from their funds. Gift Acceptance Policy sets parameters for the establishment of these funds.

- Grants from Field of Interest Funds are generally allocated as part of the Quality of Life Grants Program. As SCF provides donors with flexibility, certain funds operate in unique ways, based on their Fund Agreements.

3.2 Designated Funds

Donors with Designated Funds recommend at the time that the fund is created which qualified donee(s) will receive grants from their funds in perpetuity.

3.3 Student Awards

Donors establish funds for student awards to encourage people interested in continuing their education. SCF's Student Awards Policy sets parameters for the establishment of Student Awards.

3.4 Donor Advised Funds

Donors with Donor Advised Funds recommend which qualified donees receive grants from the fund each year. As flexibility is a key, some donors select their recipients with input from applications to the Quality of Life Granting Program, and others make decisions based on their personal preferences or knowledge of the community.

4.0 Flow through Funds

Donors may flow funds through SCF to the cause of their choice following Income Tax Act regulations regarding qualified donees.