

Beginners Guide to Effective Funding Proposals

OBIAA Annual Conference
May 2024



<https://forms.office.com/r/ypVYRun4uw?origin=lpLink>

Territorial Acknowledgment

A full-page background image showing a sunset over a body of water. The sun is a bright orange circle on the horizon, with its light reflecting in a shimmering path down the water's surface. The sky is filled with large, dark blue and grey clouds, some of which are illuminated from below by the sunset, creating a mix of orange, yellow, and purple hues. In the foreground, the water is dark with gentle ripples. To the right, a sandy dune with sparse vegetation and a few evergreen trees rises from the shoreline. A piece of driftwood lies on the beach near the water's edge.

Objectives



Explain the proposal writing process



Components of an effective proposal

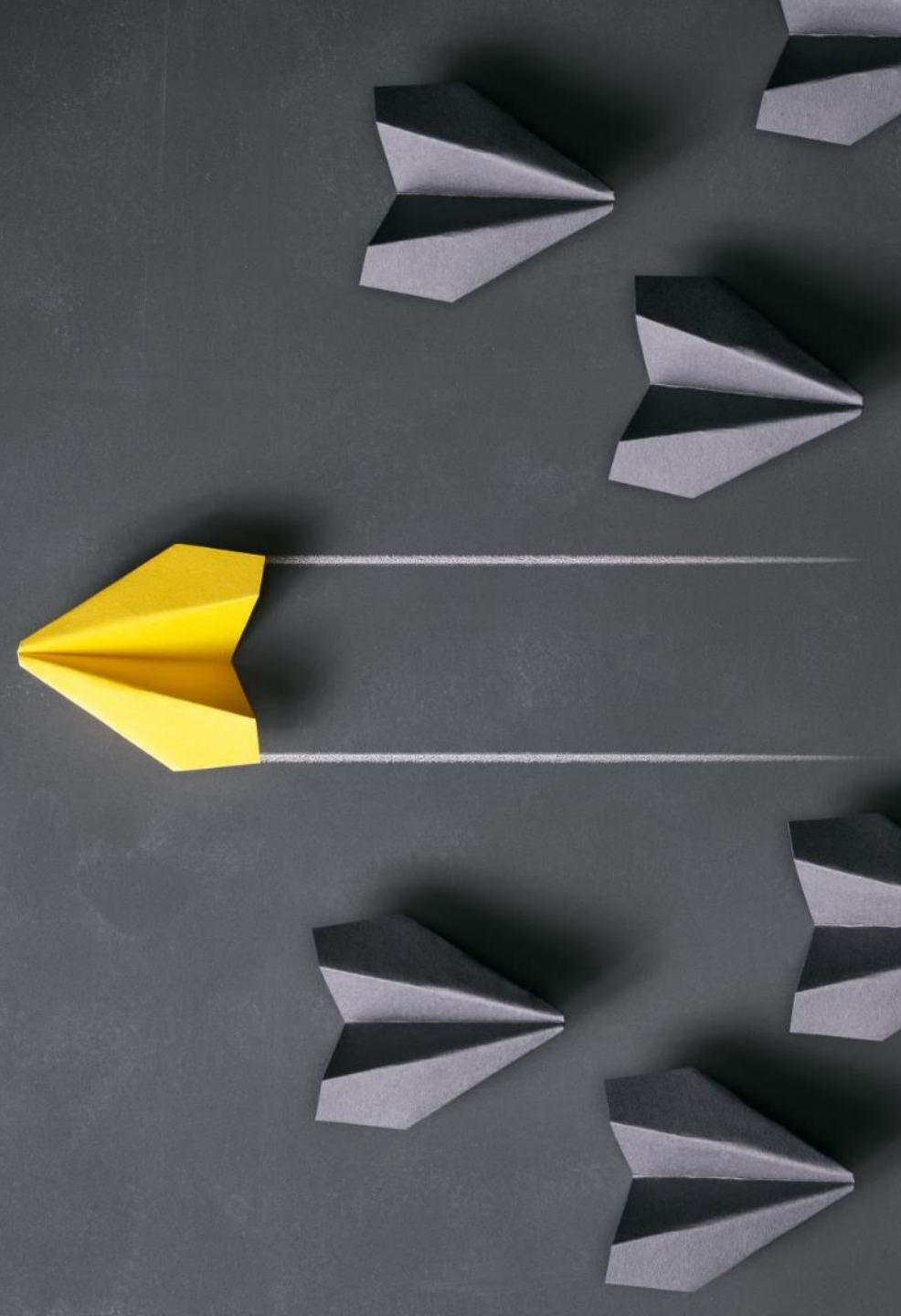
The Proposal Process



Articulate the Project Need

What is the problem or opportunity that your organization is trying to address?

- Why is it important?
- What are you planning to do about it?



Develop Your Project Concept

Pg. 3



WHY

WHAT IS THE PROBLEM?

WHO IS THE AUDIENCE?

WHAT POTENTIAL IMPACTS? WHO
ARE THE MEASURES OF SUCCESS?



WHAT

WHAT ARE THE KEY
ACTIVITIES?



HOW

PARTNERS?

WHEN?

WHERE?

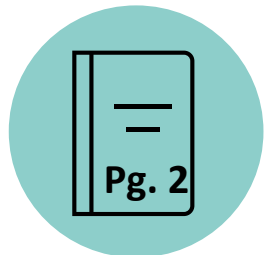
BUDGET?

Exercise: Your Elevator Pitch

What is a project your organization is seeking funding for?

Take two minutes and try to explain it in 3 sentences or less

Then share with partner



Why Your Organization?

- Vision/Mandate/Mission
- History (performance measures / previous successes)
- Governance

Mission Statement:

To cultivate and enhance downtown Kingston's position as the region's leading culinary, entertainment, shopping and services destination, while attracting more people to experience and contribute to our vibrant downtown community.

Purpose:

Foster an environment in which businesses can find success.

Guiding Principles:

Integrity forms the foundation of our Guiding Principles:

- **To be Exceptional** - Maintain excellence and pursue progressive solutions in the development and delivery of all initiatives.
- **To be Inclusive** - Welcome, celebrate, and respect our diverse community.
- **To be Transparent** - Committed to fostering trust through authentic and collaborative communication and relationships.
- **To be Advocates** - Advocate for a healthy, vibrant, and thriving downtown community.

Types of Grants/Funds

Program or Project Support

Program grants provide funding for specific projects or programs. Funds are typically restricted to the exact purpose outlined in the grant proposal .

Examples
BR+E Project
Music Festival

General Operating Support

General operating support grants help support operating expense for an organization.

Examples
Small Business
Enterprise Centre

Capital Funding Support

Grants for capital projects such as building construction, property acquisition, or similar expansion campaigns.

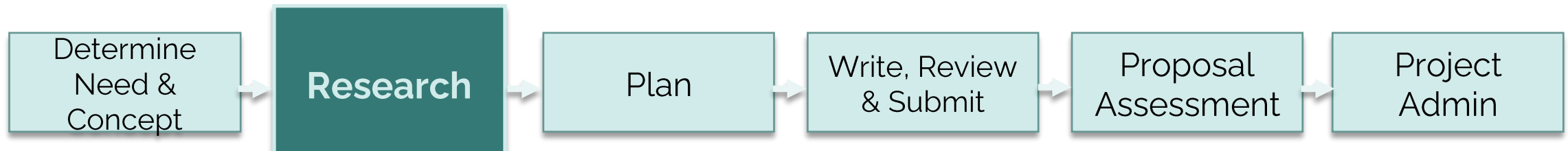
Examples
Water treatment plant
Playground

Research Potential Funding Sources

- [Grants Ontario](#)
- [Ministry of Agriculture, Food and Rural Affairs](#)
- [Northern Ontario Heritage Fund](#)
- [Federal Government - FedDev](#)
- [Other – Trillium](#)



10





What to Look For When Researching:

- **What are the funders objectives?**
- Who is eligible?...and why?
 - Prioritizing/targeting certain groups
- What type of funding is it? What costs are eligible?....and why?
 - Operating / Project / Capital
- What is the intake process? Deadlines

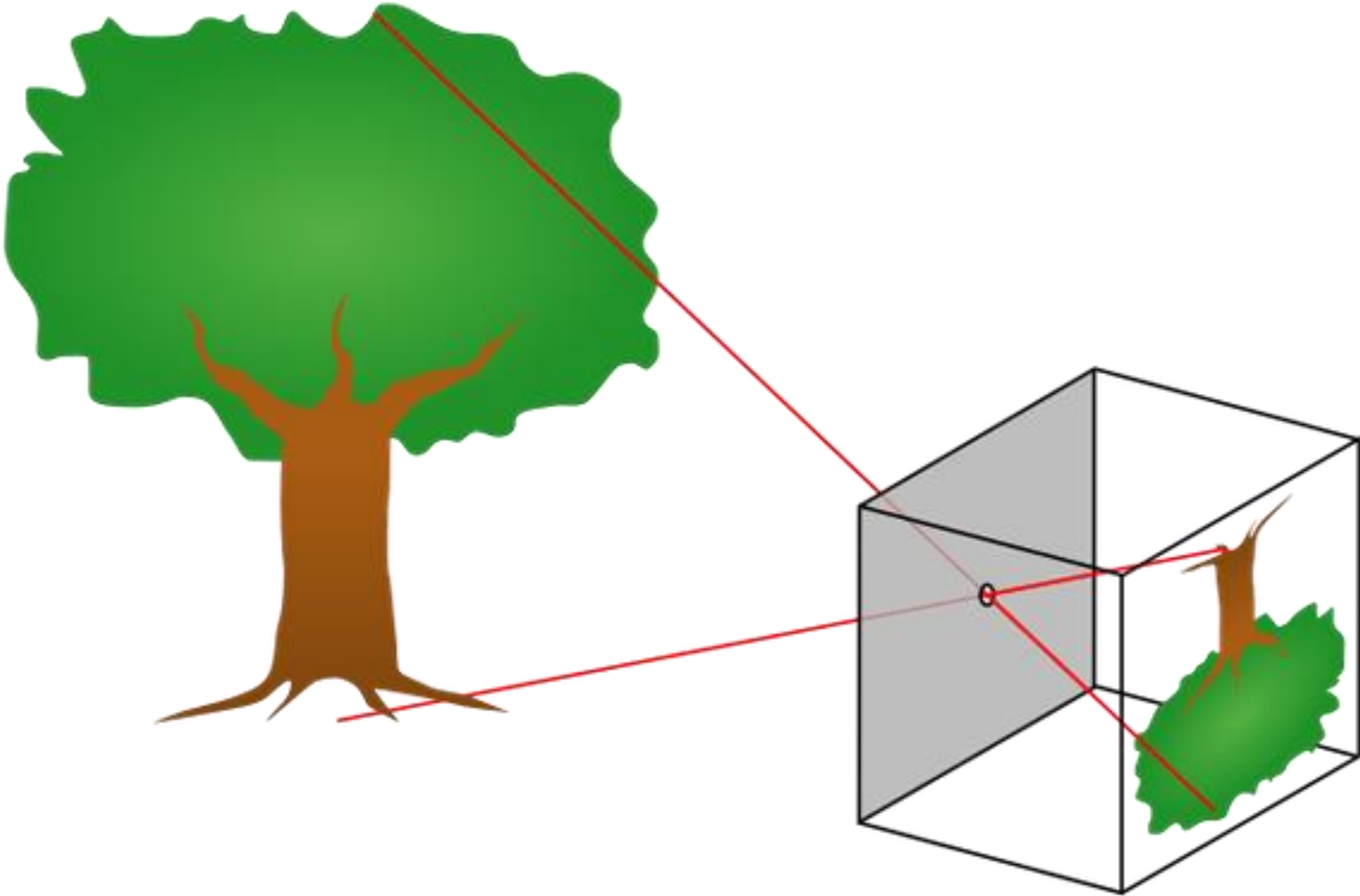
Program Objectives

The Tourism Development Fund program aims to support projects that will increase tourist visitation and visitor spending in Ontario by:

1. Developing innovative tourism products and experiences
2. Increasing domestic and/or foreign private sector tourism investment
3. Strengthening the skills, resources and abilities of the tourism industry to attract or support new tourism investments

Eligible Applicant Organizations

- Municipalities and Destination Marketing Organizations
- Indigenous Organizations
- Not-for-Profit Organizations (with a clearly defined tourism focus)
- For-Profit Tourism Organizations
- For-Profit Tourism Businesses



What to Look For Researching:

- **What previous projects / organizations have been funded?**
 - And.....why?
- Who has received support in the past?
- What was the average amount?
- Phone a friend – talk to your network

Overview

The following successful projects were approved from the RED 5 Program Intake 6 (February 7 to March 7, 2022).

Central region

City of Orillia & Lake Country

The City of Orillia & Lake Country community are developing an Innovation Hub that includes the hiring of two Innovation Coordinators, who will delivery programming geared to the attraction and retention of talent in three key area/sectors, as well as a shared co-working and collision space.

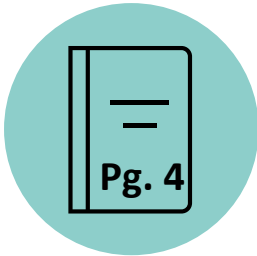
Provincial share: \$150,000

District of Muskoka

The District of Muskoka will implement and market a Muskoka-specific job board to connect job seekers with employment opportunities in Muskoka. The job board will provide information on job seekers, available positions, hiring statistics and job movement across the region.

Provincial share: \$70,000

Should you Apply?



Key questions you should ask (yourself):

Questions		Notes
Are you eligible? (is there another organization that is in your network?)	Yes/ No	
Does the project concept align / contribute to the program priorities/objectives?		
How competitive is the program and likelihood for success?		
Can you meet the deadlines with your current workload?	Yes / No	
Do we have budget to cover all the costs associated with the initiative?	Yes / No	



Build your Understanding of the Funding Program

- Read the guidelines (fully)
- Look at the assessment criteria
- Review the application and the questions
- Seek Clarity – talk to the funder
 - Attend Overview / Q & A Sessions
 - What questions do you have for the funder?

4.0 Evaluation Process and Assessment Criteria

Applications that meet the eligibility and mandatory requirements will be scored in accordance with the following assessment criteria:

Assessment Criteria	Application Section	Scoring Weight
1. Organizational capacity	Section E	15%
2. Francophone, Indigenous, or 2SLGBTQIA+ impact	Section F	10%
3. Project description	Section G	20%
4. Alignment to program objectives	Section G (question 2)	20%
5. Confirmed partnerships and support from stakeholders	Section H Letters of Support	10%
6. Project performance measures	Section I	20%
7. Budget	Section J	5%

Tourism Development Fund 2023 - Application Guide



Create a Project Team

- Are there any organizations you could partner with for the project?
- Manage expectations from the start
- Refine your project concept as a Team (get buy-in)
- Assign roles



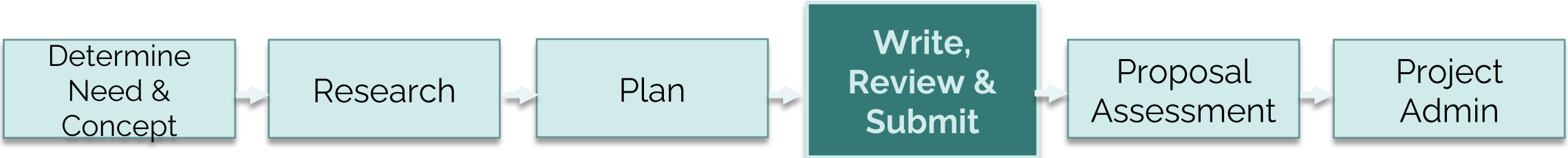
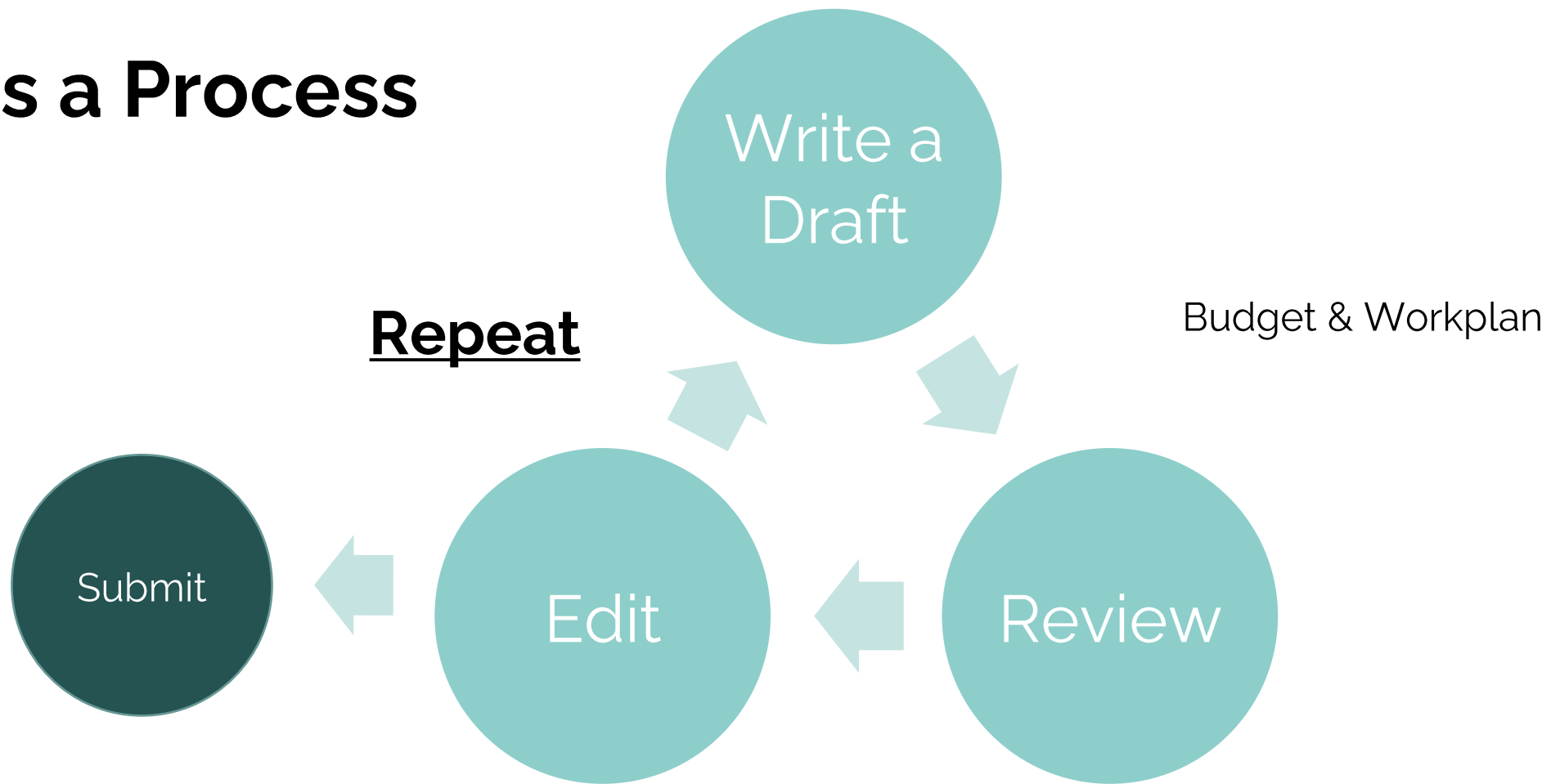
Create a Work Back Plan For the Application

- Develop a high-level plan for the proposal
- Pay attention to the deadline
- Confirm your internal approval process
- Is there any supporting information required/recommended?

Task	Responsible	Due	Completed
Review the Call for Proposals	Jane and Professor	January 1	
Evaluate Agency's Goals using the Worksheet	Jane	January 10	
Complete the Evaluation Criteria Worksheet	Jane and Professor	January 15	
Develop the Application Package Checklist	Jane	January 15	
Identify appropriate partners	Jane and Professor	January 20	
Contact partners and ask for their interest and secure commitment for letters of support	Jane and Professor	January 22	
Prepare your questions for the Contact person at the agency	Jane	January 30	
Make contact and obtain answers to your questions	Jane	January 31	
Revise worksheets as relevant with this new information	Jane	February 5	
Draft, Review, Edit and Repeat	Jane and Professor	March 15	
Develop Budget	Jane and Professor	March 20	
Collect Letters of Support from Partners	Jane	March 1	
Finalize Text	Jane and Professor	March 30	
Complete all forms	Jane	April 1	
Make copies of final proposal	Jane	April 5	
Submit proposal at least 3 working days before the April 15 deadline using a courier service.	Jane	April 10	

Source: [Writing a Successful Grant Proposal \(purdue.edu\)](https://www.purdue.edu/officeofgrantdevelopment/)

Writing is a Process



Data Driven Story Telling

Can you identify and describe the impacts that are expected by undertaking the project?

What data do you have?

Think about data-driven story telling

- Audience
- Outcomes/Impacts
- Need

Data Driven Story Telling - Examples

Think about data-driven story telling – outcomes

Before:

The agriculture sector is the main driver of our local economy.

Businesses in our community are struggling after Covid.

After:

The agriculture and agri-food sector employs over 4,000 people and represents 16% of the County's labour force. 60% of the County's top ten largest employers are agriculture related.

Based on our recent BR&E report of 100 businesses 47% stated that they are at risk of downsizing in the next 12 to 18 months coming out of Covid.

Writing

- Keep language:
 - Clear
 - Concise
 - Compelling
- Watch out for multi-part questions

ii) Investment attracted or retained

Describe in detail how the project will lead to the attraction and retention of investments in rural Ontario, and how this will be measured. (Maximum 300 words)

Word Count: 0 of 300

Activities Exercise (10 min) 5 min discussion / 5 min feedback

Businesses in the BIA are anticipating **reduced sales / activity due to winter vacations and road & sidewalk construction plans.**

It is May 01 and you have been asked to **start planning a NEW program / event / initiative in your BIA** during the height of the Winter season.

Goal is to **bring community together** and **celebrate the businesses** in the BIA.

Your Board has allocated **\$3,000 seed budget to start.**

You only have capacity to manage **ONE grant application** / process

- 1) What was your idea / initiative?
- 2) What is your next steps
- 3) And....top THREE REASONS you picked the approach you did?

Activities Exercise (10 min) 5 min discussion / 5 min feedback

ing-opportunities-ontario-government

Ontario

Français

Menu

[Home](#) > [Business and economy](#)

Available funding opportunities from the Ontario Government

Find out what funding is currently available from the Government of Ontario, if you're eligible and what you need to apply.

[Learn how to apply.](#)

Log in to Transfer Payment Ontario

On this page

1. Overview

2. Aboriginal Participation Fund

3. Child and Youth Mental Health (CYMH) program

4. Community Residential Program 2024-2026

5. Connecting Links Program 2024-25

6. Fire Protection Services Reimbursement: Unincorporated Ontario

7. Forest Sector Investment and Innovation Program

8. Inclusive Community Grants

9. Investment Ready: Certified Site designation

10. Ministry of Children, Community and Social Services – Generic Budget 2023-2024

11. Ministry of Children, Community and Social Services - Indigenous Healing and Wellness Strategy 2023-2024

12. Ministry of Children, Community and Social Services – Ontario Works Programs 2023 or 2023-2024

13. Municipal Energy Plan Program

14. Ontario Automotive Modernization Program (O-AMP)

15. Ontario FireSmart Communities Grant

16. Public Library Operating, Pay Equity, and First Nation Salary Supplement Grants 2023-2024

17. Regional Development Program: Eastern Ontario Development Fund and Southwestern Ontario Development Fund

18. Regional Development Program: Advanced Manufacturing and Innovation Competitiveness (AMIC) Stream

19. Winter Roads Program: Bridges and Culverts Stream

20. Closed funding opportunities

21. Contact us

Senior Secretariat INCLUSIVE Community GRANT

Objectives:

Increase accessibility / #2 - Accessible housing / Transportation / #1 - Outdoor spaces / buildings and #3 - transportation needs
<< Guidelines - adds: Social participation / civic participation / community support & health services
* Reduce Isolation / walkability / opps for volunteerism, etc..

Eligibility:

Community Org / not4P / legal entities , plus INSURANCE

Priority Populations: Small Urban/ Rural / Older Immigrants / Indigenous

DUE: May 22, 2024

Funding:
Up to \$60K / Up to 100% of Eligible

MEDJCT REGIONAL Dev't Program – Eastern & Southern Funds

- Create Jobs & build talent
- Attract and encourage investment
- Business growth and eco impacts
- Innovation, collaboration & cluster dev't

Eligibility:

Businesses, municipalities and Not4P plus INSURANCE

STREAMS:

Business Projects - 3Yrs / 10 pp / 5 new jobs / \$ 500K invest or \$200K rural

Community Eco Dev't Projects - measurable outcome invest / growth / jobs created / \$100K with private sector support / activities are new to ORG

DUE: Ongoing / July 02 – Sept 17

Funding:
Up to \$1.5M / Up to 50% of Eligible

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Activities Exercise (5 min / 5 min)

You only have capacity to manage **ONE grant application** (MAX) / process..

- 1) What was your idea / initiative?
- 2) What is your next steps
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Budget

- Develop a realistic budget
 - Clarify what you're asking for
 - Justify your costs (have a rationale)
 - Are they reasonable (supporting quotes)
- Each activity should be clearly labeled and identified as either eligible or ineligible



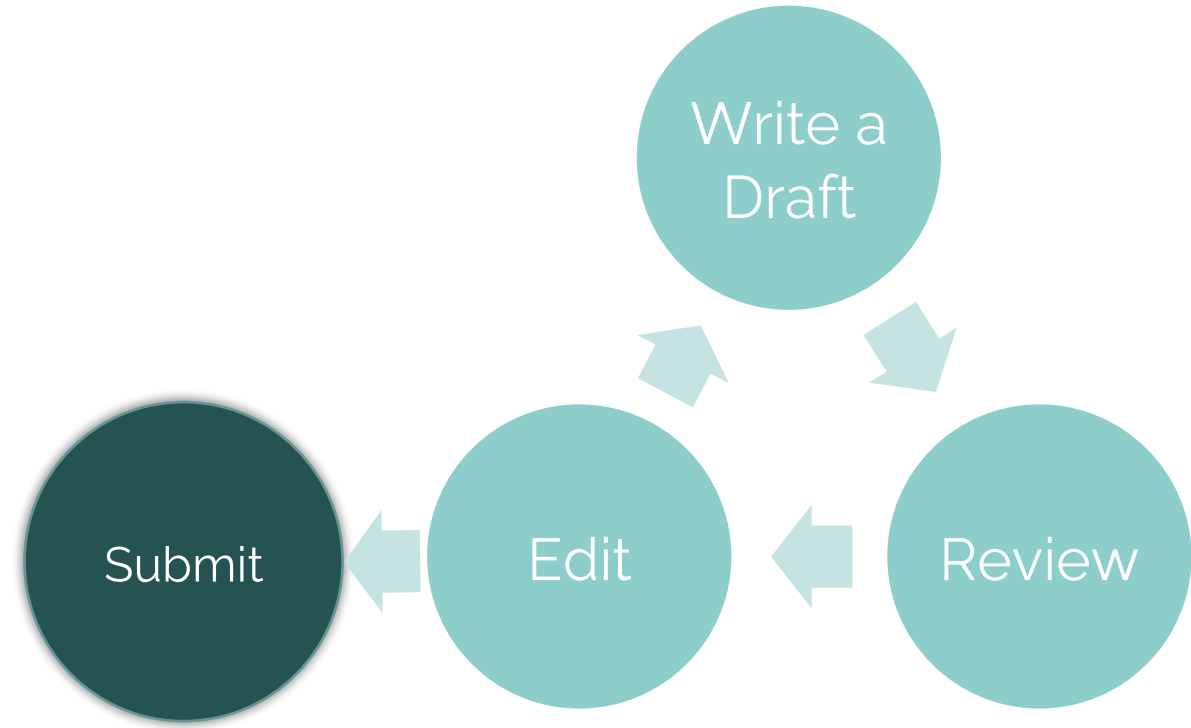
Aligning the Budget and Workplan

- Ensure your numbers are consistent and should align with your workplan
 - Include someone from your treasury/finance team if able
- The workplan for the project will help reviewers understand and evaluate the planning and feasibility.
- It may be helpful to reviewers if you present a visual version of your timeline.



Review & Submit

- Seek external review for feedback
- Check your math (the analysts will!)
- Did you answer all the application questions
- Pay close attention to the assessment criteria and how you can position your project in the best light
- Submit before the deadline





Proposal Evaluation - What Makes a Strong Proposal

- Project objectives and deliverables are clear and measurable
 - Need for project is evident (and has research to support it)
 - The project is innovative and unique
 - Project outcomes match program objectives
- Positive economic impacts
- Financially committed partners
- Strong letters of support
- Request for eligible costs only
- Organization has capacity to complete project & reporting requirements

What if you weren't approved?

- Follow up! Seek feedback about your application.
- Is there an option to reapply?
- Look for other funding opportunities



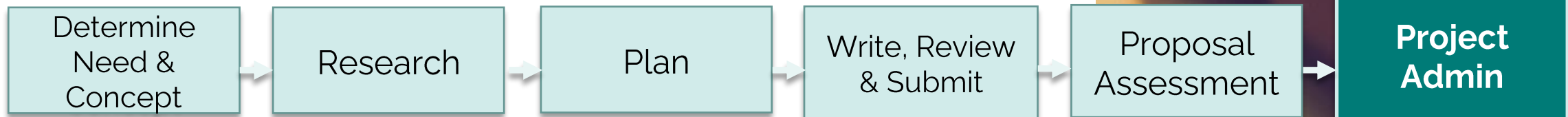
Project Administration

When your proposal is approved by the funder:

- **Do you still have the capacity to implement the initiative (has anything changed)?**

Review the funding agreement

- Is the proposed project timeline still accurate?
- When can you start project activities?
- Understand the funding cash-flow





Project Administration – Mid Project Changes

- Follow your **approved project plan (contribution agreement)**
- Understand your agreement
- Communicate early if there are unexpected project delays
- If your activities may change, **inform the funder**
- **Seek approval** for changes to activities and costs before you incur expenses (no surprises)

Session Summary



- Get organized
- Remember that every funding program has different requirements
- Think about it from the funders point of view
- Develop a strong project proposal
- Demonstrate that there is capacity to ensure the successful completion of the project and all reporting requirements

Resource Links

- Purdue –<https://extension.purdue.edu/cdext/thematic-areas/leadership-civic-engagement/beginners-guide-to-grant-writing.html>
- Charity Village -<https://charityvillage.com/government-grant-writing-part-2-tips-for-a-successful-application/>
- Imagine Canada - <https://www.imaginecanada.ca/en/grant-preparation-toolkit>
- Available funding opportunities from the Ontario Government <https://www.ontario.ca/page/available-funding-opportunities-ontario-government>
- OMAFRA Rural and North <https://www.ontario.ca/page/rural-and-north>
- Northern Ontario Heritage Fund Corporation (NOHFC) <https://nohfc.ca/>
- **Federal Economic Development Agency for Southern Ontario** <https://feddev-ontario.canada.ca/en>
- Ontario Trillium Foundation <https://www.otf.ca/our-grants>
- Analyst: economic analysis software <https://www.ontario.ca/page/analyst-economic-analysis-software>
- Performance measurement for agriculture, agri-food and economic development organizations <https://www.ontario.ca/document/performance-measurement-agriculture-agri-food-and-economic-development-organizations>