# McConnell Foundation Application Orientation Webinar

**Updated September 2023** 



#### Some technical tips

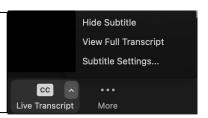
For subtitles:
 click on the Live Transcript button at the bottom of your screen.

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To ask a question:

click on the Q&A button at the bottom of your screen. Questions can be shared with the host privately or to the whole group.

You can adjust the size of the subtitles by clicking on Subtitle Settings







## Agenda

- I. Welcome!
- 2. McConnell Orientation & Background
- 3. Focus Area Overview
- 4. Focus Area Strategies:
  - a. Communities
  - b. Reconciliation
  - c. Climate
- 5. Two-Stage Application Process
- 6. Resources
- 7. Questions Discussion





#### About the McConnell Foundation



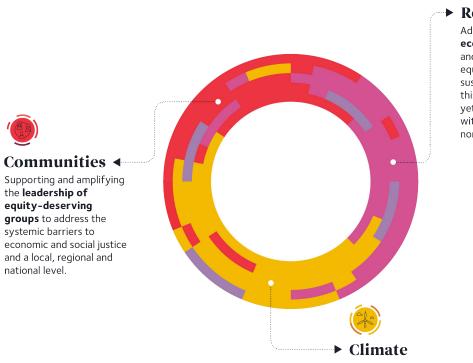
- Pan-Canadian family foundation founded in 1937
- Works to advance a resilient, inclusive and sustainable society that can successfully address its complex challenges
- Focus Areas: Climate, Reconciliation and Communities



#### What we do



#### What We Fund



#### **▶** Reconciliation

Advance a **reconciliation economy** where wealth and resources are equitably shared and sustainably stewarded for this generation and those yet to come, in relationship with both Indigenous and non-Indigenous people.

#### **Capacity Strengthening**

Organizational development and strengthening

Support for sector-serving networks

Leadership development

Innoweave

#### **Montreal Funding**

We allocate approximately \$2 million annually to Montreal charities.



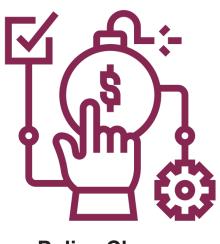
Contribute to Canada's transition to a **net zero-carbon economy** in a way that produces sustainable and equitable outcomes for all.

#### **Communities**

#### **Strategies**



**Collaborative Action** 



**Policy Change** 



#### Reconciliation

#### **Strategies**



Indigenous-led solutions to activate the NIES Calls to Economic Prosperity



Indigenous-led Collaborative Funding Projects

Image source: https://niestrategy.ca/



## Climate Strategies



Climate Mitigation Solutions



Diversity & Inclusion: Equitable outcomes for all



Sustainable Finance: Increasing flow of capital









#### McConnell Two-Step Application Process







- McConnell's website
- This information session
- Other resources in the sector (web sites, webinars, workshops, books, etc.)
- Office Hours sessions with McConnell Staff: <a href="https://mcconnellfoundation.ca/office-hours/">https://mcconnellfoundation.ca/office-hours/</a>





Organizations need to register on our online portal:

https://mcconnell.fluxx.io/user\_sessions/new





Organizations will be asked to submit a short application through our granting portal with the following information:

- Eligibility confirmation
- Basic project overview
- Readiness assessment
- Focus area alignment

Organization detail





Review by McConnell for Focus Area fit - either an invitation to submit a full application, or a declination (approximately I month)





If there is a strong fit, organizations will be asked to submit a longer detailed application through our granting portal with the following information:

- Project plan, including EDI considerations
- Partnership & Evaluation plan

- Alignment with McConnell
   Focus Areas
- Budget





McConnell Due Diligence, ongoing discussions potentially leading to funding (4-6 months)



## Things to keep in mind:

There are no deadlines to apply.

Applications are reviewed on a rollingbasis.

We accept applications in English and French.

You may complete applications in your own time: applications can be saved and returned to at a later date.

The 2-Stage process starts on **February 1**.

#### We do not consider requests:

- that are part of a general fundraising campaign
- · to reduce accumulated capital or operating deficit
- · for endowments
- for annual operating funds or other recurring costs, unless directly linked to one of our focus areas and the success of the proposed project
- involving partisan political activities
- involving strictly religious purposes or activities
- for purely academic or basic research
- for which organizations or projects are based outside of Canada
- for international development
- for projects advancing nature-based solutions such as: reforestation and tree planting, nature conservation or biodiversity preservation
- for emergency needs
- in which the primary activity is the production of a film, video, or publication
- in which the primary activity is a conference, workshop, or seminar
- in which the primary activity involves training, scholarships, or subsidies

#### Resources

- Read our Applicant FAQ <a href="https://mcconnellfoundation.ca/faq/">https://mcconnellfoundation.ca/faq/</a>
- Read our Focus Area pages <a href="https://mcconnellfoundation.ca/focus-areas-overview/">https://mcconnellfoundation.ca/focus-areas-overview/</a>
- Look at our funding database for the most recent examples of what we have funded https://mcconnellfoundation.ca/funding-database/
- Read the **sample application** form <a href="https://mcconnellfoundation.ca/funding/">https://mcconnellfoundation.ca/funding/</a> (as of Feb I)
- Book a 15-minute conversation with our program

team: https://mcconnellfoundation.ca/office-hours/

#### Tips:

- Write in your own words! You don't need to mirror our language
- We want to understand what will look different after potential McConnell funding focus
  on your solution or proposed idea, not the problem.







## **Process Questions**

How do I book an office hours appointment?	You can book a 15-minute Office Hours appointment with our program team here: <a href="https://mcconnellfoundation.ca/office-hours/">https://mcconnellfoundation.ca/office-hours/</a>
What can be discussed during office hours?	This is an opportunity to check the eligibility of your project or idea and to explore how it may be a fit with McConnell's Focus Areas. During office hours, we are happy to provide more details about our Focus Areas and share the lens through which proposals will be reviewed. However, we do not review nor provide feedback on draft applications.
Can multiple organizations apply for one collaborative proposal?	Yes, we have funded several collaborative projects. When applying, one organization must submit the proposal and act as funding recipient and manager of the collaboration.
Is the Stage I application process open on a rolling basis or on a deadline schedule?	There are no application deadlines. We review applications on an ongoing basis. Application deadlines are used only when the Foundation requests proposals for specific projects. In this case, we'll list the application deadline on our website.



#### **Process Questions**

I recently applied using the old form.

Do I need to resubmit?

No, you do not need to resubmit your application. Your proposal is currently undergoing due diligence and will be fully evaluated. You will be notified of a decision regarding your application within four months of the date you submitted your proposal.

We have a draft application in the "old" system. Should we submit it ASAP or wait for the "new" system to be implemented?

We suggest two options for completing your application:

- You may complete your current draft and submit it as a full application anytime between now and March I, 2022. If you are nearly done writing your full application or would prefer to continue using this form, we encourage you to finish it. Your application will be fully reviewed under our current due diligence process, and you will receive a response within four months. Please note, after March I, 2022 you will be required to submit using the two-step process. Your draft application will be withdrawn, though still saved on our portal for your reference. You will not be able to submit using this form after the deadline.
- You may delete your current application and fill in the short-form application when the
  forms become available in January. Your application will be reviewed within about a month,
  and if there is sufficient alignment with our focus areas you will be invited to submit a
  detailed application.



#### **Process Questions**

What should I put for the start date of my project?

If your project is moving ahead on its own timeline, please provide that start date. If your project is reliant on McConnell support to kickoff, please note so in your application and provide a start date estimate of 6 months from your date of application.

How long will it take to get an answer once I have applied? And how long does it take for an application to be approved?

Proposals are submitted in two phases: I) a preliminary application containing five questions about your work and four budget questions and, if approved, 2) a detailed application form with questions related to your selected focus area. In general, applicants will be notified regarding their eligibility for a Phase 2 application within a month.

The complete review process, from application to approval, can last up to four to six months. *Please note, this excludes the time an applicant requires to complete their second stage submission.* 

In some cases, it may be valuable to explore if a proposed project might benefit from being linked with other partners, complementary projects or investment strategies. If so, the due diligence process may be considerably longer.



## Funding & Eligibility Questions

Is my organization eligible for funding?

We mainly provide funding to "qualified Canadian donees". Generally this means federally registered charities\*. We also make financial contributions to non-profit organizations, either through a fiduciary or directly as a non-qualified donee. If you would like to apply for support through a fiduciary, please indicate so on your application.

\* We follow **CRA** guidelines on establishing a fiduciary relationship with an eligible charity.

Is there a typical range of funding provided for projects? And, do funding opportunities increase to meet the scale and scope of the proposed work?

There are no pre-established funding minimums or maximums and we encourage organizations to apply according to the need and opportunity they have identified. At McConnell, modest funding contributions fall between \$150K-\$250K, medium-sized funding ranges between \$300K-\$450K and large funding agreements are over \$500K. Funding typically spans two to three years and occasionally as long as five years.-

To see projects we have supported in the past, visit our <u>funding database</u>.

What percentage of our project budget should McConnell funding represent?

Budgets are one piece of what we are reviewing, and we recognize that context matters. As a result, we do not have any set requirements for the percentage our funding represents for a given proposal. However, we typically do not fund the entirety of a project, and it is rare that our funding is more than 50% of a project's final budget. In assessing the proposal, we understand that not all of the funding will be known or confirmed.



## Funding & Eligibility Questions

#### Do you fund pilot projects?

Yes, in some circumstances pilot project work may be a component of an application for work in our Focus Areas. It is not likely, however, that a pilot or experimentation project will be supported at a large scale.

We fund activities focused on at least one of our three focus areas: <u>Communities</u>, <u>Reconciliation</u> and <u>Climate</u>. In addition to focus area alignment, we also look at national relevance and systems change potential. What does that mean?

#### What do you mean by taking a "systems approach" in project funding?

- National relevance: your work even if it's local could be applied to other places across
  the country and there are clear pathways for your work to be applied in other places
  and/or you have evidence of demand for your work from other places.
- Systems change: your work tackles the root causes of complex problems. You seek solutions for deeply-entrenched systemic injustices.

