

## **B3 Fund Tip sheet: Application assessment**

### **Community Investment Program**

The Community Investment Program is committed to assessing funding applications in a transparent way. This Application Assessment Tip Sheet provides clear information about how applications for the 2024 B3 (Black-led, Black-focused, and Black-serving) Fund will be assessed. Applicants are encouraged **to refer to this tip sheet as you complete your application.**

### **Who reviews my application?**

Each application that meets the fund's general eligibility requirements is reviewed by 2 members of our Fund Review Committee. More about the committee:

- This committee may include Peel Region staff, other funders from foundations and the municipalities, as well as community members with lived experience.
- Community representation has been added to the Fund Review Committee as a new measure to ensure there is community voice in the B3 Fund decision-making process.

### **How will my application be assessed: General**

#### **Demonstrated Need**

Applications will be evaluated based on how well organizations use an evidence-based approach to demonstrate how their budget request will improve their organizational capacity and positively impact Black communities in Peel.

## Principles of Interconnectedness, Human Rights & Social Justice

Application questions have been designed to provide an opportunity to show the impact of an organization's programs and services within Black communities. The 2024 B3 Fund has adopted the Ubuntu Principles in both the application and the funding approach (i.e., Fund Review Committee make up and B3 Application Form). This includes how an organization recognizes the interconnectedness of individuals within a community and how their impact on individual program participants impacts the wider community. Applicants will also be required to demonstrate how their organization supports human rights and social justice - specifically how their work positively impacts the wider Black community / communities.

## Alignment to Sector and Priority Populations

B3 organizations are the experts in identifying priority populations and emerging issues that affect Black communities in Peel. The sector and priority population lists in the application have been shaped by input from our B3 Advisory Board and survey data from Peel B3 not-for-profits in April 2024. If your sector or priority population is not listed, include it in the "Other" category. Applicants must clearly demonstrate how their program and services support the sector and priority population selected in their application form.

## How will my application be assessed: Specific

Application Form (75%)	Score weighting
<p><b>Question 1: Alignment to B3 definition(s)</b></p> <p>Please note: You are welcome to select multiple B3 definitions. However, you will only be assessed on how well you demonstrate your alignment to <b>one</b> of the B3 definitions. Selecting multiple definitions will not increase your score. It will simply provide more information to the Community Investment Program team to better understand the B3 sector in Peel.</p> <p>A strong response to this question will:</p> <ul style="list-style-type: none"><li>• Give a clear and detailed explanation of why and how your organization aligns to the chosen definition.</li><li>• Explain how your organization meets the statements that accompany your chosen definition (for example, at least 51% of the leadership team identify as Black), not just how your organization meets the general definition (for</li></ul>	15%

<p>example, Black-led)</p> <ul style="list-style-type: none"> <li>• Include evidence</li> </ul>	
<p><b>Question 2A and 3B: Alignment to priority sector(s) selected</b></p> <p>Please note that the list of priority sectors and populations included in the application is not exhaustive. If you do not see your organization’s sector and/or target population on our list, you can choose “Other” and add your own response. Selecting “Other” will not negatively affect how your application is scored. Similarly, the number of sector(s) or populations you select will not affect how your application is scored, so select the number that truly reflects your work.</p> <p>A strong response to this question will:</p> <ul style="list-style-type: none"> <li>• Demonstrate strong alignment between your organization’s programs and services and the priority sector(s) you select</li> <li>• Be specific: give examples of how your organization supports the sector you chose, where possible</li> <li>• Include evidence (for example, demographic data, program metrics)</li> </ul>	20%
<p><b>Question 2B and 3C: Alignment to priority population(s) selected</b></p> <p>Same approach as 2A and 3B</p>	20%
<p><b>Question 3A: How your organization supports Black communities in Peel</b></p> <p>A strong response to this question will:</p> <ul style="list-style-type: none"> <li>• Give a clear and detailed explanation of how your organization supports Black communities, specifically the clients or end users of your programs and services</li> <li>• Demonstrate a clear purpose and strategy guiding your work</li> <li>• Speak to your intended impact (for example, your organization’s mission and values), as well as the actual impact for your clients or end users (for example, program metrics)</li> <li>• Give examples from your programs and services</li> <li>• Be specific</li> <li>• Include evidence</li> </ul>	20%

<p><b>Question 4: Positive impact of your organization’s programs and services on an individual and community level</b></p> <p>A strong response to this question will:</p> <ul style="list-style-type: none"> <li>• Give a clear and detailed explanation of the positive impact of your organization’s programs and services on individual stakeholders (for example, program participants, volunteers, staff, Board members, et cetera)</li> <li>• Make a clear and compelling connection between individual and broader community impact</li> <li>• Demonstrate an advanced and proactive approach to planning and implementing your programs and services</li> <li>• Be specific</li> <li>• Include evidence that demonstrates your organization’s positive impact in measurable ways (for example, statistics related to the community you serve)</li> </ul>	<p>15%</p>
<p><b>Template: Budget Request</b></p> <p>The Budget Request Template is a mandatory document to submit along with your application form. It will be assessed as part of your application. In this template, you are required to provide a detailed budget submission that shows how the funds you are requesting align to your organizational capacity.</p> <p>Organizational Capacity means: the ability of an organization to fulfill its mission through a blend of sound management, strong governance, and a persistent rededication to assessing and achieving results.</p> <p>A strong budget template will:</p> <ul style="list-style-type: none"> <li>• Include eligible requested operational costs and positions.</li> <li>• Demonstrate alignment between the organization’s mission and requested items</li> <li>• Include realistic costs for each requested items</li> <li>• Demonstrate how the requested items increase an organization’s capacity</li> </ul>	<p>10% (together with Workplan, if applicable)</p>
<p><b>Template: Workplan (if applicable)*</b></p> <p>*Please note that <u>if you are applying for funding for core operating positions (for example, staff salary), you must also submit the B3 Fund Workplan template</u>, and this will be assessed as part of your application. If you are applying for funding for core operating costs (for example, rent), you do not have to complete the workplan template.</p>	<p>10% (together)</p>

<p>A strong workplan will:</p> <ul style="list-style-type: none"> <li>• Show clear and measurable goals related to the positions you are requesting funding for</li> <li>• Show clear timelines and responsibilities</li> <li>• Give detailed activities</li> <li>• Demonstrate strong alignment between the positions you are requesting and the organization’s mission</li> </ul>	with Budget Request)
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GovGrants Service Provider Profile- Equity Section (25%)	Score weighting
Describe how you apply an equity lens/principle when designing your programs and when engaging with equity-seeking groups.	10%
Does your agency have a Diversity, Equity, or Inclusion Policy, framework or statement? (Yes/No)	5%
Does your organization deliver culturally responsive programming/services, have representative leadership of the community at all levels of the organization, and/or have an explicit mandate to serve any of the following communities? (Yes/No)	5%
Did your organization list 1-2 programs offered to the population groups you listed? (Yes/No).	5%

### Financial Assessment ( /100%)

Applicants must demonstrate good financial health. A financial assessment is included in the application review process to broadly assess risk present in not-for-profit funding applicants.

Financial assessment is an important step to check the financial health of an organization applying for funding. It helps gauge an organization’s ability to carry out the proposed work and meet the requirements of the fund, and it helps assess the risk to determine if an organization may not be able to do so. In finance and in funding, this is commonly referred to risk assessment.

This assessment is done by Peel Region’s Finance team. The Finance team analyzes each applicant’s submitted financial statements for risk factors by analyzing financial ratios.

There are 5 categories for the financial ratios:

1. Liquidity: The organization's ability to meet short-term financial obligations
2. Leverage: The organization's ability to operate within their means during the year; assets that are financed by creditors; liabilities and debt.
3. Profitability: The average of the last two years of Surplus (Deficit)
4. Revenue: Diversity of revenue sources
5. Expenditures: Looking for a high proportion dedicated to delivering programs

Applicants are given a score out of 100%. A financial score threshold will be set by the CIP team. All applicants who meet this threshold will move to the next step of the review process to be considered for funding.