

2027 Foundation Grant Program: Application Navigation Guide

Welcome!

The Community Foundation of the South Okanagan Similkameen has designed a single application for its annual grant program to encompass a broad collection of funding needs. Applicants are only required to answer questions that are relevant to their request.

We hope this guide will help you determine which sections apply to your application.

Need Help?

If you are unsure which grant type or funding category best fits your request, please contact Foundation staff before submitting your application. A quick conversation can help ensure you complete the appropriate sections and reduce the need for follow-up questions during the review process.

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- 236-500-1243

Step 1: Complete the ● General Information Section

All applicants must complete this section, regardless of the type of funding requested.

Step 2: Select Your Grant Type

You will be asked to choose one of the following grant types. This selection determines which additional sections you'll need to complete:

● Annual Foundation Grant

Most applicants will select this option.

If you choose an Annual grant, you will identify the funding category that best describes your request and complete the section associated with that category.

● Multi-Year Foundation Grant

If you select a Multi-Year grant, you will identify whether the funding is intended for:

- Operations funding, or
- A project or program.

After completing the question set for multi-year grants, you will additionally complete the relevant questions for your choice of funding category (operations or project/program).

Step 3: Complete the Appropriate Section For Your Funding Category

After selecting your grant type, complete the section for the grant category that corresponds to your funding request.

Project and Program Delivery

Choose this category when you are requesting support for delivery of a program or project (including research projects).

Operations Funding

Choose this category when funding will support the day-to-day activities of your organization.

Organizational Development

Choose this category when funding will be used to strengthen your organization's skills and capacity (such as a Board development session or strategic planning process)

Equipment Purchases, Renovations, and Repairs

Choose this category when funding will support the purchase of equipment, facility improvements, renovations, or repairs.

Step 4: Complete The Following Sections (All Applicants):

Budget and Financial Information

Additional Information (optional, but helpful to the review committee)

Conditions of Granting and Certification

- **Agreement to funding terms**
 - **Certification and signature**
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A Note About City of Penticton In-Kind Funding Support

Applications of all types will complete this section if they request funding to offset the costs of using City of Penticton facilities and services. The process is as follows:

- Applicants will verify the costs of in-kind requests through the City.
- They will include and itemize the amount(s) required to pay for those requests in their application budget.
- If successful with their application, the applicant will pay the City directly for the in-kind support using the funds granted for that purpose.

Quick Reference Guide

If you are applying for...	Complete...
Annual Foundation Grant - Project/Program	"All Applicant" Sections + Project/Program Questions
Annual Foundation Grant - Operations	"All Applicant" Sections + Operations Questions
Annual Foundation Grant - Organizational Development	"All Applicant" Sections + Organizational Development Questions
Annual Foundation Grant - Equipment/Renovation	"All Applicant" Sections + Equipment/Renovation Questions
Multi-Year Operations Grant	"All Applicant" Sections + Multi-Year + Operations Questions
Multi-Year Project or Program Grant	"All Applicant" Sections + Multi-Year + Project/Program Questions
City of Penticton In-Kind Support	As applicable to project/program requests

Dates To Remember

- Online application portal opens: **Tuesday, September 8th**
- Application due date: **Friday, October 16th @ 11:59 p.m.**

Please start your application early! Due to the considerable number of applications expected, we will not be able to offer extensions to the application period.