



## Community Development and Investment Fund (CDIF) Purchase of Service Request PSR-09-66

### Frequently Asked Questions

The following has been adapted from questions asked during previous CDIF Purchase of Service Request processes and is intended to assist agencies in responding to this Purchase of Service Request. This is for information purposes only, and is not an addendum to the Purchase of Service Request.

1. ***Could you give an idea of the kinds of projects which have been funded through CDIF in the past?***

Examples of funded projects include:

- a) An employment initiative – programs that attempt to set up services within the York Region community in areas that did not exist. These services have involved some initial training materials and processes to facilitate people's employability skills and connect Ontario Works clients with jobs;
  - b) A program geared to women who have been out of the workforce for an extended period of time. The project helped them develop a comprehensive return to work employment plan that would enable them to pursue their vocational goals;
  - c) CDIF has also funded the provision of housing outreach supports to help residents secure and maintain affordable housing;
  - d) The Region also funded a parenting program that offered support to multi-cultural fathers and young parents providing education and training to promote family strengthening;
  - e) Another project supported breakfast and snack programs in York Region schools by using an extensive volunteer network.
2. ***Is there a limit to the amount that can be requested, or a recommended amount to request, and what has been the range of funding given in the past?***

Funding decisions are based on the quality of the proposal, the need or service gap that the project will address and the intended outcomes of the project, rather

than by the amount requested. Your request must include details of what you plan to do and what the potential benefit will be to residents from your project. In the past CDIF has funded projects for under \$2,000 and other larger projects close to \$300,000.

3. ***Is the amount of funding based on the size of the agency budget or its proposed project budget? For example, if an agency has an operating budget of \$10,000 as shown in its financial statements, but the agency is asking for funding of \$80,000 for a project, would that be acceptable and how would that project be evaluated?***

The agency's proposal would not be automatically excluded, but the submission will be assessed using the criteria outlined in the evaluation section of the POS document. Stability and the proven ability to manage the program would need to be assessed.

4. ***Can an agency apply for funding for more than one project?***

Yes, but each project should have a separate proposal. This will allow each proposal to be evaluated on its own merit.

5. ***If applying for more than one project or for a project that covers more than one priority funding area, for example, employment supports as well as child poverty and family strengthening, are two proposals required?***

For one integrated project spanning more than one priority funding area, a single proposal can be submitted. However, if they are two distinct projects, it is important to be clear in your proposal about the specific elements of each project. The agency may wish to consider submitting two proposals, since this would allow a clear presentation of the merits of each project.

6. ***What qualifies an agency as 'a partner' for CDIF funding purposes?***

Partnerships can be defined in different ways. For example:

- a) Two or more agencies can team up to provide services by tapping into each other's strengths. Each agency would make important contributions to the project.
- b) Sharing space and facilities also requires commitments of each agency that can be vital for project implementation. This would also constitute a partnership.
- c) A smaller agency that is not registered, could partner with a registered and established agency with a sound financial history. Then the established agency can be the flow-through for funding. The registered agency will sign the contract with the Region and will report on the project.

7. ***If an agency located in York Region partners with one which is not located in the region, would that disqualify the submission?***

Proposals will be considered from an agency that is located outside of York Region, provided that:

- a) the program provides services to York Region residents and any funding received will be used exclusively for the benefit of York Region residents,
- b) the agency and its program meet all other CDIF eligibility criteria,
- c) the project for which funding is requested fits within the Priority Funding Areas of the Purchase of Service Request.

8. ***If an agency is partnering with another agency how should the application be completed, and which agency is the applicant?***

The agency that is the lead on the project completes the application. Information is also required from the partnering agency, as this gives an indication of the strength of the project. Question 'j' of the Proposal Information Form (Schedule B) allows you to provide information about the project partner(s) and their role in the project. Each project partner is required to sign the proposal Declaration. This gives the Selection Committee the assurance that the partners mentioned are in agreement with the project and the role they will play. This kind of partnership could be used where an agency wishes to extend its service into an area where another agency has greater expertise.

9. ***If the partnership is a flow through arrangement what information needs to be submitted and by whom?***

In a flow through arrangement one agency that meets the CDIF registration, financial and board requirements acts as a flow through for another agency that may not meet these criteria. This is necessary because the Region can only contract with registered not-for-profit agencies. For these types of arrangements, the agency that is acting as the flow through needs to provide the following: evidence that it is a registered not-for-profit (indicated on Schedule A); its Board of Directors (Schedule E), and Audited Financial Statements (Attachment 1). The flow through agency must also sign the Declaration. The project details (Schedules B, C and D) should be completed by the agency that will be providing the service in the community.

10. ***Who would be the contracting party in a flow through arrangement?***

The flow through agency will be the contracting party for the project.

11. ***If an agency is acting as a flow-through, is a covering letter or declaration required to outline exactly what is being applied for?***

As far as the evaluation process goes, it is important for agencies to be very clear in their applications because the purchase of service process restricts the Region from speaking with agencies to ask for clarification. The Selection Committee can only evaluate a proposal based on what is included on the schedules. The Declaration must be signed and agencies can also include a covering letter, if they choose.

12. ***Given the expanded CDIF criteria which include additional equipment, organizational development and strategic planning, can an agency apply just for one or more of these by themselves?***

There is nothing to stop an agency from only applying for one of the items listed above. However, CDIF continues to be focused on service delivery programs and

projects. Therefore it is important that your proposal demonstrates how applying for the above items will enhance service delivery and benefit residents.

13. ***Would a proposal from a registered not-for-profit transportation company that provides transit services to clients of community agencies and those with disabilities be eligible for funding? For example, if the service is used to take people with disabilities to work?***

CDIF criteria reflect the community services mandate of the Region, and transportation services do not fall within that mandate. Transit services are not part of our mandate, so this type of project would not be eligible for funding.

14. ***Would a project for seniors be considered?***

It would depend on the services that the project would provide. If the project is focused on services to seniors which fit the mandate of another level of government, then the project would not be eligible. However, if the project focused on one of the CDIF priority areas (for example, some aspect of employment for low-income seniors) it might be considered. It would depend on the details outlined in the proposal.

15. ***Can a for-profit organization apply, and if not can it partner with an eligible not-for-profit agency to receive project funding?***

The agency eligibility criteria established in the CDIF Strategy, mean that only not-for-profit agencies are eligible for CDIF funding. For profit agencies are not eligible for funding under the Strategy even if they partner with another not-for-profit partner.

16. ***On Schedule A, under 'Legal Status of Agency' agencies can indicate 'their status as other'. Would this mean that a for-profit agency can be accepted for funding?***

The request on Schedule A for the legal status of the applying agency is intended to ensure that only agencies that meet the CDIF requirements are considered for funding. An applicant that checks 'other' and states that it is a for-profit agency will be screened out of the selection process.

17. ***On Schedule A it says: 'Agency has had regulatory issues with the federal or provincial government in the past 3 years' What does this mean?***

The Selection Committee needs to be certain that agencies recommended for funding are able to operate fully and freely without hindrances to provide services in York Region. Also, because some of our funding comes from other levels of government, we need to be assured that agencies to which funding is given are in good standing with those funders.

18. ***In Schedule B where funders are to be listed, it asks what is the purpose of the funding received. If an agency is receiving both targeted and unrestricted funding, would it be necessary to specify what the unrestricted funding will be used for or just say that it is unrestricted?***

It is always better to provide full, clear answers in your proposal. So it would be better if both sets of funding and their purposes are outlined. In addition, the

intended use of funds by the agency should be disclosed since the more information that the Selection Committee has the better and fairer will be the evaluation.

19. ***What do you mean by 'primary responsibility' for a service as mentioned in the CDIF criteria?***

Primary Responsibility refers to the level of government that is mandated to ensure that a service is provided. For example, services for people with developmental disabilities are included in the mandate of the Ministry of Community and Social Services. Therefore these services are the primary responsibility of the provincial government, and CDIF will not fund these projects. York Region's mandated social services are in the areas of Homelessness, Family and Children's services and Employment and Financial supports.

20. ***If an agency provides Family and Children's Services programs that include low income families and children, but the service does not track or make a distinction in income groups, would the programs meet CDIF criteria?***

If services meet one or more of the three priority funding areas, you are not required to make a distinction among the clientele who receive services. However it is important that in your application you mention how the programs and services are made available to low income families and children. CDIF is intended to provide services for vulnerable York Region residents. It is important that this group would benefit from your program. In community services our mandate is on helping low income, vulnerable and at-risk people. The more the proposal focuses on those criteria, the more closely it will meet the CDIF criteria.

21. ***What does 'attachment to the work force' mean in the Family and Children's Services criteria?***

Projects that promote attachment to the workforce would provide services (such as child care), for low income families with children that enable parents to enter and remain in the work force.

22. ***Would any self-employment programs qualify under Employment Supports?***  
Not at this point.

23. ***If an agency has a project that is currently funded under CDIF, can it submit a proposal that builds on that project or is it necessary for a different project to be proposed?***

CDIF funding is intended to address a specific project within one calendar year. However, if an agency intends to extend services of a currently funded CDIF project to a new category of clients, then that project can be considered. The agency can also be considered for funding to expand its services into new areas.

24. ***The Purchase of Service Request asks for job specifications for the project co-ordinator. If an agency does not have this staff position, how should it respond to this question?***

The Selection Committee needs to know that the project will be well administered. The agency would need to submit the job description for the staff person who will be responsible for administering the project.

25. ***The Region asks for audited financial statements – a new agency would be unable to produce these, as there is no financial history. Would that make newer agencies ineligible; is there any way that they could qualify?***

The Region asks for audited financial statements because we are required to purchase services from viable agencies which are able to deliver the contracted services. Agencies without a financial history can partner with an agency which has a sound financial history, or as some have done, with a local municipality in York Region. If the proposal is successful, the Purchase of Service Contract will be signed with the partnering agency, and the funds can then be flowed through to the newer agency.

Also, the Region has established a New Agency Development Fund (NADF) geared to address the funding needs of York Region agencies that have been serving the York Region community for five years or less. The Region invites proposals under this funding stream in the spring of each year. Agencies funded under NADF are not eligible for CDIF funding in the same year.

26. ***Would the Region consider an application from an agency that receives its funds from another level of government?***

Once the agency meets the CDIF eligibility criteria, the agency can apply. However, the area of the project also needs to fit with the community services mandate of the Region. For example, the Region has no mandate to support developmental services, adult mental health services or violence against women services. These are all the mandate of the Province. Also, if your agency is funded by the Federal government or Province for a program that is the responsibility of one of these levels of government, CDIF funding cannot be used to 'top up' current funding.

However CDIF funding may be used to purchase a new service that's not within the mandate of the other levels of government, once it meets the CDIF priority funding criteria and falls within the Region's community services mandate.

27. ***Would projects that are initiated by a local municipality be eligible for CDIF funding?***

The focus of CDIF is to extend community services through community service agencies. However a community agency may submit a proposal for a project that would be delivered in partnership with a municipality as long as the contracting organization and project lead is the community agency.

28. ***For many in the non-profit sector if a viable sustainability plan was in place and could be met for the next three years we wouldn't be here. So why the need for a sustainability plan, and would there need to be a plan for the next, say three to five years?***

Having a sustainability plan means that the agency has been thinking about possible alternative funding. The Region realizes that no sustainability plan can be guaranteed but it is important that each agency should have one.

For example, from an employment perspective the Region received funding under Ontario Works (OW) Performance Bonus, but it was a finite amount of money which is now exhausted. If projects that were funded this initiative became dependent on the funding, there would now be problems for those agencies because the funding is no longer there.

29. ***There is a question in the application form which asks if there are similar projects by other agencies. How would an agency determine if a similar project was being funded?***

The Selection Committee will look for some indication that you've done research in the community to see what the current needs are and how they are being met. This is important, since projects which duplicate existing ones are not funded. One way an agency can conduct its research is through checking the Region's YorkLink directory of community services. (YorkLink can be accessed through the Region's web site ([www.york.ca](http://www.york.ca))).

Also, look around your community to see if there are agencies similar to yours that offer similar types of services. Speak with other service providers to see if they know about anyone already delivering the services that you intend to provide.

Finally, you will need to ask the question – 'how will my agency's proposed services complement what other services exist in the community?'

30. ***How could CDIF funding help someone on Ontario Works who is homeless and looking for housing?***

Resources have been put in place that could assist persons facing housing situations such as has been described. The Region has provided funding through CDIF for some agencies to provide housing support services. Housing Support workers provide counselling services, support the search for housing (they keep up to date housing availability lists), and mediate between the clients and the prospective landlords.

In addition to CDIF projects Housing York Inc. manages the Region's social housing, including rent geared to income accommodations, and CDIF also supports the operation of a housing help centre that provides private rental listings.

The Region also invites the participation of the community to help address this issue.

31. ***The Declaration in the Proposal Submission Form requires a signature. Who would you accept as a signatory for the submission?***

The Declaration must be signed by an authorised official of the agency – someone who has signing authority. For example, that person could be the Executive Director, or the Board Chair or an authorized board member.

## The following questions were received during this Purchase of Service Request (PSR-09-66)

1. ***Our auditor is finalizing our 2008/09 statements but they may not be ready in time for Sept 10. [How should we proceed?]***

The agency is advised to submit the latest audited financial statements available. If a later set of audited financials is in process, this can be noted on the submission.

2. ***We receive our funds from individuals, corporations, public foundations, private foundations, users of our services, Events , Bingo, etc... In completing PSR-09-66 for the Community Development and Investment Fund could you please advise, to what detail and what should be put in Part B 1 'What sources of funding does your agency have and for what purpose?'***

An agency is free to provide as much information on its funding as it wishes. However, for the purposes of evaluating the proposal the Selection Committee wishes to know: 1) what institutional funders (organizations) support the agency and the purpose of the funding, 2) If the agency receives private sector support, and also aggregate individual donor support, both of which are indications of its fundraising capability, public (community) support, and potential for stability and sustainability.

3. ***In the case of a partnership, does the partnering agency also need to submit references and their own agency information? Could they be included as a reference for our organization, or would it be best that we seek other references?***

The partnering agency is required to sign the Declaration, and the proposal needs to state what role the partnering agency will play in the project. It is not recommended that an agency who is a partner for the project be used as a reference.

4. ***On page 5 of the 2009 Purchase of Service Request, under Funding Available, there is a statement: "This Purchase of Service is issued for the One-year CDIF Project Funding stream only. No proposals are being accepted for Renewable Funding in this Purchase of Service Request". Does this mean that agencies applying to fund existing activities being undertaken with funding from CDIF will not be considered?***

CDIF has two funding streams - a One Year Project Funding stream and a Renewable Funding stream. For the 2009 proposal call, no funding is available for the Renewable Funding stream. The One Year Project Funding stream funds projects on an annual basis. It is possible for an agency to be considered for funding of a project for a second time. In such cases we usually wish to see how the project builds on what was funded previously. This could be adding of a service component, reaching out to additional clients, serving clients from a new location or with complementary needs etc. Also, since the CDIF One Year Project Funding is not intended to fund projects indefinitely, agencies are encouraged not to rely on CDIF for continuous future year funding - hence the question about sustainability.

5. ***As it is evident that CDIF is discouraging organizations from looking to the CDIF as a renewable funding source for projects beginning in 2010, would it be possible to build a feasibility study component into our project's sustainability plan where we look at options and alternatives for future funding for a project that is in high demand?***

CDIF has always encouraged agencies to consider other funding options, since we cannot guarantee that a project funded in one year will be funded for a second year. Under the expanded CDIF we can now consider projects for the development of fundraising and sustainability plans related to the funded services.

6. ***Are transfers to clients for transportation, child care and food costs eligible? If so, are there caps or do they simply need to be substantiated? Are there other preferred ways of accounting for expenditures that facilitate individual client participation (i.e. do you prefer a strategy that encourages clients to apply for support rather than offering a universal stipend to all)?***

The CDIF Selection Committee will assess proposals based on the criteria set out on Page 17 of the Purchase of Service Request document. Budgets are reviewed and assessed from the perspective of reasonable costs to effectively deliver the services. Therefore, whatever is requested needs to be explained and seen to be reasonable. Question f) on page B-3 of the Proposal Submission Package should be used for this purpose.

### **Important Administrative Matters**

1. **Submitting Proposal:** Proposals must be received in the **Office of the Director of Supplies and Services** by **Thursday September 10, 2009 at 1:00 pm sharp**. Each agency must ensure that proposals are properly addressed and delivered to:

**The Director, Supplies and Services Branch  
The Regional Municipality of York  
17250 Yonge Street, 1<sup>st</sup> Floor  
Newmarket, Ontario L3Y 6Z1**

2. **Additional Questions:** The Region will respond to any additional questions from agencies about this Purchase of Service Request. To allow adequate time for a complete answer to be provided please send your questions as soon as possible. The preferred method of communication is by electronic mail (e-mail).

#### **All questions must be addressed to:**

Janet Hill, CPPB  
Senior Purchasing Analyst  
Supplies and Services Branch  
Regional Municipality of York  
17250 Yonge Street  
Newmarket

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