

SOUTH OKANAGAN CONSERVATION FUND (SOCF)

Application Guidance

General Instructions

This document is intended to help you in preparing and writing your proposal. It provides guidance on the content required for review and assessment of your proposed project.

The South Okanagan Conservation Fund encourages proponents to ensure that the *Syilx People* of the Okanagan Nation's perspective is reflected and included in this work, and *Syilx* partnerships or elements that seek to include, are encouraged. Projects must comply with all aspects of the [Terms of Reference](#).

Section A – GENERAL INFORMATION

1. **Application Date:** Applications must be received before 4:30 pm on the date of the deadline.
2. **Project Title:** Select a title that concisely identifies the project.
3. **Proponent:** Identify who is the eligible proponent that will enter into a legal funding agreement with RDOS (must be a registered non-profit organization and will be asked to provide proof of registration if project approved). Include who will lead this project and be the primary contact. The proponent email address is where all correspondence, including notification of approval status, grant agreement information and other project details will be sent.
4. **Partner:** If there is another partner organization involved in delivering the project, identify them here. They can be another registered non-profit society or non-eligible organization.
5. **Total Funding Requested:** Indicate the cash amount that you are requesting from the South Okanagan Conservation Fund.
6. **Total Project Budget:** Identify the total cost estimated for the completion of the project.
7. **Multi-Year Projects:** Multi-year projects up to a maximum of three years may be approved, although applicants must apply each year. Indicate if you are seeking support for multiple years for the first time, or, if your past multi-year application has been previously approved, include what year you are applying for (e.g., year 2 of 3, or year 3 of 3). (Max Three Sentences)

Section B – MANDATORY CRITERIA

1. Project falls within participating areas: Make sure that the project location falls into the participating areas. If in doubt, check the [RDOS online mapping system](#).

2. Project addresses International Union for Conservation of Nature (IUCN) threats to biodiversity targets. Make sure that your project addresses at least one of the listed threats (you can choose more than one). See page 5 of the **SOCF Terms of Reference**.
3. Project meets the basic requirements for an eligible activity: See Appendix 1 Ineligible Activities in the **SOCF Terms of Reference**.
4. Proponent is a registered non-profit organization. You will be required to provide proof of registration upon being approved for funding.
5. Proponent is prepared to make a presentation on the outcomes of their work and submit a written interim and final report on an annual basis.
6. One or more maps of the project must be attached. Provide regional and site-specific context. Can be pdf, jpg, or kmz files (no links). (Remember size limit of entire submission must be less than 7 MB).
7. One letter of support must be attached from either a primary partner, or land manager/owner where project will take place.
8. Proponent has attached a photo representing their project.

Section C – Project Outline

1. **Project Description:** Briefly describe what your project will accomplish. SOCF will use this summary for communications and reports. As well include an image (JPEG preferred) that represents your project to use in communications (Max 3 sentences)
2. **Executive Summary:** The executive summary should clearly and concisely summarize the entire proposal. Include 1 or 2 sentences on each of the following: (3-5 Paragraphs)
 - a. The problem addressed by this proposal
 - b. The overall project objectives, general methods, and measures of success
 - c. For this year, include the total cost of the project, partnership funds already obtained, and the amount requested from SOCF in the proposal
 - d. Specify how the proposed work is important for conservation and how it will benefit the South Okanagan Region
3. **How does the project specifically address threats to biodiversity?** Refer to the Themes and Targets for conservation in Sections 4.1 and 4.2 and Section 4.3 of the SOCF Terms of Reference.

Include facts and stats that support the need for the project; standards for methods to be applied, and literature references. (3-5 paragraphs and can be in point form).

- a. The framework for the Technical Review is based on the IUCN classification of direct threats (sources of stress and proximate pressures) that may be past, ongoing, and/or likely to occur in the future. The Technical Review criteria include if there is a clearly demonstrated ability for the results of the project to reduce an identified threat to a biodiversity target. [Go here for more information on the IUCN Threats Classification Scheme.](#)
4. **Provide an outline** (Project Charter) detailing the steps through to completion of the final report and presentations to RDOS. Project Charters include objectives, methods (Can be up to 5 per objective), deliverables, measures of success (MOS) and proposed timeline.
 - a. A Project Charter normally includes a project summary, goals, objectives, methods, intended results, deliverables, milestones, risks, assumptions and constraints, team roles/responsibilities, and other stakeholders. Cost estimates and sources of funding can be included separately in the application budget.
 - b. Goals are broad statements that are visionary about what you wish to accomplish, the ultimate impact or outcome of your project.
 - c. Objectives represent the steps toward accomplishing a goal. Objectives are narrow, and precise, concrete, and measurable. SMART objectives are Specific, Measurable, Achievable, Realistic and Time Bound. State your objectives in quantifiable terms, as outcomes or results of an activity and are realistic and able to be accomplished within the grant period.
 - d. How will you measure the success of the project and know that you've met the objectives/goals. [Helpful Evaluation Resource](#)
5. Identify who will be the primary person(s) responsible for delivering the project along with their qualifications and provide a reference (name, phone number, email address) for each individual. The Technical Review will assess the capacity of the individuals who will deliver the project.
6. Who you will be partnering with on this project and what their roles are (including partners providing funding). Letters of support need to be attached. The Technical Review criteria include whether the proposed activities involve other agencies and organizations, and whether it leverages funds from other sources.

7. Many SOCF-funded projects take place on the traditional territory of the *Syilx People* of the Okanagan Nation. We acknowledge the possibility of collaborating with Indigenous communities in joint leadership roles for various projects, or having projects primarily led by Indigenous communities. Please describe any communication you have had with Indigenous communities about your proposal and please include details of those contacts and a summary of any feedback that you received (2-4 paragraphs). The South Okanagan Conservation Fund encourages proponents to ensure that the *Syilx People* of the Okanagan Nation's perspective is reflected and included in this work, and *Syilx* partnerships or elements that seek to include, are encouraged.
8. How will the public be made aware of the project and the South Okanagan Conservation Fund contribution? (2-4 paragraphs can be in point form). Include ideas on where you would like to present the outcome of your project. The Technical Review criteria include whether there is a clearly described extension component of the project.
9. Location and Map: Help reviewers understand the regional and site-specific context and location of your project. Describe to the best of your ability distance to the nearest town or other known feature, as well as tenure type (Private, Indian Reserve, Locatee Lands, Crown). Attach one or more maps as separate attachments via jpg, pdf or kmz files. DO NOT include links to Google Maps or any other online map. Attachments are mandatory.
10. Budget. Include a full project budget using the budget excel template provided on the South Okanagan Conservation Fund Apply page. Submit with your application document at the same time. The Technical Review criteria include assessment of value for funding requested, cost benefits of the project, including project costs and in-kind costs, and leverage of funds from other sources. How will the public be made aware of the project and the South Okanagan Conservation Fund's Contribution. Please include ideas on where you would like to present the outcome of your project. The Technical Review will assess whether there is a clearly described extension component of the project.

Applications must be submitted to the South Okanagan Conservation Fund by 4:30 pm of the Due Date

Acceptable forms of delivery include hand delivery, courier, or mail to:

C/O RDOS 101 Martin St. Penticton BC V2A 5J9

Or, by email to:

socf.meads@gmail.com