



Fondation du Grand Montréal

THE COLLECTIVE FUND FOR SOCIAL EQUITY

TERMS OF REFERENCE 2023

Supporting initiatives for asylum seekers, refugees, and migrants without status, or with temporary or precarious status

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Purpose of the Collective Fund for Social Equity

The Collective Fund for Social Equity was created by the FGM in 2021 with the intention of intervening on issues related to social inequalities as well as issues of justice, equity, diversity, and inclusion. The FGM wishes to support, as a priority, organizations working with historically marginalized populations (Black, Indigenous, and racialized people, LGBTQ2S+ people, women and girls, and people living with physical or intellectual limitations or other neurodivergent people), using an approach based on listening and trust, to help them achieve their transformative vision for the community.

Core principles of the FGM Collective Funds

- Support rights-based collective and individual advocacy;
- Support actions and needs identified as underfunded within the context of the Fund;
- Address systemic barriers faced by community organizations (lack of overall funding, charitable status, mission-based funding, advocacy support);
- Apply the principles of trust-based philanthropy ([read more about it here](#)) and participatory distribution practices;
- Respond in an innovative way by mobilizing philanthropic players, listening to the needs expressed by the community, and addressing these needs using the available resources.

Governance

The Foundation of Greater Montreal has called on numerous community and institutional partners working with refugees and asylum seekers and non-status or temporary immigrants to create a **Participatory Advisory Committee**. The Committee includes representatives from community organizations in the Greater Montreal area, advocacy organizations, the cities of Montreal and Laval, the regional public health departments, and concertation groups.

The Committee's mandate is to:

- **Collaboratively define the Fund's objectives and parameters:** priority populations, funding axes, criteria for prioritizing and analyzing funding applications, funding conditions, etc.;
- **Depending on availability, collaborate on identifying organizations, groups and initiatives** to be proactively contacted to submit to the Fund;
- **Analyze funding applications submitted to the Fund**, according to the criteria and in accordance with the principles of justice, equity, diversity, and inclusion (JEDI) and trust-based philanthropy;
- **Participate in meetings to discuss and prioritize** the initiatives submitted;
- **Prepare final recommendations for funding distribution.**

Committee members can choose their level of involvement, in accordance with their availability and the mission of their organizations:

- Participate only in the process to set up the Fund (defining parameters and identifying organizations);
- Participate in the selection process (analyzing applications and making final recommendations);
- Or be involved throughout the entire participatory process.

The list of Advisory Committee members and their respective mandates can be found in the appendix to this document.

Composition of the Participatory Advisory Committee:

The committee will be made up of a minimum of 8 people representing a variety of backgrounds and regions.

- **Territorial representation:** Greater Montreal, including the North and South Shores, Laval, and the Island of Montreal.

- **Institutional representation:** Cities, boroughs, public health, etc.
- **Community representation:** advocacy and front-line organizations, concertation groups, etc.
- **FGM representation:** minimum 2 members from the Community Engagement Committee

Members of this committee should also have knowledge and expertise in the following areas:

- Community sector, and more specifically, issues directly and indirectly impacting immigration and asylum seekers;
- JEDI (Justice, Equity, Diversity, and Inclusion) and intersectional approaches;
- Trust-based philanthropy approaches (redistribution of power, equitable philanthropy, ADS+ approach, etc.).

Important Dates

Application period: August 7, 2023 to September 29, 2023 (5pm)

Virtual information sessions: August 28th, September 13th, and September 18th

August 28th at 11 a.m. on Zoom: <https://fgmtl-org.zoom.us/j/88204099461>

September 13th at 2 p.m. on Zoom: <https://fgmtl-org.zoom.us/j/83696563665>

September 18th at 6 p.m. on Zoom: <https://fgmtl-org.zoom.us/j/81411186627>

Funding application analysis period: October – November 2023

Communication of funding decisions: December 2023

Timeline

Selection of overall focus	By the FGM Community Engagement Committee based on proposals made by the FGM team.	February-March 2023
Preconsultation period	Discussions between members of the FGM team and community, institutional, and philanthropic stakeholders to validate the Fund's overall focus, gather evidence, and clarify objectives.	March-June 2023
Creation of the Advisory Committee	Development of an advisory and participatory committee bringing together representatives from the community.	May-June 2023
Definition and validation of the Fund's streams and criteria by the Advisory Committee	The Advisory Committee defines: <ul style="list-style-type: none"> - The Fund's funding streams; - Financing conditions; - Eligibility and prioritization criteria; - Evaluation criteria for initiatives submitted to the Fund. 	July 2023
Fund launch and project submission period	Open call for projects available via: <ul style="list-style-type: none"> • FGM website, newsletter, and social media; 	August 7 – September 29 (at 5 p.m.) 2023

	<ul style="list-style-type: none"> ● Sharing by partners working with the relevant communities; ● Proactive approach of relevant organizations. <p>Supporting documents:</p> <ul style="list-style-type: none"> ● Terms of reference; ● Fund outline (2-pager); ● Prequalification form on the FGM website. 	
Initial project selections	<p>The FGM team, in consultation with the Advisory Committee, will choose the organizations and initiatives to prioritize according to the following criteria:</p> <ul style="list-style-type: none"> ● Relevance of the organization's initiative or mission to the funding streams and priorities of the 2023 Fund; ● Interventions with historically marginalized populations that promote intersectional solutions; ● Territory of intervention; ● Demonstrated community representation and an effective participatory approach. 	September-October 2023
Conversations with selected organizations	<p>The FGM team will contact the prioritized organizations for an in-depth conversation (1 hour) which will be used to complete the funding applications that will be then validated by the organizations.</p>	September–November 2023
Project evaluation, based on conversation form questions	<p>The Advisory Committee will meet in November 2023 to review applications and make recommendations for funding distribution based on the following assessment criteria:</p> <ul style="list-style-type: none"> ● Expected benefits for individuals and communities, or targeted impacts on systems and public policies; ● Deployment of a transformative vision and a willingness to change the status quo; ● Emphasis on the principles of justice, diversity, equity, inclusion and intersectionality; 	November 2023

	<ul style="list-style-type: none"> ● Level of mobilization of the people and communities affected; ● Ability to set realistic goals in line with organizational capabilities; ● Evidence of collaboration, partnerships, or alliances. 	
Final funding recommendations made by the Advisory Committee on organizations and initiatives for the 2023 Fund		No later than November 20, 2023
Validation of recommendations by the FGM Community Engagement Committee		November 30, 2023

Objectives and funding streams for the 2023 Collective Fund for Social Equity

In 2023-2024, the Fund will provide support for **organizations and initiatives working with asylum seekers, refugees, or migrants without status, or with temporary or precarious status**, based on the needs identified by these communities during consultations. Specifically, funding will be allocated in the following streams:

		Examples
Stream 1	Activities or initiatives aimed at providing or improving administrative or legal supports and services for the target groups	<ul style="list-style-type: none"> ● Accompanying people to help them complete the necessary administrative procedures; ● Individual or group support to help people navigate administrative and legal systems; ● Legal services that are free and reliable, working to safeguard individual rights; ● Interpretation services.
Stream 2	Initiatives aimed at influencing public policy	<ul style="list-style-type: none"> ● Advocacy to change existing policies or introduce new ones that have a positive impact on the quality of life and access to rights for the target groups; ● Awareness-raising actions aimed at drawing attention to the realities experienced by these groups, combating prejudice, and strengthening solidarity with them; ● Actions to produce, popularize, and transmit information by and for, and in support of, the affected communities.
Stream 3	Initiatives aimed at strengthening individual or collective empowerment for the target populations	<ul style="list-style-type: none"> ● Emerging initiatives and activities carried out by non-status migrants, those with temporary or precarious status,

		<p>refugees, or asylum seekers for the benefit of their respective communities;</p> <ul style="list-style-type: none"> ● Initiatives aimed at equipping these populations to better defend their own individual and collective rights.
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Eligible organizations and initiatives

- Registered charities;
- Organizations without a charitable number, coalitions, associations, and grassroots groups - if the organization does not have a charitable number, it must be able to collaborate with a fiduciary organization that does;
- Organizations and initiatives operating in the Greater Montreal area (the 82 municipalities of the Montreal Metropolitan Community (MMC), including Laval and the North and South Shore.

Justice, Equity, Diversity, and Inclusion

In line with the FGM's principles of justice, equity, diversity, and inclusion, priority will be given to organizations and initiatives that:

- Intervene specifically to improve the quality of life for historically marginalized populations, as identified by the FGM;
- Have been designed and implemented by people with lived experience of the realities and issues they aim to address.

We are committed to facilitating access to this process for organizations, initiatives, citizen groups, or other associations who face systemic barriers to obtaining funding, including organizations without mission-based funding, without a charitable number, those in the process of establishing themselves, or whose primary activities are advocacy, rights activism, community mobilization, etc.

Funding conditions

In 2023, the Collective Fund for Social Equity has a total budget of \$1,300,000.

- **Support will be granted for 2 years** (unless a specific request for short-term funding is made).
- **Funding will be flexible:**
 - Mission-based funding (for the continuation or reinforcement of current activities), for a specific project, or for organizational capacity building;
 - Funding granted for existing activities, newly launched activities, or to develop a new initiative.
- **Organizations/initiatives can apply to three different funding levels:**
 - Tier 1: \$15,000 per year
 - Tier 2: \$40,000 per year
 - Tier 3: \$65,000 per year
- **Only one application** per applicant organization or group will be considered.

Prioritization criteria

Following receipt of the pre-qualification forms, organizations and initiatives will be prioritized for an in-depth conversation with the FGM team, leading to the submission of a funding application to the Collective Fund for Social Equity 2023. Prioritization criteria are as follows:

- Relevance of the organization's initiative or mission to the Fund's priorities and funding streams;
- Interventions with historically marginalized populations that promote intersectionality;

- Geographical area of activity;
- Demonstrated community representation and an effective participatory approach.

Application Analysis Criteria

Funding applications will be analyzed by the Fund's Participatory Advisory Committee according to the following criteria:

	Criteria	Explanation/examples	Points
1	Expected benefits for individuals and communities or impact on systems and policies	The initiative : <ul style="list-style-type: none"> • Meets the priority needs of the people or communities targeted by the Fund; • Aims to improve the well-being of the people or communities targeted by the Fund; • Strengthens the individual and collective power of the people or communities targeted by the Fund; • Could lead to concrete and sustainable change in existing systems (policies, rights, processes); 	/5
2	Transformative vision and a commitment to changing the status quo	<ul style="list-style-type: none"> • The initiative aims to change the status quo in favour of social justice; • The initiative aims to strengthen solidarity between the various population groups; 	/5
3	Justice, equity, diversity, inclusion and intersectionality	<ul style="list-style-type: none"> • The initiative demonstrates an intersectional and intentional approach to working with one or more historically marginalized communities (Black, Indigenous, racialized, LGBTQ2S+, living with a disability, girls and women); • The organization faces significant barriers in obtaining funding to achieve its vision and mission (difficulty accessing funders, language barriers, organizational capacity, etc.). 	/5
4	Engaging people and communities	<ul style="list-style-type: none"> • The target populations are included and involved in the ideation, implementation, and definition of the initiative and its impacts; • The initiative embodies the principle of “nothing about us without us”; 	/5
5	Realistic goals and organizational capacity	<ul style="list-style-type: none"> • The expected results are relevant and appear realistic (in terms of proposed actions, timeline and finances); • The funding will have a leverage effect (enabling the organization to strengthen its capacities, mobilise other financial resources, etc.) 	/5
6	Collaborations, partnerships, and alliances	<ul style="list-style-type: none"> • The organization works closely with other key stakeholders (generally or as part of proposed initiative); • The initiative embodies the collective impact approach (bringing actors together around a common goal, allowing them to work together, rather than in competition); 	/5
7	Bonus	Other Factors: Area of intervention, innovation, leadership in the field, service gaps, hidden gem.	/3
	Total:		/33

Support for organizations/initiatives in the application process

In keeping with the principles of trust-based philanthropy, and considering its organizational capacities, the Foundation of Greater Montreal is working to simplify the administrative processes involved in submitting applications, to make the conditions for granting funding transparent, and to communicate with interested organizations and initiatives. For more information on the Collective Fund for Social Equity 2023, organizations can:

- Consult the Terms of Reference
- Attend a Q&A session with the Foundation of Greater Montreal team (no registration required) on the following dates:
 - August 28th at 11 a.m. on Zoom: <https://fgmtl-org.zoom.us/j/88204099461>
 - September 13th at 2 p.m. on Zoom: <https://fgmtl-org.zoom.us/j/83696563665>
 - September 18th at 6 p.m. on Zoom: <https://fgmtl-org.zoom.us/j/81411186627>

Follow-up on funded initiatives

Following the selection of initiatives, both parties (the recipient organization and the FGM) will sign an agreement to formalize the partnership expectations. If the organization or initiative does not have charitable status, the agreement will be signed between the FGM and the initiative's fiduciary body.

Collaboration between the FGM and the organizations financed as part of our Collective Funds is based on the values of transparency, reciprocity, and mutual learning. The FGM actively seeks to reduce the administrative expectations associated with monitoring and reporting on initiatives, and to transform it into a collective process for sharing knowledge and learnings.

As part of the Collective Fund for Social Equity 2023, **funded organizations and initiatives will be invited to participate in an annual networking event to share knowledge and results.** Follow-up bilateral meetings may be organized at the request of organizations or the FGM.

APPENDIX: PRE-QUALIFICATION FORM (STEP 1)

	Question	Format
1	Describe the initiative, project, or activity you would like to submit to the Fund.	Text field
2	Describe the overall mission of your organization or initiative.	Text field
3	Which funding level are you applying for? <ul style="list-style-type: none">● \$15,000 per year● \$40,000 per year● \$65,000 per year	Multiple choice – 1 choice possible
4	Which funding stream does your initiative most closely align with? <ul style="list-style-type: none">● Stream 1: Legal and administrative support● Stream 2: Advocacy● Stream 3: Collective and individual empowerment	Multiple choice – 1 choice possible

5	What is the name of your organization or initiative?	Text field
6	Your organization is most active in which of the following regions? <ul style="list-style-type: none"> • South Shore/Montérégie • North Shore (excluding Laval) • Laval • Island of Montreal • Other 	Multiple choice – multiple choices possible
7	If applicable, specify the neighborhood or borough (Montreal/Laval) or municipality (North Shore/South Shore) where your activities are concentrated.	Text field
8	Does your organization aim specifically to improve the quality of life of historically marginalized populations as identified by the FGM?	Yes/No
9	If so, which one(s)? <ul style="list-style-type: none"> • Black people • Indigenous people • Racialized people • Women and girls • People living with a physical or intellectual limitation or other neurodivergent people • People who identify as part of the LGBTQ2S+ community 	Multiple choice – multiple choices possible
10	Please explain how asylum-seekers, refugees, or migrants without status, or with temporary or precarious status are involved in the leadership and/or governance of your organization/initiative.	Text field
11	Does your organization have a charitable number registered with the Canada Revenue Agency (CRA)?	Yes/No
12	If yes, please provide your registration number.	Text field
13	Enter your name.	Text field

14	Indicate your position within your organization.	Drop-down menu or text field
15	If you wish, please indicate your pronouns.	Text field
16	Email address	Text field

APPENDIX: CONVERSATION FORM (STEP 2)

Organization Name	
Name of Fiduciary Organization (if required)	
CRA registration number	
Territory (city, borough)	
Name of the person representing the organization	
Title	
Email address	
Telephone	
Address	

Initiative Name	
Target populations	
Funding Stream	
Amount requested	

1. Description of the proposed organization or initiative's mission.
2. Context for the initiative, priority issues, or transformative vision of the organization.
3. What would the requested funding be used for?
4. Describe the impact you are seeking to have through this initiative on people, communities, policies, or existing systems. The impact can be qualitative as well as quantitative, and can be short- or long-term.

5. How are the people you serve involved in the organization's leadership and/or governance? How does the organization/initiative value their participation and expertise?
6. Who are the initiative's partners, allies, and key stakeholders? How does the organization/initiative collaborate with other actors in the ecosystem?
Other information (optional)

APPENDIX: HIGHLIGHTS FROM COMMUNITY CONSULTATIONS

Between April and July 2023, the Foundation of Greater Montreal team held consultations with representatives of institutional and philanthropic organizations, organizations that work with asylum seekers, refugees and non-status, temporary and precarious migrants, concertation groups, and human rights advocacy groups and activists.

The following are some highlights from the consultations and discussions held by the committee:

- **The needs of non-status people:** According to some estimates, over 500,000 people are living without status in Canada, but conclusive data is impossible to obtain. This large population has virtually no access to basic public services, such as health care, education beyond high school, legal support, or francization. Many people are afraid to use community resources because of the information they may be asked to provide.
- **The regularization program project:** a major mobilization of rights groups and unions within the Coalition for Regularization aimed at securing the broadest possible implementation and application of a potential regularization program. To date, information about the program (who will run it and for whom) has not yet been released. The Coalition for Regularization is campaigning for the program to be accessible to all non-status people, as well as those with precarious and temporary status, and to offer permanent status.
- **Workers' rights:** Although the migrant workforce plays an essential role in sustaining the Quebec (and Canadian) economic system, the situation of migrant workers with temporary status remains highly precarious. The limitations associated with temporary status make people vulnerable to exploitation and abuse of their rights, as well as loss of status for those who take the risk of leaving their employers or denouncing abusive practices. Advocacy groups stress the need to reform the labor migration system to better protect workers' rights.
- **Support services:** Front-line organizations continue to report high demand and a lack of funding for refugee and asylum-seeker support services. This applies particularly to support with administrative procedures and interpretation (pressure on interpretation services has increased considerably since Bill 96 came into force). Local organizations are not always equipped to provide effective support to asylum seekers, and receive no

funding for this type of activity. The consultations emphasized the importance of establishing a key resource centre in every neighborhood and community.

- **Housing crisis:** Asylum seekers, refugees, and temporary or non-status migrants are particularly hard hit by the housing crisis. Homelessness is on the rise among these populations. The situation is all the more worrying given the lack of specialized housing services for immigrants. "Generalist" shelters are not equipped to adequately accompany people through their immigration process. In addition to housing, there are basic needs such as furnishings, clothing (especially winter clothing), baby gear, school supplies, etc. In addition, food banks are seeing a significant increase in the number of migrants and asylum seekers who depend on their assistance.
- **Health services:** Access to health services remains a major issue, particularly for women. Organizations are also noting the worsening of mental health problems and increased isolation in the face of challenges, uncertainty, and lack of support.
- **Legal services:** Access to reliable legal services is a crucial component in the process of regularizing and defending people's individual rights. Unfortunately, there is a glaring lack of community legal services in the Greater Montreal area, and existing services are overwhelmed. In this context, people often turn to private services, which are often very expensive, unreliable, and sometimes fraudulent. Funding legal services for regularization should be a priority.
- **Outlying areas:** The northern and southern regions of Greater Montreal, particularly the cities of Laval and Longueuil (and especially Vieux-Longueuil), are home to a growing population of asylum seekers, refugees, and non-status, temporary and precarious migrants (in fact, Laval has the second-largest immigrant population in the province, after Montreal). In contrast to Montreal, there is a lack of organizations serving the immigrant population. These organizations often cover a large area with little public transportation, creating a major challenge in terms of access to existing services. Other issues similar to those in Montreal: lack of access to health and perinatal services, housing scarcity, and the rise of hidden homelessness. Community stakeholders point to a significant lack of funding for services for immigrant populations on the outskirts of Montreal.

APPENDIX: List of organizations consulted, members of the Participatory Advisory Committee (in alphabetical order)

List of organizations consulted:

- Action Réfugiés Montréal
- Immigrant Workers Centre (IWC-CTI)
- Centre intégré de santé et de services sociaux (CISSS) de la Montérégie-Est
- Coalition montréalaise des tables de quartier (CMTQ)
- Coalition pour la régularisation
- Conseil québécois LGBT+
- Corporation du développement communautaire de Côte-de-Neiges
- Direction régionale de la santé publique
- League des droits et de libertés (LDL)
- Maison Internationale de la Rive Sud
- Médecins du Monde Canada
- Regroupement intersectoriel des organismes communautaires de Montréal (RIOCM)
- Service de développement social, sport et loisir de la Ville de Laval
- Service de diversité et de l'inclusion sociale de la Ville de Montréal – Bureau d'intégration des nouveaux arrivants à Montréal (BINAM)
- Table de concertation des organismes au service des personnes réfugiées et immigrantes (TCRI)
- Un itinéraire pour tous

Members of the Participatory Advisory Committee:

Organization Name	Mandate
AGIR Montréal	Criteria definition, application analysis
Arrondissement du Montréal-Nord, Ville de Montréal	Application analysis
Immigrant Workers Centre - Centre de travailleurs et travailleuses immigrant.e.s (IWC-CTTI)	Criteria definition, application analysis
Centre intégré de santé et de services sociaux (CISSS) de la Montérégie-Est	Criteria definition
Centre social d'aide aux migrants (CSAI)	Criteria definition, application analysis
Coalition montréalaise des tables de quartier (CMTQ)	Criteria definition
Welcome Collective - Collectif Bienvenue	Criteria definition, application analysis
Corporation du développement communautaire de Côte-de-Neiges	Criteria definition
Direction régionale de la santé publique	Criteria definition, application analysis
Fondation du Grand Montréal - Comité d'engagement dans la communauté	Criteria definition, application analysis
L'Institut national pour l'Équité, l'Égalité et l'Inclusion des personnes en situation de handicap (INÉÉI-PSH)	Application analysis
Médecins du Monde Canada	Application analysis
Service de développement social, sport et loisir de la Ville de Laval	Criteria definition, application analysis
Service de diversité et de l'inclusion sociale de la Ville de Montréal – Bureau d'intégration des nouveaux arrivants à Montréal (BINAM)	Criteria definition, application analysis
Table de concertation des organismes au service des personnes réfugiées et immigrantes (TCRI)	Criteria definition
Un itinéraire pour tous	Criteria definition, application analysis