Equity Stream Fund

Call for Proposals (CFP) Guidelines

[Unincorporated GCOs]

Equity Stream Fund: Capacity—Building for Grassroots Community Organizations

CFP Number: OCASI ESF-001

Issue Date: November 10, 2025

Submission Deadline: December 19, 2025, 5:00 PM ET

Issuing Organization:

OCASI - Ontario Council of Agencies Serving Immigrants
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This call is open to Unincorporated Grassroots Community Organizations (GCOs) in Ontario that work with equity-seeking communities and have an annual operational budget under $1 million.

Applications can be submitted in either English or French.

Applicants are advised to read the CFP Guidelines carefully, prior to completing and submitting an application.

About OCASI

OCASI is the umbrella organization for immigrant and refugee-serving agencies in Ontario, and the collective voice of the sector. The Council was established in 1978 and has over 250 member agencies across Ontario. OCASI champions equity and human rights for immigrants and refugees through advocacy, collective action, collaborative planning, research, capacity building, and information and knowledge transfer.

1. Program Overview

OCASI invites Unincorporated Grassroots Community Organizations (GCOs) in Ontario to apply for the Equity Stream Fund Program. This initiative, funded by Immigration, Refugees and Citizenship Canada (IRCC), aims to strengthen the capacity of GCOs led by and serving equity-seeking communities. These include migrants, women, youth, LGBTQIA+ individuals, Black and other racialized communities, newcomers, seniors, persons with disabilities, and other diverse groups.

Using an intermediary delivery model, OCASI will provide funding through a fair and transparent process to support a limited number of unincorporated GCOs across Ontario. The goal is to increase their organizational and service capacity. In addition to direct funding, the program offers group training, one-on-one coaching, and peer learning opportunities to strengthen the organization's leadership, operations, and funding readiness.

This Call for Proposals (CFP) guideline provides detailed information on eligibility criteria, application processes, funding details, and evaluation standards.

The Equity Stream Fund aims to:

- Prioritize GCOs that are consistently excluded from funding opportunities.
- Build the organizational and service delivery capacity of unincorporated GCOs led by and serving equity-seeking communities.
- Strengthen the settlement sector by equipping unincorporated GCOs with the skills and resources to independently access other sources of funding.
- Ensure transparency and accountability in the selection, funding, and monitoring of unincorporated GCOs, aligning with OCASI's policies and procedures.

2. Eligibility Criteria

2.1 Organizational Eligibility

Unincorporated Grassroots Community Organizations that meet **ALL** the following criteria are eligible to apply for funding under the Equity Stream program:

- Be an unincorporated Grassroots Community Organization (GCO) actively operating in Ontario for at least two consecutive years.
- Have an annual operational budget of less than $1 million
- Be led by and serving equity-seeking communities (e.g., migrants, women, youth, LGBTQIA+, Black and other racialized communities, newcomers, seniors, persons with disabilities, etc).
- Have a clear governance structure with defined roles and responsibilities.
- Have a primary purpose, presence, and reputation for delivering community-based programs and services with direct community benefit.
- Have financial statements approved by someone in a leadership role.
- Demonstrate the capacity to adopt sound financial management practices or maintain financial systems.
- Be prepared to be matched with a mentor organization to receive one-on-one mentorship to ensure effective project implementation.
- Demonstrated commitment to comply with all privacy and data security obligations for handling sensitive and confidential information.
- Demonstrate a clear need for this specific funding to execute the proposed project (e.g., a funding gap, lack of core operational support).
- Demonstrate a commitment to equity, diversity, inclusion, anti-racism and anti-oppression through existing policies or a formal commitment (e.g., a Board motion) to develop such policies during the project period.
- Demonstrated capacity to comply with all privacy and data security obligations for handling sensitive and confidential information.
- Commit to adhering to all OCASI guidelines, including reporting, financial record-keeping, and participation in monitoring and audit activities.

2.2 Project Eligibility

Proposed projects under the Equity Stream Program must focus on enhancing the capacity of GCOs to serve immigrants, refugees, and equity-seeking communities in Ontario. Projects should address a community need/issue not currently funded by another source and align with one or both of the following focus areas:

a) Organizational Capacity-Building

Strengthening internal systems to enhance participation in the settlement serving sector. Examples include but are not limited to:

- Implement programs to build strong leadership within the organization.
- Train core members/founders to establish governance structures and decision-making processes.
- Establish a clear and actionable volunteer management guideline for identifying, recruiting, and retaining volunteers.
- Formulate fundraising guidelines, including grant-writing and donor engagement strategies.
- Create policies for Human Resources and Financial Management.
- Devise data collection and protection systems to safeguard personal information.
- Develop a training plan for staff on confidentiality, equity and anti-oppression/anti-racism principles to ensure respectful and equitable client interactions and engagement.

b) Service Capacity Building

Increasing the capacity to deliver equitable, effective, and efficient services to equity-seeking communities. Examples include but not limited to:

- Implementing projects and activities that address common and pressing community-identified needs.
- Developing workshops and educational materials on relevant systemic issues that impact community wellbeing.
- Conducting community-led needs assessments and fostering strong, trusting relationships for responsive service delivery.
- Recruiting, onboarding and training staff/volunteers for effective service delivery.
- Developing and implementing templates, tools, and systems for tracking service outcomes and client progress.
- Designing and adapting service delivery models to be more accessible and tailored to specific community needs.
- Building collaborations and partnerships with local community groups and settlement agencies to co-deliver services, share resources, and access joint training, thereby enhancing service reach and impact.
- Conducting targeted outreach and promotion (e.g., websites, promotional materials) to increase service visibility and access.
- Designing service delivery models tailored to community needs.
- Providing ongoing technical and ethical training for client management and data privacy.

3. Funding Scope & Details

Under this Call for Proposal (CFP), OCASI will fund up to 7 projects proposed by unincorporated grassroots community organizations.

3.1 Funding Period

Funding will be provided for projects running from **April 1, 2026 to March 31, 2027**.

3.2 Funding Amount

The Equity Stream Fund will award grants for up to **$50,000** to 7 unincorporated GCOs for the fiscal year of **April 1, 2026 – March 31, 2027**.

3.3 Eligible Costs

Eligible costs include program, administrative and capital costs such as:

- Salaries and wages for project staff
- Materials to support project implementation.
- Capacity building activities (training, needs assessments, conference fees, etc.)
- Strategic planning & policy development
- Community consultations and engagement
- Participant/client remuneration
- Project supplies and materials
- Small Equipment purchases
- Meeting room rental/Refreshments
- Web-based platform development or maintenance (subscription fees, licenses, etc.)
- Data collection, measurement, and reporting costs
- Accessibility & special accommodation expenses
- Translation & Interpretation services
- Travel & accommodation costs related to the project

Costs must be reasonable and necessary for the successful completion and implementation of the project. General administrative costs should not exceed 10% of the overall budget.

3.4 Ineligible Costs

Funds cannot be used for:

- Cost incurred towards incorporation including: filling fees, name reservation fee, business licence fees, legal services fees and other associated costs

- Validation of professional credentials
- Payment of termination or severance pay
- Unreasonable compensation for project staff
- Provision of immigration or citizenship advice/representation
- Activities occurring outside Ontario or not serving Ontario-based communities
- Activities that do not fall within the current objectives or mandate of the applicant organization
- Annual general meetings or regular board meetings, including related travel
- Bonuses, gifts and donations
- Contingency or unexplained miscellaneous costs
- Building larger reserves
- Purchase or lease of land
- Construction and Renovation Costs
- Activities completed or costs incurred prior to the approval of the Equity Fund Stream application
- Costs associated with the preparation of a proposal in response to this CFP

3.5 Timelines for Granting Activities:

All activities and expenditures must take place between April 1, 2026 – March 31, 2027. Please be mindful that all activities must be completed and all expenditures made within the stated timeframe.

The deadline to apply is December 19, 2025. Applications submitted after the deadline cannot be considered unless a general CFP extension is provided.

3.6 Reporting Requirements

All Unincorporated GCOs that receive Equity Stream Funds are required to submit reports on project activities, expenditures, and outcomes. This reporting provides OCASI with the information necessary to evaluate compliance with the funding agreement and the project's effectiveness. The funding agreement will specify the full reporting requirements and schedules. If completed early, reports can be submitted prior to the due date.

3.7 Mentorship Requirement

All Unincorporated GCOs that receive Equity Stream Funds are required to be matched with a mentor organization for one-on-one mentorship. This program component provides targeted support in areas such as financial management, governance, and program delivery to ensure effective project implementation.

Pairing selected unincorporated GCOs with experienced partner organizations leverages expertise for practical knowledge sharing, skill-building, and enhanced collaboration. This approach facilitates the transfer of critical skills and best practices among GCOs, ultimately fostering their sustainable growth and impact. The mentorship is structured as a 12-month commitment with regular touchpoints to ensure consistent support.

3.8 Mandatory Capacity Building Requirements

As a condition of funding, all unincorporated GCOs receiving Equity Stream Funds are required to participate in a structured capacity building program. This training program is designed to strengthen core organizational & operational functions such as financial management, human resources, governance, collaborations & partnerships, etc.

4. Project Proposal

Applicants are expected to complete all sections in the application form and submit all required supporting documentation.

The main components of the application include:

Section 4.1: Organizational Profile
Section 4.2: Demographics
Section 4.3: Project Description
Section 4.4: Francophone Integration
Section 4.5: Financial Accountability
Section 4.6: Governance Structure
Section 4.7: Evaluation
Section 4.8: Project Budget
Section 4.9: Supporting Documents

4.1 Organizational Profile

Provide a comprehensive overview of your organization, including:

- **Organization Details**: Name, location, years of operation, website, contact information, etc.
- **Vision, Mission, Goals, and Values**: Clearly articulate the organization's vision, mission, goals, and core values, emphasizing how they guide your work.

Highlight how the organization is led by and serves equity-seeking communities.
- **Past Projects and Impact**: Describe previous projects, costs and the number and types of beneficiaries reached.

4.2 Demographics

Provide some statistical characteristics of your organization including geographical location, organizational focus and the equity-seeking groups your organization is working with.

4.3 Project Description

Outline the proposed project, ensuring alignment with organizational or service capacity-building needs. Include the following:

- **Statement of Need**: Identify the major organizational or service delivery need/issue your project aims to address. Support your argument with relevant figures, facts or evidence.
- **Project Activities**: Describe the proposed project and its key activities, clearly addressing specific capacity gaps.
- **Project Action Plan:** Provide a detailed timeline and action plan for the project, including:
    - Project Deliverables
    - Key Tasks
    - Indicators of Progress
- **Resources:** Describe the available resources you have to support the project and the resources you will need to implement the project.

4.4 Francophone Integration

The Equity Stream Fund is committed to sustaining and enhancing support to Francophone equity-seeking communities. If applicable, please describe how the proposed project supports Francophone equity-seeking communities such as bilingual service delivery or partnerships with Francophone groups/organizations.

4.5 Financial Accountability

Describe if you have any basic processes or systems in place to manage and track the financial transactions. Consider responding the following questions:

- How the fund will be recorded and tracked (e.g., spreadsheets or any other financial softwares).
- Who will oversee finances (e.g., a volunteer treasurer or a group member with financial expertise).

- Basic reporting plan for managing this grant(e.g., project expenditure summaries will be submitted quarterly).

NOTE: If your organization has been operating:

- For more than 2 years, provide a financial report/statement of the last fiscal year.
- For 2 years, provide a report of the financial transactions on any activities performed.

4.6 Governance Structure

Provide a clear overview of your leadership structure and decision making process, focusing on the the following questions:

- A description of the key roles and responsibilities, for example, the leadership, the project coordinator and the volunteer lead, and how they work together. An organizational chart will be useful.
- A description of how frequently meetings are held, who are involved and how decisions are made.

4.7 Monitoring and Evaluation

Develop a clear Monitoring and Evaluation (M&E) plan for the project, including:

- SMART (Specific, Measurable, Achievable, Relevant, Time-bound) indicators to track progress
- Methods of verification to ensure accurate measurement of outcomes
- A timeline for evaluation activities and reporting
- Explain how the proposed funding will ensure the long-term viability of your organization or project. Outline strategies for sustainability, such as securing additional funding, building partnerships, or developing revenue streams

4.8 Project Budget

Submit a detailed budget for the proposed project (using the standard format), including all anticipated costs and funding sources. Ensure the budget aligns with the project's objectives and activities.

4.9 Documents Required

The following documentation will be required as part of the application process to validate the applicant's eligibility. The items marked with an asterisk (*) are mandatory, while the others should be included only if available to your organization.

Required/Supporting Documentation	Description
Governance and Leadership	• List of Board of Directors (if applicable) and if a board is not established, provide a list of founding members or leadership team*
Project Team	• Job descriptions of all staff responsible to run the proposed project.*
Financial Documents	• Financial Report/Statements signed by someone in a leadership role*
Partnerships	• A signed Partnership Agreement (if applicable)
Letters of Support	• Up to three letters of support highlighting your presence and impact within the community*
Board/Leadership Acknowledgement	• Signed Board/Leadership Acknowledgment Form *

4.10 Partnerships

Applicants are encouraged to consider whether a partnership may improve the project's ability to achieve its intended outcomes. While partnerships are not mandatory, partners may benefit the project through a collaborative or supportive role.

An application must be submitted by one applicant organization, even if the application is in partnership with others. If an application is successful, the lead applicant will be the sole signatory to the funding agreement with OCASI and will be responsible for fulfilling all obligations in the funding agreement.

In the case of collaborative applications, the lead applicant organization is responsible to obtain and provide a signed copy of a partnership agreement.

Please note: Funds cannot be reallocated to a third-party organization.

5. Selection of Applications

Unfortunately, not all organizations can be funded. OCASI does not guarantee that successful applicants will receive the requested amount of funding. As a condition of funding, applicants may be asked to adjust the scale of their proposed budget.

Applicant organizations must submit all required documents through OCASI's dedicated online portal. Comprehensive application details, including templates, due diligence questions, and guidelines, are available at https://oca.si/secure-platform.

5.1. Application Process

1. Applicants apply via OCASI's Grant Online Portal
2. Acknowledging receipt of the application sent to all applicant organizations
3. Initial assessment of applications based on the priorities set out in the application—Late, incomplete and ineligible applications are eliminated
4. Review and selection of applications
5. Funding contract negotiations and signing of grant agreements with successful applicants
6. Projects begin
7. Reporting, monitoring and evaluation of projects

5.2 Review & Decisions

Each application will be reviewed to determine the quality, relevance, timeliness, feasibility, and expected outcomes/benefits of the proposed project. These criteria will be assessed through an equity lens, in alignment with OCASI's principles of equity, inclusion, and anti-oppression. Applicant organizations and funding applications will be reviewed in accordance with the general Program objectives and the specific eligibility criteria outlined in this guide.

The OCASI program team will conduct an initial screening to ensure applications are complete and all required supporting documents are submitted. Eligible applications will then be forwarded to the Independent Selection Committee for review.

A three-member Independent Selection Committee will be responsible for the evaluation of proposals and final funding recommendations, using a transparent, equity-informed evaluation process. The Equity Stream Fund Advisory Committee (ESFAC) will provide oversight and governance for the entire process to ensure fairness and adherence to predefined criteria, endorsing the final recommendations.

Concurrently, OCASI's program team will conduct due diligence to verify governance structures, financial management plans, and community impact evidence.

Applicants should note that a complete submission of all required documents is essential and will improve the likelihood of a successful selection.

5.3 Responsibilities of Funded GCOs

Selected GCOs must sign a funding agreement with OCASI and fulfill the following obligations:

- Oversee project activities to ensure completion within the timelines indicated in the funding agreement.
- Make every effort to pay for and complete the project within 12 months of the funding agreement start date. OCASI will not pay for any cost overruns nor make provisions for when the project is not completed or goes beyond 12 months.
- Submit regular reports with supporting documentation per OCASI's financial and reporting guidelines.
- Ensure that objectives and outcomes stated in the funding agreement are being met, keeping a record of progress and accomplishments to date, and maintaining accurate financial records to ensure that funding is being used for its intended purpose.
- Participate in OCASI's monitoring, audits, and project evaluation activities.
- Acknowledge OCASI in all project-related communications and promotional materials.
- Facilitate periodic financial reviews and agency visits to ensure alignment with Equity Stream Fund guidelines.
- Ensure that project facilities are accessible to persons with disabilities and that they comply with all applicable federal, provincial, and municipal statutes and codes.
- Must partner with a designated Mentor Organization to ensure effective project implementation, documentation and reporting throughout the project lifecycle.

5.4 Information Sessions

OCASI will host two virtual information sessions to address applicant questions:

Session 1	Monday, November 17, 2025, 2:00 – 3:30 PM (English and French)	**Register here**
Session 2	Monday, December 01, 2025, 2:00 – 3:30 PM (English and French)	**Register here**

5.5 Submission Instructions

The CFP application period is open from November 10 to December 19, 2025. **The deadline to submit applications is Friday, December 19, 2025, 5:00 PM ET.** Applications that are late or incomplete will not be considered.

Submit completed proposals and supporting documents via OCASI's online portal. Access the portal at https://oca.si/secure-platform.

For additional inquiries, contact Yasin Samim—Senior Program Coordinator or Isabella Hong—Grant Administrator at equityfund@ocasi.org.

5.6 What You Need To Know Before You Apply

- Eligible organizations can apply for up to **$50,000.**
- Limited to one application per organization.
- Agencies will be required to attach all requested supporting documentation to their application.
- An email acknowledging receipt of the application will be sent to all applicants.
- No extensions will be granted. OCASI will not consider late or incomplete applications.
- Applicants must submit proposals via the Application Online Portal. If this method poses any issues or challenges, agencies must notify OCASI as soon as possible.
- Applicants are advised to read the Guidelines and CFP FAQs carefully prior to completing and submitting an application.
- Submit early: It is strongly recommended to submit your application early to ensure you do not miss the deadline.

5.7 What Can I Expect if my Application is Successful?

- Notification of funding approval will be sent to all successful applicants
- Grantees will be required to sign a funding agreement with OCASI that sets out the terms and conditions of funding.
- Grantees will be required to complete OCASI's Electronic Funds Transfer (EFT) request form.
- Grantees will benefit from other forms of support, such as coaching, mentoring, training workshops, and networking activities, to exchange knowledge and collaborate.
- Grantees will be publicly announced by OCASI.

- Grantees will be required to submit narrative and financial reports for the project. Templates will be made available online through the application portal.

6. Timeline for the CFP

Milestone	Date
CFP Guidelines And Application Issued	November 10, 2025
Information Session 1 (Webinar)	November 17, 2025
Information Session 2 (Webinar)	December 01, 2025
CFP Questions To OCASI Due	December 05, 2025
Q&A Section Posted	December 10, 2025
Proposal Deadline	December 19, 2025, 5:00 PM ET
Review And Selection Period	December 20, 2025 to February 15, 2026
Applicants Notified Of The Outcome Of Their Submission	March 1, 2026
Funding Agreement Deadline	March 20, 2026
Approved Projects Start	April 1, 2026

7. Questions and Clarifications

Submit questions in writing to equityfund@ocasi.org by **December 05, 2025**. A Q&A section will be posted on https://ocasi.org/program/equity-stream-fund by **December 10, 2025**. No phone inquiries will be accepted.

8. Acknowledgment

This project is funded by the Government of Canada through Immigration, Refugees and Citizenship Canada (IRCC). OCASI is solely responsible for the application and management of this program.

Funded by:

Immigration, Refugees and Citizenship Canada

Financé par :

Immigration, Réfugiés et Citoyenneté Canada

Glossary of Key Concepts

This glossary contains definitions of some important terms used in the guidelines, application form or other documents that may be requested throughout OCASI's Grant Application Process.

1. **Accessibility:** The design of products, devices, services, or environments that are accessible to people with disabilities. Ontario has laws to improve accessibility for people with disabilities, including the Accessibility for Ontarians with Disabilities Act (AODA), the Ontario Human Rights Code, and the Ontario Building Code.

2. **Accessibility Standards:** Laws that individuals, governments, businesses, nonprofits, and public sector organizations must follow to become more accessible. The accessibility standards contain timelines for implementing required measures and help organizations identify, remove, and prevent barriers in order to improve accessibility for people with disabilities.

3. **Anti-Racism and Anti-Oppression (ARAO):** Practices that work to challenge, prevent, and eliminate racist and oppressive systems. ARAO considers structural, institutional, ideological, behavioural, and organizational practices that create and perpetuate power imbalances in society. ARAO aims to equalize power imbalances that create different forms of oppression and racism in communities and society through systemic change.

4. **Anti-Racism Action Plan**: A policy or commitment required from grant applicants to identify and eliminate systemic barriers to racial equity by reviewing governance policies, programs, and services to create better opportunities for everyone.

5. **Audited Financial Statements**: A complete set of financial statements, including a statement of financial position; a statement of operations; and a statement of changes in financial position. Audited financial statements are completed by a certified accountant who is not part of your organization. The certified accountant performs auditing activities in accordance with generally accepted accounting principles.

6. **Capacity-Building Activities:** Activities designed to strengthen organizational operations and service delivery, including but not limited to governance, financial management, human resources, and strategic planning.

7. **Cash Flow:** A presentation of all anticipated revenues and planned expenses that will occur over the length of your project. At the beginning of your project, your cash flow will have only forecasted revenues and expenses. Over time, your cash flow will be updated to reflect the actual revenues and expenses.

8. **Equity Stream Fund**: This funding initiative is designed to enhance the organizational and service capacity of Grassroots Community Organizations (GCOs) to serve equity-seeking communities across Ontario.

9. **Equity-Seeking Communities**: Groups facing systemic barriers due to historical or ongoing injustices based on race, ethnicity, gender, disability, sexual orientation, or socioeconomic status. Examples include migrant women, youth, LGBTQIA+, Black and other racialized groups, newcomers, seniors, and persons with disabilities.

10. **Gender-Based Analysis (GBA):** Evidence-based, analytical tool that identifies how diverse groups of women/girls, nonbinary folks, and men/boys may experience policies, programs, and initiatives, and enhances inclusiveness in decision-making to ensure that diverse gender perspectives and needs are better represented.

11. **GBA+ or GBA plus:** The process by which a policy, program, initiative or service can be examined for its impacts on people and is made responsive to their specific needs and circumstances. In Canada, GBA+ is aligned with the seven grounds listed in the Canadian Charter of Rights and Freedoms. GBA+ recognizes that factors in addition to gender, such as race, produce disproportionate disadvantages that can deepen gender disadvantage and discrimination.

12. **Grant:** A payment issued to a recipient for a project. The conditions you agree to at the time of application will apply. At the end of your project, you will be required to submit a final activity report and/or participate in the evaluation of results.

13. **Final Report:** A final report is submitted at the end of your project based on the requirements in the funding agreement. Your final report needs to provide the results of the activities you have undertaken for the duration of your project.

14. **Final Financial Report:** A final financial report includes, as separate items, the budget as well as all of the revenues realized and expenditures incurred for the given period regarding the Project being funded.

15. **Financial Statements:** A complete set of financial statements, including a statement of financial position; a statement of operations; and a statement of changes in financial position. Financial statements may be audited or unaudited.

16. **Francophone Integration**: The process and set of services designed to welcome and support French-speaking immigrants and refugees in Canada,

aiming to facilitate their successful arrival, settlement, and integration into Francophone communities outside Quebec.

17. **Grassroots Community Organizations (GCOs)**: Organizations with a close connection to the communities they serve, often emerging organically to address local issues such as social inclusion, equity, or service provision for underserved, equity-seeking populations.

18. **Incorporated Organizations:** Formally registered legal entities, such as nonprofits or associations, that originate from a "bottom-up" approach of community members working collectively to advocate for change or a specific cause. Non-profit or charitable organizations are legally registered under federal or provincial laws.

19. **Lead Organization/Ultimate Recipient:** The lead organization is the organization affiliated with the Project Lead. OCASI enters into an agreement with the Lead Organization, which becomes an “Ultimate Recipient” upon signing a funding agreement and is responsible for meeting the terms and conditions of the agreement.

20. **Unincorporated Organizations/Associations**: A group of people who have decided to do things together for a purpose or goal other than profit. There are no federal or provincial laws that govern unincorporated organizations or associations.