



Equity Stream Fund
Call for Proposals (CFP) Guidelines
[Incorporated 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 Incorporated 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 Incorporated 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 incorporated 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 GCOs led by and serving equity-seeking communities.
- Strengthen the settlement sector by equipping GCOs with the skills and resources to independently access IRCC and similar funding in the future.
- Ensure transparency and accountability in the selection, funding, and monitoring of incorporated GCOs, aligning with OCASI's policies and procedures.

2. Eligibility Criteria

2.1 Organizational Eligibility

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

- Be an incorporated 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 an active and functioning Board of Directors.
- Have financial statements approved by the Board.
- 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).
- Have a primary purpose, presence, and reputation for delivering community-based programs and services with direct community benefit.
- 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.
- Show the capacity to adopt sound financial management practices or maintain financial systems.
- 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.

**Equity-Seeking Communities refers to groups facing systemic barriers / exclusion based on historical or ongoing injustices based on race, ethnicity, age, gender, disability, sexual orientation, socioeconomic status, etc.*

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 sector. Examples include but are not limited to:

- Board training to improve governance practices
- Formulating a comprehensive fundraising and donor relationship management strategy
- Creating a plan for membership growth, community outreach, and engagement
- Establishing financial oversight and fiduciary responsibilities
- Developing human resources policies for staff management
- Creating transparent budgeting and financial policies
- Implementing monitoring and evaluation (M&E) systems to assess impact.
- Facilitating strategic planning to optimize resources
- Building partnerships to strengthen community networks
- Developing data collection and protection systems to safeguard personal information

b) Service Capacity Building

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

- Activities that address common and pressing community needs in education, health, employment, and community services
- Activities that build strong community relationships for service delivery
- Conducting outreach and promotion (e.g., websites, promotional materials) to increase service visibility
- Onboard and train staff for effective service delivery
- Designing service delivery models tailored to community needs
- Providing technical and ethical training for client management
- Implementing reporting procedures and templates for accountability
- Establishing partnerships with other community or settlement organizations

3. Funding Scope & Details

Under this Call for Proposals (CFP), OCASI will fund up to 15 proposed projects by incorporated 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 **\$100,000** to 15 incorporated GCOs for the fiscal year **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
- 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 15% of the overall budget.

3.4 Ineligible Costs

Funds cannot be used for:

- 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 Incorporated 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 Mandatory Capacity Building Requirements

As a condition of funding, all Incorporated 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 the systems and processes in place to ensure robust financial management and accountability for the project. Include annual budget, details on budgeting, financial oversight, and reporting mechanisms.

NOTE: If your organization has been incorporated for less than two years, you will need to submit at least one full fiscal year of financial statements from the date of incorporation.

4.6 Governance Structure

Provide a clear overview of your organization's governance structure, including:

- List of current Board of Directors
- List of Staff
- Organizational By-Laws
- Board & Organizational Policies

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 Structure & Policies	- List of your current Board of Directors* - A copy of your Organization's Letters Patent and Documents of Incorporation* - Organization's By-Laws
Project Team	Job descriptions of all staff responsible to run the proposed project*
Financial Documents	Audited financial statements for the last fiscal year (if available) or unaudited statements signed by the Board Treasurer*
Anti-Racism Policy or Plan	Existing Anti-Racism & Anti-Oppression Policy, or a written commitment to develop one within the first six months of the project*
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 Acknowledgment	Signed Board 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.

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
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Session 2	Monday, December 1, 2025, 2:00 – 3:30 PM (English and French)	Register here
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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 \$100,000.
- 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 1, 2025
CFP Questions To OCASI Due	December 5, 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:

Financé par :



Immigration, Refugees
and Citizenship Canada

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.