



BMO EMPLOYEE CHARITABLE FOUNDATION GRANT PROGRAM

Thank you for your interest in the Grants Program of BMO Employee Charitable Foundation, BMO Financial Group.

BMO Employee Charitable Foundation is a charitable foundation registered with Canada Revenue Agency, established and maintained by the employees and pensioned employees of BMO Financial Group for the purpose of collecting and distributing donations to charitable organizations. These contributions **are not related to any corporate donations or marketing sponsorships** made by the Bank.

The Foundation is unique in that it offers each employee and pensioned employee the opportunity to designate their personal pledges to one or more registered Canadian charities of their choice. Not everyone chooses to designate their donation, making it possible for the Allocation Committees in each region across Canada to consider charitable grant applications. In addition, fundraising events supported by employees, pensioned employees and customers also help to increase the non-designated pool of funds for the consideration of charitable grant applications.

BMO Employee Charitable Foundation fulfills grants for charitable organizations which are registered with Canada Revenue Agency and focus primarily on humanitarian causes. Allocation decisions are guided by, but not restricted to, applications where there is financial or volunteer support by employees, or the charity is a client of BMO Financial Group. It is also preferred to support requests that fund a tangible item where recognition of our logo can be affixed to publicly acknowledge our donation (brass plaques are available through our office). We would appreciate successful applicants to acknowledge the employees of BMO Employee Charitable Foundation's support through recognition by name or logo on donor recognition walls, print publications, websites, etc.

The following **fall outside of consideration** for grant requests:

- Political parties and organizations or lobby/advocacy groups that promote a particular social, political or economic ideology
- Religious organizations (except secular activities that are inclusive of all faiths)
- Organizations that discriminate be it on the basis of race, religion, sexual orientation, disability, or any other form of discrimination that goes against BMO's Corporate Values.
- Institutions/programs that are the responsibility of government through taxation (i.e., public schools, parks, etc.) The exception would be programs that are run through schools such as breakfast and lunch programs, and after school programs.
- Private/independent schools
- Individuals
- Third-party organizations, such as service/fraternal clubs
- Programs outside of Canada that do not directly affect the well-being of Canadians
- Conferences, seminars, symposiums, workshops, tables, tickets, travel, tuition, membership fees, registration fees, sabbatical or academic leaves
- Low-interest or no-interest loans
- Direct mail solicitations
- Fundraising event costs, advertising, or sponsorships (i.e. runs/races, tournaments, galas, etc.)
- Freelance films, videotapes or audio productions
- Pledges or commitments of funds for more than one year
- Salaries or Administration costs
- Intermediary funding organizations, i.e. if the intermediary charity's sole purpose is to redistribute money that the foundation supports directly, preference would be to support that charity directly.

BMO EMPLOYEE CHARITABLE FOUNDATION GRANT APPLICATION

Grant applications are reviewed regularly with decisions reached within three to six months of receipt. These one-time grants do not exclude any organization from receiving annual funding through employee pledges and/or fundraisers.

Applications must include the following:

- A covering letter on your organization's stationery, signed by an Executive member, briefly outlining your proposal.
- Two hard copies of the completed application, with supporting documents.
- Include your charitable registration number or proof that your organization is a qualified donee, as per Canada Revenue Agency.
- Latest audited financial statements and/or annual report.
- List of the Executive Committee/Board Members, showing occupations.
- If applicable, enclose two quotes for the cost of equipment or construction pertaining to your project.
- You may attach any pamphlets or support material that you feel will help in the decision process however, the grant application questions must still be completed in full.
- If applicable, please provide a breakdown of the various costs requested as it may be more feasible for our foundation to approve portions of the request if we are not able to fund the entire request.
- Grant applications should be directed to the Regional Office nearest to your organization.

Note to Ontario Charities: Registered Canadian charities which receive funding of \$5,000 or more will not be considered for further funding for 5 calendar years. This restriction does not exclude any organization from receiving annual funding through employee pledges and/or fundraisers.

Some of the information that you provide in this application may be considered as personal under federal privacy law. We collect such information only from you, for the sole purpose of assessing grant applications. Our allocation committee members and board members use this information in the process of reviewing, and granting or declining applications. This information is kept on file for as long as it is needed for these purposes. Where applicable, this information will be used to contact and advise you of the allocation committee's decision. If you want to review or verify any of the information in your application, please contact our Administrator in your region (refer to page 3). BMO Employee Charitable Foundation follows a strict policy and does not release information about our grant applicants, except where required by law. We do not share your information with any third party organization or use it for marketing.

**PLEASE SUBMIT YOUR
GRANT APPLICATION TO THE
ADMINISTRATOR IN YOUR REGION**

B.C. / YUKON

BMO Employee Charitable Foundation: B.C. & Yukon
Sherry Addison - Regional Administrator
First Bank Tower
595 Burrard St., 22nd floor
Vancouver, BC V7X 1L7
Tel: 604- 668-1156 / Fax: 604-689-0674

**ALBERTA / NWT
& MANITOBA / SASKATCHEWAN**

BMO Employee Charitable Foundation:
Alberta & NWT and Manitoba & Saskatchewan
Jeri Sherban - Regional Administrator
First Canadian Centre
350 7th Avenue S.W., 6th floor
Calgary AB T2P 3N9
Tel: 403-503-6438 / Fax: 403-234-3872

ONTARIO

BMO Employee Charitable Foundation: Ontario
Sabrina Akmal - Regional Administrator
55 Bloor St. West, 11th Floor
Toronto, ON M4W 3N5
Tel: 416-927-6781 / Fax: 416-927-6511

QUEBEC

BMO Employee Charitable Foundation: Quebec
Nathalie Provencher - Regional Administrator
119 rue Saint-Jacques, 2e étage
Montreal QC H2Y 1L6
Tel: 514-877-7449 / Fax: 514-877-8339

ATLANTIC PROVINCES

BMO Employee Charitable Foundation,
Heather Gautreau - Regional Administrator
5151 George Street, 15th floor
Halifax, Nova Scotia B3J 1M5
Tel: 902-421-3999 / Fax: 902-421-3404

BMO EMPLOYEE CHARITABLE FOUNDATION GRANT APPLICATION FORM

1. APPLICANT INFORMATION

Name of Organization: _____

CRA Registered Charitable No.: _____ RR _____

Mailing Address:** _____

City & Province: _____

Postal Code: _____

Telephone: (_____) _____

Fax: (_____) _____

Website: _____

- ❖ **Attach a list** of the Executive Committee/Board Members.
- ❖ How long has the organization been in operation? _____
- ❖ What area(s) of the province do you service? _____
- ❖ Who is submitting this application? _____
- ❖ What is their position within the organization? _____
- ❖ Name of the contact for more information: _____
- Position Title/Relation to Charity: _____
- Telephone: (_____) _____
- E-mail: _____
- Fax: (_____) _____

***if your address is a box number, please also include a delivery address for couriers*

2. AWARENESS

- ❖ Has an employee of BMO Financial Group worked with your organization as an employee, volunteer or board member, or raised funds on your behalf?

YES _____ NO _____

If “yes,” please list the employee(s) name(s) and briefly outline the capacity fulfilled by the employee(s):

- ❖ Do you do business with one of our branches?

YES _____ NO _____

If “yes,” please list the name and address of the branch and provide the branch manager’s name, if you know it:

3. HISTORY

Provide a brief history of your organization (please do not exceed one page). Please include:

- Date of incorporation or registration with Canada Revenue Agency,
- Purpose of the organization,
- Programmes offered,
- Population served

4. SUMMARY OF GRANT REQUEST

- ❖ Provide a concise description of the program or project for which your organization is applying for funding support. Please indicate:
 - the specific purpose for the funds requested (i.e.: how will this grant be spent?)
 - the need or problem to be addressed
 - the overall goals and purposes of the project
 - how the program or project will have a positive impact on the quality of life of those served
 - how would this donation be publicly acknowledged by your membership and the communities you serve? (i.e. newsletters, recognition walls, press releases, websites, etc.)

5. BUDGET

- ❖ What amount is being requested from BMO Employee Charitable Foundation? \$ _____
- ❖ What is the total budget for the program/project being considered? \$ _____
- Attach an itemized budget for this program/project and the use of the funds requested above
- If the request is for equipment or construction/renovation please include a **minimum of two quotes**

6. FUNDING

- ❖ How does your organization receive funding? For example, government funding, community/corporate/private foundations, fundraising events, individual/ corporate donations, etc.

Please provide a brief outline:

BEFORE SUBMITTING **2 COPIES** OF THIS APPLICATION
TO YOUR REGIONAL OFFICE (*see page 3*),
USE THE CHECK LIST ON PAGE 1 OF THIS DOCUMENT
TO ENSURE THAT YOUR APPLICATION IS COMPLETE