

This FAQ provides charitable organizations seeking funding from BMO with helpful background information to understand the application process, eligibility criteria, and other essential details to request support. Whether you're a long-standing partner or a new community organization seeking funding, we can create a positive social impact together.

What are BMO's giving areas of focus?

Our giving areas of focus fall into three broad categories: **communities, sustainability, and inclusivity**. View **specific details** on giving activities within these focus areas.

When does BMO accept requests?

BMO uses a grant cycle approach to ensure we have time to thoughtfully consider the proposals and manage the volume of requests we receive. We open our system for applications twice a year:

- Between February 1 and March 31
- Between August 1 and September 30

Links to our online application portals will be available on the <u>BMO Gives page</u> during these cycles. We look forward to receiving your application for funding during these grant cycles.

How do I submit a proposal?

Before you can submit a proposal, new applicants must complete a brief assessment to confirm eligibility. Once we confirm your eligibility to apply for funding, you can submit a proposal via our online platform.

Can you provide examples of projects and interest areas that BMO has funded?

The following link to our <u>Our Stories blog</u> showcases some of the organizations we've partnered with.

Can multi-year projects be funded through one application? Or do we need to re-apply year-over-year?

You can request multi-year funding through one application. You do not need to apply each year. Annual funding is also acceptable.

How do you make funding decisions?

We carefully assess each project against several criteria using the information provided in the application. From time to time, we may ask you for additional details. Otherwise, we generally approve funding based on a project's merits and how it fits our programming and overall portfolio. We may also approve funds at a lower amount than requested.

How long does it take to review a proposal?

We do our best to take time for thoughtful review of every proposal. Depending on the number we receive in each grant cycle, it could take a few months to respond.

What are your eligibility criteria?

At a minimum, applicants must be a registered Canadian or U.S. charity or non-profit organization, and programming must occur in Canada or the U.S. to be eligible for consideration.

New applicants must complete a brief built-in assessment to confirm eligibility as part of the application process. Consistent with <u>BMO's stated corporate values</u>, we do not support organizations that employ discriminatory practices. The following is a list of organization types that **are not eligible** to apply for funding:

- For-profit entities
- Individuals (e.g., sponsoring an athlete, artist, student)
- Organizations or lobby/advocacy/partisan groups that promote a particular social, political or economic ideology
- Political parties/organizations
- Religious organizations (except for programs/services offered to the general public on a nondenominational basis)
- Organizations that discriminate on prohibited grounds
- Elementary and secondary public schools, including student organizations and private/independent/religious schools (except registered charities that serve children and young people with specialized needs and do not receive public funding)
- Tuition, membership/registration fees, sabbatical or academic leaves
- Amateur or elite sports teams or events
- Local, regional, or provincial/state campaigns or agencies of, or those affiliated with a national organization, which is already receiving a donation
- Third-party organizations/events raising funds for a charity
- Private foundations (primarily funded by individuals, families or corporations and not publicly funded)
- Private clubs
- Professional and technical associations
- Conferences, conventions, seminars, symposiums or workshops, unless they are part of a broader charitable program that has received funding
- Trips and tours, including subsidized travel, accommodation and entertainment expenses, unless these costs are part of a broader charitable program that has received funding
- Courtesy/goodwill advertising
- Low-interest or no-interest loans
- Direct mail solicitations
- Crowdfunding initiatives, including those driven by online platforms