

BMO EMPLOYEE CHARITABLE FOUNDATION KIDS 'N MOTION GRANT PROGRAM

Thank you for your interest in the Kids 'n Motion Grant program of BMO Employee Charitable Foundation.

BMO Employee Charitable Foundation is a non-profit charitable organization, established and maintained by the employees and pensioned employees of the BMO Financial Group, for the purpose of collecting and distributing employee and pensioned employee donations to charity. These contributions are **not related to any corporate donations** made by the Bank.

In 2004 BMO Employee Charitable Foundation introduced Kids 'n Motion, a funding program dedicated to addressing the health risks associated with physical inactivity and childhood obesity among children and youth who are physically or mentally challenged, or financially disadvantaged. Working together with Community Foundations of Canada, the Kids 'n Motion program supports charities across Canada that focus on keeping children healthy and active. This program is BMO Employee Charitable Foundation's first permanent endowment fund.

Grant Criteria for Kids 'n Motion

In awarding grants, we will support organizations which:

- ❖ Are registered with Canada Revenue Agency, or are recognized as a qualified donee
- ❖ Are local programs involving children and youth between the ages of 3 and 18 in sports and activities with a focus on physical participation
- ❖ Promote the participation of diverse groups and individuals
- ❖ Extend access to those who otherwise might be excluded for financial reasons, or physical and other disabilities
- ❖ Contribute to greater awareness of the need to promote active lifestyles among children and teens
- ❖ Present a significant, sustainable result with a moderate amount of funding
- ❖ Offer a willingness to recognize the support of BMO Employee Charitable Foundation.

The following fall outside of consideration for funding 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 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 (some exceptions may apply, for example the funding promotes a leadership learning workshop for youth recreation program or the applicants wishing to attend have financial restraints.)
- Low-interest or no-interest loans
- Direct mail solicitations
- Fundraising event costs, advertising, or sponsorships (i.e. runs/races, tournaments, galas, etc.)
- Pledges or commitments of funds for more than one year
- Salaries or Administration costs (some exceptions may apply, for example direct program costs)
- Intermediary funding organizations, i.e. if the intermediary charity's sole purpose is to redistribute money to a charity the foundation supports directly, then the preference is donate directly.

BMO EMPLOYEE CHARITABLE FOUNDATION KIDS 'N MOTION GRANT APPLICATION

Application Submission Period: November 1 to February 28, annually

If your grant application meets the above-listed criteria, please complete our application form and send it to the Regional Administrator listed for your area.

Final Application Deadline: February 28, annually

If you miss this submission deadline, please re-submit your application during the next Application Submission Period.

Final Decisions Announced: April 30, annually

Grant recipients will be notified by this date. Every effort will be made to contact applicants. If you have not been contacted by this date, please understand that we were unable to fund your request.

Funding Amounts

While the endowment fund grows, BMO Employee Charitable Foundation agrees to support Kids 'n Motion grants to an annual total of \$25,000 from its unallocated funds. Grant funding per region is proportionately based on regional contributions to this fund each year.

We would appreciate successful applicants to acknowledge the employees and pensioned employees of BMO Employee Charitable Foundation's support through some sort of recognition such as written publication.

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.
- If application, please provide **a breakdown of the various costs requested** as it may be more feasible to approve portions of the request.
- 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**.
- Grant applications should be **directed to the applicable Regional Office** (see next page).

Note to Ontario Charities: Charitable organizations who 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
B.C. & Yukon Regional Administrator
First Bank Tower
595 Burrard St., 22nd floor
Vancouver, BC V7X 1L7
Tel: 604- 668-1156 / Fax: 604-689-0674

ALBERTA / NWT

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

MANITOBA / SASKATCHEWAN

BMO Employee Charitable Foundation,
Manitoba/Saskatchewan
Jeri Sherban
Western 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
Coralie Choto
Ontario Regional Administrator
55 Bloor St. West, 17th Floor
Toronto, ON M4W 3N5
Tel: 416-927-6781 / Fax: 416-927-6511

QUEBEC

BMO Employee Charitable Foundation, Quebec
Francine Latouche
Quebec 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,
Atlantic Provinces
Rhodie Dearn
Atlantic Provinces Regional Administrator
5151 George Street, 15th floor
Halifax, Nova Scotia B3J 1M5
Tel: 902-421-3999 / Fax: 902-421-3404

For BMO Use Only:

DATE REC'D	
FILE NO.	
ALLOCATION	
DECLINE	

BMO EMPLOYEE CHARITABLE FOUNDATION KIDS 'N MOTION GRANTS PROGRAM GRANT APPLICATION FORM

1. APPLICANT INFORMATION

Name of Organization: _____

CRA Registered Charitable No. (BIN): _____ 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 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 a BMO Financial Group employee worked with your organization as an employee or a volunteer, 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, etc.

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 children 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.)
 - what is unique about this program or project, and how does it differ from other groups or organizations offering similar services in your community?

