

BMO EMPLOYEE CHARITABLE FOUNDATION KIDS 'N MOTION GRANT PROGRAM

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, including those 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.)
- 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

BMO EMPLOYEE CHARITABLE FOUNDATION KIDS 'N MOTION GRANT APPLICATION

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

Grant applications will be reviewed on a quarterly basis with a decision reached within six months of receipt. These one-time grants do not exclude any organization from receiving annual funding through employee pledges and/or fundraisers.

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.

When completing the application please be sure to address each of the following points:

- Include **a covering letter** on your organization's stationery, signed by an Executive member, briefly outlining your proposal.
- **Complete the application in full.** It may be typed or neatly handwritten following the same format of headings and page divisions.
- Please submit the **original and one duplicate** copy of the application.
- Enclose your **latest audited financial statements** and/or annual report.
- Enclose a list of the **Executive Committee/Board Members.**
- 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.**
- Grant applications should be **directed to the applicable Regional Office** (see next page) for consideration.

Note to Ontario Charities: Organizations approved for one-time grants under \$5,000 will not be considered again within 3 calendar years. Those approved for \$5,000 or more will not be considered again within 5 calendar years. These one-time grants do 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
Lori Brotherton
Ontario Regional Administrator
55 Bloor St. West, 17th Floor
Toronto, Ontario
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 PQ 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/country 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

- ❖ How did you learn about BMO Employee Charitable Foundation's Kids 'N Motion? Please indicate those that apply:

Previous donations _____

At a local Bank Branch _____

Phone enquiry _____

Internet _____

From a known employee _____

Other _____ *(please describe below)*

- ❖ 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):

3. HISTORY

- ❖ Provide a brief history of your organization (please do not exceed one page).
- ❖ 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 meet the grant criteria for the Kids 'N Motion program
 - how the program or project will have a positive impact on the quality of life of those served
 - what is unique about this program or project, and how does it differ from other groups or organizations offering similar services in your community?

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

- ❖ Does your organization receive government funding?

YES _____ NO _____

If “yes,” please provide a brief outline:

- ❖ Does your organization receive funding from United Way, ShareLife or United Jewish Appeal?

YES _____ NO _____

If “yes,” please provide a brief outline:

- ❖ Detail the current sources of income for this program/project, including donations from other institutions or organizations. For each, indicate whether this income is on-hand or anticipated.

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