

# Canadian Million Dollar Round Table Charitable Foundation

## Regional & Local Grants

### ***Application & Guidelines***

*The Canadian Million Dollar Round Table Charitable Foundation is a public charity, incorporated as a non-profit organization in Canada on November 17th, 1994. It receives gifts mainly, but not exclusively, from the members of the Million Dollar Round Table in Canada and from some foreign countries.*

Applications for grants are accepted anytime during the year. All grant requests are submitted to the Grants Committee for review and classification. The Committee then makes recommendations to the Board of Directors, which must act upon all grant requests. Please note that the Canadian MDRT Foundation Grants Committee meets once a year, in the Fall, to review grant proposals and make recommendations. Keeping this in mind, please note that applications received after the stated deadline will be held until the following Fall. Updated documents may be required. Please submit your grant request mindful of the time constraints involved. **Be sure to include the documents requested in the “Additional Information Required for Grant Consideration” section.**

### **The Program**

Regional/Local grants are designed to recognize programs or projects that are regional or local in scope and provide services to people living in Canada.

The Regional/Local grant program provides grants ranging from \$500 to a maximum of \$5,000 per charitable organization.

Because of the demand for Regional/Local grants, grant applications submitted by qualified charitable organizations in which Canadian MDRT Charitable Foundation Knights are involved, will receive preferential consideration.

Regional/Local grants are limited within the overall Canadian MDRT Charitable Foundation philanthropic effort and can be reapplied for each year, to a maximum of \$5,000 per charitable organization in a three-year period. (A ‘charitable organization’ is defined as an organization with its own distinct charitable registration number.)

Grants must be sponsored by a current Knight of the Canadian MDRT Charitable Foundation. A Knight is someone who has a current or paid-up pledge with the Canadian MDRT Charitable Foundation. **A Knight can sponsor only one grant application per year. Once a knight receives a grant, they will not be eligible for a grant for 3 years.**

### **Application deadline is JULY 15.**

The life insurance industry is a major contributor to the health and vitality of the world and its economy. As such, the grant programs of the Canadian MDRT Charitable Foundation are designed to provide support to organizations that serve to enhance the "Quality of Life".

### **Eligibility**

Grants are awarded for a wide range of programs and causes. However, grants are only awarded to charitable organizations/programs that are non-sectarian, responsibly managed, and employ appropriate fiscal accounting procedures.

NOTE: Section 110 of the Income Tax Act represents the federally tax-exempt status of the organization. For international organizations, an appropriate document from that country will be acceptable.

Grants are awarded to organizations that provide services designed to help people in need, such as, but not limited to:

- a) Volunteer emergency services, emergency food or shelter groups.
- b) Service to shut-ins, handicapped or disabled persons, intellectually disadvantaged citizens, organizations providing mental health services (including alcohol and drug dependency programs), services to the blind, etc.
- c) Programs for youth, senior citizens or at-risk groups, provided they are conducted on a not-for-profit basis.
- d) Unique and unusual opportunities for uplifting programs.

Grants may also be made to support business and economic research: to strengthen public interest activities, such as studies of government regulation or business ethics and practices; to encourage major initiatives in the field of health promotion and illness or injury prevention; to foster cooperation between organization and academic institutions that help to increase the knowledge base upon which the financial industry depends; and to fund projects that demonstrate and promote principles which are important to the life insurance industry.

### **Ineligible Organizations**

- a) Religious organizations, if the funds will be used in whole or part for sectarian purposes or for other programs designed primarily to serve their own memberships.
- b) Colleges or universities, unless the request is for a specific research centre or centre that provides services for the public at large (i.e. hospitals, disease research, etc.).
- c) Lodges, service clubs, fraternities, alumni associations, adult sports and recreation leagues or individual persons.
- d) Chambers of Commerce, professional or industry associations, labour unions, political clubs, parties or campaigns, or organizations whose principal purpose is the promotion of legislation.

### **Additional Information Required for Grant Consideration**

**Be sure to include the following with your completed application:**

- a) **A copy of your organization's Charitable Registration Number** granting it tax-exempt status as provide in Section 110 of the Income Tax Act. If you are applying from a country other than Canada a similar document from your government will be acceptable.
- b) **A copy of your organizational documents (Articles of Incorporation and Bylaws).** The committee will make note that there are sound organizational procedures in place. Bylaws must be updated current i.e. 2015 or as long as applicable legislation allows it to be called current.
- c) **A list of the names of your organization's governing body (Officers and Board of Directors).** The committee will look for strong guidance from a responsible Board.
- d) **A set of financial statements and operating budgets for the organization for the most current year.** Audited financial statements are preferred. The committee will be looking for sound fiscal management, sources of income and expenses, growth of the organization, and percentage of funding going directly to programs and services (as opposed to salaries and overhead).

- e) **A copy of the proposed budget for the program or project for which funds are requested. This budget should be specifically for the project that you are requesting funding for** and should not be included in the operating budget requested in item "d" above. The committee will note if the budget is sufficient to accomplish the task involved, while not being too generous or wasteful.
- f) A list of the major funding sources for your organization.
- g) A letter of recommendation from your Canadian MDRT Foundation Knight sponsor.

## **GRANT PROPOSALS: INSTRUCTIONS AND PROCEDURES**

Thank you for your interest in the grant programs of the Canadian Million Dollar Round Table Charitable Foundation. This information is designed to assist you in preparing your proposal. Like most foundations, the Canadian MDRT Foundation likes to fund good programs that are run by sound organizations. One of the keys in making this determination is noting whether the organization has a good program idea, but more importantly, a well-organized plan for pursuing that idea.

Before you actually begin preparing your proposal, take a moment to read the application and ask yourself the following questions:

Does my organization/project meet the criteria to be eligible for a grant under this program?

Do I have all of the supplemental materials that I need to submit along with the proposal? (See: "Additional Information Required for Grant Consideration" section.)

Do I have a Canadian MDRT Charitable Foundation Knight sponsor? A Knight sponsor is someone who has a current or paid-up pledge with the Canadian MDRT Charitable Foundation.

### **The Proposal (in general)**

The first item to note with regard to the proposal is appearance. Grant applications are reviewed by many people and are usually considered with a great deal of other applicants. For this reason, it is essential that you:

- \* Keep the written proposal short and to the point. State what is to be accomplished and how it is to be accomplished. Excess and unrelated information will usually serve only to mask the specific reason for which funds are being requested. If additional pages are included with the proposal, keep them as brief as possible.
- \* Always type your grant proposal. Hand-written proposals are not only hard to read; they also reflect poorly on the organization preparing them.
- \* Include a letter of recommendation from your Knight sponsor. Keep in mind that grants committees consist of other Canadian MDRT Foundation members ... a letter from the person sponsoring your application can be very beneficial.

While funding can be requested for general support, in most cases you will be much better served by requesting funding for a specific program or project. In many cases, it is easier to award funds when the committee can see specifically where the funding will be used. Knowing exactly how a grant will be used by an organization can be a major factor in the approval or denial of a grant request.

## Regional/Local Grant Program

The Regional/Local Program awards grants for organizations/programs that are regional or local in scope. Grants range from \$500 to \$5,000 and can be reapplied for up to a maximum of \$5,000 in a three-year period.

Application deadline for Regional/Local grants is July 15 of each year.

The following is an overview of the Canadian MDRT Charitable Foundation's Regional/Local grant application:

### ***History of Organization***

When was it formed, why was it formed, what are its goals.

### ***Project Title and Brief Description***

What is the name of the project and what will it try to accomplish? Who will benefit from the project and how?

### ***Geographic Area to be Served***

What area of the country will the program or project serve?

### ***Client Group to be Served***

Who will benefit from the program or project?

### ***Total Project Cost***

This amount should coincide with the project budget that you will be submitting.

### ***Amount and Source of Matching Funds***

The Canadian MDRT Charitable Foundation encourages the matching fund concept and favours conditions wherein other organizations will match, dollar for dollar, funds raised by the charitable organization.

### ***Amount Requested from the Canadian MDRT Charitable Foundation***

Is the amount requested realistic? Can it be justified by the project and budget that it will be used for? Is it within the guidelines stated for the Regional/Local Grant program?

### ***Other Funding Sources (and Amounts) for the Project***

Who else is currently providing support for this project, or has provided support for it in the past? Note the type and amount of the support given.

### ***Objective/Purpose***

What are you setting out to accomplish? What is the specific need you are addressing? How is it unique to similar programs run by other organizations? Be specific.

### ***Approach***

How will you implement the program? The committee will be looking for an approach that is set forth clearly and logically.

### ***Support***

What other types of support are there for this project? This includes support from other charitable organizations, government, companies or individuals.

### ***Competence***

Can your organization/staff implement this program successfully? Be sure to note staff qualifications and previous successes by the organization for this or similar programs.

### ***Evaluation***

Will there be accurate records maintained to demonstrate the success/shortcomings of the program? How will the program be evaluated and what will be done with the evaluation results?

Be specific here because this information will be very important for the Grants Committee in deciding if a program will be able to generate long-term results.

### ***Relevance***

Will there be a measurable improvement if funds are awarded? What will be the effects if the program is not started or fails?

### ***Future Funds***

How will this program be funded in the future?

### ***Additional Comments***

Use this section to include any other pertinent information that you deem necessary. Include an additional sheet of paper if needed, but be brief and focus on the project for which funds are requested. The Committee wants to see organizations that are truly enthusiastic about their proposed projects. If your project is unique or innovative, say so.

### **Submitting Your Proposal**

When your proposal is completed, re-read it and check for any errors or omissions. Ask yourself if the proposal is clear and concise, and if all of the questions have been answered completely. Now take a moment to make sure that you have all of the supporting documents needed in order to be considered for a grant. **Missing or incorrect supporting information can delay the processing of your application and may cause your application to be denied.**

**Please Note: All proposal applications must be sent by mail or courier.**

### **Helpful Hints**

Make sure your proposal is concise and complete. Be sure to demonstrate your enthusiasm for the program or project and point out any unique or special aspects of the project. Be sure that you have all of the required supporting information. Most importantly, be sure to submit your proposal well in advance of the stated deadline. This will allow plenty of time for processing and will give the Canadian MDRT Charitable Foundation ample opportunity to contact you if there are any questions or concerns. **Proposals that are incomplete as of the deadline cannot be considered.**

In addition, Canadian MDRT Charitable Foundation encourages the submission of photographs and videotapes with your grant application

Direct all questions or completed applications to:

Program Coordinator  
Canadian Million Dollar Round Table Foundation  
209-390 Queens Quay West Toronto, ON M5V 3A2  
Toll Free: 1-800-563-5822, ext. 9878  
Fax: 416-444-2175  
Email: [info@cmdrtfoundation.org](mailto:info@cmdrtfoundation.org)  
[www.cmdrtfoundation.org](http://www.cmdrtfoundation.org)

**Application Form**  
**CANADIAN MILLION DOLLAR ROUND TABLE CHARITABLE FOUNDATION**  
**209-390 Queens Quay West Toronto, ON M5V 3A2**  
**REGIONAL / LOCAL GRANT APPLICATION**  
**(Applications must be typed)**  
**Deadline: July 15**

Organization:

Charitable Registration #:

Address:

STREET

CITY

PROVINCE

POSTAL CODE

Contact Person:

Phone:

Title:

Canadian MDRT Charitable Foundation Knight Sponsor:

Phone:

Is the sponsor involved in the charity? If so, how?

Address:

STREET

CITY

PROVINCE

POSTAL CODE

Brief history of organization:

Project title and brief description:

Geographic Area to be served:

Client Group to be served:

Anticipated project period:

Type of Request:

\_\_\_ Special Project

\_\_\_ Operating Support

\_\_\_ Seed Money / Pilot Project

Total Project Cost: \$

Amount of matching funds: \$

Source of matching funds:

Amount requested from Canadian MDRT Charitable Foundation: \$

Other funding sources (and amounts) for this project:

*Please answer each question in the space provided. Additional attachments other than the ones requested above are not necessary unless essential to the understanding of your programs. You are encouraged to submit with your application photographs and/or videotapes of your organization. (NOTE: by submitting photographs and/or videotapes, you are giving the Canadian MDRT Charitable Foundation consent to reproduce or reuse the materials for promotional or publicity purposes.)*

**Objective/Purposes:** What specific problem is to be solved? How will the objective be accomplished?

**Approach:** How and where will the program be implemented?

**Support:** What kind of local support is there for this program?

**Competence:** What evidence can you give of the ability of your organization and personnel to implement this program successfully?

**Evaluation:** How does the organization plan to evaluate the success of the program?

**Relevance:** Why should the Canadian MDRT Charitable Foundation support this program?

**Canadian MDRT Charitable Foundation Funds:** How will the funds be used?

**Future Funds :** How will the project be financed in the future?

**Additional Comments:**

**BE SURE TO ENCLOSE ALL DOCUMENTS LISTED IN "ADDITIONAL INFORMATION REQUIRED FOR GRANT CONSIDERATION" SECTION.**