

### **Eligible for Funding** (must be a specific project or initiative)

- Registered charities
- Non-profit organizations
- Rural municipal bodies

### **Ineligible for Funding**

- International, national or large provincial charities/organizations (local chapters may be excepted)
- Debt reduction campaigns or operating budget contributions
- Organizations whose primary fundraising focus is to advocate religious, social, moral, political or economic point of view

### **Advocacy Model**

- Applications must be submitted by a Heartland employee, agent or broker on behalf of the fund recipient
- Heartland staff, agents, brokerage employees/owners are all eligible to submit, with no restriction on the number of applications per individual advocate
- Advocate agrees to act as primary liaison with fund recipient and to be involved in any cheque presentations, if selected
- Fund recipient agrees to acknowledge funding
- Fund recipient agrees to Heartland's promotional efforts, i.e. social media, cheque presentation, etc

### **Committee / Process**

- No pre-determined number of recipients or set range for individual amounts requested; allotment is solely at the discretion of the Fund committee
- Preference for wholly-funded projects but we can consider partial funding
- Decisions of committee are final
- Committee includes Heartland executive, management and staff plus 2 external members
- Submissions will be accepted by the committee until February 14th
- Committee will review submissions and make final determinations after the application deadline

### **Balanced Scorecard**

- Committee to use a balanced scorecard to help guide disbursement decisions
- Example criteria including but not limited to:
  - Alignment with Heartland brand and core values
  - Promotional capacity
  - Impact - who will benefit and how