



## **LA CAPITALE FOUNDATION**

### Financial Support Policy

Adopted on December 3, 2012

Updated on March 21, 2016

Updated on September 29, 2017

Updated on January 28, 2019



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## BACKGROUND

La Capitale, which was founded on mutualist values over 75 years ago, has, over time, become a leading financial group whose mission is to help people build, protect and value what they feel counts for their individual and collective financial security. With a strong presence across Quebec, and, since 2006, increasingly present throughout Canada, La Capitale has a diversified line of insurance products and financial services, which it offers to the general public as well as to some 600,000 members working in the Quebec public and parapublic sectors.

La Capitale has experienced remarkable growth in recent years, particularly because of the new brand image that we adopted in 2011, which conveys the core values on which our entire organization is based: a people-first attitude, integrity, transparency, a customer-centric mindset, corporate longevity, social commitment and responsibility, and appreciation for Quebec public administration and public service employees.

La Capitale has positioned itself as an accessible, flexible, caring and ambitious socio-economic player that offers a personalized approach. Our visual identity reflects these brand attributes. Our corporate commitment to *valuing what counts* affirms our promise to our clients and the community. We take pride in playing an active role in improving the well-being of individuals and the community as a whole through the activities of the La Capitale Foundation, which annually supports more than 200 organizations, which share over \$1.3 million. In fact, a few years ago, La Capitale developed a structure that gives the Foundation full responsibility for managing activities and requests for financial support (donations) which are in keeping with the company's core values and mutualist mission.

The La Capitale Foundation is therefore solely responsible for examining all the requests for support that it receives, in order to determine whether or not they meet the eligibility criteria and are in line with the Financial Support Policy. The Foundation must carry out this function in compliance with the eligibility criteria and its objectives and in a manner consistent with the organization's core values and culture.



## **DESIGNATED PILLARS**

The La Capitale Foundation's primary objective is to provide assistance to various organizations and to recognize the work of Quebec public administration and public service employees. It promotes careers in the Quebec public service, as well as the development of mutualism and cooperation. The La Capitale Foundation also favours causes that seek to improve the quality of life of young people and adults alike, particularly those associated with autism spectrum disorder (ASD), an intellectual disability and vulnerable seniors.

### **1. Valuing the role of Quebec public service employees**

The Foundation concentrates on supporting activities which highlight the remarkable contribution made by one or more Quebec public service employees or the outstanding career of a public service member (recognition evening, 25 years of service celebration, tribute to a leading figure, distinguished career award nomination, etc.).

Examples:

- Fondation du CHU de Québec (Soirée des Diamants)
- Institut d'administration publique de Québec (Prix d'excellence)
- McGill University Health Centre and its foundation (Hospital Hero program, Director General's Awards and Quarter Century Club)
- Centre hospitalier universitaire de Sherbrooke (Prix d'excellence)
- L'Alliance des cadres de l'État (Prix reconnaissance)
- Forum des jeunes de la fonction publique québécoise (Gala prix reconnaissance)
- Association des directeurs généraux des municipalités du Québec (Prix reconnaissance)

The Foundation also supports the associations and foundations of institutions (e.g. hospitals, health and social service centres, universities), as well as public sector employee associations.

### **2. Promotion of mutualism and cooperation**

The Foundation provides assistance to organizations that promote mutualism and cooperation and contribute to their development.

Examples:

- SOCODEVI
- Conseil québécois de la coopération et de la mutualité



### **3. Causes that seek to improve the quality of life of vulnerable seniors or those with an ASD or an intellectual disability.**

Examples:

- Autism Speaks Canada
- Intégration TSA
- Little Brothers
- Espace-vie TSA
- Amalgame
- Cité-Joie
- Adaptavie
- Noël du Bonheur
- Société pour les arts en milieu de santé (SAMS)
- Contact-Aînés
- Service amicale Basse-Ville
- Dr Clown Foundation
- L'Association pour l'intégration sociale (AISQ)
- La Fondation À pas de géant / Giant Steps Foundation



## **RESOURCES**

The Foundation uses the resources below when providing assistance to the various organizations aligned with its financial support policy.

### **Financial**

- Financial support (with no expected return) to charitable works
- Purchase of tickets, corporate tables and items to support the fundraising endeavours of an organization recognized for its contribution to the development and promotion of cooperation or mutualism
- Purchase of tickets, corporate tables and items to support a fundraising or benefit event held by an organization recognized for its contribution to one of the Foundation's causes
- Legacies or other monetary contributions

### **Non financial**

- Volunteer board membership
- Volunteer work or assistance in managing activities developed by a collective entrepreneurial organization
- Volunteer work or assistance in managing activities developed by an organization in areas of interest to the Foundation
- Free professional advice
- Free use of space for events or meetings
- Youth training or transfer of expertise
- Offer of classes, seminars or workshops on various topics for public education purposes and recognized as being of a charitable nature, rather than being of benefit to an employer, company or a particular group of companies
- Legacies or other contributions with movable or immovable value



## **GENERAL RULES**

All requests for support addressed to La Capitale must be transmitted to the La Capitale Foundation, which undertakes to process all requests received.

### **Donations advisory committee**

An advisory committee was set up in 2011. It consists of representatives of La Capitale's main business sectors. The committee meets a few times each year to analyze, discuss and assess the relevance of single- and multi-year requests for support that may be of interest to the business sectors and/or the Foundation.

### **Decision-making process**

Under the authority of Public Affairs and Corporate Outreach, the Public Relations and Foundation unit, which manages the Foundation's requests for support, considers all requests less than \$25,000, which is the level established by the Foundation's board of directors, in accordance with the guidelines adopted by the board. The Public Relations and Foundations unit keeps a record of donations paid and payable, as well as all commitments, and presents it in board meetings.

Any request equal to or greater than the \$25,000 limit established must be approved by the Foundation's board of directors, following assessment and recommendation by the Public Relations and Foundation unit.

### **Submission of a request for support to the Foundation**

Those wishing to apply for support must complete and submit the Request for Financial Support to the Foundation. This form is available at [lacapitale.com](http://lacapitale.com) in the *About us* section under Our Foundation. The Request for Financial Support clearly sets out our Foundation's priorities and the procedure for making a request. To ensure that all requests are analyzed objectively and fairly, a six-week submission period has been established: in February and March of each year.

Those submitting a request for less than \$25,000 should allow six to eight weeks, following the request submission deadline, for processing. It may take longer to consider requests for \$25,000 or more.

Individual organizations will generally receive a single donation per year. It is therefore to an organization's advantage to submit a bundled request form. Moreover, the financial support provided to an organization is not automatically renewed from year to year, unless a multi-year commitment has been made. A new request must be submitted to the Foundation each year for assessment.



## **ELIGIBILITY**

The Foundation carefully selects causes and organizations that, as much as possible work directly with its designated pillars, so that these organizations can fully benefit from its support. In this regard, beyond the financial support provided, the Foundation makes an effort to become actively involved with the organizations and causes it supports.

As previously mentioned, the Foundation contributes to the growth and vitality of the community by supporting organizations and causes that seek to improve the quality of life of individuals, particularly those associated with ASD, an intellectual disability, vulnerable seniors and causes that value the role of Quebec public service employees and that promote mutualism and cooperation.

The number of new causes and organizations that need help increases each year. Although the La Capitale Foundation continues to increase its presence in the community, the number of requests submitted exceeds its budget, which means that difficult choices are sometimes necessary. Therefore, although the Foundation recognizes the merit of all the requests it receives and that of the organizations which submit them, it cannot grant all requests.

The Foundation does not provide support for the following purposes:

- Yearbooks
- Internships or study trips
- Internships abroad
- Political parties, political organizations or interest groups (lobbying)
- Religious institutions or organizations
- Contribution paid directly to an individual
- Promotional and advertising campaigns





## **ShineBEYOND prizes**

The goal of the ShineBEYOND Call for Projects is to invite non-profit organizations, healthcare facilities and schools to apply for a prize that will enable them to complete a project that is aligned with one of the Foundation's causes: autism, intellectual disability and vulnerable seniors.

The applications submitted should not represent a request for assistance in order to carry out a mission, but rather be used to carry out a project that provides direct service to individuals that are part of the Foundation's causes (and not to other organizations that support other organizations) by contributing to the improvement of the quality of life of others (citizens or colleagues). It must propose a program that has a measurable social impact.

More concretely, the proposed project must respect the allotted budget, directly target more than one person, be completed in the province of Quebec, and use the amount received under the Call for Projects before December 31 of the following year.

When the Call for Projects period closes, a review panel pre-selects projects based on these criteria, and a jury selects a winner for each of the three causes. The selected applications are then submitted to the Foundation's board of directors for approval.



## **ADMINISTRATOR AND EMPLOYEE VOLUNTEER SUPPORT**

The Foundation supports and encourages directors, senior managers, vice-presidents and employees to participate in volunteer activities and become actively involved in the community and with organizations and causes that are in line with its objectives and priorities.

To this end, the Foundation may grant a financial contribution to certain causes in which its officers and directors are involved.

The Foundation has developed a support policy for employees of La Capitale and its subsidiaries. In this regard, all requests for support submitted by staff members of a subsidiary of La Capitale must be transmitted through the completion of a dynamic form posted in the Foundation section of Agora, La Capitale's intranet site. Forms can be completed and submitted online to the Foundation. The Employee Volunteer Program Request for Financial Support form clearly sets out the eligibility criteria, the support policy, the acceptance conditions for group activities aimed at improving the health and well-being of the general public, and the procedure for making a request.

Requests received are analyzed by the Public Relations and Foundations unit. Four to five weeks should be allowed for the processing of requests from staff members.

### **Employee eligibility**

The employee must have direct involvement in volunteer activities for a body, association or non-profit organization in support of a charitable cause or endeavour. Volunteer work done as personal or family recreation, or for an activity in which the employee's child participates, is ineligible.

### **Employee support policy**

For medium- or long-term involvement of a staff member, the cause or organization is entitled to financial support of up to \$200. A maximum of \$100 applies to short-term or sporadic involvement (participation in a fundraising event, a walk, etc.). One request per year, per employee, may be accepted.

### **Group activities aimed at improving the health and well-being of the general public**

Special projects led by La Capitale employees, the proceeds of which will be used for charitable purposes, may also be submitted for analysis. A maximum of \$1,000 applies to such projects. President's Challenge projects (social involvement) are not eligible for financial support from the Foundation.