

KELLY SHIRES BREAST CANCER FOUNDATION

Criteria for Financial Assistance

Title: Criteria for funds administration

Revisions: May 1, 2012

Policy: Criteria governing how the charity will administer funds to breast cancer patients in need across Canada.

Purpose: This policy is to guide the association in assessing requests from (the) applicants who submit a formal application to the charity requesting financial assistance in relation with their breast cancer treatment/diagnosis. The mission is to provide assistance to women/men in order to make their fight with breast cancer a little less challenging.

NOTE: We are **NOT** funded by any government agencies. We are a charity run by volunteers relying solely on the generous support of donations from the general public and business communities.

Policy Statements:

1. Application **must** complete in full, and **must** include the mandatory supporting documents outlining their need for financial assistance. Application's missing the mandatory documents are considered incomplete and cannot be processed until required documentation is received. (Please refer to #6 in the policy statement for a complete list of required documents)
2. The applicant must be diagnosed with breast cancer. (priority given to those on active treatment)
3. The applicant must be a Canadian citizen or an approved landed immigrant.
4. Each application can be submitted for a maximum of **\$1000.00** (funds permitting).
5. The applicant can apply 4 times to the Trust per calendar year, however no more than once per month (funds permitting).
6. In order to establish financial need:
 - ✓ Applicants **must** provide current income tax notice of assessment and your current full income tax return.
 - ✓ Applicants **must** provide the current notice of assessment for their spouse/partner/significant other
 - ✓ Applicants must disclose ALL sources of income (including but not limited to child support, spousal support, etc.)
 - ✓ Receipts (and/or estimates) **must** be provided for amounts claimed through the fund (note receipts dated prior to diagnosis will not be considered).
 - ✓ Proof of citizenship/approved landed immigrant status **must** be provided.

- ✓ Applicants applying for financial assistance for rent or mortgage **must** supply supporting documentation verifying the amount they are requesting.
- ✓ Applicants that were working (self employed or employed by other means) that are now currently not working must submit their ROE (record of employment)
- ✓ **ORIGINAL** receipts/estimates must accompany your application
- ✓ Proof of any and all funding/income received by other organizations, agencies or family support
- ✓ Applicant must include medical report supporting diagnosis

(Please note that applications cannot be considered complete and put before the committee unless **ALL** pertinent documentation is included, documentation requested is mandatory – if documentation is not included it will only delay any financial assistance that could be provided. Please note that occasionally the Charity may request further supporting documents for financials such as bank statements).

7. On occasion testimonials can be requested by approval committee indicating how the charity has helped the applicant.
8. All applications will be reviewed by at least 3 of the approval committee members. If requests for funding do not meet the criteria listed, especially in cases where alternative medicines are being sought, these requests will also be reviewed by a licensed medical practitioner.
9. Policies and criteria are reviewed annually and amended accordingly.
10. All personal information is protected under the Canadian Privacy Act.
11. The Approval Committee, under their discretion, retains the right to deny any application.

Some examples that fit the funding criteria (but not limited to):

- Transportation to/from the centre for appointments or treatment
- Accommodation
- Medications that are not covered by any other plans (or non-covered % portions) related to your cancer.
- Parking at the cancer centre/hospital
- Food costs while on **active** treatment
- Child-care services while at the centre/hospital for an appointment or treatment or in hospital
- Home health aides
- Prosthetics/specialized lingerie/Wigs
- Rent payment/mortgage payment
- Supportive care: counseling services for patient, partner and/or children; attendance to a cancer support program/course
- Rehabilitation supportive care: e.g., lymphedema management, weight management/nutrition consultation special needs due to chemo treatment (e.g. prescription glasses due to change of vision. Will need approval from a licensed medical practitioner)
- Other expenses related to treatment, living costs during treatment & recovery
- Expenses not listed above can be submitted and considered after review by Directors and approval committee

NOTE: Some items carry a cap on amount(s) that can be approved by the Committee.

Application Process:

1. Submit a **completed** Kelly Shires Breast Cancer Foundation application by **MAIL**. Applications can be downloaded on-line at www.kellyshiresfoundation.org or requested by calling 1-877-436-6467. The applicant must disclose if they are receiving any financial assistance from other sources (e.g., programs in centre, child support, government assistance health insurance programs, and group insurance programs, etc)

2. Priority will be given to:

- to low income applicants (size of family will be taken into consideration, low income determined by Stats Canada)
- To applications where costs are medically related to breast cancer diagnosis and treatment
- All Canadian residents can apply for assistance to this fund. Quebec residents need to apply directly to the Quebec chapter. The Quebec chapter can be reached at www.randonneedesneiges.org or 1-866-717-7773.

3. Applicants will be notified of application status within 10 business days of the Charity receiving a **completed** application form & mandatory supporting documents.

4. The charity reserves the right to review and assess special cases or circumstances not listed in this policy.

OTHER APPLICATIONS OF THE FUND:

At fiscal year-end, the charity can choose to donate funds to cancer centers, hospitals or research within Canada. (Funds permitting)

Please note that in order to help as many breast cancer patients as possible assistance for funds relating to the following items (but not limited to the list) will be capped at the following amounts per application:

- Mortgage/rent will be capped at \$700/request
- Groceries will be capped at \$400/request
- Utilities (i.e. Hydro, gas, electricity, water, heating/cooling) will be capped at \$400/request
- Medical travel costs (gas, bus, tax, etc) will be capped at \$200/request
- Lifetime financial assistance will be capped at \$10,000.00 (**CANNOT** be issued as a one-time lump sum)

Items that will **NOT** be considered for approval are as follows (but not limited to):

- Credit card payments
- Property taxes/condominium maintenance fee's
- Car repairs
- Cable/internet (with exception)
- Cellular phone (with exception)
- House, life, car, critical illness insurance, etc.

This policy and criteria is reviewed and changed annually according to demand and limitation of funds.