



# A&B FOUNDATION

## GRANT APPLICATION GUIDELINES

The Alexander & Baldwin Foundation (A&B Foundation) is a charitable foundation funded annually based on the profitable business activity of Alexander & Baldwin, Inc. and its operating companies, including Matson Navigation Company, Inc., A&B Properties, Inc., and Hawaiian Commercial & Sugar Company.

### **GRANT MAKING PHILOSOPHY AND PREFERENCES**

The A&B Foundation's objective is to improve the quality of life in communities where A&B companies primarily operate or where A&B employees reside. The Foundation's references are to support organizations and projects that address significant community needs; that have the active volunteer support of A&B employees; that are preventive in nature; and that have the proven support of the community. This is done by providing cash contributions to community-based projects and organizations which have qualified as Federally recognized charities with IRS Section 501(c)(3) status.

The A&B Foundation works to improve its communities through a responsive, broad-based program of giving in the following categories: health & human services, education, community, culture and arts, maritime and the environment. The Foundation will consider support for startup, general operating, and special project needs, as well as major and minor capital requests.

### **GUIDELINES**

- Generally, only one grant application will be considered from a charity each calendar year.
- The Foundation does not fund travel or endowments; does not fund religious activities of a particular denomination; does not purchase advertising, attendance at or sponsorships of events, including sporting or entertainment.

- Multi-year pledges are provided in limited circumstances.
- Scholarship programs generally will not be supported as A&B has its own scholarship programs for children of A&B employees and retirees.
- The Foundation does not provide direct support for specific individuals or donate goods or services; however, at its discretion, it may refer requests not suitable for charitable funding to Alexander & Baldwin, Inc. or its subsidiaries for consideration of direct corporate support.

### **REQUIRED SUPPORTING DOCUMENTATION FOR ALL REQUESTS**

- Proof of IRS Section 501(c)(3) status (determination letter);
- A current list of board of directors, with officers identified, with occupations and/or affiliations, phone numbers and/or email addresses;
- A current board-approved operating budget, including confirmed and anticipated sources of revenue (income);
- And, if request is for other than operating funds, a board-approved project budget, including confirmed and anticipated sources of revenue (income).

## **FORMAT FOR REQUESTS**

Requests should be covered by a Grant Application Cover Sheet (attached); photocopies are OK.

- If your request amount is \$2,000 or less, the request ***should not exceed three typewritten pages*** (not including the required supporting documentation).
- For a request amount greater than \$2,000, an ***executive summary of no more than 250 words is strongly recommended*** if your request exceeds three typewritten pages (not including the required supporting documentation).

The request ***must contain the following required information:***

- A concise statement of organizational purpose, including relevant history and accomplishments.
- The primary objectives of the proposed project or activity, including the need or problem, how the activity will be administered and the population/number of people to be served.
- The anticipated results and the plan or methodology for evaluation.
- The reason why the Foundation was considered an appropriate donor.
- Opportunities for acknowledgement/

recognition of the Foundation.

- Other sources of funding, including requests pending and donations received.
- Names of persons associated with A&B who are involved with the organization.

## **REQUEST SUBMITTAL, TIMING AND DEADLINES**

The Alexander & Baldwin Foundation has two Contributions Committees that are geographically oriented— the Hawaii Committee and the Mainland Committee. Each has its own deadlines and meeting schedule (see following table).

Requests must be submitted in writing; in order to meet deadlines, they may be faxed or mailed but an original copy must also be provided.

Requests generally are considered at the next scheduled meeting, but the Foundation reserves the right to delay consideration of a request.

If an organization wishes to receive confirmation that a request has been received, please enclose a self-addressed envelope or post-card.

Notification to grant applicants of each Committee's decisions will be in writing, generally within one week of each meeting; transmittal of grant funding is generally arranged within several weeks' time.

	<b>Organizations in Hawaii and the Pacific Islands:</b>	<b>Organizations on the U.S. Mainland:</b>
Send grant requests to:	Ms. Meredith J. Ching, Chair Hawaii Contributions Committee Alexander & Baldwin Foundation c/o Alexander & Baldwin, Inc. c/o P.O. Box 3440 Honolulu HI 96801-3440	Mr. Matthew Cox, Chair Mainland Contributions Committee Alexander & Baldwin Foundation Matson Navigation Company 555 12th Street Oakland, CA 94607
<b>Application Receipt Date/ Meeting Month:</b> [NOTE: Applications must be received by the correct A&B Foundation Committee by this date.]	December 1st / January; February 1st / March; April 1st / May; June 1st / July August 1st / September October 1st / November	This Committee meets monthly. Deadlines are by the first of each month for the month following.
Large Request (over \$20,000) meeting months:	March and September	Monthly
Access to Staff for Inquiries:	Linda Howe – 808-525-6642 or lhowe@abinc.com	Paul Merwin – 707-421-8121 or plmifm@aol.com
Facsimile Submittal:	808-525-6677	707-421-1835



# A&B FOUNDATION GRANT APPLICATION COVER SHEET

PLEASE PRINT OR TYPE

Name of Organization: \_\_\_\_\_

(other names used, if any): \_\_\_\_\_

Contact Name and Title: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Grant Amount Requested (required): \_\_\_\_\_ Date Submitted: \_\_\_\_\_

Name and Signature of Board Member (required): \_\_\_\_\_

Fundraising Goal: \_\_\_\_\_ Timing Issues: \_\_\_\_\_

Did your organization receive A&B Foundation funding in any of the 3 previous years?  No  Yes

Self-Identification (check, as appropriate):

**Type of Organization**

- Health & Human Services
- Education
- Community
- Culture/Arts
- Environment
- Maritime
- Other:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Location**

- Hawaii
- Statewide
- Oahu
- Maui County
- Kauai
- Big Island
- Pacific Islands
- U.S. Mainland
- Bay Area/N. California
- Southern California
- Pacific Northwest
- Arizona/Illinois
- Other:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Type of Funding Requested**

- Start-up
- Operating
- Special Project
- Minor Capital
- Major Capital
- Other:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_