



Hafa Adai!

We are pleased that your organization has taken the time to review the TakeCare Foundation Inc., ("Foundation") guidelines for our **Charitable Giving Program**.

The Foundation is comprised of employees of TakeCare and FHP. The employee driven organization plays a major role in assisting with the contributions and the selection process. Through the donations of our employees, recipients of the grants are able to fulfill their mission and goals that in turn benefits the community.

If your organization is interested in applying for a grant, your project should focus on one or more of the following categories.

- The disabled, disadvantaged, underserved community
- The homeless community
- Men, women, adolescents, children and seniors

To assist you with your written proposal, grants are awarded based on the Foundation's main purpose of devoting to *charitable and educational causes* that enhance the health, wellness and welfare of the above categories. It was formed to provide and *support health education and prevention programs* and to engage in *scientific research in the area of health maintenance and health care delivery*. You need to make sure that you give a full account of how the funds will be used to develop programs in support of your organizations proposal.

To assist with the submission, included in the packet is the application, a proposal checklist and the guidelines to help simplify the process for your organization. ***Please note that incomplete applications or proposals received outside the cycle guidelines will not be considered.***

As a company, we believe that giving back to the community is essential in promoting a "healthy" environment for Guam and our neighboring islands.

If you have any questions or concerns, please feel free to contact the Foundation at tc.foundation@takecareasia.com.

Sincerely,

A handwritten signature in black ink, appearing to read "Arvin Lojo".

Arvin Lojo
President



FREQUENTLY ASKED QUESTIONS

1. Who can apply for a Charitable grant?

Non-profit organizations that have been in existence for a minimum of two (2) years on Guam and the CNMI and has a non-profit Employer Identification Number ("EIN"), for a minimum of two (2) years.

2. What is the maximum grant amount that an organization can apply for?

The maximum grant amount is \$5,000. However, the amount awarded by the Foundation Committee may not necessarily be the amount requested by the organization. Since this is an employee driven program, grants are awarded based on the availability of funds.

3. How often can an organization apply for a Charitable Giving grant?

Applications may be submitted once a year depending on the cycle the application was submitted.

There are two (2) cycles as follows:

- a. *1st Cycle: Applications must be stamped received January 2-31 of each year.*
 - b. *2nd Cycle: Applications must be stamped received July 1-31 of each year.*
- *Applications received outside of the cycle guidelines will automatically be declined.*
 - *Applications received by USPS or other courier service outside the above dates will automatically be declined.*
 - *Although an organization can apply once a year, this does not automatically guarantee that your organization/association will be awarded a grant. The Committee reserves the right to place a limit on how often an applicant can receive funds.*
 - *The Foundation **will not hold or roll over** applications received outside the above dates for the next cycle.*

4. When are Charitable Giving grants awarded?

Grants are awarded as follows:

- a. *1st Cycle – No later than June 30th*
- b. *2nd Cycle – No later than December 31st*

5. Are there any limitations placed on funding?

The limitations placed on funding include the following:

- a. *Political campaigns/fundraising*
- b. *Capital campaigns*
- c. *Challenge grants/matching grants*
- d. *Endowments*
- e. *Private foundations*
- f. *Religious programs that are doctrine oriented*
- g. *Proposals that are not aligned with the Foundation's purpose "health education and prevention programs, scientific research in the area of health maintenance and health care delivery.*

6. What are the requirements to submit an application for consideration?

- a. *Must complete a grant application form. Incomplete applications will automatically be declined.*
- b. *Must have a valid non-profit Employer Identification Number (“EIN”) issued to the name of the organization applying for the grant and in affect for two years.*
- c. *Must be in existence for a minimum of two (2) years on Guam or Saipan.*
- d. *Must provide a cover letter accompanying the proposal signed by the President/CEO or Executive Director of the organization.*
- e. *Must submit a proposal that should be between 2 to 5 pages in length.*
 1. *Project name;*
 2. *Goals;*
 3. *Objectives;*
 4. *Timeline;*
 5. *The issue which the proposal seeks to address;*
 6. *Detail description of the project;*
 7. *Must be kept within the scope of the Foundations purpose.*
- f. *A complete copy of your current tax return stamped/received by the Department of Revenue and Taxation.*
- g. *Detailed line item budget showing project costs*
- h. *List of the Board of Directors and Officers.*
- i. *If a grant is awarded, a summary report of the organizations project must be submitted at the end of the program. Failure to submit automatically negates future awards.*

7. How do I submit my application?

You may submit your application using one of the following methods.

1. *Email:* tc.foundation@takecareasia.com
2. *Fax:* (671) 647-3551
3. *Drop Off or Mail:*

TakeCare Insurance Company, Inc.
Baltej Pavilion, Suite 308
415 Chalan San Antonio
Tamuning, Guam 96913
Attention: TakeCare Foundation, Inc.

Note: If mailing, we do not go by the post mark date. See question number 3 for valid time frame.

Information contained in the Charitable Giving Grant Packet **are subject to change at any time without notice.**



GRANT APPLICATION

PLEASE TYPE:

Date: _____ Amount Requesting: _____

Organization: _____

Address: _____

Contact: _____ Title: _____

Phone/Cell: _____ E-Mail: _____

IRS Tax Exempt letter Yes No

EIN Non-Profit Number: _____

Brief Description of Agency: _____

Brief Description of Project/Program: _____

Grant Category: Disabled, Disadvantages, Underserved Community Homeless Community
 Men Women Adolescents Children Seniors
 Other _____

Percentage of Agency Budget spent on:
Direct Program Services _____
Fundraising and other _____
Management/General Operating Expenses _____
TOTAL: 100%

First time submitting a proposal to TakeCare Foundation: Yes No

Last time funded by TakeCare Foundation: Month _____ Year _____



APPLICATION CHECKLIST

Organization: _____ Date: _____

Point of Contact: _____ Contact Number: _____

Following items are required to consider your application.

1. Grant Application Form
2. Cover Letter (on organization letterhead)
3. **Detailed** Proposal (minimum of 2 not to exceed 5 pages)
4. IRS letter confirming your organization's tax-exempt status and referencing your EIN Non-profit identification number.
5. A copy of your current tax return filing stamped by the Department of Revenue and Taxation, Income Tax Division for the current year. Any discrepancies, state reason.
6. Line item budget specifying how funds will be used.
7. If applicable, one-paragraph summary of previous support from TakeCare Foundation, Inc.
8. List of Board of Directors and Officers.

*Important: Incomplete applications will automatically be declined.

*Information contained in the Charitable Giving Grant Packet are **subject to change at any time without notice.**

PROPOSAL REVIEW PROCESS

- Your proposal will be reviewed and evaluated by the Foundation Committee. A committee member may call you with additional questions, request a site inspection or a meeting with your organization.
- The Foundation Committee reviews proposals as follows:
 - a. 1st Cycle – February through May
 - b. 2nd Cycle – August through November

Foundation Cycle for Submission

	1st Cycle	2nd Cycle
Proposal Submission	January 2 nd through 31 st	July 1 st through 31 st
Foundation Committee Review	February through May	August through November
Notification	Between June 1 st – 30 th	Between December 1 st - 31 st

Note: All proposals submitted outside of the proposal submission month, will automatically be decline.
All applications that are incomplete will automatically be declined.

The amount awarded by the Foundation may not necessarily be the amount requested by the organization. Since this is an employee driven program, grants are awarded based on the availability of funds.