Grant Application Guidelines

Priorities

The Foundation makes grants for programs and projects that benefit the people of Hawai`i. The fields of greatest interest are arts, culture, and humanities; community development; education; environment; health; human services; spiritual development; and youth development.

Eligibility and restrictions.

- Applicants must have 501(c)(3) status or must apply through a fiscal sponsor with 501(c)(3) status. The Foundation does not make grants to organizations classified under 509(a)(3) of the Internal Revenue Code.

- The Hawai`i Department of Education and its several Complex Areas are eligible for grants for demonstration projects with potential for system reform.  The Foundation makes grants to individual Hawai`i Department of Education schools only under these circumstances: (1) the Principal has participated in the Principals' Leadership Academy, (2) the grant amount is $5,000 or less, and (3) the Foundation has not made a grant to the school previously. The Foundation does not make grants to the University of Hawai`i other than an annual grant to the University of Hawai`i Foundation.

- The Foundation does not fund conferences, festivals, and similar one-time events; activities that have already occurred; lobbying; loans; funds for re-granting and grants to individuals or for the benefit of identified individuals (except scholarships through the Juliette M. Atherton Fund and the Community Scholarship Fund of the Hawai`i Community Foundation).

- The Foundation generally does not fund endowments or operating support.

- The Foundation does not serve as the sole funder of any organization.

- A grantee may not receive more than one grant in any calendar year, except that a grantee serving as the fiscal sponsor for another organization may receive a second grant for its own project.

- The term of a grant is usually one year. In the case of a multi-year pledge, payments are released in twelve-month intervals, and each payment is contingent on receipt of a satisfactory progress report. The Foundation generally does not fund a program for more than three consecutive years.

- The Foundation does not accept incomplete applications or applications from organizations with overdue final reports.

- Grantees must not use the Founders' names on donor recognition plaques or similar items without the Foundation's prior approval.

Capital Project Requests
Please contact staff at (808) 566-5537 to discuss additional information to be provided in your proposal.

Application procedures
- Download the grant application cover sheet posted on this website.
- Complete the cover sheet. Attach proposal narrative and all other required documents listed below.
- Use single-sided white 8 /2 x 11 inch paper.

- No binding or staples. Clips are acceptable.
- No additional copies are required.
- No cover letters, business cards, videos, CDs.
- Application materials will not be returned.
- Mail or deliver application package to:

> Atherton Family Foundation
> 827 Fort Street
> Honolulu HI 96813-4317

Proposal narrative

- Maximum 5 single-spaced pages. Minimum 12-point font and 1-inch margins. Use these headings:

  Organization: Describe the organization, including mission and history, year established, geographic reach, staff size, and staff capabilities to conduct the proposed work.

  Problem or opportunity: Describe the problem or opportunity to be addressed by the project. Describe the population that will benefit from the project, including an estimate of size or numbers.

  Activities: Describe the activities to be performed, and the services or products to be delivered, including quantities and a timeline. If the project is a partnership, describe each partner's role. Explain why you chose this approach to the problem or opportunity.

  Expected results: Explain how participants or the community will benefit. (Provide specific, measurable expected results.) Describe the plan to determine the effectiveness of the project.

  Funding plan: Explain the project budget, including adjustments to be made if not all anticipated funding is received. Describe the plan, if any, to continue funding the project after the grant period ends.

Additional required documents

- Project budget showing:
    → Anticipated income (source, amount restrictions, and whether secured or pending)
    → Anticipated expenses (overall expenses, and expenses for which Atherton grant will be used)

- Board of directors list

- IRS 501(c)(3) determination letter (not required if applying through a fiscal sponsor)

- Organization's annual operating budget for the current year

- Organization's balance sheet for the most recently completed fiscal year

- Organization's income statement (or profit/loss statement) for the most recently completed fiscal year

Audited financial statements are preferred but not required.
Local units of national organizations must submit local unit financial information.

Fiscal sponsors

If a fiscal sponsor is involved, please see additional requirement listed on grant application cover sheet.

Deadlines

Applications postmarked or delivered by the first business day in:	. . . will be considered at the Board of Directors meeting in:	. . . and applicants will receive decision letters in:
December	February	early March
February	April	early May
April	June	early July
August	October	early November
October	December	late December