



F O U N D A T I O N

# Employee-Directed Programs

Helping our Communities Build a Better World





## Organizational Eligibility

Nonprofit tax-exempt organizations, recognized by the U.S. Internal Revenue Service under Section 501 (c) (3), are eligible for support if the organizational mission represents one of Whirlpool Foundation's three strategic focus areas:

## Lifelong Learning

Community/technical colleges  
Continuing education organizations  
Customized job training organizations  
Pre-Schools  
Public or private four-year colleges and universities  
Public primary and secondary schools

## Cultural Diversity

Foreign exchange organizations  
Language arts schools/organizations  
Organizations promoting ethnic or cultural diversity

## Quality Family Life

Dependent care organizations  
Habitat for Humanity  
Housing development organizations  
Latchkey organizations  
Parenting programs/organizations

## Sample Organizations

The following organizations are only a sample of eligible nonprofits who have participated in both the Matching Gifts and Dollars for Doers Programs. For a complete list of organizations contributed to, please visit [www.whirlpoolcorp.com/social-responsibility/whirlpoolfoundation/empdirected.asp](http://www.whirlpoolcorp.com/social-responsibility/whirlpoolfoundation/empdirected.asp)

## Lifelong Learning

Andrews University  
Ball State University  
Clyde Green Springs High School  
Evansville Day School  
Stanford University  
University of Michigan

## Cultural Diversity

Association on American Indian Affairs  
INROADS Incorporation  
The Black Heritage Council of Marion  
Women and Philanthropy

## Quality Family Life

Big Brother/Big Sisters  
Boy Scouts of America  
Child & Family Services  
Focus on the Family  
Girl Scouts of America  
Habitat for Humanity  
Hospice at Home  
Salvation Army  
YMCA/YWCA

## Application Instructions

1. Eligible program participants, participating in the Matching Gifts Program must complete Section A and B of the application and forward the form, with the contribution check, to the nonprofit organization for their completion of Section D.

Eligible Whirlpool employees participating in the Dollars for Doers Program must complete Section A and C of the application and forward the form to the attention of the volunteer supervisor of the nonprofit organization for their completion of Section D.

2. The nonprofit organization administrator or volunteer supervisor must complete Section D and return the entire form, with a copy of the check and/or securities, documentation of the organization's IRS 501(c) (3) tax exemption notification, and mission statement to:

Whirlpool Foundation  
Attn: Administrative Coordinator  
2000 M 63, Benton Harbor, MI 49022  
(269) 923-5584

# Whirlpool Foundation Employee-Directed Program Application

## SECTION A—All Eligible Whirlpool Program Participants

Participant Name (please print) \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone ( \_\_\_\_ ) - \_\_\_\_ - \_\_\_\_ Work Phone ( \_\_\_\_ ) - \_\_\_\_ - \_\_\_\_ Please Check: ☐ Employee ☐ Retiree ☐ Director

Work Location \_\_\_\_\_ Title \_\_\_\_\_

Please Check Strategic Focus Area: ☐ Lifelong Learning ☐ Cultural Diversity ☐ Quality Family Life

## SECTION B—Matching Gifts Program Participant

Organization Name \_\_\_\_\_ Date of Gift \_\_\_\_\_

Attached is My Personal Contribution of \$ \_\_\_\_\_ (\$50 Minimum) or \_\_\_\_\_ Shares of \_\_\_\_\_

(Description of Securities) \_\_\_\_\_

I request that the above organization report this gift to Whirlpool Foundation as an application for a matching gift. My signature acknowledges that I have read and met the criteria according to the matching gift program guidelines as specified on the reverse side of this form, and I did not receive any goods or services in exchange for my donation and will provide any necessary documentation to this fact upon request.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_

(Program Participant—Please forward this form with your contribution check to the organization for completion of Section D.)

## SECTION C—Dollars for Doers Participant (NOTE: Only active employees are eligible.)

Organization Name \_\_\_\_\_ Date \_\_\_\_\_

Organization Purpose \_\_\_\_\_

Dates of Volunteer Activity \_\_\_\_\_ Length of Time with Organization \_\_\_\_\_ Average Time Spent Monthly \_\_\_\_\_

Nature of Your Volunteer Work with the Organization \_\_\_\_\_

Name and Title of Your Volunteer Supervisor \_\_\_\_\_

I certify that I have been an active volunteer for the organization above, donation of at least (please check one):

☐ Employee participation (average of 8 hours a month or total 50 hours within a 6 month period)

☐ Family participation (combination of the employee completing 25 hours and a family member(s) completing the remaining 25 hours within the same 6 month period)

I request that Whirlpool Foundation consider making a \$500 grant on my behalf. My signature acknowledges that I did not receive any goods or compensation for my services.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_

(Program participant—Please forward this application to the recipient organization for completion of Section D.)

## Section D—Official of Recipient Organization

Federal Tax Identification Number \_\_\_\_\_ I affirm that the above contribution of \$ \_\_\_\_\_ or \_\_\_\_\_ number of shares of \_\_\_\_\_ with a value of \$ \_\_\_\_\_

was received on or about \_\_\_\_\_ (date received) and that this organization is qualified to receive a matching gift under the provisions of Whirlpool Foundations Matching Gift Program guidelines as specified on the reverse side of this form, and that there were no goods or services provided in exchange for this contribution.

**OR** I affirm that the above named Whirlpool employee volunteered with our organization, consistent with the guidelines stated in this application. I certify that our organization is a nonprofit institution, in which contributions are tax deductible under Section 170(c) of the Internal Revenue Code of the United States. Furthermore, I certify that receipt of this volunteer contribution will not represent payment in exchange for, or in expectation of, monetary or other benefits to be given to the volunteer or any person or organization named by the volunteer.

Legal Name of Organization \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Name of Official or Volunteer Supervisor \_\_\_\_\_ Title \_\_\_\_\_

E-mail Address \_\_\_\_\_ Website Address www. \_\_\_\_\_

My signature acknowledges that application for this grant is under the provision of Whirlpool Foundation's Employee-Directed Program and that this organization will provide any necessary documentation to this fact on request by Whirlpool Foundation or its representative.

Signature \_\_\_\_\_ Telephone ( \_\_\_\_ ) - \_\_\_\_ - \_\_\_\_ Fax No. ( \_\_\_\_ ) - \_\_\_\_ - \_\_\_\_

Please send proof of the contribution (copy of check, etc.), this completed application, 501(c) (3) tax determination letter, and your mission statement within 14 days to: Whirlpool Foundation, Attn: Program Administrative Coordinator, 2000 M-63, Benton Harbor, MI 49022

# Employee-Directed Program Guidelines



## Purpose

Whirlpool Foundation's Matching Gift Program is designed to encourage Whirlpool employees, retirees, and directors to support U.S.-based nonprofit organizations that enhance Whirlpool Foundation's three strategic focus areas of lifelong learning, cultural diversity and quality of life. The program offers a way of combining personal contributions with Whirlpool Foundation's gifts, thereby contributing substantially to organizations of particular interest.

## Program Participant Eligibility

All full-time, salaried and hourly U.S.-based employees of Whirlpool Corporation are eligible to participate. This includes any employee on short-term disability or flexible work arrangement. All retired employees receiving benefits under the company's retirement plan, and all active or retired members of the Board of Directors of Whirlpool Corporation, are also eligible to participate.

## Gift Match Eligibility

To be considered for a matching contribution, the gift must be a personal contribution of an eligible participant, in cash or securities, actually made and not merely pledged for future payment. Securities will be matched at the quoted market value based on the last sale or published bid price as of the date of the gift.

## Amount of Contribution

Whirlpool Foundation's Matching Gift Program will match eligible gifts on a dollar-to-dollar basis to qualifying U.S. nonprofit organizations. Each gift must be no less than \$50 and total no more than \$10,000 per eligible participant, each calendar year (January 1–December 31). The \$10,000 maximum per participant applies to one large gift to a single institution, or several smaller gifts to a single institution, or smaller gifts to a variety of qualifying nonprofit organizations. Eligible gifts will not be carried over and applied to the next year's maximum. Acknowledgment will be made in writing to both the organization and the program participant.

## Program Terms

1. All applications received from nonprofit organizations will be considered on a semi-annual basis.
2. The financing, administration, interpretation and application of this program is determined solely by Whirlpool Foundation, which has authority to modify, suspend, revoke or terminate this program at any time without prior notice. **Any misuse of these funds or abuse of these guidelines by the nonprofit organization and/or the program participant as determined by Whirlpool Foundation, will preclude further participation in both the Matching Gifts and Dollars for Doers Programs.**
3. Whirlpool Foundation must receive, by January 30th, any request for a contribution match made by program participants late in the previous calendar year, to be eligible for a match and have it attributed to the previous calendar year.
4. All program payments will be transmitted to the recipient organization also on a semi-annual basis, in March and September, after the completed and verified application is approved by Whirlpool Foundation's Board of Trustees.
5. In response to Whirlpool Foundation's annual audits, nonprofit organizations may be required to provide supporting documentation that substantiates that the grants that were awarded were within the Employee-Directed Program guidelines.

## Program Limitations

1. The Matching Gifts or Dollars for Doers Program will not make a matching contribution to the following: individuals; United Ways or similar federated fund campaigns; fraternal, social, political, musical, union or veteran organizations; health & human services organizations; churches or religious denominations or theological schools or other religion-related groups; lobbying or advocacy groups of any type; athletic organizations; insurance premiums; dues to national or local alumni groups; bequests or payments in exchange for services rendered (e.g. tickets, memberships, tithes and church offerings, tuition, subscriptions, advertising, and/or dinners); and organizations which represent a conflict of interest for an employee of Whirlpool Corporation.
2. The Dollars for Doers grant cannot represent payment in exchange for, or in expectation of, monetary or other benefits to be given to the Whirlpool employee volunteer or any person or organization named by the Whirlpool employee volunteer.



## Purpose

Whirlpool Foundation's Dollars for Doers Program encourages and recognizes active U.S. based Whirlpool employees who donate a significant amount of time to a nonprofit organization in their community. The program provides a \$500 grant for a U.S. nonprofit organization in which an employee has continuing active involvement.

## Employee Eligibility

All full-time, salaried and hourly U.S.-based employees of Whirlpool Corporation are eligible to participate. This includes any employee on a flexible work arrangement.

## Employee and Family Participation

To be considered for a grant, 50 hours of volunteer services must have been completed within a 6 month period for an organization. The volunteer services may be contributed solely by the employee or in combination of the employee's family completing the remaining 25 hours, within the same 6 month period.

## Amount of Contribution

Whirlpool Foundation will make a \$500 contribution, one time per year to a qualifying U.S. nonprofit organization. Employee can participate either individually or with the employee's family but cannot obtain more than one Dollars for Doers grant per calendar year. The contribution check will be mailed directly to the organization. Acknowledgement will be made in writing to both the organization and the program participant.