



We are the

Red Tab Foundation

Employees helping employees

Reference Guide for Grant Partners

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**WHAT
WOULD YOU DO
IF YOU NEEDED
HELP AND DIDN'T
KNOW WHERE TO
TURN?**

The Red Tab Foundation was founded in 1981 by Jerry O'Shea, a Levi Strauss & Co. employee. Jerry's vision was to provide short-term aid for co-workers and retirees who had encountered unexpected financial emergencies. Today, this unique nonprofit organization provides aid to — and receives support from — our colleagues around the world.

Jerry's legacy lives on.

WANT TO HELP? LEARN HOW AT
WWW.REDTABFOUNDATION.ORG

We are the
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Employees helping employees

INTRODUCTION

Levi Strauss & Co. employees and retirees in over 20 countries have received help from the Red Tab Foundation (RTF). Outside of the United States, internal partners play a key role in spreading the word about our emergency services and helping us evaluate and administer requests for financial support. This manual is intended to give you an understanding of RTF's purpose, the types of emergencies we can address and your role as a grant partner.

RED TAB FOUNDATION OVERVIEW

RTF helps Levi Strauss & Co. employees and retirees following critical, unexpected financial emergencies. The assistance is need-based and provided to address at-risk basic necessities. Specifically....

RTF is:

- a tax-exempt public charity regulated by the U.S. tax authority;
- an independent legal entity separate from LS&Co.;
- funded primarily through donations from employees, retirees, and other foundations.

RTF is NOT:

- a company benefit to which employees are automatically entitled;
 - a supplement to LS&Co. medical plans;
 - used to recruit employees.
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GENERAL ROLES & RESPONSIBILITIES

Grant Partner

- Acts as in-country/region point of contact for LS&Co. employees in financial need;
- Determines eligibility and identifying applicable qualifying emergency; consults with RTF Staff if necessary.
- Submits applications on behalf of applicants, makes recommendations on the level of emergency aid required, gathers supporting documentation as requested by RTF staff; communicates/explains RTF decisions to applicants.
- Partners with RTF to raise awareness and provide ongoing feedback of RTF programs.
- Communicates employee issues and concerns to RTF to help identify opportunities for new and/or improved programs.

RTF Staff

- Reviews applications and grant partner recommendations; determines final outcome.
 - Disburses funds.
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APPLICATION PROCESS

After you are notified of an employee in crisis, there are generally SIX steps in the process.

Step 1: Make Contact

- Please contact the employee (or immediate family member) to get a full understanding of the emergency. In order to proceed to the next step, you should be confident that the employee has:
 - Experienced a qualifying emergency;
 - Their basic needs are at risk due to the emergency;
 - He/she lacks the income, savings, insurance or other resources to adequately address the emergency.
 - If you are unsure, or feel the employee does not meet the eligibility criteria, please contact the foundation by e-mail: Redtabfoundation@levi.com

APPLICATION PROCESS

Step 2: Gather applicant's information for their application

- Record their full name, location, household size, monthly income and major expenses, expenses he/she is unable to pay. This information will be entered into the online application form.
- Collect any available documentation supporting their emergency and/or need.
- Please also request their bank's wire instructions (bank name, SWIFT Code, account name and number).

Step 3: Access the application

- Application can be found at www.redtabfoundation.org under "Apply for Help"
- You will be asked a few questions which determine which application form to use.
- You will be asked to log in. If you are first time applicant, click "new applicant" to register.
- Once you're logged in, you will be asked three more questions to ensure the applicant meets general eligibility criteria.

APPLICATION PROCESS

Step 4: Complete the application

- **Section 1:** The applicant's information
 - Provide the applicant's location, household size, household income and major monthly expenses, the nature of their emergency
 - Make sure to provide answers to all the required questions
- **Section 2:** Your information
 - Provide your personal information, the amount of assistance you recommend RTF provide and a brief rationale for your recommendation.
- **Section 3:** Supporting documentation
 - Attach any available documentation (e.g. proof of emergency).
 - You can also email documentation to redtabfoundation@levi.com.
- **Submit:** Send the application to the foundation by clicking the "Submit" button

APPLICATION PROCESS

Step 5: Await a decision or further instructions

- Within two business days, you will receive details on the outcome (approval or denial with reasoning) or a request for additional information and/or supporting documentation.
- For approvals, the foundation will typically wire funds directly to the applicant. We will need the applicant's wire instructions to disburse the funds.

Step 6: Communicate the outcome or next steps

- You notify the applicant of the outcome or work with the applicant to collect the information and/or documentation requested.

EMPLOYEE ELIGIBILITY

To be eligible for assistance from the Red Tab Foundation, an employee must meet the following requirements:

- Be employed by Levi Strauss & Co. (Contractors paid by a third-party and franchise workers are not eligible).
- Experience an eligible emergency.
- Be able to provide supporting documentation to validate the emergency and financial need.

QUALIFYING EMERGENCIES

1. [Major Illness/Injury](#)
2. [Death/Funeral](#)
3. [Disaster](#)
4. [Involuntary Job Loss](#)
5. [Emergency Travel](#)
6. [Loss of Transportation](#)
7. [Domestic Violence](#)

QUALIFYING EMERGENCIES

1. Major Illness/Injury

The Red Tab Foundation can assist with the following:

- Past-due household expenses as a direct result of a recent illness or injury of the employee or retiree, spouse/domestic partner, child, sibling or parent living in the same household;
- Critical medical treatment (including treatment for substance abuse) or equipment that is being denied due to inability to pay and/or lack of coverage;
- Non-reimbursable or uncovered medical bills are considered if the employee has unsuccessfully pursued a payment agreement and/or demonstrates a clear inability to pay.
- Maximum level of assistance: US \$5,000

Required Documentation:

- Approved leave of absence or doctor's note stating inability to work for medical reasons; past due household bills.
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QUALIFYING EMERGENCIES

2. Death/Funeral

The Red Tab Foundation can assist with the following:

- Burial expenses of the employee or retiree, spouse/domestic partner, child, sibling, or parent living in the same household;
- Hardship attributed to lost income of the deceased is also considered.
- Maximum level of assistance: US \$5,000

Required Documentation:

- Statement from funeral home indicating expense and financial responsibility of applicant; proof of lost income and past due household bills, if applicable.

QUALIFYING EMERGENCIES

3. Disaster (e.g. Fire, flood)

The Red Tab Foundation can assist with the following:

- Replacement of essential items (clothing, food, medicine); Supplemental food and miscellaneous expenses for displaced family members who may have moved into employees' homes; Critical home repairs to primary residence needed for health and/or safety (not covered by insurance, Non-governmental relief organization, etc.);
- Temporary housing and/or relocation expenses.
- Maximum level of assistance: US \$5,000

Documentation that may be requested:

- Proof of disaster such as photos or insurance report, repair estimate from licensed contractor, if applicable. Assistance (not to exceed US \$500) may be issued to replace essential items while supporting documentation is collected.

QUALIFYING EMERGENCIES

4. Involuntary Job Loss

The Red Tab Foundation can assist with the following:

- Past-due household expenses as a direct result of **involuntary** job loss or layoff impacting an employee, spouse, domestic partner, sibling or parent living in the same household; Voluntary layoff, resignation and termination for cause ARE NOT eligible job loss situations.
- Hardship due to a substantial/involuntary reduction in work hours is considered if the employee has received an eviction or utility disconnection notice.
- Maximum level of assistance: US \$5,000

Required Documentation:

- Copy of separation notice or paperwork from the unemployment office noting the cause of unemployment and date the separation occurred; past due household bills.

QUALIFYING EMERGENCIES

5. Emergency Travel

The Red Tab Foundation can assist with the following:

- Travel to obtain critical medical care not available locally;
- Travel to attend a funeral or final visit to a terminally ill immediate family member defined as: child, sibling, parent or grandparent;
- Travel to escort a critically ill immediate family member to a medical facility or hospice care;
- Travel to assist an immediate family member following a fire or natural disaster.
- Maximum level of assistance: US \$5,000

Documentation that may be requested:

- A statement from the attending physician regarding medical need, health status or need for remote medical facility or hospice, funeral notice; receipts for travel expenditures, as applicable.
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QUALIFYING EMERGENCIES

6. Loss of Transportation

The Red Tab Foundation can assist with the following:

- Repair costs to only source of transportation;
- Vehicle must be owned by the applicant and INOPERABLE;
- Repair cost must not exceed the value of vehicle;
- Aid for this emergency is limited to one grant in a 5-year period.
- Maximum level of assistance: US \$5,000

Required Documentation:

- Proof of ownership
- Itemized repair estimate from a licensed mechanic

QUALIFYING EMERGENCIES

7. Domestic Violence

The Red Tab Foundation can assist with the following:

- Aid to secure court ordered protection, obtain shelter and other essential items needed to establish a safe living environment due to domestic violence.
- Maximum level of assistance: US \$5,000

Documentation that may be requested:

- Police report if available
- Court ordered protection request
- Proof of moving expenses

KEY CONTACTS

| Name | Title | Email | Phone |
|---------------------|-----------------------|--|--------------|
| Ben Blake (Primary) | Grant Program Manager | Bblake@levi.com | 415-501-3118 |
| Mary Palafox | Executive Director | Mpalafox@levi.com | 415-501-6154 |
| Jenny Calvert | Program Coordinator | Jcalvert@levi.com | 415-501-4607 |
| John Booker | Marketing Manager | Jbooker@levi.com | 415-501-6490 |

General Red Tab Foundation email: Redtabfoundation@levi.com

Fax: 415-501-1859