

BELL, DISHMAN, DUJAY, PERMENTER & STEINHAGEN FOUNDATIONS

COMMUNITY GRANT APPLICATION GENERAL GUIDELINES

The following guidelines and comments are provided to assist applicants in the preparation of their grant requests and to provide some insight as to the manner in which grants are considered.

1. **Grant requests should be submitted online to Hancock Whitney – Private Wealth Management by May 31** to assure consideration along with all other applications received during the year. **Submitted material will not be returned and becomes the property of the Foundation.**
2. Applicants must have received tax exemption as a 501(c)(3) charitable organization (or its equivalent) prior to making application and must attach a copy of the IRS exemption letter to the grant request form. Grants may not be made to individuals.
3. The Affidavit form that is found in the Documents section of the online application must be printed, signed, notarized and uploaded to the application.
4. Funds available for charitable purposes typically fall within the areas of: (1) arts and culture, (2) community services, (3) education, (4) health, and (5) services for the needy and disadvantaged.
5. There are no formal restrictions as to the types of requests being considered, whether programming, project or capital improvement in nature. There are never enough funds available to meet the many worthwhile requests submitted for consideration. In order to meet as many of these needs as possible within the Southeast Texas, and to encourage charitable organizations to expand their permanent services without becoming dependent upon the foundations, the Trustee prefers to move its support among various charitable organizations from time to time, and not to become a continuous supporter of any one organization. There is a general policy against the funding of positions, salaries or other continuing operational expenses that would subject the organization to becoming dependent upon continued foundation support. Funds will not be provided for student loans, scholarships or fellowships for individual students, grants for endowment funds, annual fundraisers or annual operating budgets.
6. These guidelines are general in nature, with the Trustee presuming that it will make exceptions and changes, within its own discretion, as it may from time to time deem appropriate.
7. Trustee may request additional documentation from or perform site visits to charitable organizations that have applied for a grant at its discretion.
8. All decisions relating to applications and grant awards are made by the Trustee and not by the individual members of the donor's family.
9. It is the Trustee's practice to notify all applicants of the decision concerning their requests. This usually occurs in August. All organizations who are awarded grant funds will be required to sign and return the letter agreement stating the terms of the grant award within 30 days of the notice.
10. A report must be submitted upon completion of the program/project as described in the grant application. If the funds are not utilized in the time specified, a report must be filed each year with an update on the progress until the program/project is complete. Future grant requests will not be considered unless the appropriate reports have been received. A Final Report form is available online to all successful grant applicants and is due May 31 the year following a grant award.