

H.H. & EDNA HOUSEMAN CHARITABLE TRUST

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 prior to making application and must attach a copy of the IRS exemption letter to the grant online application. 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) the arts & culture (2) community services, (3) education, (4) health, and (5) services for the needy & disadvantaged in the Orange County area.
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 community, and to encourage organizations to expand their permanent services without becoming dependent upon the Foundation, the Granting Committee and Trustee prefer to move their support among various charities from time to time, and not to become a continuous supporter of any 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; grants/scholarships or fellowships for individual students; for endowment funds; for annual fundraisers; or for annual operating budgets.
6. These guidelines are general in nature, with the Granting Committee and Trustee presuming that they will make exceptions and changes in any and all of these areas, within their own discretion, as they may from time to time deem appropriate.
7. The Granting Committee and 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 Granting Committee and Trustees of the Houseman Charitable Trust and not by the individual members of the donor's family.
9. It is the Granting Committee and 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 Final Report must be submitted upon completion of the program/project as described in the grant application or at least annually if the funds are not utilized in the time specified. 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.