

G. N. WILCOX TRUST
Bank of Hawaii, Trustee

Grant Application Information for Program

I. Policy

Applications for grants are accepted by the Committee on Beneficiaries from qualified tax-exempt 501(c)(3), charitable organizations. The Committee's general policy is to confine grants to organizations within the State of Hawaii, with a priority is to assist Kauai organizations serving that island.

Although the Trust is broad-purposed, it does not make grants to individuals, nor for reserve purposes, endowments, or deficit financing. No multiple-year pledges are made. Generally grants will not be made to government agencies, nor to organizations supported substantially by government funds, nor to organizations that "re-grant" G. N. Wilcox Trust funds.

The Committee on Beneficiaries will consider only one request a year from an organization. A new request will not be entertained if a prior pledge or report is still outstanding. The exception to this policy is a tuition aid program (separate guidelines available) which may be considered in addition to one other request from a school.

NOTE: If a fiscal sponsor is being used, it is necessary to contact the Charitable Foundation Services office prior to submitting a grant proposal.

II. General Information

a. Board of Directors

In order to be successful in accomplishing its purposes, a charitable organization generally must have community and business support, rather than relying solely on foundations or government funding.

For this reason the Committee on Beneficiaries pays particular attention to how active members of an organization's Board of Directors carry out their responsibilities to the organization.

In the interest of public causes, G. N. Wilcox Trust requires 100% of members serving on the Board of Directors to make an annual financial contribution, at some level, to the support of the organization (excluding churches); in addition to participating in fundraising activities. Directors are also required to attend Board meetings, volunteer work when needed, and make significant efforts to gain community and business support.

b. School Participation

If the request for funding supports a program that involves school or classroom participation, the applying charity must provide a list of the schools that will be involved in the program along with a letter of support from the schools' principals or teachers who have either committed or are interested in the program. The organization must also provide us with an approximate number of students that will be involved and/or benefiting from the program.

c. Other Factors

Some other factors considered in reviewing a proposal are:

- the community's need for the proposed program or project in relation to other similar activities
- reasonableness of the project's income/expenditure budget
- ability of the applicant to obtain entire funding and sustain the proposed project

III. Foundation Deadlines

- **Requests – Must be completed by the 1st of April, July, or October.**

There may be times due to unforeseen circumstances or unusually high volume, that a request may not be reviewed in time for the intended project. An average of 90 - 120 days is required to process a proposal, allowing for a possible site visit and for studying the proposal in relation to other activities of the Foundation.

Applicants will be notified in writing of the action taken on their requests. The recipient of a grant will be required to submit a narrative report specific to the Foundation's Reporting Guidelines on what has been accomplished as a result of the grant, and a fiscal accounting of the grant expenditures.

The Foundation receives more requests for assistance than its funds permit supporting. However, normally, all applications are considered, and each is acted upon according to its current and projected relative merit, provided it is in keeping with the deed of trust.

NOTE: Although not ordinarily required, an audited financial statement may be requested if circumstances warrant.

Contact Information for the G. N. Wilcox Trust (Toll-free from Neighbor Islands: 1-800-272-7262)

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