



ONLINE GRANT APPLICATION TRAINING

FOR FOUNDATIONS MANAGED BY:

HANCOCK WHITNEY WEALTH MANAGEMENT

1. COMBINED FOUNDATIONS:

Helen G. Bell Charitable Trust
H.E. & Kate Dishman Charitable Foundation Trust
Eva DuJay Foundation – Mary Harold Medical Fund
Roy & M. Permenter Charitable Foundation
B.A. & Elinor Steinhagen Benevolent Trust

2. H.H. & Edna Houseman Charitable Trust

3. Mamie McFaddin Ward Heritage Trust

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ACCESSING THE ONLINE APPLICATION AND GRANT MANAGEMENT SYSTEM

The Hancock Whitney Grant Portal
Link can be found on the Southeast
Texas Nonprofit Development
Center's website:

<https://setxnonprofit.org>

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NAVIGATING THE HANCOCK WHITNEY PORTAL

Once on the website, click on the Hancock Whitney Portal Tab. This will take you directly to the grant application portal.

****Please note that the each time you start a new online application, you will need to click on**

[“APPLY FOR A NEW GRANT”](#)

even if you have applied for grants in the past**

If you are returning to update a grant or to submit reports, you will need to click on

[“RETURN TO GRANT PORTAL”](#)

to access your open grants and/or your grant history.

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NONPROFIT CENTER WEBSITE

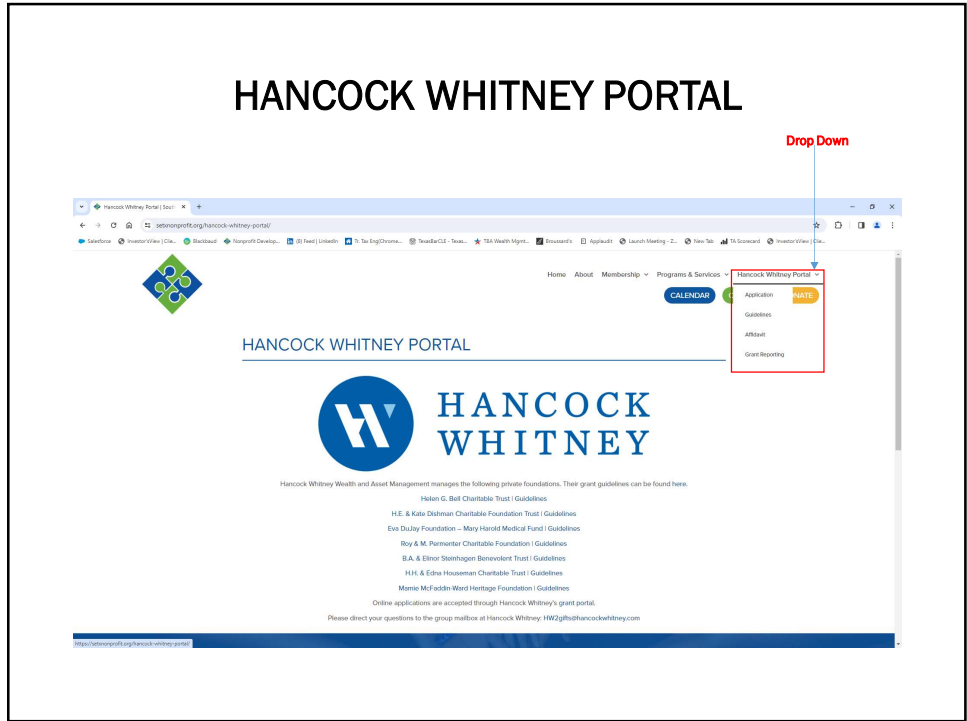
www.setxnonprofit.org

The screenshot shows the homepage of the Nonprofit Center website. At the top right, there is a red text label "Click here" with a blue arrow pointing to the "Hancock Whitney Portal" link in the navigation menu. The navigation menu includes "Home", "About", "Membership", "Programs & Services", and "Hancock Whitney Portal". Below the navigation are three buttons: "CALENDAR", "CONTACT", and "DONATE". The main content area features a large image of a group of people smiling. Overlaid on the image is the text "You make the difference. We're here to help." and two buttons: "LEARN MORE" and "SEE PROGRAMS".

Shaping the future of the nonprofit sector in
Southeast Texas

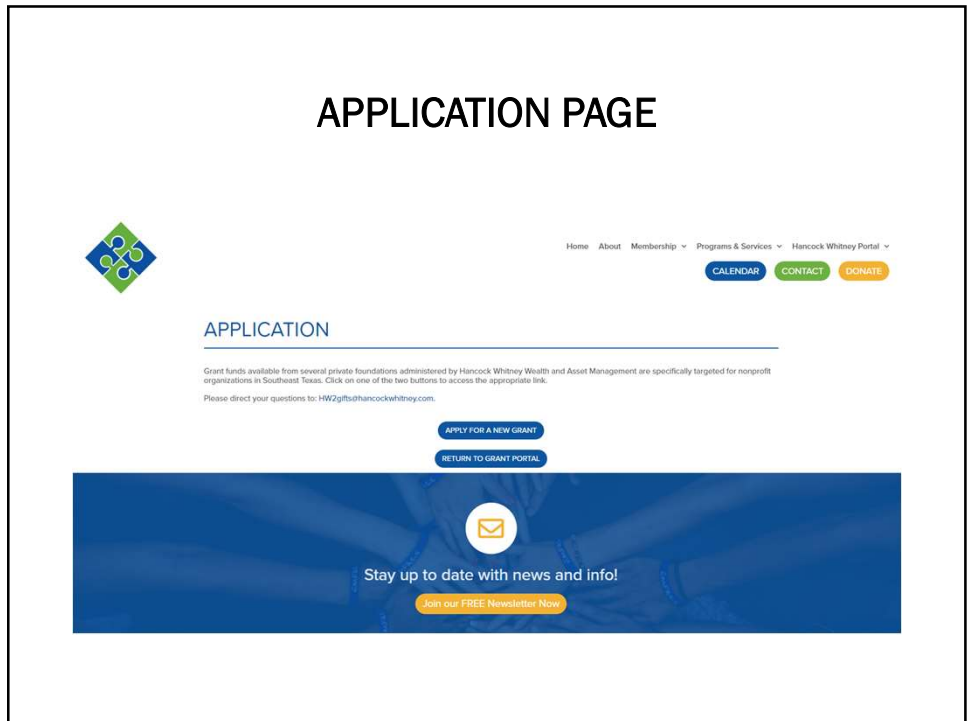
4

HANCOCK WHITNEY PORTAL



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APPLICATION PAGE



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APPLICATION SELECTION PAGE



[Contact Us](#) | [Exit](#)

Welcome to the Hancock Whitney application portal.

For which grant are you applying:

--Select One--

Submit

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APPLICATION LOG IN PAGE



[Contact Us](#) | [Exit](#)

Here you will either create a new account if you are a first time user or use your existing Login if you already have an account. You must use your functional & valid email address as your Login email.

Please Sign In

Welcome to the Online Grant Site for Private Foundations managed by Hancock Whitney Trust And Asset Management.

Participating Foundations:

- HELEN G. BELL CHARITABLE TRUST***
- H.E. & KATE DISHMAN CHARITABLE FOUNDATION TRUST***
- EVA DUJAY FOUNDATION-MARY HAROLD MEDICAL FUND***
- H.A. & EDNA HOUSEMAN CHARITABLE TRUST
- ROY & M. PERMENTER CHARITABLE FOUNDATION***
- S.A. & ELINOR STEINHAGEN BENEVOLENT TRUST***
- MAMIE MCFADDIN WARD HERITAGE FOUNDATION.

***These Foundations use the Combined Application

In order to qualify for funding, services and/or project must be located in Southeast, Texas

You may use this system to:

- Start a new application
- Access & continue work on a saved application
- View applications you have submitted
- Submit interim or final reports

If you've never used our system select the "New Applicants, Click here" button. If you have used this system before enter your log in information below.

If you have trouble logging in, please click the "Forgot Password" button.Thank you!

E-mail Password

New Applicants, Click Here

Forgot Password?

Login

Enter your email address and password. Then:

First time applicants must select New Applicant to create an account.

Returning applicants, enter your email & password and click Login

Use the Forgot Password function to have an email sent to the email address on file to reset your password.

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ENTER TAX ID NUMBER



Contact Us | Exit

Please enter your Tax ID:

Please Note: No grants can be made to Individuals.
DO NOT enter your SSN or Other personal information.

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APPLICATION NAVIGATION



To navigate to the different application pages, just click on the tabs below. Please enter all of the requested information and attach all of the required attachments.

Contact Us | Exit

[General Information](#) | [Guidelines](#) | [Organization Information](#) | [Key Contacts](#) | [Request Information](#) | [Organizational History](#) | [Attachments](#) | [Review My Application](#)

General Information [Printer Friendly Version](#) [E-mail Draft](#)

* Required before final submission

General Information

Hancock Whitney Wealth Management (herein referred to as "Trustee") has been entrusted with the responsibility of managing the below listed Charitable Foundations for the benefit of our South Texas, its citizens and charitable organizations. We look upon this as an opportunity to perpetuate the love, care and concern which the individuals establishing these funds have had for their community and for their fellowman, and to continue the contributions which they made during their lifetimes in their honor.

Your application for a grant will be considered under all of the listed foundations, with possible funding coming from one or more, at the Trustee's discretion. If you would like to receive consideration from a specific foundation, you may so designate in the appropriate space provided.

The purpose of this Combined Application Form and our review thereof, is to avoid the necessity of you applying separately for grants from each foundation. This unified process allows us to give more comprehensive consideration of your request from all funds available at one time each year.

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REQUIRED ATTACHMENTS

The following files are required to be uploaded prior to submission. Please do not submit a copy of your IRS Tax Form 990, as that information will be accessible utilizing your Tax ID number/Employer Identification Number (EIN), provided on your IRS Determination Letter.

1. Project Budget (This should be a breakdown of the funds you are requesting.)
2. Project Timeline
3. IRS Determination Letter
4. Most Recent Audited Financial Statement (If your organization has not had a financial audit, please submit a copy of: 1) a Review; or 2) a Compilation, completed by an outside, independent CPA.)
5. Profit/Loss Statement
6. Balance Sheet
7. Current Operating Budget
8. Certification/Affidavit Form

To Upload a file, click the "Browse" or "choose File" button below.

- Locate the document on your computer
- Select the document and click OK
- You will return to this screen
- Click Upload.

Attachments are required for each application. Please follow the instructions listed above to attach. **Documents should be uploaded in PDF format.** Documents should be combined into one attachment per upload category. For example, if your project income and expenses are separate documents, please combine them into one file and upload that one file to the Project Budget category.

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REQUIRED ATTACHMENTS AND TEMPLATE

The screenshot shows a form with four sections, each with a red asterisk and a description:

- Profit/Loss Statement:** Most recent Year-to-Date, detailed statements of income and expenses, i.e. Profit & Loss (P&L) Statement. Includes a "Choose File" button and an "Upload" button.
- Balance Sheet:** Most recent Balance Sheet. Includes a "Choose File" button and an "Upload" button.
- Current Operating Budget:** Current year, Board approved, Operating Budget. Includes a "Choose File" button and an "Upload" button.
- Certification/Affidavit Form:** Please go to the Southeast Texas Nonprofit Development Center's website for a copy of the Affidavit/Notarization Template. The Affidavit must be signed, notarized and attached. Includes a "Choose File" button and an "Upload" button.

Three red callout boxes with white text provide instructions:

- To upload an attachment, click on the **Choose File** button to open a search window that will allow you to navigate to the location of the document on your computer.
- Once you locate it, click on the **Open** button in the search window. You will see that the file location will appear in the browse field.
- Finally, click the **Upload** button to attach the file to your application.

A fourth red callout box points to the Certification/Affidavit Form section:

Go to the SETX Nonprofit Development Center's website to download the Affidavit form. Download the Affidavit, complete it, have it signed by your Authorized Signer for your organization and have it notarized. Then upload the Affidavit to your Grant Application.

At the bottom of the form are two buttons: "Save & Finish Later" and "Review & Submit".

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SAMPLE PROJECT BUDGET

HANCOCK WHITNEY 2024 Combined Trust Project Budget

Income	
Hancock Whitney Combined Trust Grant Request	
• Irrigation system	\$2,500.00
• Lumber for raised beds	\$4,000.00
Total Request	\$6,500.00
Expenses	
Community Garden	
• Fence	\$15,000.00
• Water Meter and Backflow Test	\$7,500.00
• Irrigation System	\$2,000.00
• Tools and Hoses	\$500.00
• Signage	\$200.00
• Lumber for Raised Beds	\$4,000.00
• Soil	\$400.00
• Seeds and Starter Plants	\$200.00
• Rainwater Collection System	\$2,400.00
• Shade Cover / Pergola	\$2,500.00
• Benches for Meeting / Classroom Area	\$800.00
• Bike Rack	\$100.00
Total Project Expenses	\$35,600.00

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GRANT APPLICATION CERTIFICATION & AFFIDAVIT

AUTHORIZED SIGNERS CERTIFICATION

The individual listed below is certified to be an authorized signer for _____ with authority to sign documents related to grant requests and to issue any payment instructions.

Printed Name _____ Signature _____ Title _____

Personal Address: _____
Street Address

City, State and Zip Code _____

Personal Phone Number: _____

Date of Birth: _____

AFFIDAVIT

I, the undersigned, state and affirm that all the statements and information submitted with this grant application are true and correct. Further, I hereby declare that the organization for which this application is filed, is a charitable organization as defined under 501(c)(3) and/or related sections of the Internal Revenue Code, and does not discriminate in any manner based on race, color, religion, sex, national origin or based on age.

Printed Name _____ Signature _____ Title _____

NOTARIZATION:

I, the below signed Notary, in and for the State of _____ County of _____ do hereby acknowledge that _____ the above signed Affiant, did sign and publish the above Affidavit before me, on this _____ day of _____, 20____, affirming the correctness and validity of the statements made in the application to which the Affidavit is attached.

NOTARY _____

My Commission Expires: _____ day of _____, 20____.

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SAVING AND REVIEW

The screenshot shows a form with four main sections, each with an 'Upload' button and a 'Browse...' link:

- Profit/Loss Statement:** Most recent Year-to-Date, detailed statements of income and expenses, i.e. Profit & Loss (P&L) Statement.
- Balance Sheet:** Most recent Balance Sheet.
- Current Operating Budget:** Current year, Board approved, Operating Budget.
- Certification/Affidavit Form:** Please download, complete and attach This Affidavit/Notarization Template. The Affidavit must be signed, notarized and attached.

At the bottom of the form are two buttons: 'Save & Finish Later' and 'Review & Submit'.

Callout 1 (top right): At any time during your application submission, if you wish to save and continue at a later time, you can click the link "Save & Finish Later". If you close the application without saving it, your work will be lost.

Callout 2 (middle right): When you have filled in each field and added all required attachments, you can click on "Review & Submit" to review your application before submission. You will still be able to make any needed changes.

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APPLICATION REVIEW

The screenshot shows the 'Organization Information' section of an application. A red error message at the top reads: "Your application is missing information that is required before it can be submitted." A blue callout box explains: "When you click on the 'Review & Submit' button, if any of the required fields/documents are missing you will receive this message." Another blue callout box points to a red triangle icon and says: "The system will then indicate the fields/attachments that are missing and required before submission." A red triangle icon with the text "This is a required field." is positioned over the 'Phone' field.

Organization Information

- Organization Name:** All Stars Project Inc
- Mailing Address:** P.O. Box 1111
- Street Address (if Different):** 123 North Street
- City:** Beaumont
- State:** Texas
- ZIP Code:** 77701
- Phone:** 409-892-1111
- Fax:** 409-892-1112
- E-mail Address:** director@allstarsproject.com
- Web Address:**
- Tax ID:** 133148295
- Date Organization was Established:** 06/01/1983
- Frathe Type:** Public Charity

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SAVED APPLICATIONS

Account: director@allstarsproject.com | [Change E-mail/Password](#)
 Last Log in: 5/1/2017 10:15 AM CMT—05:00

Applications Requirements

Applications

Thank you! Your application has been saved. You should receive an e-mail confirmation.

Below you will find the applications that you have saved and submitted.

Show In Progress Applications ▾
 Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
All Stars Full Application	All Stars Project	1	55055	5/1/2017	Owner	
All Stars Full Application-Stage 2	All Stars Project		55056	5/2/2017	Owner	

Grants Management Account Log-In Link:
 (This link will take you to your grants management account where you can see applications previously started and saved or submitted.)

CHECK <http://setnnonprofit.org> FOR THE CORRECT LINK WHEN THE SYSTEM IS ACTIVE

When you click on "Save & Finish Later", you will be taken to your grants management account. You will have the ability to log back into your account and continue working on your application.

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SHARING/TRANSFERRING OWNERSHIP OF APPLICATIONS

Show In Progress Applications ▾
 Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
All Stars Full Application	All Stars Project	1	55055	5/1/2017	Owner	
All Stars Full Application-Stage 2	All Stars Project		55056	5/2/2017	Owner	

You now have the capability to transfer the ownership of an application to a new person, assign viewers to your application and email a copy of the application from your grant management account dashboard.

- Transfer to a New Owner** – Clicking this icon will open the Transfer Ownership form.
- Manage Viewers** – Clicking this icon will open the Manage Viewers form.
- Email a Copy** – Clicking this icon opens a new email form.

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APPLICATION DEFINITIONS

OWNER: The owner has exclusive rights to edit, save, or submit an application.

- The current owner will be allowed to transfer each application to a different owner. The new owner must accept the transfer. If the new owner does not have a grants management account, one will be created during the transfer process.
- The owner can grant View-only rights to any number of other people; a read-only version of the application will be listed on the others' Grants Management Account dashboard. Again, if the new viewer does not have a grants management account, one will be created for them.
- The owner can see a list of all "viewers" and take view rights away from any of them.

VIEWER: "Viewers" will see applications owned by others listed in their grant management account dashboard and can view read-only copies until view rights are taken away by the owner.

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APPLICATION REVIEWS AND AWARDS

- Once you have submitted your completed grant application, there will be an extensive review of all of your information before funding is considered. At that point, your application will be submitted to the appropriate grant committee to determine if a grant will be awarded. This typically takes 2 months from the application's due date.
- You will be notified by Hancock Whitney Wealth Management on behalf of the various foundations by email when a decision is made to either approve or decline your request.
- If your grant is approved, a signed approval letter must be returned via your Grants Management Account. You will receive an email with the link to log-in to the Grants Manager Account using the same email and password that you used for the online application. Click on the Requirements Tab at the top and then in the middle of the page you will see a link for the Approval Letter. Click on this link to open the form, then download and print your letter. Once the letter is signed, upload the letter to your Grants Manager account and click the submit button.
- Please note that any payments on awarded grants will be made per the terms set out in the signed approval letter.
- All grants awarded will be required to file a final report before the beginning of the next grant season. You will receive an notice and a link to file the report and upload any appropriate attachments online.

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QUESTIONS

If you have any questions about the Hancock Whitney online grant process, please contact the Hancock Whitney Wealth Management staff at the following email address:

hw2gifts@hancockwhitney.com