

The Stewart Huston Charitable Trust

Lukens National Historic District

50 South First Avenue, 2nd Floor · Coatesville, Pennsylvania 19320 · Phone 610-384-2666 · Fax 610-384-3396 · Email admin@stewarthuston.org

GENERAL ORGANIZATIONAL REQUIREMENTS

The following requirements are mandatory for all organizations requesting funds from The Stewart Huston Charitable Trust:

Tax Status: Applicants must have evidence of being granted 501(c) (3) tax exemption status by the Internal Revenue Service.

Demonstrated Need: Requests for support must demonstrate that the program/organization is addressing a known community need, and not simply duplicating existing efforts.

Types of Support: While the Trustees prefer to provide support for specific projects that address a particular community need or issue, support is considered for general operations, capital projects, equipment purchases, and last-resort funding on a selective case-by-case and meritorious basis.

Leveraged Resources: The Trust prefers not to be the major source of funding for an organization, but prefers to make grants to organizations which already have commitments from other funding sources. Special consideration is given to programs that encourage other commitments of human and financial resources. Of particular interest are programs that generate a high level of volunteer involvement from the community and/or attract a high level of funding from other sources.

GENERAL ORGANIZATIONAL RESTRICTIONS

The following requirements are mandatory for all organizations requesting funds from The Stewart Huston Charitable Trust:

All grant awards are subject to the vote of the full Trustee body.

It is not the intention of the Trustees to establish a permanent grant relationship with grantees.

During the period in which a present grantee is receiving tentative payments on a previously awarded grant, the Trustees will not entertain a new grant request until the multi-year commitment is completed.

Additionally, for good and sufficient reasons, the Trustees reserve the right to cancel future grant payments on any multi-year commitments they have made.

The Trustees will not award a new grant to an organization which has unfulfilled reporting requirements from a previous grant award.

With regard to types of grants, the Trustees do not make grant awards for:

- Financial support to individuals
- Endowment purposes
- Purchases of tickets for benefit purposes
- Coverage of continuing operating deficits

Concerning types of organizations, support is not provided to the following:

- Organizations not qualified for tax-exempt status under Section 501(c) (3) of the IRS code.
- Intermediate or pass-through organizations (other than United Way and Chester County Community Foundation) which in turn allocate funds to beneficiaries of their own selection
- Groups such as fraternal organizations, political parties or candidates, veterans, labor or local civic groups, volunteer fire companies, and groups involved in influencing legislation.

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TRINITARIAN/EVANGELICAL DISTRIBUTION GUIDELINES

Trinitarian Evangelical Grants

Sixty percent of the annual distributions from the Trust are to be made for the benefit of Trinitarian Evangelical activities. Fifty percent of the annual distributions will be made for the benefit of Trinitarian Evangelical organizations in the Savannah, Georgia, area while ten percent of the annual distributions will be made for the benefit of Trinitarian Evangelical organizations in the Coatesville Pennsylvania, and other areas.

The Chester County Court has decreed that the phrase “Trinitarian Evangelical activities,” as used in Mr. Huston’s will, includes activities carried on by Protestant churches (other than Unitarian churches) and affiliated or related organizations which follow the Christian Gospel, including dissemination of the Christian Gospel and exemplification of Christian principles through social welfare and other charitable endeavors.

The court further rules that dissemination of the Christian Gospel includes activities such as preaching and conducting services, offering religious instruction, and distributing religious literature. Exemplification of Christian principles includes activities such as providing food and shelter to the homeless, maintaining orphanages, operating hospices, and conducting drug and alcohol abuse prevention and rehabilitation programs.

Process for Trinitarian/Evangelical Organizations Requesting Grants

Trinitarian/Evangelical grants are awarded twice each year: in the spring and in the fall. Organizations who are interested in submitting a grant request are encouraged to visit the Trust’s Website, www.stewarthuston.org, in order to view the distribution guidelines to determine whether they may qualify for a grant. Once they have reviewed the guidelines, they are welcome to call the office at 610-384-2666, between the hours of 10 AM and 4 PM, EST, Monday through Friday, if they have any questions or concerns. Once eligibility has been established, the submission process should be followed as outlined below.

The Request for Contribution form should be completed and sent to the Trust along with a proposal. **Proposals are due on March 1 and September 1.** Proposals should contain a summary of the organization, a description of the project, and be accompanied by the following attachments:

1. The Request for Contribution form, which can be found on our Website, www.stewarthuston.org, can be completed online and e-mailed to us at admin@stewarthuston.org. Please use care in completing the form, and be sure to include all of the required information.
2. IRS tax-exempt letter
3. Pennsylvania Charitable Organizations Registration Certificate (any organization that has over \$25,000 in gross revenue, regardless of location, must register in Pennsylvania before soliciting funds) of written confirmation of exemption (churches are exempt from this requirement)
4. Current by-laws
5. Current board of directors list (with professional affiliation)
6. Most recent 990 form filed with the IRS (churches exempt)
7. Most recent independent financial audit
8. Overall operating budget for current fiscal year
9. List of public/private funding sources for your organization during the past fiscal year
10. Current semi-annual or annual report

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11. Examples of published media reviews
12. Strategic plan for your organization
13. Organizational flow chart
14. Statement of Christian ministry faith-based initiatives (Trinitarian/Evangelical organizations only)
15. Statement that there has been no change in purpose, character or method of operation since the Agency's IRS tax ruling was issued
16. A detailed project budget
17. A list of public and private funding sources for the project

Proposals can be paper-clipped or stapled together. Please do not put proposals in binders. Please submit four copies of your proposal materials.

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SECULAR DISTRIBUTION GUIDELINES

Secular Grants

Mr. Huston further stipulated that forty percent of the annual distributions from the Trust are to be used for secular charitable activities within one hundred miles of Coatesville, Pennsylvania.

Process for all Secular Organizations Requesting Grants for the Year

Secular grants are awarded once a year: in the spring. Organizations who are interested in submitting a grant request are encouraged to visit the Trust's Website, www.stewarthuston.org, in order to view the distribution guidelines to determine whether they may qualify for a grant. Once they have reviewed the guidelines, they are welcome to call the office at 610- 384-2666, between the hours of 10 AM and 4 PM, EST, Monday through Friday, if they have any questions or concerns. Once eligibility has been established, the submission process should be followed as outlined below.

- A. Initial screening begins with a Letter of Intent, which should be received by the Trust no later than **January 15**. In the event the 15th falls on a weekend or a holiday, letters will be accepted during that following week.

Letters should be a maximum of 6 pages length, with the Request for Contribution form as the very first page. This form can be found on our Website, www.stewarthuston.org, completed online, and e-mailed to us at admin@stewarthuston.org. Please use care in completing the form, and be sure to include all of the required information

The next 2-4 pages should describe the project (including costs) for which the funds will be utilized.

The next page should be a brief history of the tax-exempt organization (location, purpose, etc.)

The final page should be the budget for the entire project, not just for the requested amount. If the request is for operating support, then the budget for the entire organization should be included.

- B. From **January 15 to March 1** the Trustees will develop a list of all secular organizations requesting funds. At this time, the Trustees will know the prior year-end asset level and projected giving level for the then current fiscal year. Organizations selected from this list will then be asked to submit the current form of the full proposal. This notification of who is to submit a full proposal will take place during the first two weeks of March.

Proposals should contain a summary of the organization, a description of the project, and be accompanied by the following attachments:

1. The Request for Contribution form, which can be found on our Website, www.stewarthuston.org, can be completed online and e-mailed to us at admin@stewarthuston.org. Please use care in completing the form, and be sure to include all of the required information.
2. IRS tax-exempt letter
3. Pennsylvania Charitable Organizations Registration Certificate (any organization that has over \$25,000 in gross revenue, regardless of location, must register in Pennsylvania before soliciting funds) of written confirmation of exemption (churches are exempt from this requirement)
4. Current by-laws
5. Current board of directors list (with professional affiliation)
6. Most recent 990 form filed with the IRS (churches exempt)
7. Most recent independent financial audit

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8. Overall operating budget for current fiscal year
9. List of public/private funding sources for your organization during the past fiscal year
10. Current semi-annual or annual report
11. Examples of published media reviews
12. Strategic plan for your organization
13. Organizational flow chart
14. Statement that there has been no change in purpose, character or method of operation since the Agency's IRS tax ruling was issued
15. A detailed project budget
16. A list of public and private funding sources for the project

Proposals can be paper-clipped or stapled together. Please do not put proposals in binders. Please submit four copies of your proposal materials.

- C. A second list containing the full proposal submittals will then be generated and distributed to the Trustees. During this time evaluations of the proposals and remaining site visits will be conducted. A site visit may be requested as part of the evaluation process but is not an indication of approval status. The list of proposals will then be presented according to our regular spring distribution format. The Trustee distribution meeting takes place in late May, with notifications going out in June. The next funding cycle will start again in January.

Upon making a grant reward, the Trustees request that the grantee and the Trust enter into a signed grant agreement regarding stewardship of the Trust's funds.

Grants generally are made in the following program categories:

Health and Human Services

- Activities which promote community-based health care.
- Programs which provide emotional and physical support to children, youth, adults, and senior citizens, as well as those which strengthen families and assist individuals with special needs.
- Programs which increase employment opportunities and provide a means for developing self-reliance, responsibility and productivity among individuals in need.

Civic Affairs

- Projects that enhance the quality of life in local communities and revitalize them.
- Programs which provide access to educational opportunities for individuals, including those with special needs.
- Projects which promote human relations and understanding among diverse populations.
- Activities addressing the special needs of youth at risk for delinquency, school drop-out, abuse, neglect, and pregnancy.
- Activities that enable a broad spectrum of citizens to have access to artistic and cultural experiences which may otherwise be denied them.
- Programs which help preserve/exhibit historic, artistic and cultural treasures.
- On a very limited basis, fundraising efforts such as festivals, concerts, and other events.

The Trustees, while not totally excluding other locations, have a primary focus in two geographic areas: Chester County, Pennsylvania, and Savannah, Georgia, which have strong relevance to Stewart Huston's life and which promote the opportunity for philanthropic impact with the Trust's giving.