Form **990-PF** Department of the Treasury Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052 **2012** Open to public Inspection

For calendar year 2012 or tax year beginning , and ending

Name of foundation: VICTORIA S & BRADLEY L GEIST FOUNDATION

A Employer identification number: 99-0163400

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 3170, DEPT 715 | Room/suite

B Telephone number: (808)694-4525

City or town, state, and ZIP code: HONOLULU, HI 96802-3170

C If exemption application is pending, check here ▶ [ ]

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change

D 1. Foreign organizations, check here ▶ [ ]

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 39,611,412.

J Accounting method: [X] Cash [ ] Accrual [ ] Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

ENVELOPE POSTMARK DATE JUL 15 2013

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	808.	808.		STATEMENT 1
	4 Dividends and interest from securities	1,117,238.	1,117,238.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	3,822,559.			
	b Gross sales price for all assets on line 6a 22,852,396.				
	7 Capital gain net income (from Part IV, line 2)		3,822,559.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	4,940,605.	4,940,605.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	278,988.	195,292.		83,696.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	3,000.	900.		2,300.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 4	84,138.	8,138.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	3,068.	0.		3,068.
	22 Printing and publications				
	23 Other expenses STMT 5	163,000.	0.		163,000.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	532,194.	204,330.		252,064.
	25 Contributions, gifts, grants paid	1,939,363.			1,939,363.
	26 **Total expenses and disbursements.** Add lines 24 and 25	2,471,557.	204,330.		2,191,427.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	2,469,048.			
	b **Net investment income** (if negative, enter -0-)		4,736,275.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

223501 12-05-12 LHA **For Paperwork Reduction Act Notice, see instructions.** 10 G14 Form **990-PF** (2012)

10550531 791519 115024150 2012.03030 VICTORIA S & BRADLEY L GEIS 11502401

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		80,299.	80,299.
	2 Savings and temporary cash investments	638,483.	605,534.	605,534.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 6	33,358,621.	35,847,914.	38,925,579.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	33,997,104.	36,533,747.	39,611,412.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	33,997,104.	36,533,747.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	33,997,104.	36,533,747.	
	31 **Total liabilities and net assets/fund balances**	33,997,104.	36,533,747.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	33,997,104.
2	Enter amount from Part I, line 27a	2	2,469,048.
3	Other increases not included in line 2 (itemize) ▶ RETURNED GRANTS	3	67,595.
4	Add lines 1, 2, and 3	4	36,533,747.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	36,533,747.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES	P		
b	CAPITAL GAINS DIVIDENDS			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	22,700,670.		19,029,837.	3,670,833.
b	151,726.			151,726.
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				3,670,833.
b				151,726.
c				
d				
e				

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	3,822,559.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	1,850,390.	38,209,753.	.048427
2010	1,840,585.	36,535,398.	.050378
2009	1,832,859.	33,024,702.	.055500
2008	2,329,127.	39,094,323.	.059577
2007	2,240,238.	44,498,064.	.050345

2 **Total** of line 1, column (d)	2	.264227
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.052845
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	38,371,614.
5 Multiply line 4 by line 3	5	2,027,748.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	47,363.
7 Add lines 5 and 6	7	2,075,111.
8 Enter qualifying distributions from Part XII, line 4	8	2,191,427.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b		1	47,363.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3	Add lines 1 and 2		3	47,363.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-		5	47,363.
6	Credits/Payments:			
a	2012 estimated tax payments and 2011 overpayment credited to 2012	6a 128,724.		
b	Exempt foreign organizations - tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d		7	128,724.
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	81,361.
11	Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ▶ 81,361. **Refunded** ▶		11	0.

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ HI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A | Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ BANK OF HAWAII Telephone no. ▶ (808)694-4525

Located at ▶ 130 MERCHANT STREET, HONOLULU, HI ZIP+4 ▶ 96813

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception**. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2012 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012?	4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A | 5b |

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | No: X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b |

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BANK OF HAWAII 130 MERCHANT ST HONOLULU, HI 96813	CO-TRUSTEE 1.00	278,988.	0.	0.
GARY S. MORIMOTO 130 MERCHANT ST HONOLULU, HI 96813	CO-TRUSTEE 0.40	0.	0.	0.
CHARMAN J. AKINA 130 MERCHANT ST HONOLULU, HI 96813	CO-TRUSTEE 0.40	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	38,016,094.
b	Average of monthly cash balances	1b	939,859.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	38,955,953.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	38,955,953.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	584,339.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	38,371,614.
6	**Minimum investment return.** Enter 5% of line 5	6	1,918,581.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	1,918,581.
2a	Tax on investment income for 2012 from Part VI, line 5 — 2a: 47,363.		
b	Income tax for 2012. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	47,363.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,871,218.
4	Recoveries of amounts treated as qualifying distributions	4	67,595.
5	Add lines 3 and 4	5	1,938,813.
6	Deduction from distributable amount (see instructions)	6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,938,813.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,191,427.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,191,427.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	47,363.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,144,064.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				1,938,813.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			1,294,150.	
b Total for prior years: ____, ____, ____		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ $ 2,191,427.				
a Applied to 2011, but not more than line 2a			1,294,150.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				897,277.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				1,041,536.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail of the person to whom applications should be addressed:

SEE STATEMENT POLICY-1

b The form in which applications should be submitted and information and materials they should include:

SEE STATEMENT POLICY-1

c Any submission deadlines:

SEE STATEMENT POLICY-1

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

SEE STATEMENT POLICY-1

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT GRANTS-1				1,611,363.
SEE STATEMENT SCHOL-1				328,000.
Total			▶ 3a	1,939,363.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	808.	
4 Dividends and interest from securities			14	1,117,238.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	3,822,559.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		4,940,605.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 4,940,605.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

BANK OF HAWAII, Trustee

By [signature] Vice President

Signature of officer or trustee | Date JUN 24 2013 | Title

May the IRS discuss this return with the preparer shown below (see instr)? ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no.	

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2012

Description	Units	Book Value	Market Value
AOL TIME WARNER BONDS 7.7% 05/01/2032	100,000.000	131,879.00	139,818
AT&T INC	12,160.000	379,910.89	409,914
ABBOTT LABORATORIES	1,210.000	60,454.38	79,255
ABERDEEN INTERNATIONAL EQUITY FUND INST	299,635.646	3,815,075.05	4,374,680
ABERDEEN ASIA-PACIFIC EX-JAPAN EQUITY FUND INSTITUTIONAL CLASS	122,583.394	1,296,688.18	1,474,678
AFRICAN DEVELOPMENT BANK SUB NOTES 6.875% 10/15/2015	50,000.000	58,465.50	57,255
ALLSTATE CORP	940.000	27,325.24	37,760
ALTRIA GROUP INC	9,120.000	233,712.97	286,733
AMERICAN ELECTRIC POWER CO	1,950.000	76,829.80	83,226
AMERICAN EXPRESS CO	2,470.000	111,189.52	141,976
AMERICAN INTL GROUP NOTES 3.8% 03/22/2017	15,000.000	14,969.55	16,235
AMERISOURCEBERGEN CORP	1,460.000	54,375.95	63,043
APACHE CORP	590.000	57,821.06	46,315
APACHE FINANCE CANADA COMPANY GUARNT 7.75% 12/15/2029	50,000.000	58,145.00	71,262
APPLE INC	270.000	86,005.31	143,687
ASTRAZENECA PLC PLC SP ADR	6,960.000	330,632.77	328,999
BCE INC	6,850.000	269,744.87	294,139
BHP FINANCE USA LTD COMPANY GUARNT 1.875% 11/21/2016	100,000.000	102,165.00	103,108
BANK OF NEW YORK MELLON CORP	1,600.000	32,216.16	41,120
BANK OF NOVA SCOTIA N Y AGY SR UNSECURED 1.85% 01/12/2015	50,000.000	50,721.25	51,204
BAXTER INTL INC	960.000	47,805.31	63,994
BEAM INC	560.000	29,587.60	34,210
BERKSHIRE HATHAWAY INC CL B	2,080.000	159,785.33	186,576
BERKSHIRE HATHAWAY INC SR UNSECURED 3 2% 02/11/2015	75,000.000	76,659.00	78,959
BORGWARNER INC	490.000	36,448.70	35,094
BRISTOL MYERS SQUIBB CO	8,030.000	236,155.65	261,698
CBS CORPORATION CL B	890.000	33,579.70	33,865
CENTURYLINK INC	7,440.000	288,317.95	291,053
CHEVRON CORP	1,470.000	144,790.27	158,966
CHICAGO IL BUILD AMERICA BONDS TAXABLE C 6.207% 01/01/2036	60,000.000	61,437.00	65,159
COACH INC	1,510.000	85,435.80	83,820
COCA COLA CO	2,120.000	72,615.41	76,850
COCA COLA ENTERPRISES INC NOTES 5% 08/15/2013	55,000.000	59,752.00	56,570
COGNIZANT TECH SOLUTIONS CORP	1,500.000	101,089.35	110,823
COLUMBIA ACORN INTERNATIONAL FUND CL Z	26,645.579	983,783.33	1,088,205
COMCAST CORP COMPANY GUARNT 6.5% 01/15/2017	40,000.000	44,392.00	48,242
CONOCOPHILLIPS	5,790.000	75,395.84	335,762
COVANCE INC	480.000	22,251.17	27,730
CUMMINS ENGINE INC	1,250.000	123,932.99	135,438
DEERE & CO	550.000	45,534.50	47,531
DOMINION RESOURCES INC SR NOTES SER F PUTABLE 8/15 5.25% 08/01/2033	100,000.000	95,309.00	114,009
DOMINION RESOURCES INC /VA	1,560.000	74,788.88	80,808
DOVER CORP	900.000	48,848.85	59,139
DUKE CAPITAL CORP SENIOR NOTES 8% 10/01/2019	50,000.000	57,400.00	66,034
DUKE ENERGY CORP	3,700.000	206,780.34	236,060
EMC CORP	4,530.000	101,702.63	114,609
EBAY INC	1,040.000	42,336.52	53,038

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION 99-0163400
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2012

Description	Units	Book Value	Market Value
EBAY INC SR UNSECURED 3.25% 10/15/2020	70,000.000	70,823.90	75,501
EUROPEAN INVT BK SR UNSUB 2.375% 03/14/2014	105,000.000	108,307.50	107,481
EUROPEAN INVT BK SR UNSECURED 1.75% 03/15/2017	100,000.000	101,601.00	103,787
EXELON CORPORATION	6,070.000	216,170.30	180,522
EXPEDITORS INTL WASH INC	2,430.000	94,166.29	96,107
EXPRESS SCRIPTS HOLDING CO	2,760.000	149,284.83	149,040
FEDERAL FARM CREDIT BANK UNSECURED 2.48% 11/21/2024-2013	50,000.000	49,900.00	49,738
FEDERAL HOME LOAN MTGE CORP NOTES .75% 09/28/2015-2014	175,000.000	174,571.25	176,108
FEDERAL HOME LOAN MORTGAGE CORP NOTES 2.375% 01/13/2022	175,000.000	170,002.50	182,817
FEDERAL NATIONAL MTGE ASSN NOTES 2.875% 12/11/2013	100,000.000	101,852.00	102,563
FREEPORT MCMORAN COPPER & GOLD CLASS B	1,660.000	65,530.49	56,772
GENERAL ELECTRIC CO	4,340.000	29,001.14	91,097
GEORGIA ST MUNI ELEC AUTH TAXABLE-SUB GEN RESOLUTION 4.43% 01/01/2022	40,000.000	40,000.00	44,206
GILEAD SCIENCES INC	1,210.000	45,451.47	88,875
GLAXOSMITHKLINE PLC ADR	7,150.000	309,447.55	310,811
GOLDMAN SACHS GROUP INC	310.000	32,526.90	39,544
GOOGLE INC CL A	210.000	78,103.99	148,550
HCP INC	2,380.000	98,970.95	107,481
HALLIBURTON CO	1,110.000	41,177.78	38,506
HARRIS CORP SR UNSECURED 5.95% 12/01/2017	100,000.000	99,652.00	116,523
HEALTH CARE REIT INC	2,180.000	111,377.93	133,612
HEINZ H J CO	5,300.000	280,695.18	305,704
HESS CORP	940.000	51,847.81	49,782
HONEYWELL INTERNATIONAL INC	760.000	24,037.66	48,237
HONOLULU HAWAII CITY & CNTY TXBL-SER G 2.512% 11/01/2022	100,000.000	100,000.00	101,400
HONOLULU HAWAII CITY & CNTY TXBL-SER G 2.812% 11/01/2023-2022	50,000.000	50,000.00	51,521
HONOLULU HI CITY & CNTY WASTEWTR SYS REV BUILD AMERICA BONDS 4.643% 07/01/2022-2020	75,000.000	75,000.00	85,240
INTEL CORP	1,710.000	32,832.00	35,260
JP MORGAN CHASE & CO	1,450.000	47,412.24	63,755
JANUS TRITON FUND CL I	82,321.538	1,337,501.80	1,491,666
JOHN HANCOCK III DISC M/C-IS	116,223.512	1,510,905.66	1,545,773
JOHNSON & JOHNSON	3,040.000	37,703.14	213,104
KIMBERLY CLARK CORP	2,090.000	138,765.36	176,459
KIMBERLY CLARK CORP SR UNSECURED 3.875% 03/01/2021	50,000.000	55,045.00	56,002
KINDER MORGAN ENERGY PARTNERS LP SR UNSECURED 3.95% 09/01/2022-2022	60,000.000	59,675.70	64,156
KOHL'S CORP	580.000	25,707.75	24,928
LABORATORY CORP AMERICA HOLDINGS	390.000	33,189.62	33,782
LANDESBANK BADEN-WURTTEMBERG SUBORDINATED 7.625% 02/01/2023	50,000.000	65,753.50	64,918
LILLY ELI & CO	6,910.000	259,192.55	340,801
NATIXIS LOOMIS SAYLES LTD GOV AND AGCY FD CL Y	42,990.412	516,238.27	517,175
LORILLARD INC	720.000	79,178.69	84,002
MAINSTAY HIGH YIELD CORP BOND FUND CL I	44,299.184	260,409.18	270,668
MARATHON OIL CORP SR UNSECURED 2.8% 11/01/2022-2022	70,000.000	70,505.40	70,434
MAUI CNTY HAWAII TAXABLE-SER A-RECOVERY ZONE ECONOMIC DEV BDS 4.559% 06/01/2022-2020	50,000.000	50,000.00	55,549

STATEMENT INV-1

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2012

Description	Units	Book Value	Market Value
MCDONALDS CORP	830.000	63,335.64	73,214
MERCK & CO INC	6,380.000	245,477.52	261,197
MICROSOFT CORP	1,410.000	3,723.28	37,661
MORGAN STANLEY SR UNSECURED 3% 08/31/2017	50,000.000	50,500.00	49,325
THE MOSAIC COMPANY	540.000	32,178.60	30,580
NCUA GUARANTEED NOTES US GOVT GUARANTEED 2.35% 06/12/2017	60,000.000	62,085.00	63,820
NATIONAL GRID PLC SP ADR	6,020.000	295,803.98	345,789
NATIONAL OILWELL VARCO INC	820.000	57,181.15	56,047
NEW VALLEY GENERATION IV TVA PASS THRU CERTS 4.687% 01/15/2022 OFV 100000	69,392.730	63,826.74	78,930
NEXTERA ENERGY INC	740.000	40,521.66	51,201
OCCIDENTAL PETROLEUM CORP	390.000	33,684.30	29,878
ORACLE	1,190.000	32,546.50	39,651
PPG INDUSTRIES INC SR UNSECURED 1.9% 01/15/2016	50,000.000	50,576.50	51,242
PPL CORPORATION	5,660.000	157,019.15	162,046
PARTNERRE FINANCE COMPANY GUARNT 6.875% 06/01/2018	50,000.000	49,555.00	60,706
PEPSICO INC	1,140.000	74,922.51	78,010
PERRIGO CO.	600.000	37,627.98	62,418
PHARMACIA CORPORATION DEBENTURES 6.75% 12/15/2027	50,000.000	59,712.00	68,253
PHILIP MORRIS INTERNATIONAL	1,900.000	125,024.94	158,916
PRES&FELLOWS OF HARVARD BONDS 6.3% 10/01/2037-2016	75,000.000	78,010.10	87,056
T ROWE PRICE INSTITUTIONAL EMERGING MARKETS EQUITY FUND	48,665.441	1,542,694.48	1,516,415
PROCTER & GAMBLE CO	1,880.000	108,896.59	127,633
PUBLIC SERVICE ENT GROUP INC	1,410.000	44,358.46	43,146
QUALCOMM INC	2,290.000	122,701.64	141,658
QUEST DIAGNOSTICS INC	400.000	21,716.00	23,308
RS GLOBAL NATURAL RESOURCES FUND CL Y	52,827.449	2,159,186.03	1,966,766
RESOLUTION FUNDING CORP BONDS 8.875% 07/15/2020	65,000.000	95,932.85	99,232
REYNOLDS AMERICAN INC	5,370.000	202,174.07	222,479
T ROWE PRICE INSTITUTIONAL FLOATING RATE FUND CL I	39,699.920	384,211.53	405,336
ROYAL BANK OF CANADA UNSECURED 1.15% 03/13/2015	30,000.000	29,990.40	30,326
ROYAL DUTCH SHELL PLC ADR B	4,160.000	283,288.15	294,902
SPDR S&P 500 ETF TRUST	16,240.000	2,130,407.05	2,312,738
SPDR GOLD TRUST	6,010.000	1,014,674.31	973,743
SANDISK CORP	850.000	29,578.55	36,975
SCHLUMBERGER LTD	1,080.000	77,208.05	74,842
CHARLES SCHWAB CORP	7,550.000	87,802.72	108,418
SHELL INTERNATIONAL SR UNSECURED 2.375% 08/21/2022	25,000.000	24,891.75	25,117
SHELL INTERNATIONAL SR UNSECURED .625% 12/04/2015	15,000.000	14,996.40	15,054
SOUTHERN CO	6,760.000	275,513.14	289,396
STERICYCLE INC	740.000	57,099.51	69,027
TEMPLETON GLOBAL BOND FUND CL AD	45,776.764	611,960.23	610,662
TEVA PHARMACEUTICALS FIN BV SR UNSECURED 2.95% 12/18/2022	40,000.000	39,920.80	40,462
TEXAS ST REF-TAXABLE-PUB FIN AUTH 4.004% 10/01/2023-2021	50,000.000	50,000.00	56,916
THIRD AVENUE REAL ESTATE VALUE FUND CL IS	39,167.608	905,575.67	993,682
TIME WARNER CABLE INC	490.000	30,898.86	47,623
TOTAL SA SP ADR	5,640.000	290,389.60	293,336

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2012

Description	Units	Book Value	Market Value
TOYOTA MOTOR CREDIT CORP. SR UNSECURED 2.05% 01/12/2017	30,000.000	31,131.90	31,028
US BANCORP	1,120.000	28,120.85	35,773
US BANK NA NOTES 6.3% 02/04/2014	100,000.000	105,093.40	106,047
UNILEVER CAPITAL CORP SR UNSECURED .85% 08/02/2017	30,000.000	29,774.70	29,698
UNILEVER PLC SPONSORED ADR	4,810.000	157,162.04	186,243
US TREASURY BONDS 3.5% 02/15/2039	205,000.000	246,000.00	231,746
US TREASURY 4.75% 05/15/2014	40,000.000	39,465.63	42,469
US TREASURY 4.25% 11/15/2014	100,000.000	106,304.69	107,426
US TREASURY 4.25% 08/15/2015	150,000.000	156,562.50	165,270
US TREASURY N/B 2.75% 10/31/2013	85,000.000	90,073.44	86,803
US TREASURY 2.625% 12/31/2014	35,000.000	34,980.85	36,652
US TREASURY 3.625% 02/15/2020	115,000.000	123,260.16	134,371
US TREASURY 1 25% 09/30/2015	145,000.000	147,605.47	148,625
US TREASURY 2% 02/15/2022	125,000.000	121,948.24	129,268
US TREASURY 1.25% 10/31/2019	122,000.000	123,701.33	123,010
US TREASURY 1.625% 11/15/2022	65,000.000	65,190.43	64,289
UNITED TECHNOLOGIES CORP	600.000	46,543.20	49,206
VANGUARD TOTAL BOND MARKET ETF	28,230.000	2,370,893.51	2,372,167
VANGUARD LONG-TERM TREASURY FUND CL ADM	39,401.987	528,962.42	514,984
VARIAN MEDICAL SYSTEMS INC	1,680.000	112,182.99	118,003
VERIZON COMMUNICATIONS	7,320.000	191,883.20	316,736
VERISK ANALYTICS INC CL A	1,700.000	57,258.38	86,649
VISA INC CL A SHARES	670.000	50,389.36	101,559
VODAFONE GROUP PLC SP ADR	10,240.000	272,724.27	257,946
WAL-MART STORES INC	1,000.000	65,682.00	68,230
WAL-MART STORES INC SR UNSECURED 6.5% 08/15/2037	50,000.000	50,494.00	70,310
WATSON PHARMACEUTICAL	800.000	45,108.00	68,800
WELLS FARGO COMPANY	2,440.000	71,751.62	83,399
WELLS FARGO CO SR UNSECURED 2.625% 12/15/2016	100,000.000	102,293.00	105,537
WINDSTREAM CORP	5,990.000	72,234.01	49,597
TOTAL		**35,847,913.83**	**38,925,579**

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION
FORM 990-PF, PART XV, LINE 3
FOR YEAR ENDED 12/31/2012

EIN: 99-0163400

2012 Grants List

Organization	Address	Project Description	Check Date	Payment Amount
Effective Planning Innovative Communication, Inc.	1130 N. Nimitz Highway, Suite C-210 Honolulu, HI 96817	Hawaii Youth Opportunities Initiative	3/21/2012	250,000
Bishop Museum	1525 Bernice Street Honolulu, HI 96817	Hawaiian Hall - Completion of Phase II	2/17/2012	100,000
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Respite Program	4/18/2012	35,700
Hale Kipa, Inc.	615 Piikoi St., Suite #203 Honolulu, HI 96814-3139	Foster Youth Stabilization Project Through the Hawaii Advocate Program	8/10/2012	100,000
Family Programs Hawai'i	680 Ala Moana Blvd., Suite 200 Honolulu, HI 96813	Mentoring Program for Transitioning Foster Youth	10/10/2012	75,000
Catholic Charities Hawai'i	Clarence T.C. Ching Campus 1822 Ke`eaumoku Street Honolulu, HI 96822	Horizons Independent Living Program	10/19/2012	50,000
Outreach for Grieving Youth Alliance	P.O. Box 11260 Honolulu, HI 96828	Hawaii Foster Youth Coalition	3/28/2012	20,000
Children's Alliance of Hawaii, Inc.	1100 Alakea Street, Suite 400 Honolulu, HI 96813	Enhancements - Kauai	1/6/2012	11,500
Children's Alliance of Hawaii, Inc.	1100 Alakea Street, Suite 400 Honolulu, HI 96813	Enhancements	1/6/2012	13,600
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Enhancements	1/6/2012	50,000
Friends of the Children's Justice Center of East Hawaii Inc.	1290 Kinoole St. Hilo, HI 96720	Enhancements	1/6/2012	40,000
Friends of the Children's Justice Center of Maui, Inc.	1773-A Wili Pa Loop Wailuku, HI 96793	Enhancements	1/6/2012	42,000
Friends of the Children's Justice Center of West Hawaii	77-6403 Nalani St. Kailua-Kona, HI 96740	Enhancements	1/6/2012	21,000
Hale 'Opio Kaua'i, Inc.	2959 Umi St. Lihue, HI 96766	First Jobs Academy 2.0	12/28/2012	75,000
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Higher Education Support Program - eXcel	4/9/2012	60,000
The Salvation Army - Family Intervention Services	P O Box 5085 Hilo, HI 96720	The Foster Care Alumni Support Program for Transitioning Foster Youth	6/29/2012	75,000
University of Hawaii - Office of Research Services	2530 Dole St Sakamaki D-200 Honolulu, HI 96822	Determining the Impact of Drug Use on Immune Markers in Adolescents	5/31/2012	50,000
Research Corporation of the University of Hawaii at Hilo	200 W. Kawili St. Hilo, HI 96720	Efficacy of a vaccine against Angiostrongylus costaricensis to A. cantonensis in rats (Rattus rattus) from Hawaii	7/26/2012	40,000
University of Hawaii - Office of Research Services	2530 Dole St Sakamaki D-200 Honolulu, HI 96822	Engineering underdominance in Culex quiquinquefasciatus	5/31/2012	50,000
The Queen's Medical Center	1301 Punchbowl Street Honolulu, HI 96813	TRPM2 signaling in aging immune cells	5/31/2012	50,000
University of Hawaii - Office of Research Services	2530 Dole St Sakamaki D-200 Honolulu, HI 96822	Targeted Transgene Delivery For Ex-Vivo Gene Therapy	5/31/2012	50,000
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	It Takes An Ohana	9/10/2012	46,163
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Ho'ololi Mua No Ke Ala Senior Program (HSP)	12/11/2012	35,900
Mediation Services of Maui Inc.	95 Mahalani Street, Suite 25 Wailuku, HI 96793	Meeting of the Minds	11/15/2012	3,500
Friends of Hawaii Volcanoes National Park	P.O. Box 653 Volcano, HI 96785	Youth Ranger Internship Program	11/15/2012	12,000

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION
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FOR YEAR ENDED 12/31/2012

EIN: 99-0163400

2012 Grants List

Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Enhancements for Children in Foster Care	11/15/2012	50,000
Children's Alliance of Hawaii, Inc.	200 N. Vineyard Blvd., #410 Honolulu, HI 96817	Enhancements for Foster Children on Kauai	11/15/2012	12,000
Children's Alliance of Hawaii, Inc.	200 N. Vineyard Blvd., #410 Honolulu, HI 96817	Enhancements for Foster Children on Oahu	11/15/2012	11,000
Friends of the Children's Justice Center of Maui, Inc.	1773-A Wili Pa Loop Wailuku, HI 96793	Malama i na keiki	11/15/2012	42,000
The Salvation Army - Family Intervention Services	P O Box 5085 Hilo, HI 96720	The Foster Care Alumni Support Program For Transitioning Foster Youth-West Hawaii	11/15/2012	50,000
Honolulu Academy of Arts dba Honolulu Museum of Art	900 South Beretania Street Honolulu, HI 96814	Improving the Quality of the Visitor's Experience	11/15/2012	50,000
Friends of the Children's Justice Center of East Hawaii Inc.	PO Box 6908 Hilo, HI 96720	Enhancements	11/15/2012	40,000
			Total Grants:	1,611,363

Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
Brigham Young University - Idaho 525 S Center Rexburg, ID 83460		
Ruane, Joseph	Scholarship	$4,500.00
	Subtotal for Brigham Young University - Idaho:	$4,500 00
Butte College Financial Aid Office 3536 Butte Campus Drive Oroville, CA 95965		
Seabrooks, Devon	Scholarship	$3,000.00
	Subtotal for Butte College:	$3,000.00
Chaminade University of Honolulu 3140 Waialae Avenue Honolulu, HI 96816-1578		
Brown, Crystal	Scholarship	$4,500.00
Sonobe-Morita, Tayler	Scholarship	$3,000.00
	Subtotal for Chaminade University of Honolulu:	$7,500.00
College of Southern Nevada Financial Aid Office 6375 W Charleston Blvd Las Vegas, NV 89146		
Bailey, Elizabeth	Scholarship	$1,750.00
	Subtotal for College of Southern Nevada:	$1,750 00
Colorado Mesa University 1100 North Avenue Grand Junction, CO 81501-3122		
Watson, Katrina	Scholarship	$4,000.00
	Subtotal for Colorado Mesa University:	$4,000 00
Creighton University Office of Financial Aid 2500 California Plaza Omaha, NE 68178		
Yi, Grace	Scholarship	$2,250.00
	Subtotal for Creighton University:	$2,250 00

Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
Dean College 99 Main St Franklin, MA 02038		
Joseph, Taylor	Scholarship	$2,000.00
	Subtotal for Dean College:	$2,000.00
Hawaii Community College 200 West Kawili Street Hilo, HI 96720-4091		
Akui, Ainakailani	Scholarship	$2,000.00
Burke, Rachel	Scholarship	$2,000.00
Dedrick, Lt	Scholarship	$2,000 00
Esquerra, Kaimana	Scholarship	$2,500 00
Ferreira, Thalsbeth	Scholarship	$1,000.00
Franca, Shammahlyn	Scholarship	$2,000 00
Kamalii, Barrilyn	Scholarship	$2,000 00
Lerma, Ritalynn	Scholarship	$1,000.00
Medeiros, Manoa	Scholarship	$1,000 00
Miguel, Taiisha-Chentelle	Scholarship	$2,500.00
Perreira, Jade	Scholarship	$2,500.00
Wells, Ashley	Scholarship	$4,500.00
Wilkinson, Isaiah	Scholarship	$2,000 00
Young, Kananileo	Scholarship	$2,000 00
	Subtotal for Hawaii Community College:	$29,000 00
Hawaii Pacific University 1166 Fort Street, 2nd Floor Honolulu, HI 96813		
Fernando, Raquel	Scholarship	$3,500 00
Lee, Mint	Scholarship	$4,500.00
	Subtotal for Hawaii Pacific University:	$8,000 00
Heald College - Honolulu 1500 Kapiolani Blvd Honolulu, HI 96814		
Lum, Joshua	Scholarship	$500.00
Morton, Cherolyn	Scholarship	$2,000.00
	Subtotal for Heald College - Honolulu:	$2,500 00

EIN: 99-0163400

Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
Honolulu Community College 874 Dillingham Blvd Honolulu, HI 96817-4598		
Carter, Brittney	Scholarship	$1,000 00
Carvalho, Keaton	Scholarship	$1,000.00
Fernandez, Roland	Scholarship	$1,000 00
Halley, Moses	Scholarship	$2,000.00
Heanu-Toyama, Robert	Scholarship	$2,000.00
Hollins, Jasmine	Scholarship	$500.00
Kaliko V, Samuel	Scholarship	$2,000 00
Kodama, Kristie	Scholarship	$1,000.00
Kodama, Stephanie	Scholarship	$1,000.00
Nunn Khan, Azam	Scholarship	$1,250.00
Phanphongsa, Jordan	Scholarship	$1,000.00
Wong-Fernandez, Rhonda	Scholarship	$1,250 00
Worachit, Jime	Scholarship	$1,000 00
Worachit, Nanglar	Scholarship	$2,500.00
	Subtotal for Honolulu Community College.	$18,500 00
Kapiolani Community College 4303 Diamond Head Rd Honolulu, HI 96816-4496		
Humel, Shyanne	Scholarship	$1,000 00
Ilog, Sommer	Scholarship	$2,000 00
Kalaaukahi-Rhodes, Tihani Jayme	Scholarship	$500 00
Kim, Stephanie	Scholarship	$1,000 00
Nakagawa-Pali, Cheniel	Scholarship	$2,500 00
Nolan, Alohalani	Scholarship	$1,000.00
Saepae, Megan	Scholarship	$1,000 00
	Subtotal for Kapiolani Community College·	$9,000.00
Kauai Community College 3-1901 Kaumualii Hwy Lihue, HI 96766-9591		
Nagamine, Bryson	Scholarship	$3,500 00
Rosa-Arango, Chardonnay	Scholarship	$4,500 00
	Subtotal for Kauai Community College:	$8,000.00

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FOR YEAR ENDED 12/31/2012

Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
Kettering College of Medical Arts Student Finance Office 3737 Southern Blvd. Kettering, OH 45429-1299		
Vargas, Jennylyn	Scholarship	$5,000.00
	Subtotal for Kettering College of Medical Arts:	$5,000 00
Leeward Community College 96-045 Ala Ike Pearl City, HI 96782-3393		
Akiona, Meagan	Scholarship	$2,000.00
Akiona, Mele	Scholarship	$1,000.00
Akiona, Nicole	Scholarship	$2,000.00
Atai, Naomi	Scholarship	$2,000 00
Beauford, Lazarus	Scholarship	$500.00
Billianor-Pinero, Jazzlyn	Scholarship	$2,500 00
Cordeiro, Maria	Scholarship	$2,000.00
Finai, Robyn	Scholarship	$2,000.00
Guerrero, Creg	Scholarship	$3,750.00
Guzman, Rosesita	Scholarship	$625 00
Keko'Olani, Tiffany	Scholarship	$2,500 00
Keko'Olani, Vannesa	Scholarship	$1,250 00
Nakea, Xaviera	Scholarship	$1,000.00
Noble, Darielyn-Ashly	Scholarship	$2,000.00
Pada, Bernadette	Scholarship	$2,500.00
Poomaihealani, Jordan	Scholarship	$2,000.00
Sakai-Soto, Bryson	Scholarship	$2,000.00
Silva, Genny	Scholarship	$1,250.00
Te Moananui, Ku	Scholarship	$2,500.00
Vanderwerf, Scarlet	Scholarship	$1,000.00
Yutob, Gerald	Scholarship	$2,000.00
	Subtotal for Leeward Community College:	$38,375 00
Mills College 5000 MacArthur Blvd Oakland, CA 94613		
Cabrido, Crystal	Scholarship	$5,000.00
	Subtotal for Mills College:	$5,000.00

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION
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FOR YEAR ENDED 12/31/2012

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Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
New Mexico State University 2850 Weddell Street Las Cruces, NM 88003-8001		
Gilliland, Adrian	Scholarship	$5,500.00
	Subtotal for New Mexico State University	$5,500.00
University of Hawaii - Hilo Financial Aid Office, 200 W Kawili St Hilo, HI 96720-4091		
Burns, Yukiko	Scholarship	$2,000.00
Castro, Kenoa	Scholarship	$3,000.00
Flores, Sky	Scholarship	$3,500.00
Limkin, Keola	Scholarship	$3,750.00
Mahi-Leopoldino, Keshia	Scholarship	$5,000.00
Mccormick, Bryson	Scholarship	$4,000.00
Nartates, Nicolette	Scholarship	$3,000.00
Wagner-Wright, Joel	Scholarship	$5,500.00
	Subtotal for University of Hawaii - Hilo	$29,750.00
University of Hawaii - Manoa Saunders Hall 2424 Maile Way Honolulu, HI 96822		
Adviento, Judy	Scholarship	$4,500.00
Alcos, Maile	Scholarship	$5,000.00
Artuyo, Naalei	Scholarship	$4,000.00
Cambra, Shanice	Scholarship	$3,500 00
Clerk, Brenda	Scholarship	$3,500.00
Collins, Noel	Scholarship	$3,000.00
Das, Krishna	Scholarship	$4,500.00
DeGuerra, Taylor	Scholarship	$2,250 00
Ganahl-Yates, Chloe	Scholarship	$2,500.00
Imose, Kelsea	Scholarship	$3,500.00
Kahala-Minczer, Jo-Lynn	Scholarship	$4,000 00
Kasahara, Sachi	Scholarship	$3,000.00
Kealoha, Abruaym	Scholarship	$4,500.00
Kim, Jenny	Scholarship	$2,250.00
Manaole, Ashley	Scholarship	$1,750 00
Manaole, Troy	Scholarship	$4,500.00
Paguada, Luz	Scholarship	$2,250.00
Peapealalo, Natasha	Scholarship	$3,000.00
Raymond, Sasha	Scholarship	$5,500 00
Roos, Dominic	Scholarship	$3,000.00
Santiago, Taisha-Ann	Scholarship	$4,000 00

Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
Straley, Jonathan	Scholarship	$3,000 00
Wallace-Wong, Ariel	Scholarship	$4,000.00
Yonekura, Kintaro	Scholarship	$5,000.00
	Subtotal for University of Hawaii - Manoa:	$86,000 00
University of Hawaii - Maui College 310 Kaahumanu Ave Kahului, HI 96732-1617		
Agudo, Claire	Scholarship	$2,000.00
Donner, Carol-Lynn	Scholarship	$500.00
Glastetter, Merrill	Scholarship	$4,000 00
Hosaka, Andrew	Scholarship	$1,000.00
U'U, Samantha	Scholarship	$3,000.00
	Subtotal for University of Hawaii - Maui College:	$10,500.00
University of Hawaii - West Oahu Financial Aid Office, 96-129 Ala Ike Pearl City, HI 96782-3699		
Carvalho, Chanel	Scholarship	$3,000.00
Desa, Brad	Scholarship	$750 00
Flores, Donovan	Scholarship	$4,000 00
Gamiao, Elizabeth-Elyse	Scholarship	$3,000 00
Lum, Tanisha	Scholarship	$2,250 00
Nagel, Haunani	Scholarship	$1,125 00
Perez-Doi, Shayna	Scholarship	$4,500.00
Yutob Jr, Gemani	Scholarship	$3,500 00
	Subtotal for University of Hawaii - West Oahu.	$22,125 00
University of Nevada - Las Vegas Box 452016 4505 S Maryland Pky Las Vegas, NV 89154		
Dumlao, David	Scholarship	$2,250.00
	Subtotal for University of Nevada - Las Vegas:	$2,250 00
University of New Mexico 1700 Lomas Blvd NE Albuquerque, NM 87106		
Kelsey, Ashley	Scholarship	$4,000.00
	Subtotal for University of New Mexico.	$4,000.00

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION
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FOR YEAR ENDED 12/31/2012

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Scholarship Grants 1/1/2012 to 12/31/2012

Payee Name	Purpose	Payment Amount
University of Phoenix - Hawaii 745 Fort Street Ste 2000 Honolulu, HI 96813-3800		
Aweau-Quinonez, Christney	Scholarship	$5,500 00
	Subtotal for University of Phoenix - Hawaii:	$5,500 00
University of Phoenix - Online 3157 E. Elwood Street Phoenix, AZ 85034-7209		
Perreira, Jasmine	Scholarship	$2,000 00
Tacub, Jamielee	Scholarship	$8,000 00
	Subtotal for University of Phoenix - Online:	$10,000 00
Utah Valley University 800 W University Parkway Orem, UT 84058-5999		
Fanene, Kayla	Scholarship	$3,000.00
	Subtotal for Utah Valley University:	$3,000.00
Windward Community College 45-720 Keaahala Rd Kaneohe, HI 96744-3598		
Ching-Stevens, Raychel	Scholarship	$1,000.00
	Subtotal for Windward Community College:	$1,000.00
	Total Grants	$328,000.00

MEDICAL RESEARCH
2012 Request for Proposals

HAWAI'I COMMUNITY FOUNDATION

Overview

The Hawai'i Community Foundation's (HCF) Medical Research program makes grants annually to support basic and clinical research conducted in Hawai'i. The overall goal of the program is to support a robust local medical research community that benefits the people of Hawaii. In 2012, funds will be awarded through one grantmaking round. Award recommendations are made by the Medical Research Advisory Committee (MRAC).

The Medical Research program is supported by several funders including: the George F. Straub Trust, the Victoria S and Bradley L. Geist Foundation, and multiple funds at Hawaii Community Foundation.

The following are the program's areas of focus:

- Clinical/basic research – Alzheimer's disease, mental or physical diseases related to old age
- Clinical/basic research – cancer, heart disease, or lung disease
- Clinical/basic research – general
- Clinical/basic research – immunology, genetics, or the medicinal uses of Hawaiian plants
- Clinical/basic research – prevent blindness, with particular emphasis on macular degeneration
- Clinical/basic research – type II diabetes (juvenile diabetes)

Grants in these areas are up to $50,000

- Research infrastructure – This priority area is not a research project, per se, but is intended to improve Hawai'i's research organizational effectiveness. For example, support of organizational change, support new or existing research systems, or assist with inter-organizational collaborative efforts.

Grants in this area are up to $25,000

Priorities

The intent of the Medical Research program is to support research proposals that are based on strong science and use proper protocols. Priority is given to research projects that:

- Articulate biomedical relevance and potential to impact health care delivery to benefit the people of Hawai'i.
- Are likely to lead to increased competitiveness for national funding by providing seed funding for gathering preliminary data.
- Are a collaborative effort in Hawai'i-based research.
- Supports a new researcher or a new line of research in Hawai'i.

Award Period

- Researchers will have eighteen (18) months to complete their research project

Eligibility

Organizations are eligible to apply for a grant if:

- Organization is a 501(c)(3) organization or a unit of government.
- The PI is based in and is conducting their research in Hawai'i.
- The PI is at least equivalent to an Assistant Professor.
- Only one (1) grant proposal submission per PI will be accepted. This includes being identified as a Co-PI.
- A PI with a current grant may apply if the current grant is due to be completed within six (6) months of the RFP deadline date. However, if awarded, a new grant will not be released until the current grant is completed and all reports are received.

Please note: The MRAC that reviews all proposals includes scientists from a variety of disciplines in both basic and clinical research Since your proposal may not be reviewed by a researcher in your specific discipline, the writing should be tailored for a more general medical/scientific audience.

Online Submission

Applications will only be accepted online. Principal Investigators need to establish an online account prior to submitting an application. Please email the following information to medicalresearch@hawaiicommunityfoundation.org (Note: This email address will be deactivated on 3/17/2012):

- Full Name of Principal Investigator
- Principal Investigator's Department
- Principal Investigator's Mailing Address
- Principal Investigator's Email Address
- Research Organization's Name
- Research Organization's Mailing Address
- Chief of Research Organization's Full Name
- Chief of Research Organization's Email Address

Note: Principal Investigators submitting medical research proposals will not be able to register for an online account at the new user registration area of the Hawa'i Community Foundation Nonprofit Gateway.

After the Principal Investigator submits this information, they will be sent an email containing their login and password. This may take up to three business days so please establish your account early to allow ample time to complete your application and submit it by the deadline. This login and password may only be used for Medical Research applications.

To submit an application online, please go to www.hawaiicommunityfoundation.org/grants/medicalresearch.

Deadline

Submit your proposal online by 5:00 p.m. HST on March 16, 2012. Applicants will be notified in June 2012.

Online Application

You will be asked to provide the following:

1. **Proposal Abstract** – Short description of the technical study that also includes study title, institution, and PI's name.
2. **Lay Summary** – Short description of the study written for the general public that also includes study title, institution, and PI's name.

Documents:

You will be asked to upload the following:

1 **Proposal Narrative** (maximum of eight (8) pages, single spaced, using Times New Roman font, and a font size of not less than 12 pt.)
   - Name(s) of PI(s).
   - Research Plan that outlines the significance of the research, specific aim(s), methodology and preliminary data.
   - Significance of project, including how the research will benefit the people of Hawai'i, document a need and relate to the field of medicine, and how project findings will be disseminated.
   - **For Clinical Research, the proposal narrative must also include the following:**

- How patients will be recruited.
- Detail on the research procedures that will be used.
- Detail on how the research will be analyzed.
- Status of IRB approval.

2. **Bibliography** (maximum of two (2) pages)
   - DO NOT submit actual papers or research documentation as part of your proposal.

3. **Budget**
   - Grant funds may be used for salaries, supplies and other expenses directly related to the proposed project. Funding may support PI(s) salary. However the parent institution must confirm the availability of the PI's time. A limited amount of equipment essential to the proposed project may be funded provided sufficient justification is included.
   - **Project Budget** – Provide details of the total cost of the project. Identify the amount requested from this grant and which expenses the grant funds would cover, and list all the sources of funds to cover the total cost of the project including those that have been secured and are currently unsecured. The project budget may include travel expenses provided justification is sound and reasonable.
   - **Budget Justification** – Provide justification for all of the expenses attributed to the research that this grant is being requested to support. For salaries, please provide the formula for deriving at the budgeted amount (i.e. hourly rate x # of hrs. dedicated to the project).
   - **Indirect Costs** – For grants to the University of Hawai'i that are awarded through the Office of Research Services, a flat rate of 5% of total direct costs will be allowed. For other institutions, indirect costs are allowed on a direct personnel costs basis only and are calculated as follows.
     - 40% of the project's direct personnel costs for studies with a total project budget below $10,000
     - 30% of the project's direct personnel costs for studies with a total project budget of $10,001 – $20,000
     - 20% of the project's direct personnel costs for studies with a total project budget of $20,001 and over
   - **Other Funding Sources** – Include a list of pending requests for this and all other research projects of the PI and co-PI(s) including name of agency, title of project, amount requested and period of support. Indicate whether the application is for an identical or similar project and where the proposed study fits with current or pending funded research. For scientific or budget similarities between this and other pending requests and/or funded projects, provide an explicit description of why this funding would not be considered overlap. Also include the abstract and specific aims of other projects that might be seen as potentially having overlap.

4. **Biographical Sketch** (maximum of four (4) pages)
   - Required for all PI(s) and co-PI(s) associated with the research. Please use the NIH Bio Sketch format. This format can be found at http://grants.nih.gov/grants/funding/phs398/biosketch.pdf.
   - Reviewers are interested in research that will be shared. The productivity of the PI in publishing results of previous research should be included.

5. **IRB Application Cover Page**
   - For research involving either human or animal subjects, the PI must submit the IRB application cover page as documentation of a request for IRB approval. Please do not submit the entire application. If approved, the grant will be contingent on receiving IRB approval.

6. **Authorization Form** – Signed by research organization's authorizing official.

Format for Uploaded Documents

- [ ] Use 8 1/2" x 11" letter size
- [ ] Margins are not less than 1"on all sides
- [ ] All pages must be paginated and include the study title
- [ ] The font is Times New Roman and text font size is not less than 12 pt.
- [ ] Use the following descriptive file name format when uploading your files: HCF Online Application #_PI Name_Name of File (For example, 'App#467_JohnSmith_Narrative' or 'App#455_JaneDoe_BioSketch'

Proposal Resubmission

A PI who previously submitted a research proposal that was denied within the last twelve (12) months, and was encouraged to resubmit a proposal, may resubmit their proposal for review provided they adhere to the items below. Resubmitting a proposal DOES NOT guarantee your research proposal will be approved.

- The proposal resubmission must adhere to the items requested above.
- In the Proposal Narrative, please provide a cover letter that summarizes the differences between the original and resubmitted proposals.
- Applicants are strongly advised to consider the previous comments of the reviewers when resubmitting a proposal.

Final Reports

A final report (consisting of a financial report from the fiscal sponsor and a programmatic narrative report from the PI) is due to Hawai'i Community Foundation one month after the end date of the grant. A PI with an overdue final report will not have their proposal reviewed.

In addition, PI's will be required to submit a post-grant report one year after the final report, to describe additional project funding, publications of research, and whether the preliminary data led to nationally funded research. This will be used in an ongoing outcomes evaluation of the HCF Medical Research Program.

Reporting guidelines are available online at www.hawaiicommunityfoundation.org/grants/medicalresearch.

Contact Information

If you have any questions regarding the proposal, please contact Terry Savage of Hawai'i Community Foundation at 566-5508 (O'ahu), toll-free from Neighbor Islands at 1-888-731-3863 or email tsavage@hcf-hawaii.org

For technical assistance with the online application process, please contact our Help Desk at http://hawaiicommunityfoundation.org/ticket.

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

827 Fort Street • Honolulu • Hawai`i • 96813-4317 • (808) 566-5524

Capacity Building
Request for Proposals

Background: The Foundation wishes to support foster children, their caregivers, and transitioning foster youth. The Foundation recognizes that the strength and capacity of the nonprofit organizations and programs serving foster children, their families, and youth are key to the healthy development of foster children and transitioning youth. The Foundation offers this Request for Proposals to provide meaningful support that enables nonprofit organizations and programs to strengthen and grow their capacity to serve foster children, their caregivers and transitioning foster youth.

Funding Priorities:
The Foundation seeks to support projects that will increase the capacity of the organization, the program, or the system in the community to deliver quality services to the clientele described under Eligibility Requirements. Capacity building efforts may address

- Governance and leadership;
- Strategic relationships;
- Evaluation and impact;
- Resource Development;
- Internal operations and management;
- Program design, delivery and evaluation;
- Executive and key staff transitions; and
- Staff training.

Eligibility Requirements:

- Tax-exempt Hawaii organizations are eligible to apply. Organizations may be either 501(c)(3) or religious organizations. Units of government and public schools are not eligible under this Request for Proposals. Fiscal sponsorships are not permissible.
- The majority percentage of the organization's or program's clientele or project beneficiaries must be
    - Children in the foster custody of a Hawai`i state government agency;
    - Children placed by a Hawai`i state government agency in therapeutic foster placement or in kinship, foster, respite, guardianship, permanent custody, or adoptive families; or
    - Their caregivers, or
    - Current foster youth or young adults between the ages of 16 and 24 who have aged out of the state child welfare or mental health systems.

Grant Range, Duration and Exclusions:

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Grants generally range from $5,000 to $40,000 and may be multi-year commitments, based on submission of satisfactory progress reports. Grants will not be made for capital, endowments, re-granting activities or operating costs.

Proposal Review Criteria:
The strongest proposals will be those that meet all or most of the following criteria:

Readiness to Build Capacity

- Organization demonstrates awareness of its strengths and weaknesses.
- Planning and/or self-assessment have taken place prior to beginning project.
- Project is based on a well-considered strategy.
- Project timing is relevant for the organization's stage of development.
- Board supports and is engaged in the project. If the project is program-based, upper level management supports and is engaged in the project.
- Organization demonstrates an ability to evolve, learn and be responsive to change.

Integrity of Proposed Project

- Project is focused and well defined.
- Project identifies clear outcomes and measures of success.
- Appropriate stakeholders are involved in the project.
- Project budget is adequate, relates to the project narrative, and costs are reasonable.
- If a consultant is involved in the project, that person is qualified to undertake the project

Potential for Impact of the Project

- Project will build substantial new capacity within the organization, program, or system.
- Project positions the organization or system for greater impact in fulfilling its mission.
- Project must involve an evaluation/measurement component.

Programming Excellence & Impact
Organization's programs demonstrate excellence and impact in serving the children, youth and caregivers involved in the state's child welfare or child and adolescent mental health systems.

Financial Condition
Organization's financial condition is stable, or the proposal explicitly addresses financial management

Online Submission: This application is available for online submission. Your organization must first establish an online account with the Hawaii Community Foundation to access the online application. Please go to
http://www.hawaiicommunityfoundation.org/grants/geistfoundation-capacitybuilding
to request an account or, if you already have an account, to access the online application.

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Note: If you are requesting an account, it may take a few days for you to receive the account information. It's highly recommended you request your account early to give yourself adequate time to complete the application by the submission deadline.

The online application will request the following:

A. Organizational Profile (*Maximum 4,000 character count single space*)
- Describe the history of the organization, including an overview of its programs.
- Briefly describe the organization's place in the child welfare or mental health field and in this community.
- How does the organization measure its impact upon the needs of its clients or community?

B. Project Description
- Describe what you plan to do, including desired outcomes. (*Maximum 4,000 character count single spaced*)
- Why have you chosen to do this project now? (Reference both internal and external factors.) (*Maximum 3,000 character count single spaced*)
- What have you done internally to prepare for this project? For example, discussions with the management team, involved the appropriate stakeholders, consulted with the board, etc. (*Maximum 3,000 character count single spaced*)
- Who will provide leadership for this project, and why? (*Maximum 2,500 character count single spaced*)
- In addition to Geist grant resources, what other resources, both financial and non-financial will you need for this project? For instance, how much staff time, what types of information, etc. (*Maximum 2,500 character count single spaced*)
- Beyond the project outcomes, how will this project contribute to your organization's ability to accomplish its mission to benefit foster children, their caregivers and transitioning foster youth? How will you measure the impact, and when will you begin to see that impact? (*Maximum 4,000 character count single spaced*)
- For requests that include a consultant or other external contractor, please answer the following (*Maximum 2,000 character count single spaced*):
  - How did you select this individual/organization?
  - What capacity (knowledge and skills) will your organization acquire as a result of their work?

  Important note: While you may describe the role and work of the consultant/contractor in the proposal, do not integrate their work plan and statement of qualifications in the project description. The consultant/contractor's work plan and statement of qualifications must be uploaded as a separate document.
  Suggested elements of a consultant work plan:
  http://www.hawaiicommunityfoundation.org/doc_bin/pa/good_workplan_elements.pdf

Supporting Documents
You will need to upload the following documents as part of your application:

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- If the project includes hiring new staff, upload the job description and discuss how the position will be sustained beyond the grant period.
- **Project Matrix** -- This is a key component of your proposal, and will be used in the final reporting process. Use the Project Matrix Link here, http://nexus.hawaiicommunityfoundation.org/document.doc?id=134 . You will need to fill out the matrix, save it to your computer and then upload it with your application.

Additional documents

- ☐ Supporting Capacity Building Proposal Cover Sheet, signed by the Executive Director and President of the Board.
- ☐ Project or program budget, detailing expenses and all sources of revenue (secured and unsecured) that will support the project or program. For multi-year requests, provide a cumulative budget and budgets for each year.
- ☐ Organization's annual operating budget for the current year
- ☐ Organization's balance sheet for the most recently completed fiscal year
- ☐ Organization's income statement (or profit/loss statement) for the most recently completed fiscal year
- ☐ Board of Directors list
- ☐ 501(c)(3) determination letter, if newly established 501(c)(3) within the last year.

(Local units of national organizations must submit local unit financial information.)

File Naming Format for Supporting Documents
For documents to be uploaded, please use the following descriptive file name format when uploading your files: Application ID #_Your Org Name_Name of File. (For example, '145_HCF_Budget.pdf' or '145_HCF_Board of Directors.doc').

Deadline

Completed online applications must be submitted by 5:00 p.m. HST on September 14, 2012.

For more information, contact Pam Funai via email at pfunai@hcf-hawaii.org or call (808) 566-5537 or toll-free from neighbor islands (888) 731-3863 ext. 537.

The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

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VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

Capacity Building Project Matrix

Issue: *Why is this effort needed?*

Mission: *How will this work improve capacity to benefit the foster care community?*

Outcome *What will be different?*	**Activities** *What are you going to do?*	**Timeframe** *When will you do this?*	**Predicted Changes** *How will you know if the desired change is occurring?*	**Actual Changes*** *What actually occurred?*
				(to be completed for Year 1 progress/final and Year 2 final reports)

***This column will be used as you implement your project. You will submit the matrix with "Actual Changes" information with progress and final reports.**

July 2008

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

Capacity Building Project Matrix (*sample 1*)

Issue: *Why is this effort needed?*
Example: Placement of children and youth with neurological challenges in therapeutic foster homes is increasing. Current interventions are not effective; foster parents become frustrated. This leads to more placements for youth and foster parent burn-out.

Mission: *How will this work improve capacity to benefit the foster care community?*
Example: By educating foster parents and staff in interventions for neurologically challenged youth and providing ongoing support, youth will be maintained in the least restrictive environment and foster parents will be retained.

Outcome *What will be different?*	**Activities** *What are you going to do?*	**Timeframe** *When will you do this?*	**Predicted Changes** *How will you know if the desired change is occurring?*	**Actual Changes*** *What actually occurred?*
Example: 1. More children with neurological impairments will be maintained in foster homes and experience fewer placements. 2. Foster parents for children with neurological impairments will be retained	Year 1 ° Train 7 additional foster parents on Hawaii Island ° Provide intensive staff training, consultation and assistance in new interventions. ° Document and implement policies and procedures to provide ongoing support to foster families.	Year 1 ° 12 sessions during August – November. ° One week in Sept. and one week in November. ° Documentation will be completed in January. Implementation will occur by March.	Year 1 1 a. 11 children (80%) with neurological impairments will remain in their current placements. 1.b. 8 (80%) staff members will have successfully completed training program 2. 10 foster parents (75%) will be retained.	(to be completed for Year 1 progress/final and Year 2 final reports)
	Year 2 ° Train 7 additional foster parents statewide. ° Provide intensive staff training, consultation and assistance in new interventions.	Year 2 ° 12 sessions during August – November. ° One week in Sept. and one week in November.	Year 2 1.a. 16 children with neurological impairments (80%) will remain in their current placements. 1.b. All staff members will have successfully completed training program. 2. 16 foster parents (75%) will be retained	

***This column will be used as you implement your project, you will submit the matrix with "Actual Changes" information with progress and final reports.**

July 2008

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

Capacity Building Project Matrix (*sample 2)*

Issue: *Why is this effort needed?*
Example: Changes in the state's youth services system require organizational transition to diversify programs and funding sources and to expand fund development capacity.

Mission: *How will this work improve capacity to benefit the foster care community?*
Example: Program and funding diversification will enable the organization to provide needed residential services to transitioning foster youth.

Outcome *What will be different?*	**Activities** *What are you going to do?*	**Timeframe** *When will you do this?*	**Predicted Changes** *How will you know if the desired change is occurring?*	**Actual Changes*** *What actually occurred?*
Example: 1. New funding sources will be secured. 2. The board and staff will develop and implement fund development strategies.	Year 1 ° Contract with a grants consultant to identify and submit grants for two new sources of funding. ° Increase current contract with OYS. ° Engage the board members in fund development through their participation in training, annual campaign, and fundraising events. Year 2 ° Contract with a grants consultant to identify and submit grants for two new sources of funding. ° Institute annual campaign and hold two fundraising events.	Year 1 ° Contract with consultant by November. Submit two applications to new funding sources by July. ° Executive Director will negotiate with OYS for contract beginning next July. ° Provide board training by December. ° Board committee completes planning for new annual campaign by the end of the first year. ° Board committee is formed to stage events. Year 2 ° Submit two applications to new funding sources by July. ° Conduct annual campaign October – December. ° Hold fundraising events in September and March	Year 1 1.a. 4 potential new sources will be identified, and two proposals will be submitted. 1.b. A contract with OYS for two additional beds will be executed 2.a. All board members participate in training. 2.b. Plan for annual campaign is finalized 2.c Events committee is formed. Year 2 1.a. 2 new proposals are submitted, and 1 new funding source is secured. 2.a. Annual campaign raises $5,000, and a donor database is established. 2.b. Two fundraising events clear $4,500.	(to be completed for Year 1 progress/final and Year 2 final reports)

***This column will be used as you implement your project. You will submit the matrix with "Actual Changes" information with progress and final reports.**

July 2008

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

827 Fort Street • Honolulu • Hawai`i • 96813-4317 • (808) 566-5524

Enhancements for Foster Children
Request for Proposals

Background
The purpose of the Foundation's Enhancements for Foster Children program is to enhance the lives of foster children by providing items and services that allow them to enjoy a quality of life similar to that of their peers. The funds are offered in the belief that every child is special and that their growth should be nurtured and celebrated.

Eligibility Requirements
Tax-exempt Hawaii organizations are eligible to apply. This includes nonprofit organizations, 501(c)(3) organizations, religious organizations that are exempt from taxation, and units of government.

Grant Range and Duration Grants range from $5,000 to $50,000.

- Grantees may propose an administrative fee for administering these funds.
- The grant period is from January 1 through December 31, 2013.

Grant Requirements
The Foundation seeks to make grants to organizations to purchase enhancement items and services for the benefit of eligible children.

"Eligible child" means a person who:

- Is under 18 years of age, or is under 21 years of age and remains in the foster care system because he or she is attending high school; and
- Resides in Hawaii; and
- Is in one of the following categories:
  - Is in the foster custody of a Hawai`i state government agency; or
  - Is placed by a Hawai`i state government agency in therapeutic foster placement or in kinship, foster, respite, guardianship, permanent custody, or adoptive families.

"Enhancement items and services" means:

(1) Extracurricular activities (e.g., graduation or prom attire, field trips, athletic uniforms);
(2) Hobbies, sports, and cultural activities (e.g., hula lessons, soccer registration);
(3) Intersession activities (e.g., summer camp);
(4) Facilitation of transition into adulthood (e.g., driver's education, copy of birth certificate);
(5) Quality of life enhancements (e.g., modest birthday and holiday presents, books, toys).

The following restrictions apply:

(1) Each expenditure must respond to a specific request made by an eligible child's foster caregiver, social worker, therapist, school counselor, guardian ad litem, or similar

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professional service provider for a specific item or service that will enhance the child's quality of life.

(2) Payments must be made to vendors for the benefit of eligible children. Payments must not be made directly to children or their foster caregivers. Grantees may provide vendor gift cards to children or foster caregivers only in cases where a vendor declines to accept a grantee's check.

(3) Enhancements funds are not intended for basic living expenses such as housing, groceries, medical and dental care, and ordinary tuition expenses.

(4) Grantees may expend no more than $500 per eligible child during the grant period.

(5) Grantees must return all unexpended funds at the end of the grant period.

(6) Grantees must submit a final report by January 31, 2014. The Foundation may require interim reports. The Foundation does not accept proposals from organizations with overdue reports.

Application requirements

Online Submission: This application is available for online submission. Your organization must first establish an online account with the Hawaii Community Foundation to access the online application. Please go to
http://www.hawaiicommunityfoundation.org/grants/geistfoundation-enhancements
to request an account or, if you already have an account, to access the online application.
Note: If you are requesting an account, it may take a few days for you to receive the account information. It's highly recommended you request your account early to give yourself adequate time to complete the application by the submission deadline.

The online application will request the following:

(1) Describe your organization (*Maximum 3,500 character count single spaced*):
- Describe your organization's mission and programs.
- Describe the geographic area
- Describe the number and age range of the eligible children you propose to serve.

(2) Enhancements (*Maximum 4,000 character count single spaced*):
- Describe the enhancement items and services you propose to fund.
- Describe any programs your organization currently offers that will be complemented by the Enhancements program.

(3) Outreach (*Maximum 3,000 character count single spaced*):
- Describe how your organization will market the availability of the Enhancements program to the community you propose to serve.
- Provide an estimate of the percentage of children served who will be clients of your organization and those who will be referrals from outside of your organization's client base.

(4) Staff (*Maximum 2,000 character count single spaced*):
- Describe the qualifications of the staff or volunteers who will oversee and coordinate the Enhancements program.

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(5) Evaluation (*Maximum 3,000 character count single spaced*):

- Describe how your organization will evaluate the impact of the Enhancements program.

Additional Documents to be uploaded

- ☐ Enhancements program budget
- ☐ Interim expense report for Geist Foundation Enhancements for Foster Children 2012
  - Provide the unduplicated number of children served and the total amount expended in each category:
  - Extracurricular activities (e.g., graduation or prom attire, field trips, athletic uniforms);
  - Hobbies, sports, and cultural activities (e.g., hula lessons, soccer registration);
  - Intersession activities (e.g., summer camp);
  - Facilitation of transition into adulthood (e.g., driver's education, copy of birth certificate);
  - Quality of life enhancements (e.g., modest birthday and holiday presents, books, toys);
  - Administration fee.
  - Also provide the total, unduplicated number of children served and the total number of children served who are not clients of the agency.
- ☐ Organization's annual operating budget for the current year.
- ☐ Organization's balance sheet for the most recently completed fiscal year.
- ☐ Organization's income statement (or profit/loss statement) for the most recently completed fiscal year.
- ☐ Board of Directors list
- ☐ 501(c)(3) determination letter, if newly established 501(c)(3) within the last year.

File Naming Format for Supporting Documents

For documents to be uploaded, please use the following descriptive file name format when uploading your files: Application ID #_Your Org Name_Name of File. (For example, '145_HCF_Budget.pdf' or '145_HCF_Board of Directors.doc').

Deadline

Completed online applications must be submitted by 5:00 p.m. HST on September 14, 2012.

For more information, contact Pam Funai via email at pfunai@hcf-hawaii.org or call (808) 566-5537 or toll-free from neighbor islands (888) 731-3863 ext. 537.

The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

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VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

827 Fort Street • Honolulu • Hawai`i • 96813-4317 • (808) 566-5524

Supporting Foster Children and their Caregivers
Request for Proposals

Background:
The Foundation wishes to support foster children and their caregivers. The Foundation recognizes that the appropriate resources and support for foster children and their caregivers contribute to healthier and happier lives. The Foundation offers this Request for Proposals to provide meaningful support for efforts that will result in supportive homes and experiences for Hawaii's foster children.

Funding Priorities:
Preference will be given to efforts that

- Support the recruitment, training and retention of quality foster parents;
- Support the continued relationships of foster children to their siblings;
- Address the unique needs of foster children or of their caregivers; or
- Empower foster children to participate in the decisions affecting their lives.

Eligibility Requirements:

- Tax-exempt Hawaii organizations are eligible to apply. This includes nonprofit organizations, 501(c)(3) organizations, religious organizations that are exempt from taxation, and units of government.
- More than 50 percent of the individuals served by the program must be:
    - Children in the foster custody of a Hawai`i state government agency;
    - Children placed by a Hawai`i state government agency in therapeutic foster placement or in kinship, foster, respite, guardianship, permanent custody, or adoptive families; or
    - Their caregivers.

Grant Range, Duration, and Exclusions:

- Grants usually range from $10,000 to $50,000 per year.
- Requests are considered in relationship to the size of the organization's operating budget.
- Unless the organization's clientele are solely legally recognized foster children and their caregivers, administrative fees are capped at 5% per grant award. The Foundation reserves the right to determine those costs that are administrative and subject to the limited percentage.
- Commitments for up to three years will be considered, contingent on the submission of satisfactory progress reports.
- Capital requests and endowments will not be funded.

Proposal Review Criteria:

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The strongest proposals will be those that meet all or most of the following criteria:

Integrity of the Proposed Program

- Program is well-defined and likely to be implemented successfully,
- Organization demonstrates the ability to deliver the program,
- Program budget is adequate and program costs are reasonable and consistent with the narrative,

Potential for Impact of the Program

- Program has the means to measure benefits to the participants or the community,
- Program evaluation and ongoing improvement are clearly incorporated into program design,
- Program demonstrates the ability to leverage other resources (such as funds, in-kind or community partnerships).

Online Submission: This application is available for online submission. Your organization must first establish an online account with the Hawaii Community Foundation to access the online application. Please go to
http://www.hawaiicommunityfoundation.org/grants/geistfoundation-fosterchildren
to request an account or, if you already have an account, to access the online application.
Note: If you are requesting an account, it may take a few days for you to receive the account information. It's highly recommended you request your account early to give yourself adequate time to complete the application by the submission deadline.

The online application will request the following:

A. **Proposal narrative**:

1) Describe your organization. (*Maximum 3,500 character count single spaced*)
   - What are the organization's mission and history, geographic reach, and volunteer and/or paid staff size?
   - What is the organization's experience in this field?
   - What are the staff capabilities to conduct the proposed work?
2) Describe your targeted issue and program. (*Maximum 5,000 character count single spaced*)
   - What is the problem or opportunity to be addressed?
   - Who will benefit? Include estimated numbers.
3) Describe the activities required to implement this program. (*Maximum 7,000 character count single spaced*)
   - What key activities will occur?
   - What is the projected timeline?
   - Why is this program design expected to be effective? Describe any research and best practices that influenced this program design and any modifications that have been made.

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- If this is a multi-year request and you expect the activities to be different in years 1, 2, and 3, describe your expectations for how the program will develop.
- If a consultant will be used, submit the work plan and deliverables. Additional information may be requested.

4) Describe the anticipated benefits to participants and/or the community. (*Maximum 3,000 character count single spaced*)
   - How many unduplicated people will participate and for how long?
   - What changes do you expect among the program participants or the community?
   - How will you track participation and changes? How will you obtain feedback, make improvements and determine effectiveness?
5) Describe your funding plan. (*Maximum 3000 character count single spaced*)
   - Explain the project budget, including adjustments to be made if not all anticipated funding is received.
   - For what duration of time will funding be requested from the Foundation?
   - What are other prospective sources of funding once Foundation funding ceases?

B. Additional documents

- ☐ Supporting Foster Children and their Caregivers Proposal Cover Sheet, signed by the Executive Director and President of the Board.
- ☐ Project or program budget, detailing expenses and all sources of revenue (secured and unsecured) that will support the project or program. For multi-year requests, provide a cumulative budget and budgets for each year.
- ☐ Organization's annual operating budget for the current year
- ☐ Organization's balance sheet for the most recently completed fiscal year
- ☐ Organization's income statement (or profit/loss statement) for the most recently completed fiscal year
- ☐ Board of Directors list
- ☐ 501(c)(3) determination letter

If you are using a fiscal sponsor, please submit the following documents:

- Fiscal Sponsor's Board of Directors Resolution authorizing project fiscal sponsorship (click to download Resolution template)
- Fiscal Sponsor's agreement (click to download Agreement template)
- Your organization's Board or leadership group list
- Fiscal Sponsor's Board of Directors list
- Fiscal Sponsor's Income Statement (or Profit & Loss Statement) for the most recently completed fiscal year
- Fiscal Sponsor's Balance Sheet for the most recently completed fiscal year
- Fiscal Sponsor's Annual Operating Budget for the current year

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(Local units of national organizations must submit local unit financial information.)

File Naming Format for Supporting Documents
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Deadline

Completed online applications must be submitted by 5:00 p.m. HST on September 14, 2012.

For more information, contact Pam Funai via e-mail at pfunai@hcf-hawaii.org or call (808) 566-5537 or toll-free from neighbor islands (888) 731-3863 ext. 537.

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VICTORIA S. AND BRADLEY L. GEIST FOUNDATION

827 Fort Street • Honolulu • Hawai'i • 96813-4317 • (808) 566-5524

Supporting Transitioning Foster Youth
Request for Proposals

The Foundation supports the Hawaii Youth Opportunities Initiative, a Co-Investment site with the Jim Casey Youth Opportunities Initiative. Therefore, the Foundation offers this Request for Proposals to provide support to Hawaii's transitioning foster youth through projects that are aligned with the Jim Casey Youth Opportunities Initiative and the Hawaii Youth Opportunities Initiative. Grant seekers are encouraged to visit the Jim Casey website for more information at www.jimcaseyyouth.org. If your project aligns with the funding priorities, please contact Pam Funai at 566-5537 or 888-731-3863 (toll free) or pfunai@hcf-hawaii.org to discuss your project and for access to the online application.

Funding Priorities:
Preference will be given to proposals that align with the Jim Casey Youth Opportunities Initiative. Successful projects and programs will demonstrate youth engagement in development and be designed to result in improved youth outcomes in one or more of the following areas:

- **Permanence** – *Every young person has an adult to rely on for a lifetime and a supportive family network.*
- **Education** – *Young people acquire education and training that enable them to obtain and retain steady employment.*
- **Employment** – *Young people support themselves by obtaining and retaining steady employment.*
- **Housing** – *Young people have safe, stable and affordable housing and have access to transportation for work and school.*
- **Physical and Mental Health** – *Young people have health insurance for both physical and mental health.*
- **Personal and Community Engagement** – *Young people have supportive relationships in the community that help them achieve their personal goals.*

Eligibility Requirements:

- Tax-exempt Hawaii organizations are eligible to apply. This includes nonprofit organizations, 501(c)(3) organizations, religious organizations that are exempt from taxation, and units of government.
- Programs must preferentially and primarily (more than 50%) serve current or former foster youth, age 14-24, who were in state child welfare or mental health systems after their 14th birthday, even if they were adopted or legally reunited with their birth families prior to the age of majority.

Grant Range, Duration, and Exclusions:

- Grants usually range from $10,000 to $75,000 per year.
- Requests are considered in relationship to the size of the organization's operating budget.

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- Unless the organization's clientele are solely legally recognized as current or former foster youth up to the age 24, administrative fees are capped at 5% per grant award. The Foundation reserves the right to determine those costs that are administrative and subject to the limited percentage.
- Requests for up to three years will be considered. If funded, subsequent years will be contingent on the submission of satisfactory progress reports.
- Capital requests and endowments will not be funded.

Proposal Review Criteria:
The strongest proposals will be those that meet all or most of the following criteria:

Integrity of the Proposed Program

- Program is aligned with one or more of the youth outcomes identified by the Jim Casey Youth Opportunities Initiative.
- Program is well-defined and likely to be successfully implemented.
- Organization demonstrates the ability to deliver the program.
- Program budget is adequate and program costs are reasonable and consistent with the narrative.
- Program design includes youth input and will engage the target population.

Potential for Impact of the Program

- Program clearly identifies intended outcome and the means to measure progress.,
- Program evaluation is clearly incorporated into program design,
- Program demonstrates the ability to leverage other resources (such as funds, in-kind or community partnerships).

Online Submission: This application is available for online submission. Your organization must first establish an online account with the Hawaii Community Foundation to access the online application. Please go to http://www.hawaiicommunityfoundation.org/grants/geistfoundation-supportingtransitioning to request an account or, if you already have an account, to access the online application.
Note: If you are requesting an account, it may take a few days for you to receive the account information. It's highly recommended you request your account early to give yourself adequate time to complete the application by the submission deadline.

The online application will request the following:

A. **Proposal narrative:**

1) Describe your organization (*Maximum 3,500 character count single spaced*)
   - What is the organization's mission, geographic reach, and volunteer and/or paid staff size?
   - What is the organization's experience in this field?
   - What are the staff capabilities to conduct the proposed work?

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2) Describe the youth outcome (s) your program is designed to address. (*Maximum 7,000 character count single spaced*)
   - What is the intended outcome area (permanence, education, employment, housing, physical and mental health or personal and community engagement)?
   - Within the identified outcome area, what specific outcomes are you trying to achieve?
   - What targets and measures will you use to demonstrate progress? (Include estimated numbers.)
   - How will you track participation and changed outcomes? How will you obtain feedback, make improvements and determine effectiveness?

3) Describe the strategies and activities required to implement this program. (*Maximum 7,000 character count single spaced*)
   - What key activities will occur?
   - What is the projected timeline?
   - Why is this program design expected to be effective? Describe any research and best practices that influenced this program design and any modifications that have been made.
   - If this is a multi-year request, please describe your expectations for how the program will develop, including specific activities for each year.
   - If a consultant will be used, submit the work plan and deliverables. Additional information may be requested.
4) Describe the community partnerships required to implement this program or project. (*Maximum 3,000 character count single spaced*)
   - What other organizations do you intend to partner with to achieve impact? If you've worked together prior to this application please describe those partnerships.
   - What discussions or commitments have you had with these organizations? What level of commitment have these partners made?
   - What roles will each organization perform in this project?
5) Describe your funding plan. (*Maximum 3,000 character count single spaced*)
   - Explain the project budget, include adjustments to be made if not all anticipated funding is received.
   - For what duration of time will funding be requested from the Foundation?
   - What other sources of funding are committed to implementation of this project?
   - What are the other prospective sources of funding once Foundation funding ceases?

B. Additional documents

- If a consultant will be used, you will need to upload the work plan and deliverables. Additional information may be requested.

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- Project or program budget, detailing expenses and all sources of revenue (secured and unsecured) that will support the project or program. For multi-year requests, provide a cumulative budget and budgets for each year.
- Organization's annual operating budget for the current year.
- Organization's balance sheet for the most recently completed fiscal year.
- Organization's income statement (or profit/loss statement) for the most recently completed fiscal year.
- Board of Directors list
- 501(c)(3) determination letter, if newly established 501(c)(3) within the last year.

If you are using a fiscal sponsor, please submit the following documents:

- Fiscal Sponsor's Board of Directors Resolution authorizing project fiscal sponsorship (click to download Resolution template)
- Fiscal Sponsor's agreement (click to download Agreement template)
- Your organization's Board or leadership group list
- Fiscal Sponsor's Board of Directors list
- Fiscal Sponsor's Income Statement (or Profit & Loss Statement) for the most recently completed fiscal year
- Fiscal Sponsor's Balance Sheet for the most recently completed fiscal year
- Fiscal Sponsor's Annual Operating Budget for the current year.

(Local units of national organizations must submit local unit financial information.)

File Naming Format for Supporting Documents
For documents to be uploaded, please use the following descriptive file name format when uploading your files: Application ID #_Your Org Name_Name of File. (For example, '145_HCF_Budget.pdf' or '145_HCF_Board of Directors.doc').

Deadline

Completed online applications must be submitted by 5:00 p.m. HST on September 14, 2012.

For more information, contact Pam Funai via e-mail at pfunai@hcf-hawaii.org or call (808) 566-5537 or toll-free from neighbor islands (888) 731-3863 ext. 537.

The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

Revised July 2012

HAWAI'I COMMUNITY FOUNDATION

Connecting people who care with causes that matter

Scholarships

With the changing economic landscape, HCF has seen an increase in the number of those in Hawaii seeking scholarships, including nontraditional students who are juggling families and jobs as they pursue their educational goals. We are witnessing a shift in the profile of today's college students as 75% of them are balancing school with work and parenting responsibilities. Exacerbating the situation, financial aid for college students is decreasing as the cost of education is mounting.

The Hawaii Community Foundation recognizes the growing challenge of supporting students who are motivated to attain their degrees and achieve their career goals. HCF's scholarship program consists of over 170 different scholarship funds established by generous individuals, businesses, organizations, and private foundations. All of them are dedicated to making sure that educational opportunities are available to Hawaii students who need and deserve them.

In 2011, the Foundation distributed more than $4 6 million to deserving students, making it the third largest private provider of post-secondary scholarships in the state. Many of the recipients are hoping to attend college or university, while some are pursuing career and technical education at a community college.

Partnering with HCF for your scholarship fund

At HCF, you can create a scholarship fund or support the HCF Community Scholarship Fund to help deserving Hawaii students succeed. Contributing to the Community Scholarship Fund helps students who are first in their families to attend college. Establishing a new fund allows you to target the learners and fields of learning you want to support.

Students can apply to the scholarship program through a single, online application and, if eligible, be awarded from one or more of the funds housed at the Hawaii Community Foundation.

HAWAI'I COMMUNITY FOUNDATION

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How to Apply for Scholarships

2013-2014 Academic Year Scholarships

When applying online, please read **ALL** the instructions listed below. Follow these steps for successful submission of your online application:

Step 1 Create an Account & Log In/scholarships/scholarships-login

Create an account for yourself by providing a username and password. You will also need to provide a valid email address. You may save and return to your application at any time by using your login information.

› CREATE AN ACCOUNT OR LOGIN HERE

Step 2 Complete the Basic Application

Complete all required Personal, Academic and Financial Information.

Step 3 Upload Supporting Materials

Upload an electronic or PDF copy of your most recent grade transcript or GED scores and 2013-2014 Student Aid Report (SAR) from the FAFSA onto your application. Your Personal Statement can be copied and pasted onto your application. Learn more about supporting materials.

Step 4 Complete the Optional Sections

The Letters of Recommendation and Additional Questions/Essays will take additional time and effort to complete, but may qualify you for ALL available scholarships.

Step 5 Review & Submit

Review your information and edit where necessary. Read and agree to certification and submit application when ready. Note: You will not be able to submit your application until all required supporting documents are electronically attached to your application.

The deadline to complete your online application is Febrary 22, 2013 5:00 p.m. (HST).

Once you submit your online application, you will not be able to make changes to your application or upload additional documents. If you have questions, please email HCF Scholarships or call 808-566-5570 (or toll-free from neighbor islands: 1-888-731-3863).

HAWAI'I COMMUNITY FOUNDATION

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Search Scholarships

Site Navigation

- Welcome to Scholarship Manager
- Search Scholarships
- Contact Us

Search Scholarships

Instructions
Use the options below to determine your search criteria. Please note that you can search three different ways.

- Category Search - Scholarships are assigned categories by your schools. This option allows you to identify and search the categories that you feel are most relevant to you.
- Keyword(s) Search - Your school may assign a keyword to a scholarship This option allows you to search that keyword field.
- Description and Name Search - You can simply search the description or name of scholarships to see if they contain words that you might deem suitable (e g. Biology).

Search Options

Category Search

Keyword(s) Search

Description and Name Search

View All | Search | Reset

Use the options above to run a search!

Scholarship Search Result

Victoria S and Bradley L Geist Foundation	The Trustees of the Victoria S and Bradley L Geist Foundation are interested in assisting students that have been in the foster care system Mr and Mrs Geist grew up independently and their successes in life came through their own personal efforts Because of the Geists' own childhood experiences, you have been selected in recognition of the strides you have taken to succeed and to give you encouragement to continue your efforts Deadlines February 22, 2013 for Fall & Spring semester scholarships, September 20, 2013 for Spring only semester scholarships Requirements • Be currently or formerly placed in the foster care system in the state of Hawai'i • Applicants must submit a confirmation letter from a DHS or Foster Family Program case worker to verify foster status	More Info

HAWAI'I COMMUNITY FOUNDATION

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Additional Scholarships

Additional Scholarship Application Deadlines

The Victoria S. and Bradley L. Geist Foundation Scholarship Program

The Geist Foundation awards students currently or formerly in the foster care system. As a result of financial assistance from the Geist Foundation, hundreds of students are able to attend vocational schools, community colleges, and public and private universities both here in Hawaii and on the continental United States. Verification of foster care status within the State of Hawaii is required.

The Victoria & Bradley Geist Scholarship is only available online this year. For the online application, students will need to create an account by providing a username, password and valid email address. The deadline for the Fall online application is February 22, 2013. Click here to apply online for the 2013 -2014 Victoria S. and Bradley L. Geist Foundation Scholarship Program. For questions, please email us or call our Scholarships staff at 808-566-5570 or toll-free from neighbor islands at 1-888-731-3863.

Juliette M. Atherton Scholarship for Ordained Protestant Ministers

This application is for ordained Protestant ministers seeking funding from the Juliette M Atherton Scholarship in support of advanced degree studies. If you are a Protestant Minister, you must be, or plan to be, enrolled in a degree program leading to an advanced degree, usually a doctorate, in order to be considered for this scholarship. Please note that Atherton Foundation no longer funds continuing education for ordained ministers.

Dependent children of Protestant ministers and graduate seminarians may not use this application, but should instead use the Hawaii Community Foundation's standard online application to apply The common application can be found at http://www.hawaiicommunityfoundation.org/scholarships-login Information on other scholarships administered by Hawaii Community Foundation can be viewed year round.

The deadline to apply for Juliette M. Atherton Scholarship for Ordained Protestant Ministers is February 22, 2013. To apply for the Juliette M. Atherton Scholarship for Ordained Protestant Ministers scholarship click here

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
BANK OF HAWAII ACCT #115024150	808.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	808.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BANK OF HAWAII ACCT #115024150	1,268,964.	151,726.	1,117,238.
TOTAL TO FM 990-PF, PART I, LN 4	1,268,964.	151,726.	1,117,238.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	3,000.	900.		2,300.
TO FORM 990-PF, PG 1, LN 16B	3,000.	900.		2,300.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2011 FEDERAL EXTENSION PAYMENT	76,000.	0.		0.
FOREIGN TAX PAID	8,138.	8,138.		0.
TO FORM 990-PF, PG 1, LN 18	84,138.	8,138.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GRANTS ADMINISTRATION FEES	163,000.	0.		163,000.
TO FORM 990-PF, PG 1, LN 23	163,000.	0.		163,000.

FORM 990-PF OTHER INVESTMENTS STATEMENT 6

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT INV-1	COST	35,847,914.	38,925,579.
TOTAL TO FORM 990-PF, PART II, LINE 13		35,847,914.	38,925,579.

Form **8868** (Rev. January 2013) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits*.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print

File by the due date for filing your return. See instructions

Name of exempt organization or other filer, see instructions.
VICTORIA S & BRADLEY L GEIST FOUNDATION

Employer identification number (EIN) or
99-0163400

Number, street, and room or suite no. If a P.O. box, see instructions.
P.O. BOX 3170, DEPT 715

Social security number (SSN)

City, town or post office, state, and ZIP code. For a foreign address, see instructions.
HONOLULU, HI 96802-3170

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ BANK OF HAWAII
130 MERCHANT STREET - HONOLULU, HI 96813
Telephone No. ▶ (808)694-4525 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ [ ] . If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2013, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ [X] calendar year 2012 or
▶ [ ] tax year beginning ______, and ending ______

2 If the tax year entered in line 1 is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 47,363.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	$ 128,724.
c	**Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.