Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter Social Security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf.*

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 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 or province, country, and ZIP or foreign postal 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: ☒ 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)* ▶$ 41,922,951.

J Accounting method: ☒ 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 ▶ ☐

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))

	Line	(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 ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	276.	276.		STATEMENT 1
	4 Dividends and interest from securities	1,011,101.	1,011,101.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,163,094.			
	b Gross sales price for all assets on line 6a 12,155,546.				
	7 Capital gain net income (from Part IV, line 2)		1,163,094.		
	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	2,174,471.	2,174,471.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	288,958.	202,271.		86,687.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	3,900.	1,170.		2,730.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 4	6,448.	6,448.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	8,602.	0.		8,602.
	22 Printing and publications				
	23 Other expenses STMT 5	163,511.	511.		163,000.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	471,419.	210,400.		261,019.
	25 Contributions, gifts, grants paid	1,974,962.			1,974,962.
	26 **Total expenses and disbursements.** Add lines 24 and 25	2,446,381.	210,400.		2,235,981.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-271,910.			
	b **Net investment income** (if negative, enter -0-)		1,964,071.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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323501 10-10-13 LHA **For Paperwork Reduction Act Notice, see instructions.** Form **990-PF** (2013)

09570417 791519 115024150 2013.03030 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 (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	80,299.	11,969.	11,969.
	2 Savings and temporary cash investments	605,534.	1,691,566.	1,691,566.
	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	35,847,914.	34,586,705.	40,219,416.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item 1)	36,533,747.	36,290,240.	41,922,951.
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	36,533,747.	36,290,240.	
	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**	36,533,747.	36,290,240.	
	31 **Total liabilities and net assets/fund balances**	36,533,747.	36,290,240.	

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	36,533,747.
2	Enter amount from Part I, line 27a	2	-271,910.
3	Other increases not included in line 2 (itemize) ▶ RETURNED GRANTS	3	28,403.
4	Add lines 1, 2, and 3	4	36,290,240.
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	36,290,240.

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10-10-13

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	VARIOUS	VARIOUS
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	11,943,573.		10,992,452.	951,121.
b	211,973.			211,973.
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
	(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	
a				951,121.
b				211,973.
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 — 1,163,094.

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))
2012	2,144,064.	38,371,614.	.055876
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

2	**Total** of line 1, column (d)	2	.269758
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	.053952
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	40,465,182.
5	Multiply line 4 by line 3	5	2,183,177.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	19,641.
7	Add lines 5 and 6	7	2,202,818.
8	Enter qualifying distributions from Part XII, line 4	8	2,235,981.

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	19,641.
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	19,641.
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	19,641.
6	Credits/Payments:				
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	81,361.		
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	81,361.
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	61,720.
11	Enter the amount of line 10 to be: **Credited to 2014 estimated tax** ▶	61,720.	**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 the 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?	2		X
	If "Yes," attach a detailed description of the activities			
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?	5		X
	If "Yes," attach the statement required by General Instruction T			
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 2013 or the taxable year beginning in 2013 (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 2013, 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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

				Yes	No
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 2013?		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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?	☐ 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 2013 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 2013.)*	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 2013?		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	288,958.	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	40,424,648.
b	Average of monthly cash balances	1b	656,755.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	41,081,403.
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	41,081,403.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	616,221.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	40,465,182.
6	**Minimum investment return** Enter 5% of line 5	6	2,023,259.

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	2,023,259.
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 19,641.		
b	Income tax for 2013. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	19,641.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,003,618.
4	Recoveries of amounts treated as qualifying distributions	4	28,403.
5	Add lines 3 and 4	5	2,032,021.
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	2,032,021.

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	2,235,981.
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	2,235,981.
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	19,641.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,216,340.

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				2,032,021.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			1,041,536.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ $ 2,235,981.				
a Applied to 2012, but not more than line 2a			1,041,536.	
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 2013 distributable amount				1,194,445.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (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 2012 Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				837,576.
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 2008 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2014** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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 2013, 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) 2013	(b) 2012	(c) 2011	(d) 2010	(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 address 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				1,799,087.
SEE STATEMENT SCHOL-1				175,875.
Total			▶ **3a**	1,974,962.
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	276.	
4 Dividends and interest from securities			14	1,011,101.	
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	1,163,094.	
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.		2,174,471.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 2,174,471.

(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

Signature of officer or trustee — Vice President — Date: MAY 0 6 2014 — 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.	

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
BANK OF HAWAII ACCT #115024150	276.	276.	
TOTAL TO PART I, LINE 3	276.	276.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
BANK OF HAWAII ACCT #115024150	1,223,074.	211,973.	1,011,101.	1,011,101.	
TO PART I, LINE 4	1,223,074.	211,973.	1,011,101.	1,011,101.	

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	3,900.	1,170.		2,730.
TO FORM 990-PF, PG 1, LN 16B	3,900.	1,170.		2,730.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	6,448.	6,448.		0.
TO FORM 990-PF, PG 1, LN 18	6,448.	6,448.		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.
ADR/ADS FEES	511.	511.		0.
TO FORM 990-PF, PG 1, LN 23	163,511.	511.		163,000.

FORM 990-PF OTHER INVESTMENTS STATEMENT 6

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT INV-1	COST	34,586,705.	40,219,416.
TOTAL TO FORM 990-PF, PART II, LINE 13		34,586,705.	40,219,416.

Victoria S. & Bradley L. Geist Foundation

2013 Grants List

Organization	Address	Project Description	Check Date	Payment Amount
Bishop Museum	1525 Bernice Street Honolulu, HI 96817	Hawaiian Hall - Completion of Phase II	3/1/2013	100,000 00
Catholic Charities Hawaii	Clarence T.C. Ching Campus 1822 Ke'eaumoku Street Honolulu, HI 96822	Seeking funding to expand and sustain the Horizons Independent Living Program for Foster Youth	12/6/2013	70,000 00
Children's Alliance of Hawaii, Inc.	200 N. Vineyard Blvd., #410 Honolulu, HI 96817	Enhancing the Lives of Abused and Neglected Foster Children on Kauai	12/6/2013	6,600.00
Children's Alliance of Hawaii, Inc.	200 N. Vineyard Blvd., #410 Honolulu, HI 96817	Enhancements for Foster Children on Oahu Who Have Been Sexually Abuse	12/6/2013	13,200 00
Effective Planning Innovative Communication, Inc	1130 N. Nimitz Highway, Suite C-210 Honolulu, HI 96817	Hawaii Youth Opportunities Initiative	7/8/2013	300,000 00
Effective Planning Innovative Communication, Inc.	1130 N. Nimitz Highway, Suite C-210 Honolulu, HI 96817	Youth Engagement in Child Welfare and Family Court Youth Events	4/3/2013	15,400 00
Family Programs Hawai'i	680 Ala Moana Blvd , Suite 200 Honolulu, HI 96813	Mentoring Program for Transitioning Foster Youth	8/5/2013	75,000.00
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Higher Education Support Program - eXcel	8/5/2013	60,000.00
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	It Takes An Ohana	9/25/2013	49,548.00
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Ho'ololi Mua No Ke Ala Senior Program (HSP)	12/19/2013	35,900.00
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Respite Services for Resource Families in the Foster Care System	7/29/2013	37,884 00
Family Programs Hawai'i	250 Vineyard St. Honolulu, HI 96813-2445	Enhancements for Children in Foster Care	12/6/2013	50,000 00
Friends of the Children of West Hawaii, Inc	P O Box 9041 Kailua-Kona, HI 96745	Enhancements for Foster Children	12/6/2013	12,000.00
Friends of the Children's Justice Center of East Hawaii Inc.	PO Box 6908 Hilo, HI 96720	Special Needs and Enhancements Program	12/6/2013	45,000.00
Hale Kipa, Inc.	615 Piikoi St., Suite #203 Honolulu, HI 96814-3139	Family Unification Program Housing Vouchers for Youth Transitioning from Foster Care	1/10/2013	31,050.00
Hale Kipa, Inc.	615 Piikoi St , Suite #203 Honolulu, HI 96814-3139	Family Unification Program Housing Vouchers for Youth Transitioning from Foster Care	8/7/2013	66,500 00
Hawaii Community Foundation	827 Fort Street Mall Honolulu, HI 96813	Hana Community Endowment Fund	12/11/2013	150,000 00
Maui Economic Opportunity, Inc.	99 Mahalani Street Wailuku, HI 96793	Enhancement Services for Foster Children	12/6/2013	33,000.00
Maui Youth and Family Services Inc	PO Box 790006 Paia, HI 96779-0006	Maui Youth and Family Services Request for Support of Foster Family Specialist	12/6/2013	40,931.00
PARENTS Inc	45-955 Kamehameha Hwy Ste 403 Kaneohe, HI 96744-3222	East Hawaii Fatherhood Initiative	12/6/2013	19,600 00
Partners in Development	2040 Bachelot Street Honolulu, HI 96817	Staff Development	4/3/2013	5,824 00

Victoria S. & Bradley L. Geist Foundation

2013 Grants List

Organization	Address	Project Description	Check Date	Payment Amount
Partners in Development Foundation	2040 Bachelot Street Honolulu, HI 96817	Sending staff to the CWLA and NFPA national foster care conferences	12/6/2013	16,650 00
Rehabilitation Hospital of the Pacific Foundation	226 North Kuakini Street Honolulu, HI 96817	Rehabilitation Hospital of the Pacific Capital Campaign	4/3/2013	200,000.00
The Salvation Army - Family Intervention Services	P O Box 5085 Hilo, HI 96720	The Foster Care Alumni Support Program for Transitioning Foster Youth	9/30/2013	75,000 00
University of Hawaii - Office of Research Services	2440 Campus Rd., Box 368 Honolulu, HI 96822-2234	Cell free recombinant production of the atypical Cell free Cell-free recombinant production of the atypical estrogen receptor GPER for drug binding studies	4/10/2013	49,000 00
University of Hawaii - Office of Research Services	2440 Campus Rd., Box 368 Honolulu, HI 96822-2234	The role of Y chromosome encoded gene Sly in the origin of sperm DNA damage.	4/10/2013	48,000.00
University of Hawaii - Office of Research Services	2440 Campus Rd , Box 368 Honolulu, HI 96822-2234	Identifying Genes Correlating Encephaloceles with a Neural Tube Defect	4/10/2013	48,000.00
University of Hawaii - Office of Research Services	2440 Campus Rd , Box 368 Honolulu, HI 96822-2234	What can we learn about regenerative medicine from a Hawaiian marine worm?	4/10/2013	48,000 00
University of Hawaii - Office of Research Services	2440 Campus Rd , Box 368 Honolulu, HI 96822-2234	Characterization of the molecular effectors of c-Jun-N-terminal kinase isoforms during memory consolidation	4/10/2013	48,000 00
University of Hawaii - Office of Research Services	2440 Campus Rd., Box 368 Honolulu, HI 96822-2234	Effect of follicle architecture on establishment of methylation imprints in mouse oocytes	4/10/2013	49,000 00
			Total:	**1,799,087.00**

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2013

Description	Units	Book Value	Market Value
AOL TIME WARNER BONDS 7.7% 05/01/2032	100,000.000	131,879.00	128,397
AT&T INC	12,160.000	379,910.89	427,546
ABBVIE INC	3,800.000	141,681.23	200,678
ABERDEEN INTERNATIONAL EQUITY FUND INST	299,635.646	3,815,075.05	4,650,345
ABERDEEN ASIA-PACIFIC EX-JAPAN EQUITY FUND INSTITUTIONAL CLASS	144,775.169	1,558,107.29	1,660,571
AFRICAN DEVELOPMENT BANK SUB NOTES 6.875% 10/15/2015	50,000.000	58,465.50	54,565
AGILENT TECHNOLOGIES INC	420.000	17,989.40	24,020
ALLSTATE CORP	940.000	27,325.24	51,268
ALTRIA GROUP INC	9,120.000	233,712.97	350,117
AMERICAN ELECTRIC POWER CO	1,950.000	76,829.80	91,143
AMERICAN EXPRESS CO	1,080.000	48,617.28	97,988
AMERICAN INTL GROUP	925.000	44,612.75	47,221
AMERICAN INTL GROUP NOTES 3.8% 03/22/2017	15,000.000	14,969.55	16,019
AMERISOURCEBERGEN CORP	1,460.000	54,375.95	102,653
APACHE CORP	590.000	57,821.06	50,705
APACHE FINANCE CANADA COMPANY GUARNT 7.75% 12/15/2029	50,000.000	58,145.00	66,341
APPLE INC	530.000	203,316.51	297,341
APPLE INC SR UNSECURED 2.4% 05/03/2023	35,000.000	35,117.60	31,472
ASTRAZENECA PLC PLC SP ADR	6,960.000	330,632.77	413,215
BCE INC	670.000	25,929.00	29,004
BHP FINANCE USA LTD COMPANY GUARNT 1.875% 11/21/2016	100,000.000	102,165.00	102,152
BP PLC SPONS ADR	5,285.000	216,699.86	256,904
BANK OF NEW YORK MELLON CORP	1,600.000	32,216.16	55,904
BANK OF NOVA SCOTIA N Y AGY SR UNSECURED 1 85% 01/12/2015	50,000.000	50,721.25	50,758
AID-TUNISIA UNSECURED 1.686% 07/16/2019	125,000.000	126,548.75	120,808
BAXTER INTL INC	315.000	15,686.12	21,908
BERKSHIRE HATHAWAY INC CL B	1,005.000	84,346.07	119,153
BERKSHIRE HATHAWAY INC SR UNSECURED 3.2% 02/11/2015	75,000.000	76,659.00	77,303
BORGWARNER INC	980.000	36,448.70	54,792
BRISTOL MYERS SQUIBB CO	1,860.000	53,326.02	98,859
BURLINGTON NORTHERN INC SR UNSECURED 8.75% 02/25/2022	45,000.000	61,472.25	58,433
CBS CORPORATION CL B	350.000	21,146.30	22,309
CVS/CAREMARK CORP SR UNSECURED 2.75% 12/01/2022-2022	40,000.000	40,047.20	36,919
CATERPILLAR FINANCIAL SERVICES UNSECURED 1% 11/25/2016	25,000.000	24,980.25	24,855
CHEVRON CORP	1,470.000	144,790.27	183,618
CHICAGO IL BUILD AMERICA BONDS TAXABLE C 6.207% 01/01/2036	45,000.000	46,077.75	40,653
COACH INC	1,510.000	85,435.80	84,756
COCA COLA CO	2,120.000	72,615.41	87,577
COGNIZANT TECH SOLUTIONS CORP	580.000	37,177.78	58,568
COLUMBIA ACORN INTERNATIONAL CL R5	26,664.472	983,783.33	1,244,164
COMCAST CORP SR UNSECURED 2.85% 01/15/2023	45,000.000	44,926.20	41,607
CONOCOPHILLIPS	5,790.000	75,395.84	409,064
CUMMINS ENGINE INC	700.000	68,634.01	98,679
DEERE & CO	550.000	45,534.50	50,232
DOMINION RESOURCES INC SR NOTES SER F PUTABLE 8/15 5 25% 08/01/2033	100,000.000	95,309.00	105,473
DOMINION RESOURCES INC /VA	2,000.000	99,675.28	129,380
DOVER CORP	230.000	12,483.59	22,204

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2013

Description	Units	Book Value	Market Value
DUKE ENERGY CORP	4,580.000	268,456.55	316,066
EMC CORP	5,290.000	122,009.83	133,044
EBAY INC	1,040.000	42,336.52	57,060
EBAY INC SR UNSECURED 3.25% 10/15/2020	70,000.000	70,823.90	71,215
EUROPEAN INVT BK SR UNSUB 2.375% 03/14/2014	105,000.000	108,307.50	105,449
EUROPEAN INVT BK SR UNSECURED 1.75% 03/15/2017	100,000.000	101,601.00	102,257
EXPRESS SCRIPTS HOLDING CO	2,760.000	149,284.83	193,862
FEDERAL FARM CREDIT BANK UNSECURED 2.48% 11/21/2024-2013	50,000.000	49,900.00	44,686
FEDERAL HOME LOAN MTGE CORP NOTES .75% 09/28/2015-2014	175,000.000	174,571.25	175,247
FEDERAL NATIONAL MTGE ASSOC UNSECURED 1.6% 07/24/2019-2013	30,000.000	30,094.50	29,006
FEDERAL HOME LOAN MORTGAGE CORP NOTES 2.375% 01/13/2022	175,000.000	170,002.50	167,293
FREEPORT MCMORAN COPPER & GOLD CLASS B	1,660.000	65,530.49	62,648
GTE FLA INC SR UNSECURED 6.86% 02/01/2028	30,000.000	32,142.30	31,535
GENERAL ELECTRIC CO	4,340.000	29,001.14	121,650
GENERAL ELECTRIC CAPITAL CORP SR UNSECURED VARIABLE .83935% 01/08/2016	100,000.000	100,211.00	100,601
GEORGIA ST MUNI ELEC AUTH TAXABLE-SUB GEN RESOLUTION 4 43% 01/01/202	40,000.000	40,000.00	39,880
GILEAD SCIENCES INC	310.000	5,822.30	23,281
GLAXOSMITHKLINE PLC ADR	3,235.000	140,186.66	172,717
GOLDMAN SACHS GROUP INC	310.000	32,526.90	54,951
GOOGLE INC CL A	100.000	37,192.38	112,071
HCP INC	2,380.000	98,970.95	86,442
HALLIBURTON CO	1,110.000	41,177.78	56,333
HARRIS CORP SR UNSECURED 5.95% 12/01/2017	100,000.000	99,652.00	111,448
HAWAII ST HSG FIN & DEV CORP SF MTGE PURCHASE REVENUE TXBL-FNMA MBS PASS-THRU PROGRAM-SER A 2 6% 07/01/2037 OFV 43000	37,754.360	37,754.36	34,046
HEALTH CARE REIT INC	2,560.000	136,290.73	137,139
HESS CORP	940.000	51,847.81	78,020
HONEYWELL INTERNATIONAL INC	760.000	24,037.66	69,441
HONOLULU HAWAII CITY & CNTY TXBL-SER G 2 512% 11/01/2022	100,000.000	100,000.00	90,596
HONOLULU HAWAII CITY & CNTY TXBL-SER G 2.812% 11/01/2023-2022	50,000.000	50,000.00	45,199
HONOLULU HI CITY & CNTY WASTEWTR SYS REV BUILD AMERICA BONDS 4.643% 07/01/2022-2020	75,000.000	75,000.00	79,553
INTEL CORP	870.000	21,307.00	22,581
JP MORGAN CHASE & CO	1,450.000	47,412.24	84,796
JP MORGAN CHASE & CO SR UNSECURED 3.2% 01/25/2023	50,000.000	49,996.00	47,402
JANUS TRITON FUND CL I	82,321.538	1,337,501.80	1,960,076
JOHN HANCOCK III DISC M/C-IS	116,223.512	1,510,905.66	2,108,295
JOHNSON & JOHNSON	3,040.000	37,703.14	278,434
KAUAI CNTY HI BUILD AMERICA BONDS-TAXABLE 5 393% 08/01/2026	50,000.000	59,955.00	52,966
KIMBERLY CLARK CORP	2,090.000	138,765.36	218,321
KIMBERLY CLARK CORP SR UNSECURED 3 875% 03/01/2021	50,000.000	55,045.00	52,125
KINDER MORGAN ENERGY PARTNERS LP SR UNSECURED 3 95% 09/01/2022-2022	60,000.000	59,675.70	58,468
KRAFT FOODS GROUP INC	2,030.000	102,615.16	109,437
LABORATORY CORP AMERICA HOLDINGS	390.000	33,189.62	35,634
LANDESBANK BADEN-WURTTEMBERG SUBORDINATED 7.625% 02/01/2023	50,000.000	65,753.50	60,021
LILLY ELI & CO	1,530.000	57,160.03	78,030
NATIXIS LOOMIS SAYLES LTD GOV AND AGCY FD CL Y	41,830.929	501,605.41	488,167

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2013

Description	Units	Book Value	Market Value
LORILLARD INC	3,695.000	146,454.94	187,263
M & T BANK CORPORATION	300.000	33,947.01	34,926
MAINSTAY HIGH YIELD CORP BOND FUND CL I	44,299.184	260,409.18	268,010
MARATHON OIL CORP SR UNSECURED 2.8% 11/01/2022-2022	70,000.000	70,505.40	64,513
MAUI CNTY HAWAII TAXABLE-SER A-RECOVERY ZONE ECONOMIC DEV BDS 4.559% 06/01/2022-2020	50,000.000	50,000.00	51,859
MCDONALDS CORP	1,530.000	130,992.05	148,456
MERCK & CO INC	6,950.000	270,102.03	347,848
MICROSOFT CORP	1,410.000	3,723.28	52,748
MICROSOFT CORP SR UNSECURED 3 625% 12/15/2023	15,000.000	14,926.20	15,023
MONSTER BEVERAGE CORP	1,290.000	63,408.53	87,423
MORGAN STANLEY SR UNSECURED VARIABLE 3% 08/31/2017	50,000.000	50,500.00	51,916
NCUA GUARANTEED NOTES US GOVT GUARANTEED 2.35% 06/12/2017	60,000.000	62,085.00	62,491
NATIONAL GRID PLC SP ADR	3,455.000	167,957.70	225,681
NATIONAL OILWELL VARCO INC	820.000	57,181.15	65,215
NATIONAL RURAL UTILITIES SR UNSECURED FLOATING .4876% 05/27/2016	35,000.000	35,000.00	35,010
NEW VALLEY GENERATION IV TVA PASS THRU CERTS 4 687% 01/15/2022 OFV 100000	63,329.650	58,249.98	69,449
NEXTERA ENERGY INC	245.000	13,415.95	20,977
NA DEVELOPMENT BANK SR UNSECURED 4.375% 02/11/2020	80,000.000	86,785.60	83,320
OCCIDENTAL PETROLEUM CORP	390.000	33,684.30	37,089
ORACLE	615.000	21,352.80	23,530
OVERSEAS PRIVATE INV CORP UNSECURED FLOATING .12% 07/15/2025	25,000.000	25,000.00	25,000
PPG INDUSTRIES INC SR UNSECURED 1.9% 01/15/2016	50,000.000	50,576.50	50,737
PPL CORPORATION	6,450.000	181,739.12	194,081
PARTNERRE FINANCE COMPANY GUARNT 6 875% 06/01/2018	50,000.000	49,555.00	57,311
PEPSICO INC	1,140.000	74,922.51	94,552
PHARMACIA CORPORATION DEBENTURES 6.75% 12/15/2027	50,000.000	59,712.00	61,176
PHILIP MORRIS INTERNATIONAL	2,135.000	146,481.29	186,023
PRES&FELLOWS OF HARVARD BONDS 6.3% 10/01/2037-2016	75,000.000	78,010.10	82,979
T ROWE PRICE INSTITUTIONAL EMERGING MARKETS EQUITY FUND	55,214.175	1,730,512.17	1,623,297
PRICELINE.COM INC	45.000	32,476.38	52,308
PROCTER & GAMBLE CO	390.000	22,097.40	31,750
PUBLIC SERVICE ENT GROUP INC	1,410.000	44,358.46	45,176
QUALCOMM INC	2,290.000	122,701.64	170,033
RS GLOBAL NATURAL RESOURCES FUND CL Y	52,827.449	2,159,186.03	1,889,110
REALTY INCOME CORP	1,900.000	82,593.00	70,927
REYNOLDS AMERICAN INC	5,930.000	227,088.47	296,441
RIO TINTO FIN USA PLC SR UNSECURED 2.25% 12/14/2018	35,000.000	34,680.10	34,827
T ROWE PRICE INSTITUTIONAL FLOATING RATE FUND CL I	39,699.920	384,211.53	408,512
ROYAL BANK OF CANADA UNSECURED 1.15% 03/13/2015	30,000.000	29,990.40	30,248
ROYAL DUTCH SHELL PLC ADR B	4,160.000	283,288.15	312,458
SPDR S&P 500 ETF TRUST	14,890.000	2,382,067.95	2,750,034
SANDISK CORP	305.000	10,613.48	21,515
SCHLUMBERGER LTD	1,080.000	77,208.05	97,319
SENIOR HOUSING PROP TRUST	3,330.000	82,717.20	74,026
SHELL INTERNATIONAL SR UNSECURED 2.375% 08/21/2022	25,000.000	24,891.75	22,892
SHELL INTERNATIONAL SR UNSECURED .625% 12/04/2015	15,000.000	14,996.40	15,003

VICTORIA S. AND BRADLEY L. GEIST FOUNDATION **99-0163400**
FORM 990-PF, PART II, LINE 13
FOR YEAR ENDED 12/31/2013

Description	Units	Book Value	Market Value
SOUTHERN CO	6,760.000	275,513.14	277,904
STERICYCLE INC	920.000	78,411.58	106,876
TEMPLETON GLOBAL BOND FUND CL AD	50,413.121	671,861.96	659,908
TEXAS ST REF-TAXABLE-PUB FIN AUTH 4.004% 10/01/2023-2021	50,000.000	50,000.00	51,133
THIRD AVENUE REAL ESTATE VALUE FUND CL IS	40,100.062	930,127.18	1,155,684
TIME WARNER CABLE INC	490.000	30,898.86	66,395
TOTAL SA SP ADR	6,130.000	315,350.99	375,585
TOYOTA MOTOR CREDIT CORP. SR UNSECURED 2.05% 01/12/2017	30,000.000	31,131.90	30,660
US BANCORP	1,120.000	28,120.85	45,248
US BANK NA NOTES 6 3% 02/04/2014	100,000.000	105,093.40	100,491
UNILEVER CAPITAL CORP SR UNSECURED .85% 08/02/2017	30,000.000	29,774.70	29,204
UNILEVER PLC SPONSORED ADR	2,020.000	65,015.31	83,224
US TREASURY BONDS 3 5% 02/15/2039	205,000.000	246,000.00	193,053
US TREASURY 4.75% 05/15/2014	40,000.000	39,465.63	40,678
US TREASURY 4 25% 11/15/2014	100,000.000	106,304.69	103,527
US TREASURY 4.25% 08/15/2015	150,000.000	156,562.50	159,581
US TREASURY N/B 3.125% 05/15/2019	45,000.000	50,835.94	47,953
US TREASURY 3.625% 02/15/2020	15,000.000	15,343.95	16,327
US TREASURY 1.25% 09/30/2015	20,000.000	20,359.38	20,324
US TREASURY 2% 02/15/2022	125,000.000	121,948.24	118,623
US TREASURY 1.25% 10/31/2019	82,000.000	83,143.52	78,431
US TREASURY 1 625% 11/15/2022	65,000.000	65,190.43	58,673
UNITED TECHNOLOGIES CORP	195.000	15,126.54	22,191
UTILITY DEBT SECURITIZATION AUTH NY TXBL-RESTRUCTING-SER T 2.042% 06/15/2021-2019 OFV 35000	35,000.000	34,999.65	34,647
VANGUARD TOTAL BOND MARKET ETF	39,325.000	3,261,253.40	3,147,966
VARIAN MEDICAL SYSTEMS INC	1,110.000	73,084.98	86,236
VENTAS INC	1,220.000	76,036.26	69,882
VERIZON COMMUNICATIONS	7,320.000	191,883.20	359,705
VERIZON COMMUNICATIONS SR UNSECURED 3.65% 09/14/2018	25,000.000	24,999.00	26,464
VERISK ANALYTICS INC CL A	1,300.000	43,785.82	85,436
VISA INC CL A SHARES	460.000	34,595.68	102,433
VODAFONE GROUP PLC SP ADR	11,210.000	298,826.97	440,665
WAL-MART STORES INC	270.000	17,734.14	21,246
WAL-MART STORES INC SR UNSECURED 6.5% 08/15/2037	50,000.000	50,494.00	62,547
WELLS FARGO COMPANY	1,900.000	55,872.16	86,260
WELLS FARGO CO SR UNSECURED 2.625% 12/15/2016	100,000.000	102,293.00	104,728
ACTAVIS PLC	130.000	21,369.40	21,840
PERRIGO COMPANY PLC	600.000	93,402.00	92,076
TOTAL		**34,586,705.52**	**40,219,416**

Scholarship Grants 01/01/2013 to 12/31/2013

Payee Name	Purpose	Payment Amount
Bacone College 2299 Old Bacone Rd Muskogee, OK 74403		
Granito-Wallace, Anela	Scholarship	$4,000.00
	Subtotal for Bacone College:	$4,000.00
Chaminade University of Honolulu 3140 Waialae Avenue Honolulu, HI 96816-1578		
San Agustin, Vanda	Scholarship	$4,000.00
	Subtotal for Chaminade University of Honolulu.	$4,000 00
College of Southern Nevada Financial Aid Office 6375 W Charleston Blvd Las Vegas, NV 89146		
Bailey, Elizabeth	Scholarship	$2,000 00
	Subtotal for College of Southern Nevada	$2,000 00
Hawaii Community College 200 West Kawili Street Hilo, HI 96720-4091		
Ada, Kalannie	Scholarship	$1,000 00
Kamalii, Barrilyn	Scholarship	$1,000 00
Keanu, Kamalani	Scholarship	$1,000 00
Lerma, Ritalynn	Scholarship	$2,000 00
Medeiros, Manoa	Scholarship	$1,000 00
Mendoza, Chemarie	Scholarship	$2,000 00
Perreira, Thomas	Scholarship	$1,000 00
Skillman, Sage	Scholarship	$2,000 00
	Subtotal for Hawaii Community College	$11,000 00
Hawaii Pacific University Hawaii Pacific University Attn· Scholarships- Ms Shayna Carvalho 1166 Fort Street, Suite 210 E Honolulu, HI 96813		
Fernando, Raquel	Scholarship	$4,000 00
	Subtotal for Hawaii Pacific University·	$4,000.00

Scholarship Grants 01/01/2013 to 12/31/2013

Payee Name	Purpose	Payment Amount
Honolulu Community College 874 Dillingham Blvd Honolulu, HI 96817-4598		
Carlson, Amber	Scholarship	$2,000 00
Halley, Moses	Scholarship	$2,000 00
Kaliko V, Samuel	Scholarship	$2,000 00
Kodama, Kristie	Scholarship	$2,000.00
Kodama, Stephanie	Scholarship	$1,000 00
Phanphongsa, Jordan	Scholarship	$1,000 00
	Subtotal for Honolulu Community College.	$10,000 00
Kapiolani Community College 4303 Diamond Head Rd Honolulu, HI 96816-4496		
Desa, Dezeree	Scholarship	$2,000 00
Estencion, Shaydean	Scholarship	$2,000 00
Kaopio, Shandell	Scholarship	$2,000.00
Kim, Stephanie	Scholarship	$1,000 00
Mansinon, Maile	Scholarship	$2,000 00
Morton, Cherolyn	Scholarship	$2,000 00
Paguada, Luz	Scholarship	$1,000 00
Rodriguez, Ashlyn	Scholarship	$2,000 00
Sonobe-Morita, Tayler	Scholarship	$1,500 00
Tovio, Tamara	Scholarship	$1,000 00
	Subtotal for Kapiolani Community College.	$16,500 00
Kettering College of Medical Arts Student Finance Office 3737 Southern Blvd Kettering, OH 45429-1299		
Vargas, Jennylyn	Scholarship	$4,000.00
	Subtotal for Kettering College of Medical Arts:	$4,000 00

Scholarship Grants 01/01/2013 to 12/31/2013

Payee Name	Purpose	Payment Amount
Leeward Community College 96-045 Ala Ike Pearl City, HI 96782-3393		
Billianor-Pinero, Jazzlyn	Scholarship	$500 00
Cordeiro, Maria	Scholarship	$2,000.00
Cuarisma, Shjardache	Scholarship	$500.00
Danielson-Vaielua, Quiana	Scholarship	$2,000 00
Demotto, Jordan-Reid	Scholarship	$2,000 00
Gamboa, Christine	Scholarship	$500.00
Gamboa, Marlyn	Scholarship	$500.00
Grainger, Mannix Aaron	Scholarship	$1,000 00
Guerrero, Creg	Scholarship	$2,000 00
Kekoolani, Vannesa	Scholarship	$2,000 00
Manago, Kailakalani	Scholarship	$3,000.00
Silva, Genny	Scholarship	$1,625.00
Tambua, Melissa	Scholarship	$1,000 00
Vernaglia, Sharayah	Scholarship	$2,000.00
	Subtotal for Leeward Community College:	$20,625.00
Menlo College 1000 El Camino Real Atherton, CA 94027-4301		
Morris, Noel	Scholarship	$2,000 00
	Subtotal for Menlo College	$2,000 00
Mills College 5000 MacArthur Blvd Oakland, CA 94613		
Cabrido, Crystal	Scholarship	$4,000 00
	Subtotal for Mills College:	$4,000 00
New Mexico State University Attn: Fin Aid and Scholarship Svcs Educational Svcs Bldg - MSC 5100 Las Cruces, NM 88003-8001		
Gilliland, Adrian	Scholarship	$2,000 00
	Subtotal for New Mexico State University	$2,000 00

Scholarship Grants 01/01/2013 to 12/31/2013

Payee Name	Purpose	Payment Amount
Remington College - Mobile Campus (Honolulu) Attn: Financial Aid 1111 Bishop Street, Suite 400 Honolulu, HI 96813		
Fernandez, Romeo	Scholarship	$1,000 00
Subtotal for Remington College - Mobile Campus (Honolulu):		$1,000 00
Southwestern Assemblies of God University 1200 Sycamore Waxahachie, TX 75165		
Rosa-Arango, Chardonnay	Scholarship	$4,000 00
Subtotal for Southwestern Assemblies of God University		$4,000 00
Spartanburg Community College Financial Aid Office - Student Services Bldg - Room 147 PO BOX 4386 Spartanburg, SC 29305		
Goode, Darrellyn	Scholarship	$1,000 00
Subtotal for Spartanburg Community College		$1,000 00
University of Hawaii - Hilo Financial Aid Office, 200 W Kawili St Hilo, HI 96720-4091		
Giang, Tuan	Scholarship	$4,000 00
Mahi-Leopoldino, Keshia	Scholarship	$5,000.00
Subtotal for University of Hawaii - Hilo·		$9,000 00
University of Hawaii - Manoa 2440 Campus Rd , Box 447 Honolulu, HI 96822		
Adviento, Judy	Scholarship	$5,000 00
Brown, Crystal	Scholarship	$5,000 00
Cambra, Shanice	Scholarship	$4,000 00
Clerk, Brenda	Scholarship	$4,000.00
DeGuerra, Taylor	Scholarship	$4,000 00
Imose, Kelsea	Scholarship	$2,000.00
Keko'Olani, Tiffany	Scholarship	$4,000 00
Santiago, Taisha-Ann	Scholarship	$4,000 00
Yonekura, Kintaro	Scholarship	$2,500 00
Subtotal for University of Hawaii - Manoa:		$34,500 00

Scholarship Grants 01/01/2013 to 12/31/2013

Payee Name	Purpose	Payment Amount
University of Hawaii - Maui College 310 Kaahumanu Ave Kahului, HI 96732-1617		
Feliciano, Chenoa	Scholarship	$3,250 00
Hosaka, Andrew	Scholarship	$2,000 00
Mahaulu, Destiny	Scholarship	$2,000 00
U'u, Samantha	Scholarship	$1,000.00
	Subtotal for University of Hawaii - Maui College:	$8,250 00
University of Hawaii - West Oahu Financial Aid Office, 91-1001 Farrington Highway Kapolei, HI 96707		
Carvalho, Chanel	Scholarship	$4,000 00
Gamiao, Elizabeth-Elyse	Scholarship	$4,000.00
Ganahl-Yates, Chloe	Scholarship	$2,000 00
Lum, Tanisha	Scholarship	$4,000 00
Perez-Doi, Shayna	Scholarship	$4,000.00
	Subtotal for University of Hawaii - West Oahu:	$18,000 00
University of Nevada - Las Vegas Box 452016 4505 S Maryland Pky Las Vegas, NV 89154		
Inaura, Liandra	Scholarship	$4,000.00
	Subtotal for University of Nevada - Las Vegas:	$4,000 00
University of New Mexico 1700 Lomas Blvd NE Albuquerque, NM 87106		
Kelsey, Ashley	Scholarship	$2,000.00
	Subtotal for University of New Mexico.	$2,000 00
University of Oregon Attn. Cashiers P O Box 3237 Eugene, OR 97403		
Mccormick, Bryson	Scholarship	$4,000 00
	Subtotal for University of Oregon:	$4,000 00

Scholarship Grants 01/01/2013 to 12/31/2013

Payee Name	Purpose	Payment Amount
Windward Community College 45-720 Keaahala Rd Kaneohe, HI 96744-3598		
Cachero, Mohala	Scholarship	$1,000 00
Ching-Stevens, Raychel	Scholarship	$2,000 00
Daniels, Kaila	Scholarship	$2,000.00
Morris, Noel	Scholarship	$1,000 00
	Subtotal for Windward Community College:	$6,000.00
	Total for Fund:	$175,875 00

MEDICAL RESEARCH
2013 Request for Proposals

HAWAII 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 2013, 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 Hawai'i 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
- Supports a new researcher or a new line of research in Hawai'i
- Are a collaborative effort in Hawai'i-based research

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 if you have not previously received an account. Please email the following information to medicalresearch@hawaiicommunityfoundation.org (Note: This email address will be deactivated on 1/25/2013):

- **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 Hawai'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 and Leahi Fund applications.

If you have previously received an account, you may use that login and password to access the online application. The link to access the log in page is http://nexus.hawaiicommunityfoundation.org/nonprofit
Once logged in, your will be able to access the Medical Research application from the "Available Online Applications" page.

To submit an application online, please go to www.hawaiicommunityfoundation.org/grants/medical-research.

Deadline
Submit your proposal online by 5:00 p.m. HST on January 24, 2013. Applicants will be notified in April 2013.

Online Application
You will be asked to provide the following:

1. **Proposal Abstract** *(3,000 character count max.)*
   Short description of the technical study.
2. **Lay Summary** *(3,000 character count max.)*
   Short description of the study written for the general public.

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** (see application online to download 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 ID #_PI Name_Name of File (For example, 'App467_JohnSmith_Narrative' or 'App455_JaneDoe_BioSketch'). Do not use apostrophes, #, or parentheses in your file name and each file must have a unique file name.
- ☐ Each file's size should be kept below 500 KB

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, applicants should address previous reviewer feedback point by point.

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/medical-research.

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.

Revised January 2013

Grant Range, Duration and Exclusions:
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 https://nexus.hawaiicommunityfoundation.org/nonprofit 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.

Revised January 2013

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/grants/victoria-s-and-bradley-l-geist-foundation-capacity-building.

Supporting Documents
You will need to upload the following documents as part of your application:
- If the project includes hiring new staff, upload the job description and discuss how the position will be sustained beyond the grant period.

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- **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://www.hawaiicommunityfoundation.org/grants/victoria-s-and-bradley-l-geist-foundation-capacity-building. You will need to fill out the matrix, save it to your computer and then upload it with your application.

Additional documents

- ☐ 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

For applications to be considered they must be submitted online by clicking the "Submit" button on the final page of the application. Applications submitted by 5:00 p.m. (HST) on these dates will be considered at the next Board of Trustees meeting in the following months:

May 15, 2013 for the July meeting
September 16, 2013 for the November meeting

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.

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 2 ◦ Train 7 additional foster parents statewide ◦ Provide intensive staff training, consultation and assistance in new interventions.	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 2 ◦ 12 sessions during August – November. ◦ One week in Sept and one week in November.	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. 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.	(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 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, 2014.

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 https://nexus.hawaiicommunityfoundation.org/nonprofit 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
For applications to be considered they must be submitted online by clicking the "Submit" button on the final page of the application. Applications submitted by 5:00 p.m. (HST) on these dates will be considered at the next Board of Trustees meeting in the following months:

September 16, 2013 for the November meeting
(Note: **applications for the Enhancements for Foster Children grants will only be accepted at the September 16th deadline)**

Revised January 2013

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.

Revised January 2013

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.

Revised January 2013

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 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 https://nexus.hawaiicommunityfoundation.org/nonprofit 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 foster children and/or their caregivers (*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: http://www.hawaiicommunityfoundation.org/nonprofits/fiscal-sponsor-materials
- Fiscal Sponsor's agreement: http://www.hawaiicommunityfoundation.org/nonprofits/fiscal-sponsor-materials
- 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

For applications to be considered they must be submitted online by clicking the "Submit" button on the final page of the application. Applications submitted by 5:00 p.m. (HST) on these dates will be considered at the next Board of Trustees meeting in the following months:

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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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Revised January 2013

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.

Revised March 2013

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.
- 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 https://nexus.hawaiicommunityfoundation.org/nonprofit 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?

Revised March 2013

- What is the organization's experience in this field?
- What are the staff capabilities to conduct the proposed work?

2) 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.

3) Describe which Jim Casey Youth Opportunity Initiative youth outcome(s) your program is designed to address. (*Maximum 4,000 character count single spaced*)
    - What is the outcome area(s) your program is intended to address: permanence, education, employment, housing, physical and mental health or personal and community engagement?
    - Within the identified outcome area(s), what specific outcomes are you trying to achieve?

4) Describe how you will evaluate the outcomes of the program. (*Maximum 4,000 character count single spaced*)
    - What are the indicators of progress towards the specific outcome identified in Q3?
    - 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?

5) 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?

6) Describe your funding plan. (*Maximum 4,000 character count single spaced*)

Revised March 2013

- 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

- 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: http://www.hawaiicommunityfoundation.org/nonprofits/fiscal-sponsor-materials
- Fiscal Sponsor's agreement: http://www.hawaiicommunityfoundation.org/nonprofits/fiscal-sponsor-materials
- 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

For applications to be considered they must be submitted online by clicking the "Submit" button on the final page of the application. Applications submitted by 5:00 p.m. (HST) on these dates will be considered at the next Board of Trustees meeting in the following months:
September 16, 2013 for the November meeting

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.

HAWAI'I COMMUNITY FOUNDATION

Connecting people who care with causes that matter

Scholarships

The 2014-2015 Scholarship Application is now OPEN!

Please visit our How To Apply section for further instruction!

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 180 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.

> CREATE AN HCF SCHOLARSHIP FUND

HAWAI'I COMMUNITY FOUNDATION

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How to Apply for Scholarships

2014-2015 Academic Year Scholarships
For successful submission of your online application please read ALL the instructions listed below

Step 1 Create an Account & Log In
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.

First time applicants: Click on the link below to create a new account using a valid email address You may save and return to your application at any time by using your login information

Returning Applicants Do NOT create a new account Please use your existing username and password to log in If you do not remember your login information or are experiencing issues logging in, please email us at scholarships@hcf-hawaii.org

> CREATE AN ACCOUNT OR LOGIN HERE

Step 2 Complete the Basic Application

Complete all required Personal Information, Academic Information, Financial Information and the Personal Statement Our online common application will match you to all the funds you are eligible for, based on the information you submit We recommend that you complete the application as completely as possible, as it improves your chances of matching to more scholarships

Step 3 Upload Supporting Materials
Upload an electronic or PDF copy of your most recent grade transcript or GED scores (if a transcript is not available) and your 2014-2015 Student Aid Report (SAR), generated by your processed FAFSA to your application Your Personal Statement can be copied and pasted onto your application. Learn more about supporting materials

Step 4 Complete the Optional Sections
Submitting Letters of Recommendation and completing the Additional Questions/Essays section may qualify you for additional scholarships

Step 5 Review & Submit
Before you submit your application, please review your information and complete the certification section. Note You will not be able to submit your application until all required supporting documents are electronically attached to your application. You can check the submission status of your application under Applicant Home Once you submit your online application, you will not be able to make changes to your application or upload additional documents

We recommend that you start early and avoid waiting until the last day to complete your application! Our deadline is final and we do not accept applications or supporting materials past the deadline

NEW EARLY DEADLINE: Start early! Submit your application by January 31, 2014 and HCF will review it to ensure that all required supplementary materials are properly submitted (i e. SAR and grade transcript) HCF will notify you if your supplementary documents are not acceptable and you will have an opportunity to make any necessary revisions Please note that you must resubmit by the final deadline to be considered for scholarships.

The FINAL DEADLINE to submit your complete the online application is 4 00 p.m. (HST) on Thursday, February 20, 2014.

If you have questions, please email HCF Scholarships or call 808-566-5570 (or toll-free from neighbor islands 1-888-731-3863)

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Search Scholarships

Site Navigation

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- 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!

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Search Scholarships

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Search Scholarships Results

Let's get started. Click Apply Now to start the simple application process.

Apply Now!

You searched for:

All Published Scholarships

Search Results

Scholarship Name	Scholarship Description	URL
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 20, 2014 for Fall & Spring semester scholarships; September 19, 2014 for Spring only semester scholarships. Requirements • Be currently or formerly placed in the foster care system in the state of Hawai'i (Applicants who were reunited with their birth parent(s) or were legally adopted prior to their 18th birthday are ineligible) • Applicants must submit a confirmation letter from a DHS or Foster Family Program case worker to verify foster status The letter should indicate whether you aged out of the foster care system	More Info