

The Hanat Endowment

The Hanat Endowment funds are non-tax deductible (C4) and can be used for all activities with the exception that the funds cannot be used for lobbying or support of political candidates.

Brief history: The Hanat endowment is a bequest to the John Muir Chapter (now known as the Wisconsin Chapter,) from the estate of Arthur E. Hanat. In establishing the grant in October 1997, the Chapter passed a resolution stating, “The distribution shall be used only for the support, education and training of volunteers and activists within the Wisconsin Chapter. The activist work includes any of the areas activists work under such as public education. Support, education, and training shall include but not be limited to: (1) expenses incurred by volunteers and activists (such as copying, mailing, travel and lodging) in their work as activists, and (2) training related expenses (such as travel and lodging).” Traditionally, Hanat funds have been reserved for activities carried on by Groups within the Chapter, as well as significant Chapter-designated support for work on the Ice Age Trail.

In a resolution passed in October 1997, The Wisconsin Chapter provided \$5,000 to the Ice Age Trail Foundation towards the construction of a segment of the trail. The remaining amount of the bequest was placed in an endowment fund called the Arthur E. Hanat Endowment under the condition that distribution shall be used only for the support, education and training of volunteers and activists, including but not limited to expenses incurred by volunteers and training related expenses. In 2003, the Chapter Executive Committee expanded the eligibility of Hanat Grants to include Chapter-wide training and Group-level conservation and/or training projects.

In a resolution passed in March 2020, the Wisconsin Chapter Executive Committee changed the reporting requirement “Make a short presentation at an Executive Committee meeting” to “submit a written summary of the project to the Finance Committee, who will briefly report to the Executive Committee.”

While the Hanat Endowment has been historically underused, the following grants were approved in 2002:

- The Southeast Gateway Group to convince the Racine County Board to institute a regular, multi-site, county-wide Household Hazardous Waste collection and disposal system (\$550)
- The Wisconsin River County Group for Energy Policy Education (\$500)
- The Great Waters Group for Preservation of a significant portion of the St. Francis WE Energies property (\$500)
- The River Touring Section for Outings Leader Wilderness First Aid Training (\$1,200)

Intent of the donor: The distribution shall be used only for the support, education and training of volunteers and activists within the Wisconsin Chapter. It has been requested by family and friends that the Hanat Endowment excludes activities involving support of political candidates, including lobbying.

Examples of proposals for non-tax deductible grants:

- Advocacy training for passing a local resolution on sand mining or a solar power ordinance
- A project to explicitly build the membership of a Group or Chapter
- Training on how to meet with local elected officials
- Training on how to create a local government scorecard on environmental issues or creating a scorecard and releasing it to the public

- Implementing of a media campaign related to a local issue campaign

Award criteria:

- Grant shall be used for the support, education and training of volunteers and activists within the Wisconsin Chapter OR
- Chapter-wide training and Group-level conservation and/or training projects may qualify for a grant award.
- Eligible grantees: Applicants must be a Group within the Chapter, an official project or program of a Group or the Chapter, and, or a Section or Specialty Group of the Chapter.
- Completion of Hanat Endowment grant application and submittal is required. (See Approval Process below).
- Proposals that address priority issues or goals of the strategic plan of the Chapter or Group will be given priority.
- A defined project is required – a well thought out project with a clear intended result identified.
- Resources must be available – Some combination of financial & people – i.e. volunteer leaders, volunteer participants and/or staff available and committed to implementing the planned project/campaign.
- The awarded grant must be used by the entity/person applying for the Grant and cannot be passed through or on to another entity.

Approval process:

Completed applications should be submitted to the wisconsin.chapter@sierraclub.org or sent to Sierra Club – Wisconsin Chapter, c/o Hanat Grant Application, 754 Williamson St., Madison, WI 53703 by October 15.

The Finance Committee will review all applications submitted by the deadline in the fourth quarter of the year and make recommendations for awards to the Executive Committee prior to their final meeting in November or December.

Hanat Grant Awards will be given to applications that are recommended by the Finance Committee and approved by 2/3 vote Executive Committee members present at a regularly scheduled meeting each year.

Pending funds availability, the Finance Committee will award up to 3 grants per year, with total grants disbursed not exceeding \$1,500 per year.

Guidelines:

The Hanat endowment is comprised of funds designated as 501(c) 4. Hanat grants may be given for 501(c)3 activities, however, preference goes towards (c) 4 projects.

Some of the Hanat Grant funds may be used for a training event, sponsored by the Chapter, which would have the purposes of (a) increasing Group organizational abilities, and (b) improving Chapter-Group interactions. The training topics should be chosen with the intention of serving the above purposes. Group allocation from the Chapter will be split into c (3) and c(4) components, the expenditure of which the Groups will have to monitor.

Use of Hanat funds for Chapter-sponsored training should occur no more frequently than biennially, and use of Hanat funds for this purpose should be reviewed periodically by the Chapter Executive Committee for relevance.

Reporting requirements:

At the conclusion of the project being funded, grantees are required to submit a simple report of project accomplishments. The grantee shall:

- Submit a written summary of the project to the Finance Committee, who will briefly report to the Executive Committee
- Submit an article for the Group and Chapter *Wisconsin Sierran* newsletter on how the project achieved campaign goals or fulfilled training needs.
- Submit documentation of qualified expenses to the Chapter Treasurer for reimbursement (receipts, invoices paid etc.).
- Complete the project and submit all expenses for reimbursement within 12 months of the approval of the grant or refund the money to the Wisconsin Chapter's Hanat Grant Fund.
- Awardees are not eligible for future grants until all previous grant requirements are met.