



COOKE  
FOUNDATION,  
LTD.



2021 ANNUAL REPORT



# MISSION STATEMENT

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*The Cooke Foundation supports worthy endeavors in the community that the family feels will make a significant difference in the betterment and welfare of the people of Hawaii.*

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**ANNA CHARLOTTE COOKE**

**(1853 – 1934)**

*photo by Matteo Sandona*



**CHARLES MONTAGUE COOKE**

**(1849 – 1909)**

*photo by Jim Carter*

# HISTORY

**ON JUNE 1, 1920**, the forerunner of the Cooke Foundation, Limited, the Charles M. and Anna C. Cooke Trust, was created by Anna C. Cooke. The purpose of the Trust was:

*“to assure in some measure the continuance of, and also to extend and expand, all worthy endeavors for the betterment and welfare of this community and other communities by gifts and donations to the United States of America, any State, Territory, or any political subdivision thereof, and to corporations now or here after organized and operated exclusively for religious, charitable, scientific, or educational purposes, or for the prevention of cruelty to children or animals...”*

The funding for the Trust was 300 shares of Charles M. Cooke, Limited. Anna Charlotte Cooke was born in Honolulu on September 5, 1853, the fifth child of William H. and Mary H. Rice, who were missionaries to the Islands. She grew up on Kauai, and in April of 1874 married Charles Montague Cooke. Charles M. Cooke was born in Honolulu on May 16, 1849, the fifth child of the missionaries Amos S. and Juliette M. Cooke. He died on August 17, 1909.

Charles M. Cooke, Ltd. was formed, at Charles’ suggestion, by incorporating his and Anna’s holdings. He had obtained his considerable assets over the years by first working for Castle and Cooke; by investing in sailing ships carrying sugar, molasses, and rice; by becoming a partner in Lewers and Cooke, Ltd., a lumber company; by acquiring large holdings in Lihue Plantation, Hawaiian Agricultural Company, and C. Brewer Company; and through other investments, such as Hawaiian Electric Company, Mutual Telephone Company, and

Ewa Plantation Company. After his retirement in 1894, he and P.C. Jones started Bank of Hawaii in 1897 and, later, Hawaiian Trust Company.

In 1898, as Charles was making his will, he wrote to Anna, in California at the time, suggesting that they merge their estates. He did not want his holdings to be made public when he died, as was customary in those times. Additionally, as stated in his will:

*“...the object of forming said corporation (Charles M. Cooke, Ltd.) was to hold my wife’s and my own estate intact for the benefit and enjoyment of our children...”*

*“...extend and expand, all worthy endeavors for the betterment and welfare of this community and other communities...”*

Anna agreed to this plan, so Charles M. Cooke, Ltd. was formed with one-fifth shares belonging to Anna, and four-fifths to Charles M. Cooke. Clarence H. Cooke, speaking of his father:

*“...I have often marveled at the clear foresight of father in forming this corporation as a means of holding the family as a unit, each of his children continuing to hold equal interest in ownership. That never could have resulted if a distribution of his holdings had been made at the time of his passing, thus keeping the family together, and continuing the form of investments along the lines that he personally originated...”*

Charles M. Cooke, Ltd. was dissolved at the end of 1942, and its assets distributed to its 58 stockholders. The first Trustees of the Charles M. and Anna C. Cooke Trust were Anna C. Cooke and

her six children: C. Montague Cooke, Jr., Clarence H. Cooke, George P. Cooke, Richard A. Cooke, Alice C. Spalding, and Theodore A. Cooke. Meetings were held on Thanksgiving Day on Anna's lanai at her country home at Malaekahana. In June of 1971, Charles M. and Anna C. Cooke Trust, a private foundation, was incorporated in compliance with the Internal Revenue Code. Charles M. and Anna C. Cooke, Ltd. was formed. In 1972, the first annual report was published by the Trust. Four Trustee meetings per year were scheduled. Past meetings had been held once a year in December at Theodore Cooke's home. The assets of the Trust were transferred to Hawaiian Trust Company, Ltd. to act as a financial agent, manage the endowment portfolio, and act as grants administrator. Prior to this, Clarence Cooke and then Theodore Cooke had managed the portfolio and been grants administrators. The number of Trustees was later increased from five to six so that each family would be represented.

In 1980, the name of Charles M. and Anna C. Cooke, Ltd. was changed to the Cooke Foundation, Limited,

*"...recognizing the expanded interests of family members, and wishing to reflect this broadened perspective, we have become the Cooke Foundation, Limited as of July 1, 1980."*

Samuel A. Cooke was made a Trustee in 1973, and when Richard Cooke moved to California in 1989, Samuel Cooke, a member of the fourth generation, was elected president. In 1988, the Hawaii Community Foundation was made grants administrator.

At the 1987 April meeting, the Trustees adopted the policy that each Trustee appoint one or two alternates from their branch of the family to serve in their stead when they were unable to attend a meeting, or in the case of the Trustee's death, to be the successor to the Trustee, subject to the board's approval. The Alternate Trustees receive a copy of the minutes of meetings and attend the last board meeting of each year. In this way, the Trustees felt that more members of the family would become involved in the Cooke Foundation, Limited.



# TRUSTEES & SUCCESSORS

*Charles M. and Anna C. Cooke Trust  
and the Cooke Foundation, Limited.*

ORIGINAL TRUSTEES	SUCCESSOR TRUSTEES		
<b>Anna C. Cooke</b> 1920 – D. 1934			
<b>C. Montague Cooke Jr.</b> 1920 – D. 1948	<b>Carolene C. Wrenn</b> T. 1948 – R. 1971	<b>Samuel A. Cooke</b> T. 1973 – R. 2012	<b>Catherine L. Cooke</b> T. 2012 –
<b>Clarence H. Cooke</b> 1920 – D. 1944	<b>Richard A. Cooke Jr.</b> T. 1944 – R. 1998	<b>Lynne Johnson</b> T. 1989 – R. 2014	<b>Gregory C. Wrenn</b> T. 2014 –
<b>George P. Cooke</b> 1920 – D. 1960	<b>Dora C. Derby</b> T. 1971 – R. 1989	<b>Anna Derby Blackwell</b> T. 1989 – R. 2008	<b>Caroline Bond Davis</b> T. 2008 –
<b>Richard A. Cooke</b> 1920 – D. 1941	<b>Dorothea C. Paris</b> T. 1941 – D. 1982	<b>Betty P. Dunford</b> T. 1982 – R. 2004	<b>Elisabeth (Lissa) Dunford</b> T. 2004 –
<b>Alice C. Spalding</b> 1920 – R. 1963	<b>Phillip E. Spalding</b> T. 1963 – R. 1971	<b>Charles C. Spalding</b> T. 1971 – R. 1991	<b>Charles C. Spalding Jr.</b> T. 1991 –
<b>Theodore A. Cooke</b> 1920 – R. 1971	<b>Catherine C. Summers</b> T. 1971 – R. 1993	<b>Dale S. Bachman</b> T. 1993 – R. 2017	<b>Amber Strong Makaiau</b> T. 2017 –



# OFFICERS & TRUSTEES



## PICTURED (LEFT TO RIGHT)

**GREGORY C. WRENN** | President & Trustee

**ALISON BACLIG** | Alternate Trustee

**CHARLES C. SPALDING, JR.** | Vice President, Treasurer & Trustee

**ELIZABETH (LISSA) DUNFORD** | Vice President & Trustee

**RIKKI COOKE** | Alternate Trustee

**CAROLINE BOND DAVIS** | Vice President, Secretary & Trustee

**DALE BACHMAN** | Alternate Trustee

**BOYD DAVIS BOND** | Alternate Trustee

**JAMES (TOBY) KING** | Alternate Trustee

**NICOLE SPALDING** | Alternate Trustee

**AMBER STRONG MAKAI AU** | Vice President & Trustee

**EDITH COOKE** | Alternate Trustee

**ROBERT COWELL** | Alternate Trustee

## NOT PICTURED

**CATHERINE L. COOKE** | Vice President & Trustee

**CRAIG SPALDING** | Alternate Trustee

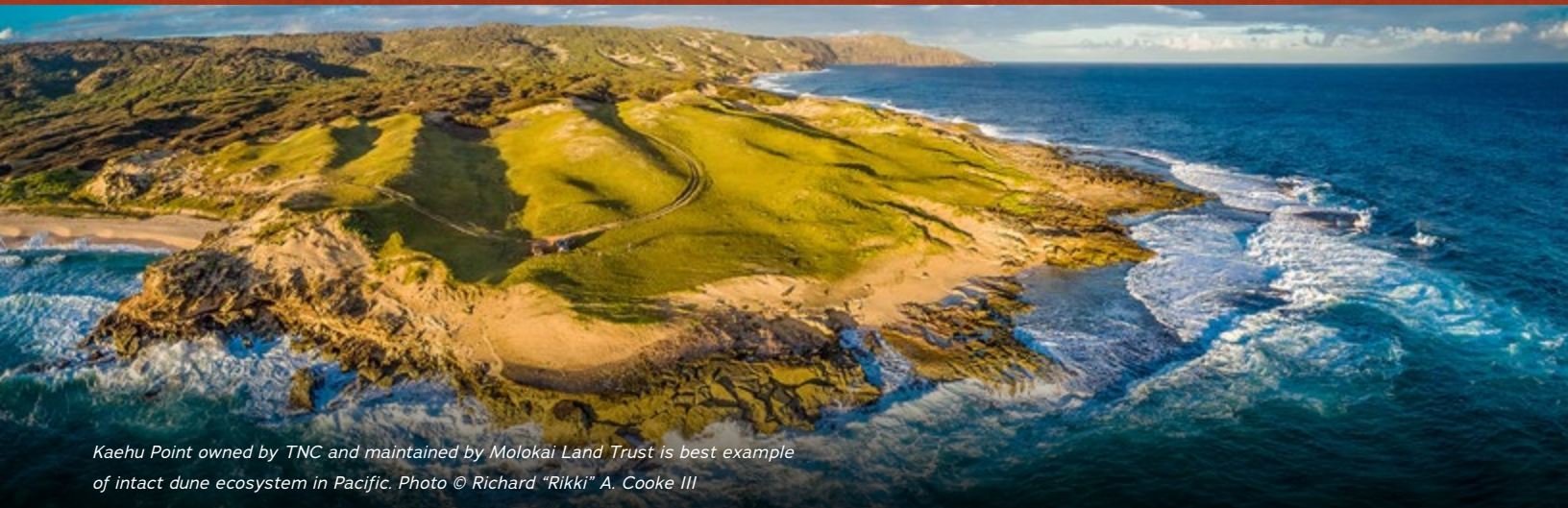
**FRED COWELL** | Alternate Trustee

**JULIET JOHNSON-MOORE** | Alternate Trustee



# THE NATURE CONSERVANCY OF HAWAII CELEBRATING 40 YEARS

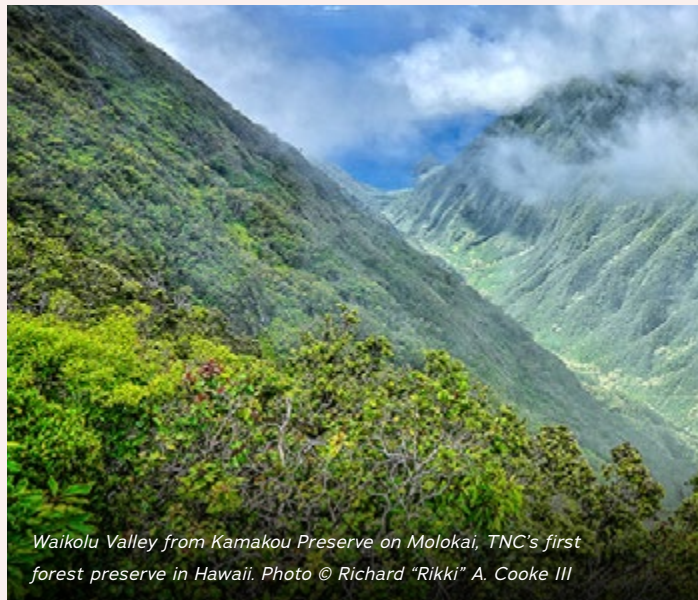
## HOW IT ALL BEGAN



*Kaehu Point owned by TNC and maintained by Molokai Land Trust is best example of intact dune ecosystem in Pacific. Photo © Richard "Rikki" A. Cooke III*

Before there was even a law on the books in Hawaii for conservation easements, local businessman Samuel Cooke and President of Molokai Ranch Philip Spalding signed one for Kamakou, establishing The Nature Conservancy's first forest preserve in Hawaii. It was the kind of pioneering excellence TNC is known for — informed by science, strategized with business acumen, and bolstered by strong relationships. Spalding called it "the most important thing I've done in my life."

Establishing Kamakou Preserve on Molokai, and a few years later the Waikamoi Preserve on Maui, marked the beginning of a new norm for protecting nature. This TNC model forged partnerships between local businesses, scientists, government and landowners, and was supported by philanthropists who donated their time and resources to save what Cooke called "the real Hawaii" — a land of incredible biological diversity and cultural connection, with spectacular landscapes, plants, and animals found nowhere else on Earth.



*Waikolu Valley from Kamakou Preserve on Molokai, TNC's first forest preserve in Hawaii. Photo © Richard "Rikki" A. Cooke III*

In 1980, Henry Little, a Regional Director for TNC who assisted with the Kamakou deal, helped establish the Hawaii state chapter — TNC's twentieth. Little says the success of the chapter rested on hiring the right local people, such as Kelvin Taketa, who started as a field representative and then led TNC Hawaii as its Executive Director into the 1990s. Little also credits a strong board, led by Cooke, that brought unlikely partners together.





Photo © Richard “Rikki” A. Cooke III

“At that time, businesses and environmentalists didn’t mix and didn’t realize they had shared values,” says Little.

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***“Sam Cooke changed that and built a powerhouse board that made everything else possible.”***

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While the organization recognized Hawaii as the endangered species capital of the world, TNC’s early staffers note that the unique natural heritage of these islands — and the threats to it — was not taught in schools while growing up in Hawaii. Education and building awareness were essential components of TNC’s early work. Internship programs and lesson plans helped cultivate the next generation of local conservation professionals. *The Islands of Life*, co-authored by TNC’s Senior Scientist and Cultural Advisor Sam ‘Olu Gon and historian Gavan Daws in 1988, brought native plants and birds into people’s living rooms and thoughts. “We were able to share the plight of our endangered birds, insects like the happy face spider and gorgeous singing land snails, unique plants and trees,” says Taketa. “Seeing it firsthand ignited people’s passion for and pride in Hawaii. We built a new norm for conservation.”

During the 1980s, Hawaii’s population reached 1 million, teaching and learning in the Hawaiian language were restored through language immersion schools, and Oahu residents voted against condo development above Sandy Beach. TNC doubled its membership, opened five more preserves across four islands, and created the first comprehensive maps of Hawaii’s ecosystems. TNC also helped secure state and federal funding for conservation management, resulting in the first national wildlife refuge for endangered tropical forest birds in the U.S. at Hakalau on the island of Hawaii.

In the early 1990s, TNC mustered key partners including the state’s Division of Forestry and Wildlife, Haleakala National Park, Maui Board of Water Supply and Haleakala Ranch to form the first of what would



The rare happy face spider is found only in Hawaii.  
Photo © Zach Pezzillo





View over Moomomi Preserve on Molokai from cave in Kalani Cliff.  
Owned by TNC and cared for by Molokai Land Trust. Photo © Richard “Rikki” A. Cooke III

become many Watershed Partnerships — voluntary alliances among private and public landowners to manage forests, a critical source of the islands’ fresh water. The East Maui Watershed Partnership was the first of its kind, covering 100,000 acres (about half the size of New York City). Today 10 Watershed Partnerships with more than 74 public and private landowners cover 2.2 million acres across Hawaii — almost half the state’s land.

But even these expansive partnerships couldn’t stop the spread of threats like invasive weeds and feral animals. A 1992 TNC report found that Hawaii had the nation’s highest rate of invasive species due to gaps in prevention, detection and control programs. In response, TNC spearheaded the Coordinating Group on Alien Pest Species (CGAPS) and the Invasive Species Committees, which brought together government, local farmers and ranchers, business, and community groups to combat this

problem. The related Silent Invasion campaign made invasive species a household phrase.

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*“I am humbled by TNC’s legacy of conservation in Hawaii and excited to be part of the next generation guiding the way into the future,”*

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says Ulalia Woodside, current Executive Director for the Hawaii chapter. TNC continues to expand protected lands and forge partnerships to effectively manage Hawaii’s natural lands and the vital resources and unique species they support. The Cooke Foundation is a proud annual supporter of TNC’s Hawaii Chapter and we applaud them on the milestone of their 40th Anniversary.

By Evelyn Wight – Reprinted by permission of The Nature Conservancy, Hawaii Chapter  
[www.nature.org/hawaii](http://www.nature.org/hawaii)



Hawaiian tree snails have unique and beautiful markings.  
Photo © G. T. Larson



An ʻĪiwi (scarlet honeycreeper) feeds on the rare ʻōpelu (*Lobelia grayana*) in Waikamoi Preserve on Maui.  
Photo © Jack Jeffrey



# 2021 YEAR IN REVIEW



**FOR MORE THAN 100 YEARS**, successive generations of the Cooke Family have strived to faithfully perpetuate and execute the noble intentions of our founder, Anna Charlotte Cooke, through the Cooke Foundation's grantmaking and charitable giving.

This past year, as recovery efforts from the global pandemic intensified, the Foundation increased its annual payout to meet the growing needs of the community.

2021 will likely be remembered as a year of uncertainty, confusion, hardship and unimaginable loss. I hope we also recall the many instances of courage, innovation, and adaptation that we collectively witnessed, in the face of adversity. We are reminded how resilient the human spirit is, as we saw countless acts of kindness and compassion.

With deep appreciation and admiration, the Trustees of the Cooke Foundation, Ltd. salute the leadership, staff and volunteers of the many organizations that are tirelessly working to ensure a better tomorrow for our island home. We have unwavering confidence in Hawaii's nonprofit community, knowing that they possess the strength, fortitude and ingenuity to execute their mission *"for the betterment & welfare of the people of Hawaii."* We stand with them, ready to support and invest in their endeavors. Our lives are enriched by the work they do. With gratitude, we thank our partners at the Hawaii Community Foundation for their steadfast guidance and support.

A handwritten signature in black ink that reads "Gregory C. Wrenn". The signature is fluid and cursive, with the first name being the most prominent.

**GREGORY C. WRENN**  
President & Trustee



# ASSISTANCE DOGS OF HAWAII



**ASSISTANCE DOGS OF HAWAII** specializes in training assistance dogs that increase independence, enhance quality of life, and provide support for more than 16,000 residents with disabilities and other special needs each year throughout the State of Hawaii. New puppies undergo over a year of training at “Sadie’s Place,” a 2.5-acre, state-of-the-art service dog training facility located in Upcountry Maui, which includes indoor and outdoor training facilities, nature trails, an agility yard and exercise field, as well as offices, classroom, and housing. Grant funding from the Cooke Foundation supported campus improvements at Sadie’s Place through the purchase of training equipment and replacement of artificial grass for its outdoor agility yard and campus courtyard, as well as tree trimming along newly paved wheelchair accessible nature trails and other areas on campus that are regularly accessed by clients and puppies in training. As a result, 100 percent of puppies in training achieved increased coordination, agility, and balance.





# HAWAII FOODBANK



**HAWAII FOODBANK** is Hawaii's leading hunger relief organization and is a trusted and established resource for those in need of perishable and non-perishable food items. Hawaii Foodbank distributed more than 4.1 million pounds of donated and purchased fresh produce on Oahu last year. The Hawaii Foodbank's Farm to Foodbank program was developed in partnership with the Hawaii Farm Bureau to purchase fresh produce

from local farmers with the goal of providing high quality, nutritious produce to our most vulnerable communities, while also contributing to long-term food sustainability in Hawaii. With a grant from the Cooke Foundation, Hawaii Foodbank purchased more than 11,200 pounds of fresh produce and distributed to more than 22,648 people through its Ohana Produce Plus program food distribution sites around Oahu in April 2021.





# LA PIETRA – HAWAII SCHOOL FOR GIRLS



## **LA PIETRA – HAWAII SCHOOL FOR GIRLS**

is an independent, college preparatory school for young women in grades 6–12. Established in 1964, La Pietra strongly believes in female-focused education and empowerment, helping its students develop into their best and most authentic selves while preparing for success in today’s society. During the summer of 2021, La Pietra collaborated with four local organizations to deliver three

week-long workshops focused on developing the purpose and vision of young women in grades 5–9 beyond its student body to students from the larger community. A grant from the Cooke Foundation enabled a total of 54 students to participate in the Girls Talk Back program facilitated by CEEDS of Peace, which teaches peace building, leadership, feminism, and self-empowerment.





# FRIENDS OF AMY B.H. GREENWELL ETHNOBOTANICAL GARDEN



## **THE FRIENDS OF AMY B.H. GREENWELL**

**ETHNOBOTANICAL GARDEN** is an authentic ethnobotanical and historical landscape in Kealakekua ahupuaa, overlooking Kealakekua Bay. It includes the only publicly accessible intact archaeological sites of the Kona Field System, over 250 native plant species, over 150 Hawaiian cultivars, and the significant Paikapahu Heiau. In 2019, with grant assistance from the Cooke Foundation, the Friends of Amy B.H. Greenwell Ethnobotanical Garden purchased the Garden from the Bernice Pauahi Bishop Museum and have turned its focus to the revitalization of the Garden to reinvigorate successful programs from the past, as well as strategize for new approaches in the present and future. In revitalizing the Garden, the Friends have prioritized four major areas, including long overdue repairs to Amy Greenwell's home "Pulelehua." A grant from the Cooke Foundation in 2020 enabled the Friends to: replace Pulelehua's

original metal roof, which was badly rusted and leaking; add solar-powered roof vents to cool the old attic space; and install a solar tube to light the kitchen space. Pulelehua will be restored and repurposed for public presentations, children's activities, classes in ethnobotany and other programs.





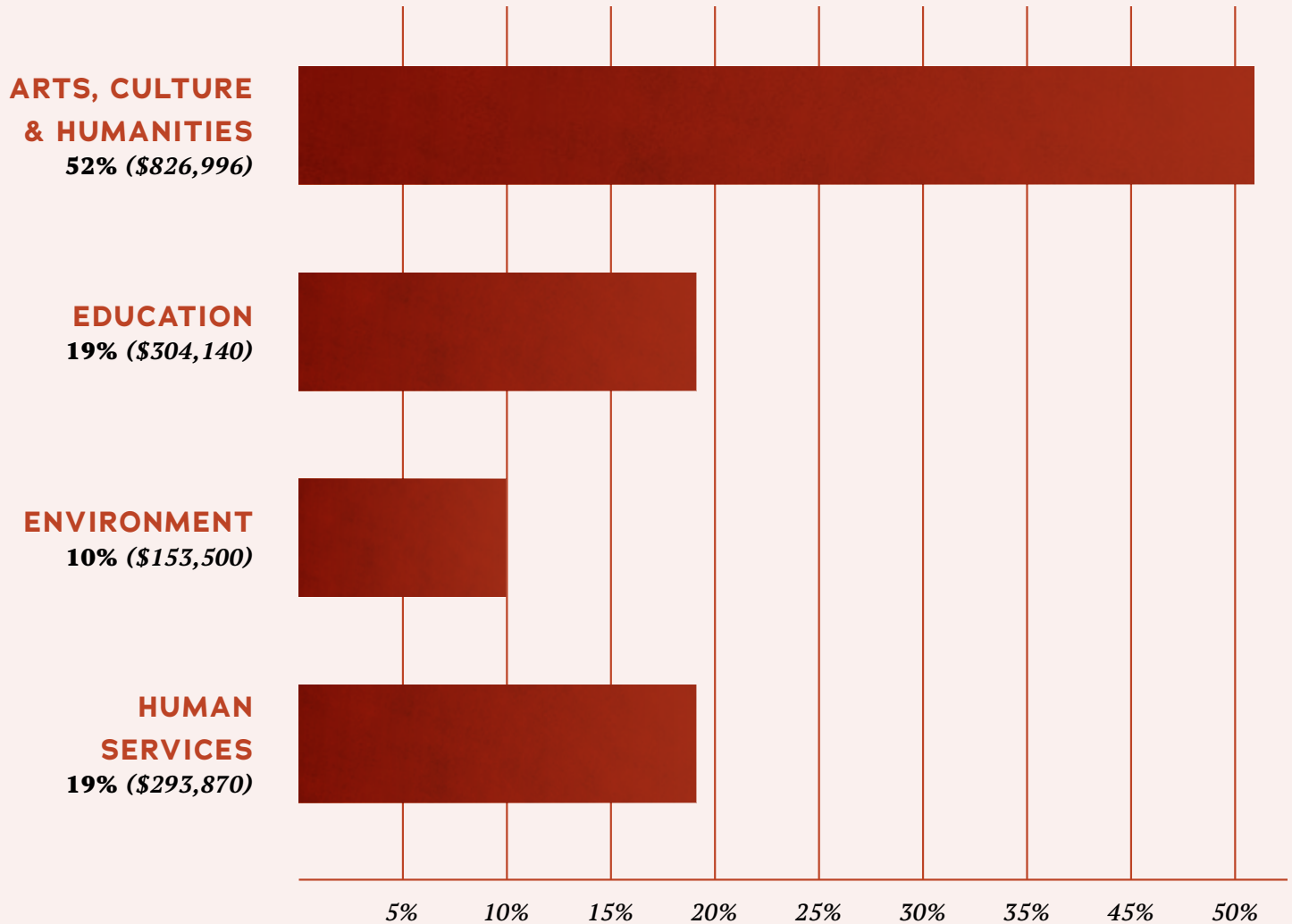
# COMPARATIVE SUMMARY

## GRANT AND CONTRIBUTION DISTRIBUTIONS

YEARS ENDED JUNE 30, 2021 – 2017

YEAR	2021		2020		2019		2018		2017	
ARTS, CULTURE & HUMANITIES	826,996	52%	370,000	33%	433,145	40%	368,994	39%	339,500	34.5%
EDUCATION	304,140	19%	245,00	22%	310,000	28%	261,000	27%	139,000	14.1%
ENVIRONMENT	153,500	10%	175,000	15%	167,000	15%	102,985	11%	153,000	15.6%
HEALTH	—		50,000	4%	—		—		—	
HUMAN SERVICES	293,870	19%	295,000	26%	180,967	17%	217,600	23%	351,500	35.8%
TOTAL	<b>\$1,578,506</b>	<b>100%</b>	<b>\$1,135,000</b>	<b>100%</b>	<b>\$1,091,112</b>	<b>100%</b>	<b>\$950,579</b>	<b>100%</b>	<b>\$983,000</b>	<b>100%</b>

# PERCENTAGE OF TOTAL GRANTS FOR 2021





# 2021 GRANTS LIST

JULY 1, 2020 – JUNE 30, 2021

## ARTS, CULTURE & HUMANITIES

### PROGRAM

#### ALOHA KUAMOO AINA

Kuamoo Community Stewardship  
& Resources Project.....\$18,082

#### BAMBOO RIDGE PRESS

Kipuka .....\$8,000

#### CHAMBER MUSIC HAWAII

Chamber Music Hawaii  
2020 – 2021 Season.....\$10,000

#### HANA ARTS

Building the East Maui  
Economy through Art .....\$10,000

#### HAWAII ALLIANCE FOR ARTS IN EDUCATION

Traditional Arts Afterschool Program.....\$10,000

#### HAWAII CHILDREN'S THEATRE

HCT Academy/Summer .....\$5,000

#### HAWAII OPERA THEATRE

Hawaii Opera Theatre:  
Hometown To The World .....\$20,000

#### HAWAII PERFORMING ARTS COMPANY, LTD.

STEAM Theatre:  
Digital Production in the Theatre .....\$20,000

#### HAWAII PREPARATORY ACADEMY

Isaacs Community Art Education.....\$5,000

#### HAWAII SYMPHONY ORCHESTRA

Hawaii Symphony Orchestra  
2020 – 2021 Season.....\$30,000

#### HAWAII YOUTH OPERA CHORUS

E Mele Kakou Outreach Program .....\$20,000

#### HOLY NATIVITY SCHOOL

Integrating Ceramics Education .....\$2,500

#### HONOLULU ACADEMY OF ARTS

Annual Grant – Unrestricted  
General Support .....\$100,000

#### HONOLULU PRINTMAKERS

A New Community Printmaking Studio  
for Honolulu .....\$20,000

#### HONOLULU THEATRE FOR YOUTH

HTY's Digital Theatre Program .....\$15,000

#### HUI HOOLANA

Sustaining through COVID changes.....\$25,000

#### HUI NOEAU

Hui Noeau Open Studio Program .....\$10,000

#### KA OHANA O KALAUPAPA

Establishing a Docent Program  
for Kalaupapa .....\$12,000

#### KAHILU THEATRE FOUNDATION

Kahilu Theatre Resiliency  
Project – Digital Outreach.....\$15,000

#### KONA DANCE & PERFORMING ARTS, INC.

Kona Dance Staff  
Restructuring Project .....\$10,000

#### MANOA HERITAGE CENTER

Annual Grant – Unrestricted  
General Support .....\$50,000

#### MANOA HERITAGE CENTER

Engaging Local Communities  
to Build Cultural Resilience .....\$10,000

#### MAUI MAKERS, INC.

The Sewing Hui: Sewing Initiatives .....\$4,500

#### UNIVERSITY OF HAWAII FOUNDATION

Ha Kupuna Nupepa.....\$19,914

### CAPITAL

#### HONOLULU ACADEMY OF ARTS

HoMA Beretania Campus  
Capital Improvements .....\$200,000

#### KOKUA KALIHI VALLEY

#### COMPREHENSIVE FAMILY SERVICES

Hale Lauele:  
Nature Classroom & Wood Studio.....\$67,000



**ST. MARY'S EPISCOPAL CHURCH**

Stabilization & Safety  
for Soldiers Chapel .....\$25,000

**STORYBOOK THEATRE OF HAWAII**

Kokee Community Arts Camp .....\$40,000

**THE MERWIN CONSERVANCY, INC.**

Preparing W.S. Merwin's Historic Home  
& Garden Dojo for Public Use through  
Transformative Program .....\$20,000

**UNIVERSITY OF HAWAII FOUNDATION**

John Young Museum of Art  
Capital Request .....\$25,000

**TOTAL ARTS, CULTURE  
& HUMANITIES..... \$826,996**

**EDUCATION****PROGRAM****AWAIAULU**

Kipapa Educator Resources III .....\$50,140

**FRIENDS OF AMY B.H. GREENWELL  
ETHNOBOTANICAL GARDEN**

Hanau Hou — Revitalizing  
Amy Greenwell Garden .....\$35,000

**HANAHAUOLI SCHOOL**

Annual Grant – Unrestricted  
General Support .....\$50,000

**HAWAII AGRICULTURAL FOUNDATION**

HAF's K – 12 Agriculture  
Education Programs .....\$10,000

**HAWAII ALLIANCE FOR PROGRESSIVE ACTION**

Reclaiming Democracy .....\$10,000

**HAWAII LITERACY, INC.**

Hawaii Literacy Bookmobiles .....\$15,000

**HUI MAKUA PUNANA LEO O MOLOKAI**

Tuition Assistance &  
COVID-19 Response Project .....\$20,000

**LA PIETRA - HAWAII SCHOOL FOR GIRLS**

The Future is Wahine Summer Workshop .....\$6,000

**MAUI HULIAU FOUNDATION**

Huliau Climate Literacy Project .....\$5,000

**PURPLE MAIA FOUNDATION**

Future Ancestors .....\$18,000

**THINKTECH HAWAII**

Investigative Journalist Project .....\$15,000

**CAPITAL****GIRL SCOUTS OF HAWAII**

STEM Center for Excellence  
at Camp Paumalu .....\$10,000

**ISLAND SCHOOL**

New Classroom Building Project .....\$60,000

**TOTAL EDUCATION..... \$304,140**

**ENVIRONMENT****PROGRAM****AMERICAN BIRD CONSERVANCY**

Protecting Endangered Seabirds  
on Maui from Manmade Threats .....\$10,000

**HAWAIIAN ISLANDS LAND TRUST**

HILT Aina Based Education Program .....\$10,000

**KA IPU MAKANI CULTURAL HERITAGE CENTER**

Huliamahi Loipunawai Farming Education  
& Training Project (Huliamahi) .....\$15,000

**MALAMA MAUNALUA**

Incorporating Community  
Into Coral Restoration .....\$15,000

**MOLOKAI LAND TRUST**

Annual Grant – Unrestricted  
General Support .....\$25,000

**PACIFIC AMERICAN FOUNDATION**

Engaging Hawaii Communities  
Through Kahoolawe's Culture,  
History & Coastal Restoration .....\$20,000



**THE NATURE CONSERVANCY OF HAWAII**

Annual Grant – Unrestricted

General Support .....\$25,000

**THE NATURE CONSERVANCY OF HAWAII**

Enhancing Hawaiian Biocultural

Capacity in Conservation.....\$20,000

**THE NORTH SHORE COMMUNITY LAND TRUST**

Community Based Restoration

of Kalaheokaunaoa (Kahuku Point) .....\$3,500

**THE TRUST FOR PUBLIC LAND**

Kaneohe Pali to Loi.....\$10,000

**TOTAL ENVIRONMENT ..... \$153,500****HUMAN SERVICES****PROGRAM****ADULT FRIENDS FOR YOUTH**

Mobile Relief Program .....\$19,870

**ANGEL FLIGHT WEST**

Wings Over Hawaii .....\$8,000

**ASSISTANCE DOGS OF HAWAII**

Sadie's Place Training

Campus Improvements .....\$10,000

**CENTER FOR ASSISTIVE TECHNOLOGY  
AND COMMUNICATION**

CATCH Speech Therapy &amp; AAC Project .....\$5,000

**FRIENDS OF THE CHILDREN'S  
JUSTICE CENTER OF OAHU**

Hoola Na Manao – Hope and Healing .....\$5,000

**HAWAII FOODBANK**

Farm to Foodbank .....\$15,000

**HONOLULU HABITAT FOR HUMANITY**

Building Back with Aloha: Engaging

Volunteers Safely in a Post-Covid World.....\$10,000

**HOOLA NA PUA**

Healing from Trauma through the Arts .....\$20,000

**IHS, THE INSTITUTE FOR  
HUMAN SERVICES, INC.**

IHS COVID Prevention

&amp; Response (CPR) Project.....\$20,000

**KAUAI FOOD BANK INC.**

Keiki Cafe.....\$10,000

**KAUAI PLANNING AND ACTION ALLIANCE**

Kauai Resilience Project .....\$10,000

**MA KA HANA KA IKE BUILDING PROGRAM**

Malama I Na Hulu Kupuna.....\$20,000

**MALAMA NA MAKUA A KEIKI**

Nutrition Support Program.....\$18,000

**RIVER OF LIFE MISSION**

Emergency Food &amp; Services Project.....\$20,000

**SAMARITAN COUNSELING CENTER HAWAII**

Client Assistance Fund.....\$5,000

**SUSANNAH WESLEY COMMUNITY CENTER**

SWCC - Trafficking

Victim Assistance Program.....\$20,000

**THE SALVATION ARMY –  
HAWAIIAN & PACIFIC ISLANDS DIVISION**

Bringing Hope &amp; Help

Through Community Hubs .....\$20,000

**YMCA OF HONOLULU,  
METROPOLITAN OFFICE**

YMCA Winter Break Childcare .....\$25,000

**CAPITAL****HABITAT FOR HUMANITY HAWAII ISLAND, INC**

Forklifts for Affordable Homes.....\$5,000

**KA LIMA O MAUI**

Uniting Ka Lima O Maui

Services on One Campus.....\$10,000

**MALAMA KAUAI**

Moloaa AINA Center: Growing a

Food Hub That Fosters the Resilience

of Farmers,Community &amp; Keiki.....\$18,000

**TOTAL HUMAN SERVICES ..... \$293,870****TOTAL COOKE FOUNDATION, LTD. \$1,578,506**

# 2022 GRANT APPLICATION GUIDELINES

*EFFECTIVE JULY 1, 2021 THROUGH JUNE 30, 2022*

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## MISSION

*The Cooke Foundation supports worthy endeavors in the community that the family feels will make a significant difference in the betterment and welfare of the people of Hawaii.*

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## ELIGIBILITY & PRIORITIES

- The Foundation's priority interests are arts, culture, and humanities; education; environment; and human services. The Foundation may make grants in other areas of interest at the discretion of the Trustees, but unsolicited proposals outside its priority interests will not be considered.
- Applicants must be classified under section 501(c)(3) of the Internal Revenue Code or must apply through a fiscal sponsor with 501(c)(3) status. The Foundation does not make grants to supporting organizations classified under section 509(a)(3) of the Internal Revenue Code.
- Applicants and/or fiscal sponsors must be in existence for five years based on the IRS ruling date of federal income tax exemption and be in stable financial condition. Applicants and/or fiscal sponsors that do not meet the five-year eligibility requirement must be sponsored by a Cooke Foundation Trustee.
- The Foundation does not generally fund loans; endowments; funds for re-granting; conferences, festivals, and similar one-time events; religious programs; activities that have already occurred; scholarships; and grants or direct cash payments to individuals or for the benefit of identified individuals.
- Applications from a unit of the University of Hawaii must be submitted through the University of Hawaii Foundation.
- A grantee may not receive more than one grant in any fiscal year (July through June), except that a grantee serving as the fiscal sponsor for another organization may receive a second grant for its own project. Fiscal sponsors are eligible to sponsor multiple projects at a time, including their own; however, the Foundation's guidelines below, regarding ongoing funding and support for two consecutive fiscal years, will apply to fiscally sponsored organizations, as well as organizations serving as a fiscal sponsor.
- The Cooke Foundation encourages Hawaii non-profit organizations to build their long-term sustainability through support from diverse funding sources such as foundation grants, public grants and contracts, individual donations, and earned income. The Foundation generally does not provide ongoing funding, support any one program for more than two consecutive fiscal



years, or fund any one organization for more than two consecutive fiscal years.

- The Foundation may choose to fund over a number of years. In the case of a multi-year pledge, payments are released in twelve-month intervals, and each payment is contingent on receipt of a satisfactory progress report.
- Requests for more than \$20,000 must be sponsored by a Cooke Foundation Trustee.
- Requests for more than \$5,000 should demonstrate that the Cooke Foundation portion of the budget does not exceed 30% of the total project budget.
- The Foundation does not accept incomplete applications or applications from organizations with overdue reports.

## APPLICATION PROCEDURES

**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 for the first time, it may take two to three days for you to receive the account information. We recommend that you request your account early to give yourself adequate time to complete the application by the submission deadline. If you are not able to submit your proposal online, please contact Daisy Chung via email at [DChung@hcf-hawaii.org](mailto:DChung@hcf-hawaii.org) or call (808) 566-5503, toll free from neighbor islands (888)731-3863 ext. 503.

## PROPOSAL NARRATIVE

**ORGANIZATION:** Describe the organization, including mission and history, year established, geographic reach, staff size, and staff capabilities to conduct the proposed work. (Max 3,500 character count, single spaced)

**PROBLEM OR OPPORTUNITY:** Clearly describe the problem, need, or opportunity to be addressed by the project. Support your statements with relevant data, research or information. Describe the population that will benefit from the project, including an estimate of size or numbers. (Max 5,000 character count, single spaced)

**PROJECT OVERVIEW:** Provide a general overview of the project. Explain why you chose this approach to address the problem or opportunity. Provide a project timeline. If this is an ongoing project provide past results and achievements. (Max 4,500 character count single spaced)

**ACTIVITIES AND EXPECTED RESULTS:** Describe the activities to be performed and the results or goals you expect to achieve. Describe how you will measure if your goals are met. (Max 3,500 character count, single spaced)

**FUNDING PLAN:** Explain the project budget, including adjustments to be made if not all anticipated funding is received. Describe the plan, if any, to continue funding the project after the grant period ends. Requests to the Foundation over \$5,000 may not exceed 30% of the project budget. (Max 3,000 character count, single spaced)

## ADDENDUM FOR CAPITAL REQUESTS

**CAPITAL CAMPAIGN:** Describe how the capital campaign is being conducted and the experience of board members and staff with capital campaigns. Identify how much funding has been secured as of the date of the proposal. (Max 3,000 character count, single spaced)

**CONSTRUCTION:** Describe the form of site control, including relevant terms of long-term leases or purchase agreements if not under ownership. Describe the status and timeline for design and engineering work and the status of required permits. Provide the source for cost estimates. Describe who will manage the design and construction phases and their experience in this work. (Max 2,500 character count single spaced)

## ADDITIONAL REQUIRED DOCUMENTS

- Board of Directors list.
- IRS 501(c)(3) determination letter (not required if previously applied to the Foundation or if applying through a fiscal sponsor).
- 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. Audited financial statements are preferred but not required. Local units of national organizations must submit local unit financial information.
- Project budget showing:
  - Anticipated income (source, amount restrictions, and whether secured or pending);
  - Anticipated expenses (overall expenses, and expenses for which Cooke grant will be used).



**IF A FISCAL SPONSOR IS INVOLVED,  
PLEASE UPLOAD THE FOLLOWING  
ADDITIONAL FILES:**

- Fiscal sponsor’s Board of Directors Resolution authorizing project fiscal sponsorship:  
<http://www.hawaiicommunityfoundation.org/nonprofits/fiscal-sponsor-materials>
- Fiscal Sponsor’s Agreement (click to download template):  
<https://www.hawaiicommunityfoundation.org/grants/fiscal-sponsor-materials>
- Fiscal Sponsor’s IRS 501 (c)(3) determination letter.
- Fiscal Sponsor’s Board of Director’s list.
- Fiscal Sponsor’s annual operating budget for the current year.
- Fiscal Sponsor’s balance sheet for the most recently completed fiscal year.
- Fiscal Sponsor’s income statement (or profit/loss statement) for the most recently completed fiscal year. Audited financial statements are preferred but not required. Local units of national organizations must submit local unit financial information.

**DEADLINES**

APPLICATION DUE DATE	CONSIDERED AT TRUSTEE MEETING
September 1, 2021	December 2021
March 1, 2022	May 2022

Completed applications must be submitted by  
**5:00 P.M. HST** on the deadline dates indicated above.



**COOKE  
FOUNDATION,  
LTD.**

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#### **NOTES**

We recognize the significance of diacritical markings in written Hawaiian as pronunciation guides, but have opted not to use them in this digital report since they display inconsistently across various computer platforms/browsers and do not conform to search engine optimization.

Cover photo courtesy of Hawaii Foodbank.