Cooke Foundation, Limited
Grant Application Guidelines
Fiscal Year 2023
(effective July 1, 2022 through June 30, 2023)

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 Hawai'i.

Eligibility and 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.

- 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 Hawai'i must be submitted through the University of Hawai'i 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 Hawai'i 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. Trustee sponsorships must be secured prior to the submission of an application.

- 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
Applications must be submitted online through Hawaiʻi Community Foundation's Grants Portal. New users may register for an account here: https://Hawaiicf.smartsimple.com/s_Login.jsp. Registered users may log in to their account to submit an application. Please give yourself adequate time before the submission deadline to access the system and familiarize yourself with the application process and requirements. For assistance with the online application process, please submit a support ticket at http://hawaiicommunityfoundation.org/ticket.

Instructions
- Only complete and timely applications will be accepted.
- The online application has fillable boxes with character limits. The character counts in MS Word may not match the character counts in the application. If you cut and paste your work into the application, please be sure your text fits the space provided.
- The online application accepts diacritical markings in written ʻŌlelo Hawaiʻi (Hawaiian language).

Organization Profile
As part of the online application, your organization profile (and fiscal sponsor organization profile, if applicable) must be certified prior to submission of grant applications and must be certified annually. Information needed to complete your organization profile (and fiscal sponsor organization profile, if applicable) includes, but is not limited to the following:
- IRS 501(c)(3) determination letter (not required if previously applied to the Foundation or if applying through a fiscal sponsor)
- Number of full-time staff, part-time staff, regular volunteers
- Organization mission
- Service location(s)
- Types of services provided (including age, gender, and target populations served)
- Financial statements
  - Annual operating budget for the current year
  - Income statement (or profit/loss statement) for the most recently completed fiscal year
  - Balance sheet 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
- Board of Directors list

Application
The application consists of 4 sections. Information needed to complete your application includes the following:

Program Overview
- Provide general information and characteristics about the program including, but not limited to program title, duration, area of interest, program location(s), and ages and genders served.
- If you have a fiscal sponsor, you will be asked to identify your fiscal sponsor. Please note, your fiscal sponsor must be registered in the Grants Portal prior to submitting your application.

Program Information
Organization Description: Describe the history and mission of the organization/program. What is the organization's experience implementing this program and staff capabilities to conduct the proposed work? (*Maximum 2,500 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. (*Maximum 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. (*Maximum 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. (*Maximum 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. (*Maximum 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. *(Maximum 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. *(Maximum 2,500 character count single spaced)*

Budget
Provide your total program budget, amount requested through this application, and upload a copy of your program budget showing:
- Anticipated income (source, amount, restrictions, and whether secured or pending)
- Anticipated expenses (overall expenses, and expenses for which Cooke Foundation grant will be used)

Supporting Documents & Certification
If a fiscal sponsor is involved, please upload the following additional files:
- Fiscal sponsor's Board of Directors Resolution authorizing project fiscal sponsorship
  https://www.Hawaiicommunityfoundation.org/grants/fiscal-sponsor-materials
- Fiscal Sponsor's Agreement
  https://www.Hawaiicommunityfoundation.org/grants/fiscal-sponsor-materials

Deadlines

Application Due Date	Trustee Meeting
September 1, 2022	December 2022
March 1, 2023	May 2023

Completed applications must be submitted by 4:00 p.m. HST on the deadline dates indicated above.