

**Cooke Foundation**  
**FISCAL YEAR 2019 GRANT APPLICATION**  
**GUIDELINES**

**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. The Foundation does not make grants to supporting organizations classified under section 509(a)(3) of the Internal Revenue Code.
- Applicants 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 that do not meet the five-year eligibility requirement must be sponsored by a 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 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 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 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 Ophelia Bitanga-Isreal via email at [obitanga-isreal@hcf-hawaii.org](mailto:obitanga-isreal@hcf-hawaii.org) or call (808)566-5593, toll free from neighbor islands (888)731-3863 ext. 593.

### **Executive Summary**

Please summarize the proposal narrative that follows as concisely as possible, using the same headings. *(Maximum 4,000 character count, single spaced)*

### **Proposal narrative**

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

Problem or opportunity: Describe the problem or opportunity to be addressed by the project. 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: Complete the Project Matrix form and upload as an attachment (see online application to download form). Describe the activities to be performed, project outputs, anticipated results, and measurement of results.

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)*

**Additional required documents**

- Completed Project Matrix Form
- 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  
*available at: <http://www.hawaiicommunityfoundation.org/nonprofits/fiscal-sponsor-materials>*

Fiscal Sponsor's Agreement (click to download template)  
*available at: <http://www.hawaiicommunityfoundation.org/nonprofits/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**

Applications submitted by:	...will be considered at the Trustee’s meeting in:
September 4, 2018	December
March 1, 2019	May

**Completed applications must be submitted by 5:00 p.m. on the deadline dates indicated above.**