

**THE THIRTIETH LEGISLATURE  
APPLICATION FOR GRANTS  
CHAPTER 42F, HAWAII REVISED STATUTES**

Type of Grant Request:

Operating                       Capital

Legal Name of Requesting Organization or Individual: Db:

KUPA - Friends of the Ho'okena Beach Park

Amount of State Funds Requested: \$ 97,782

Brief Description of Request (Please attach word document to back of page if extra space is needed):

Preserving the Past - Building the Future: Perpetuating 'ōpelu fishing traditions with market-based solutions  
The South Kona 'ōpelu fishery is well known as a culturally and economically significant resource that supports the livelihoods of numerous communities along the west coast of Hawai'i island. This project will support the Ho'okena fishing community to maintain traditional and sustainable fisheries management practices by developing an innovative market-based system that will result in an abundant 'ōpelu fishery which benefits Hawai'i island residents and visitors

Amount of Other Funds Available:

State: \$ 0  
Federal: \$ 0  
County: \$ 5000  
Private/Other: \$ 0

Total amount of State Grants Received in the Past 5 Fiscal Years:

\$ 133,741

Unrestricted Assets:

\$ 0

New Service (Presently Does Not Exist):  Existing Service (Presently in Operation):

Type of Business Entity:

- 501(C)(3) Non Profit Corporation  
 Other Non Profit  
 Other

Mailing Address:

P.O. Box 505  
City: Honaunau                      State: Hawaii                      Zip: 96726

Contact Person for Matters Involving this Application

Name: Charlie Young	Title: Secretary
Email: youngc042@hawaii.rr.com	Phone: (808) 987-9052

Federal Tax ID#: [REDACTED]	State Tax ID#: [REDACTED]
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Authorized Signature

Charlie Young, Secretary  
Name and Title

1/17/19  
Date Signed

**received**  
1/18/19 12:15p JR



**Department of Commerce and Consumer Affairs**

**CERTIFICATE OF GOOD STANDING**

I, the undersigned Director of Commerce and Consumer Affairs of the State of Hawaii, do hereby certify that

**KUPA FRIENDS OF THE HO`OKENA BEACH PARK**

was incorporated under the laws of Hawaii on 04/11/2006 ; that it is an existing nonprofit corporation; and that, as far as the records of this Department reveal, has complied with all of the provisions of the Hawaii Nonprofit Corporations Act, regulating domestic nonprofit corporations.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the seal of the Department of Commerce and Consumer Affairs, at Honolulu, Hawaii.

Dated: January 15, 2019

**Director of Commerce and Consumer Affairs**





**KUPA Friends of the Hookena Beach Park**

**PO Box 505**

**Honaunau, HI 96726**



**January 16, 2019**

**Aloha:**

**This letter is sent per Section 42F-102 Hawaii Revised Statutes Application for grants. The Applicant, KUPA Friends of the Ho'okena Beach Park has applied for Hawaii State Grants in Aid for fiscal year 2019 – 2020.**

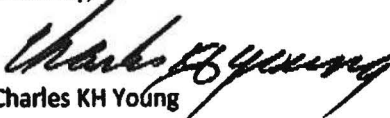
**The information requested under 42F-102 is contained in the narrative as well.**

**The funds requested will be used to establish a food processing facility in South Kona for the opelu fishermen of Ho'okena and the larger region of Kapalilua South Kona, Hawaii Island who sustainably manage and fish opelu in the South Kona region and maintain the health of the fishery for the public's benefit.**

**By processing and value adding, the fishermen will be able to access new and higher value markets resulting in higher returns for their families and communities. The target group are the communities of South Kona who depend on opelu for subsistence.**

**The total funds requested is \$97,782.**

**Sincerely,**

  
**Charles KH Young**

**Secretary,**

**KUPA- Friends of the Hookena Beach Park**



## Application for Grants

*If any item is not applicable to the request, the applicant should enter “not applicable”.*

### **I. Certification – Please attach immediately after cover page**

1. Certificate of Good Standing – Attached
2. Declaration Statement – Attached
3. Public Purpose – Attached

### **II. Background and Summary**

This section shall clearly and concisely summarize and highlight the contents of the request in such a way as to provide the State Legislature with a broad understanding of the request. Please include the following:

1. A brief description of the applicant's background;

KUPA Friends of Ho’okena Beach Park (KUPA) is a 501 c 3 non-profit organization established in 2006. KUPA was founded by native Hawaiians and the officers are all Native Hawaiians that reside in Ho’okena. The organization has an MOU with Hawai’i County to provide services for Ho’okena Beach Park such as maintenance and supervision of camping. The organization employs eight community members part time who open and close the park daily and provide a presence for emergency purposes. KUPA sponsors two annual community fishing events, an annual ono (wahoo) fishing tournament open only to canoe and an annual keiki fishing tournament. KUPA has an office at the park and operates a small concession for visitor convenience. In 2016, KUPA started working to revitalize the cultural practices of traditional Hawaiian ‘ōpelu fishing, which were in severe decline. This successful effort has included reinstating practices that historically sustained stocks of this culturally vital staple food, training a new generation of ‘ōpelu fishers, and raising awareness of the importance of these traditional practices, and promoting sustainable ‘ōpelu to new markets to help increase demand for and sales of this local, healthy, and sustainable food source. This GIA proposal will build on this success to establish needed ‘ōpelu processing facilities and marketing approaches to further increase sales of sustainable traditionally caught ‘ōpelu from Ho’okena. This will help create market a based system to support long-term implementation of sustainable ‘ōpelu management and fishing in Ho’okena.

2. The goals and objectives related to the request;

The goal of this project is to support the Ho’okena fishing community to maintain their traditional and sustainable fishing customs by creating a market-based system that increases harvest and consumption of sustainably managed ‘ōpelu

(mackerel scad). 'Ōpelu fishing is well established as a culturally and economically significant fishery for Hawaiian people in Ho'okena and all of South Kona. 'Ōpelu is Hawaii's second most economically valuable nearshore fishery after akule (big eyed scad). However, in the past three decades, catch of 'ōpelu has declined significantly due to overfishing and fishers using unsustainable fishing practices. Through this grant, KUPA will build on its ongoing efforts to revitalize traditional sustainable management of the Ho'okena 'ōpelu fishery. This revitalization includes implementing a traditional annual closed season for 'ōpelu when they are spawning, practicing hānai ko'a, the traditional Hawaiian practice of feeding 'ōpelu at aggregation sites to help build up the population, and using only vegetable-based bait as opposed to meat-based baits which attract predators and cause harvested 'ōpelu to spoil quickly.

By linking growing market demand for sustainable local fisheries products directly with fishers who sustainably manage 'ōpelu and creating the needed processing and marketing mechanisms, the project will create a system that will continually promote economic viability in the Ho'okena Hawaiian fishing community. This system will also directly enhance locally owned fishery businesses and in the long-term continue to promote value added fishery innovations that will reduce pressure on fish stocks thus helping to sustain marine ecosystems.

The specific Objective of this project is:

To put in place the needed 'ōpelu fish processing facilities and marketing systems that will allow for increased and higher value sales of traditionally managed 'ōpelu harvested in Ho'okena. In turn, this will generate the needed income to allow local fishers to continue to practice sustainable traditional 'ōpelu management in the long-term.

3. The public purpose and need to be served;

This project will help to sustain the traditional Hawaiian cultural practice of sustainable 'ōpelu fishing, create a larger supply of local healthy sustainably managed seafood for residents and visitors to Hawai'i, raise awareness of the importance of careful stewardship of our marine and land resources and eating local sustainably produced foods, and establish a sustainable market-based system that will continue to produce these benefits in the long-term without the need for long-term grant financing.

4. Describe the target population to be served; and

The immediate target population to be served are the 500 residents and family members of Ho'okena village in South Kona on Hawai'i Island with a focus on the families of village fishermen. Additionally, the project will serve all people and visitors in Kona by providing a sustainable local source of seafood and raising awareness of the importance of sustainable management.

5. Describe the geographic coverage.

Ho'okena South Kona, Hawai'i and providing benefits to all of Kona and even to O'ahu for people who benefit from access to locally sourced sustainable seafood.

### **III. Service Summary and Outcomes**

The Service Summary shall include a detailed discussion of the applicant's approach to the request. The applicant shall clearly and concisely specify the results, outcomes, and measures of effectiveness from this request. The applicant shall:

1. Describe the scope of work, tasks and responsibilities;

This project will focus on establishing the needed 'ōpelu fish processing facilities and marketing systems to increase sales of sustainably managed Ho'okena 'ōpelu.

Specific activities will include:

1. **Rent an 'Ōpelu Fish Processing and Distribution Center in South Kona for One Year.** The project will include funding to rent a processing and distribution center in South Kona for one year. At this commercial facility, Ho'okena and other South Kona fishermen will be able to bring harvested 'ōpelu to be processed and distributed to new markets in West Hawai'i. With additional assistance from local chef's who are participating in the Pacific Chefs Network value-added 'ōpelu products will be made available to expanding niche and general markets. The Pacific Chefs Network is a group of chefs working in Hawai'i and other Pacific Island locations that are dedicated to using and promoting local and sustainable food products. A financial analysis conducted in the end of 2018, indicated that revenue from projected sales of sustainable 'ōpelu products from Ho'okena will be able to cover the recurring costs of operating the processing facility by the end of this GIA support.
2. **Develop Marketable Sustainable Value Added 'Ōpelu Fisheries Products.** KUPA, in cooperation with local chef's will develop marketable value-added 'ōpelu fisheries products. These may include: fresh, whole 'ōpelu, canned 'ōpelu, and dried 'ōpelu. Fresh whole 'ōpelu that is caught using unsustainable fishing techniques currently sells for \$2.00 per pound. Fish buyers have already paid up to \$3.50 per pound for whole 'ōpelu that are managed and caught using traditional sustainable Hawai'i management practices. Dried 'ōpelu sells for as much as \$12.00 per pound in local markets making for a significant value addition through the relatively simple and efficient process of drying 'ōpelu. Canned 'ōpelu has not yet been developed as a product but similar canned mackerel from overseas sells for as much as \$15.00 per pound also presenting a significant value to the 'ōpelu product. The processing facility that is discussed under Activity One is critical to the development and continued production of

these value-added products as Hawai'i health codes require that a certified commercial kitchen be used in the development of commercial products such as those mentioned above. Value-added 'ōpelu products are a key to generating sufficient revenue to be able to cover the recurring costs of operating the processing facility by 12 months after the start of this GIA.

- 3. Purchase Needed Equipment and Supplies to Continue Production of Value Added 'Ōpelu Fisheries Products.** In order to produce sufficient quantities of value added 'ōpelu products, KUPA needs to purchase several pieces of equipment including Department of Health approved food grade canning equipment, fish cleaning and drying stations as well as an industrial capacity gas range and ice machine. Equipment will be installed in the processing facility and provide local fishers with access to essential tools and resources by which to process their fish for different value-added markets. The costs of maintaining and operating the processing equipment have also been calculated to be able to be covered by the income generated from sustainable whole and value-added 'ōpelu products in approximately one year's time.
- 4. Continue Sustainable 'Ōpelu Fisheries Management.** With support of this GIA, Ho'okena fishers will continue to implement their traditional sustainable 'ōpelu management practices that have been revitalized over the last two years. This includes implementing a closed season for 'ōpelu for four to six months per year, typically from March to August but variable based on fisher observations of 'ōpelu abundance, size, and behavior. The closed season typically coincides with when 'ōpelu start to congregate at traditional aggregation sites (ko'a) near Ho'okena village and will cover a minimum of 10 aggregation sites. The closed season typically includes 1-2 spawning periods for 'ōpelu thus reducing fishing effort during critical reproductive times. Additionally and in accordance with HAR 13-95-18, [South Kona 'Ōpelu Management Area](#), fishers will only use vegetable chum for feeding of fish on aggregation sites and only use vegetable matter as bait during fishing. In recent decades, it has been more common for fishers to use animal-based chum and bait, known locally as "chop chop", which is known to cause increased predation on aggregation sites thus reducing catch and contribute to faster spoilage which often results in a waste of valuable fisheries products. The fishermen will also only take medium-sized 'ōpelu letting smaller ones grow to reproduce and larger ones remain as they are the most reproductive. Finally, fishermen rotate catch between different aggregation sites depending on abundance, size, and behavior of the fish on the sites.
- 5. Develop Marketing Program and Brand for Kona 'Ōpelu Products.** The project will develop and execute a marketing plan that includes: pricing, promotion, and distribution of 'ōpelu products to wholesale and retail markets. The GIA will also include funding to develop the brand for Kona 'Ōpelu, which will include highlighting the major advantages of incorporating 'ōpelu to support a healthy diet, and to support a Native Hawaiian fishing community. This will include the generation of a Kona 'ōpelu Brand logo. The project will purposely develop the Brand as Kona 'Ōpelu rather than just as Ho'okena 'Ōpelu as there are



several other communities in Kona that traditionally fish ‘ōpelu and have initiated efforts to revitalize traditional sustainable fishing practices. As a result, by having a Kona Brand this opens up the opportunity for other communities to join the program as this effort expands over time.

**6. Co-host Events to Promote Kona ‘Ōpelu and Seafood Sustainability.** The project will host up to three events to promote and encourage purchasing of Traditional Kona ‘Ōpelu. A small cohort of Hawai’i Island based chefs are participating in the Pacific Chefs Network, which is working to promote local sustainable food. These chefs will participate in one or more chef-fisher exchange to showcase the importance of this traditional fishery, and to generate increased relationships between chefs and fishers. This exchange will showcase the traditional practice of “Hānai ‘ōpelu” which involves commercial fishermen feeding the stocks of ‘ōpelu with vegetable-based chum. One to two people from the media will document this learning exchange to showcase in media outlets and later during Hawai’i Seafood Month. The goals of this exchange are: 1. To increase the awareness of this traditional fishery by integrating a demonstration of fishing and stewardship practices by the fishermen, 2. To share meaningful fishery knowledge with the chefs encouraging them to support this fishery through a pledge to buy ‘ōpelu during their peak fishing season, 3. For chefs to share insight into quality and freshness standards, and to share culinary knowledge on integrating mackerel scad into their menus, and 4. To strengthen producer-buyer relationships that can benefit both of their industries, and to establish a clear understanding of the needs and challenges are facing each industry and how a tied in relationship will produce beneficial outcomes. The project will also host community educational cooking events on Hawai’i island and on O’ahu focused on ‘ōpelu to complement the Chef Fisher exchange. These events will be organized by the project team, the Pacific Chefs Network, and Ho’okena fishers. They will focus on launching and promoting the development and value-add dishes incorporating Kona ‘Ōpelu branded products, and will celebrate the start of the ‘ōpelu season in August 2019.

**7. Quarterly Meetings to Review Progress and Adaptively Manage Activities.** The project will hold quarterly meetings with participating Ho’okena fishers to review progress relative to the project work plan and timeline with each partner providing a detailed overview and update of activities.

2. Provide a projected annual timeline for accomplishing the results or outcomes of the service;

Activity	Month											
Activities	1	2	3	4	5	6	7	8	9	10	11	12
1. Rent an ‘Ōpelu Fish Processing and Distribution Center in South Kona for One Year Providing a location to create value added ‘ōpelu products.		X	X	X								

2. Develop Marketable Sustainable Value Added ‘Ōpelu Fisheries Products		X	X	X	X							
3. Purchase Needed Equipment and Supplies to Continue Production of Value Added ‘Ōpelu Fisheries Products.		X	X									
4. Continue Sustainable ‘Ōpelu Fisheries Management.	X	X	X	X	X	X	X	X	X	X	X	X
5. Develop Marketing Program and Brand for Kona ‘Ōpelu Products.		X	X	X	X							
6. Co-host Events to Promote Kona ‘Ōpelu and Seafood Sustainability			X			X			X			
7. Quarterly (or Regular) Meetings to Review Progress and Adaptively Manage Activities	X			X			X			X		X
<b>Outcomes</b>												
1. The creation of a Kona ‘Ōpelu Brand		X	X	X	X							
2. Understanding of the importance of sustainable ‘ōpelu and the availability of products for purchase will be increased in key markets			X	X	X	X	X	X	X	X	X	X
3. Pounds harvested of ‘ōpelu using sustainable approaches reaches 10,000 per month during fishing season								X	X	X	X	X
4. Sale of sustainable ‘ōpelu generate sufficient income for fisheries to earn 25% to 50% more per pound by 2020 and cover costs of operating the processing facility by month 13 of this project.											X	X

3. Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results.

To aid in the process of evaluating our progress, the project team will develop a work plan that details activities, tasks, and the person/s responsible for leading each activity, and making sure the project is on track. This work plan will be developed in the project’s first month and will supplement the project’s timeline for milestones that is included in this proposal. The project team, consisting of both sub-contractors and sub-grantees, will hold quarterly meetings to review progress relative to the project work plan and timeline with each partner providing a detailed overview and update of activities allowing for any needed adaptive management of project activities.

4. List the measure(s) of effectiveness that will be reported to the State agency through which grant funds are appropriated (the expending agency). The measure(s) will provide a standard and objective way for the State to assess the program's achievement or accomplishment. Please note that if the level of appropriation differs from the amount included in this application that the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.

This project will illustrate the enormous potential for a market-based system to highlight critical sustainability issues and increase the awareness of specific ways to address these issues. For this project, we will employ a number of methods to showcase the importance of consumers' role in supporting locally produced, sustainable seafood.

**Metrics of Success:** Our metrics of success are indicators that are SMART (specific, measurable, attainable, results-oriented, and time-bound) and are as follows:

- The creation of a Kona 'Ōpelu brand and marketing program is supporting the Ho'okena 'Ōpelu Fishery in educating and promoting their products that are being bought by the Pacific Chefs Network and other local markets by end of the grant period.
- Understanding of the importance of sustainable 'ōpelu and the availability of products for purchase will be increased in key markets through market program and at least three events promoting seafood sustainability will be hosted by the project together with the Pacific Chefs Network's chef ambassadors, bringing together coastal commercial fishers, state agencies leads, Hawai'i law makers, and key thought leaders in the fishing community
- Pounds harvested of 'ōpelu using sustainable approaches. Estimates include 10,000 lbs. per month during peak harvest months of December, January, and February with approximately, 5,000 lbs. during non-peak harvest months of October, November, March, and April.
- Sale of sustainable 'ōpelu generate sufficient income for fisheries to earn 25% to 50% more per pound by 2020 and cover costs of operating the processing facility by month 13 of this project.
- Number of media spots promoting consumption of sustainable and traditionally managed 'ōpelu Anticipate at least 10 per year.
- Project products and deliverables are finalized by end of the grant award, or in a final state of completion (see specific milestones in Gantt chart, section 6, below).

## **IV. Financial**

### **Budget**

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
  - a. Budget request by source of funds – Attached
  - b. Personnel salaries and wages – n/a
  - c. Equipment and motor vehicles – Attached
  - d. Capital project details – n/a
  - e. Government contracts, grants, and grants in aid – Attached
  
2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2020.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
24,445	24,445	24,446	24,446	97,782

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2020.
  1. \$40,000 – The Hawaii Tourism Authority to support traditional ‘ōpelu management – Secured.
  2. \$20,853 – The County of Hawaii to support scientific assessment of ‘ōpelu reproductive cycles to understand the best time to fish and when not to fish – Secured.
  3. \$97,741 – The Office of Hawaiian Affairs to initiate efforts to revitalize traditional ‘ōpelu management and fishing - Secured.
  4. \$49,960 – The Office of Hawaiian Affairs to continue previous OHA-supported project on traditional ‘ōpelu management and fishing – Pending.
  
4. The applicant shall provide a listing of all state and federal tax credits it has been granted within the prior three years. Additionally, the applicant shall provide a listing of all state and federal tax credits they have applied for or anticipate applying for pertaining to any capital project, if applicable.
 

N/A
  
5. The applicant shall provide a listing of all federal, state, and county government contracts, grants, and grants in aid it has been granted within the prior three years and will be receiving for fiscal year 2020 for program funding.

Hawaii County Grant: \$20,853  
 HTA Grant: \$36,000  
 OHA Grant: \$97,741



6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2018.

KUPA programming operates solely on incoming grants from government agencies and private foundations with various restrictions on use of funds generated by these means. Funds raised through the Ho’okena Beach Park concession operations, overseen by KUPA, cycle directly back to into that effort and cannot be used for any other purpose. As a result, KUPA does not maintain a balance of unrestricted assets. Please see appendix A & B for documentation of KUPA’s organizational fiscal balance sheet (appendix A) and profit and loss statement (appendix B), both as of December 31, 2018.

## **V. Experience and Capability**

### **1. Necessary Skills and Experience**

The applicant shall demonstrate that it has the necessary skills, abilities, knowledge of, and experience relating to the request. State your experience and appropriateness for providing the service proposed in this application. The applicant shall also provide a listing of verifiable experience of related projects or contracts for the most recent three years that are pertinent to the request.

KUPA was formed in 2006 and is devoted to improving the facilities, services, environment, and quality of life for the Ho’okena community with an emphasis on social welfare, health, community and economic development, cultural and educational needs. KUPA has been carrying out a number of programs designed to help improve overall quality of life in Ho’okena. Most recently KUPA has been implementing the project supported by OHA, the State of Hawai’i, and the County of Hawai’i to revitalize traditional Hawaiian ‘ōpelu fishing. This project started in 2016 and has organized master fishermen and community members to restore active practice of all traditional ‘ōpelu management approaches. Additionally, KUPA has hosted projects that work with youth to collect and apply traditional knowledge, hosting Summer Fun programs for youth, hosting a Keiki Fishing Tournament, hosting an annual outrigger canoe one fishing tournament, management of Ho’okena Beach Park, and enhancing marine resource management. KUPA has a stewardship agreement with the County of Hawai’i to manage the Ho’okena Beach Park which includes overseeing camping and providing cultural and environmental interpretation and emergency services for visitors. KUPA has long worked to strengthen the sustainable management of marine resources and the local environment in Ho’okena and has worked over the years to encourage community members and visitors to apply pono (responsible) practices in terms of use of marine resources, sustainable fishing, and interaction with marine animals. KUPA is part of the Hawai’i wide E Alu Pū network which is an alliance of communities working to revitalize and sustain the responsible and cultural rooted management of marine and coastal resources for the benefit of all Hawaiians. KUPA has managed several grants and contracts over the years and has an experienced board and a professional accountant and grants manager to ensure high quality project management.

## **2. Facilities**

The applicant shall provide a description of its facilities and demonstrate its adequacy in relation to the request. If facilities are not presently available, describe plans to secure facilities.

KUPA operates primarily from its' field office located at Ho'okena Beach Park. The field offices are comprised of three mobile trailers with a combined work space of approximately 200 sq. ft. Internet service is available via satellite connection and electrical power via generator. Computer and printing equipment are available. The officers of the organization also work from home. KUPA and the Ho'okena community have several additional facilities that will help to support success in this project. This includes six 'ōpelu fishing canoes that are owned by individual fishermen but are stored on the beach at Ho'okena Beach Park. We have a large beach area from which to launch our 'ōpelu canoes and the community is home to 19 'ōpelu ko'a or aggregation sites of which ten will continue to be managed according to traditional Hawaiian cultural practice under this project. We also have a small community hālau or pavilion for community meetings and a well-established concession system to manage camping at the beach park. Also, since KUPA manages the Ho'okena beach park under an agreement with the county, we can easily reserve camping areas for key exchanges and events including the keiki fishing tournament, the celebration for the opening of 'ōpelu season, and learning exchanges with the Miloli'i community and others.

## **VI. Personnel: Project Organization and Staffing**

### **1. Proposed Staffing, Staff Qualifications, Supervision and Training**

The applicant shall describe the proposed staffing pattern and proposed service capacity appropriate for the viability of the request. The applicant shall provide the qualifications and experience of personnel for the request and shall describe its ability to supervise, train and provide administrative direction relative to the request.

The following positions will serve as contractors to implement the project. As a small organization, KUPA primarily works through contractors rather than retaining full time employees.

#### **I. Project Manager – Charlie Young**

Responsibilities:

1. Coordinate and facilitate branding and product development,
2. Coordinate and facilitate 'ōpelu traceability efforts,
3. Supervise processing facility management efforts,
4. Organize and manage all processing facility data (input/output),
5. Provide strategic guidance and advice on project implementation and adaptive management,

6. Communicate project objectives and encourage feedback and collaboration with stakeholders in South Kona, the island of Hawai'i, and the State.

**Qualifications:**

1. Experience in project management and supervision
2. Established local contractor
3. Good communication skills
4. Strong collaborator
5. Desire to see project succeed

**II. Project Coordinator – Damien Kenison**

**Responsibilities:**

1. Manage all coordination and aspects of hānai and outreach projects, including scheduling, safety, supplies and materials
2. Work closely with fisherman to ensure success of project
3. Send all completed data collection reports to Technical Advisor
4. Communicate regularly with accountant/grants manager on progress of project

**Qualifications:**

1. Pays close attention to detail
2. Good communication skills
3. Works well with others
4. Desire to see project succeed

**III. Master Fisherman – Douglas Alani, Alston Kaleohano, Craig Carvalho**

**Responsibilities:**

1. From March through June of each year hānai 10 ko'a using vegetable bait (palu),
2. Using data forms, track hānai progress,
3. Send completed hānai data forms weekly to project coordinator,
4. Provide consistent supply of locally-sourced and sustainably caught 'ōpelu,
5. Participate in outreach and exchange programs, teaching traditional fishing practices
6. Collect data during fishing season
7. Send completed fishing data forms weekly to technical advisor
8. Sell fish to niche markets to help generate needed individual and program income to continue to implement traditional practices.

**Qualifications:**

1. Have a passion and desire to maintain traditional Hawaiian fishing practices
2. Possess knowledge of traditional Hawaiian fishing practices

3. Willing to pass knowledge down to the next generation

#### **IV. Assistant Coordinator – Jocina Johnson Alani**

**Responsibilities:**

1. Work with Project Coordinator scheduling hānai and outreach projects,
2. Assist Project Coordinator in communicating project details to other project partners and contractors,
3. Attend and assist with project events,
4. Assist Project Coordinator with project data and reports

**Qualifications:**

1. Willingness to learn
2. Desire to see project succeed
3. Good organizational skills

#### **V. Facilities Manager (2) – TBD**

**Responsibilities:**

1. Oversee processing facility operations and management,
2. Oversee ‘ōpelu intake and processing,
3. Coordinate and facilitate ‘ōpelu product distribution operations.

**Qualifications:**

1. Ability to process (clean and prep) harvested ‘ōpelu,
2. Ability to operate facility equipment,
3. Possess strong working knowledge of ‘ōpelu fishery.

#### **VI. Brand Development – Sig Zane Designs**

**Responsibilities:**

1. Develop logo artwork for branding efforts,
2. Provide branding development expertise,
3. Provide product development expertise.

**Qualifications:**

1. Extensive experience in local brand and product development,
2. Established name recognition,
3. Desire to see project succeed.

#### **VII. ‘Ōpelu Traceability – ThisFish**

**Responsibilities:**

1. Establish software to trace harvested ‘ōpelu,
2. Provide training to project staff on use of software.

**Qualifications:**

1. Established experience in traceability software development

## **2. Organization Chart**



The applicant shall illustrate the position of each staff and line of responsibility/supervision. If the request is part of a large, multi-purpose organization, include an organization chart that illustrates the placement of this request.

See Appendix C.

### **3. Compensation**

The applicant shall provide an annual salary range paid by the applicant to the three highest paid officers, directors, or employees of the organization by position title, not employee name.

As a small organization, KUPA primarily works through contractors rather than retaining full time employees. As requested the three highest paid contractor positions are:

1. Program Manager
2. Project Coordinator
3. Project Coordinator

## **VII. Other**

### **1. Litigation**

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgement. If applicable, please explain.

N/A

### **2. Licensure or Accreditation**

The applicant shall specify any special qualifications, including but not limited to licensure or accreditation that the applicant possesses relevant to this request.

N/A

### **3. Private Educational Institutions**

The applicant shall specify whether the grant will be used to support or benefit a sectarian or non-sectarian private educational institution. Please see [Article X, Section 1, of the State Constitution](#) for the relevance of this question.

N/A

### **4. Future Sustainability Plan**

The applicant shall provide a plan for sustaining after fiscal year 2019-20 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2019-20, but
- (b) Not received by the applicant thereafter.


This project is designed to establish as long-term sustainable system in which sale of sustainably harvested ‘ōpelu will secure higher prices than unmanaged ‘ōpelu and therefore generate sufficient revenue both to allow fishers to continue to practice traditional sustainable management and to operate the ‘ōpelu fish processing facility. This will create a positive feedback loop that will be sustained by market forces and allow the community fishers as well as consumers in Kona and other parts of Hawai’i to benefit from access to a source of local, healthy, sustainable seafood.

There is always a chance that the projections for generating income from sustainable ‘ōpelu may not come to fruition as quickly as our calculations have anticipated. In this case, we will continue to seek grant funds until the sales of ‘ōpelu are sufficient to cover the recurring cost of the overall system. We have already applied for a grant that would provide up to two years past the GIA to create the sustainable system. We may also apply for another GIA to develop additional aspects of this project. However, if we receive the GIA in 2019-20 but not beyond, we do feel confident that a combination of funds generated by sustainable ‘ōpelu sales and from supplementary grants (if needed) will allow this program to become sustainable in the long-term

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2019 to June 30, 2020

Appl KUPA-Friends of the Ho'okena Beach Park

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
<b>A. PERSONNEL COST</b>				
1. Salaries				
2. Payroll Taxes & Assessments				
3. Fringe Benefits				
<b>TOTAL PERSONNEL COST</b>				
<b>B. OTHER CURRENT EXPENSES</b>				
1. Airfare, mileage	4,142			
2. Insurance	2,000			
3. Lease/Rental of Equipment				
4. Lease/Rental of Space	20,000			
5. Staff Training				
6. Supplies	500			
7. Telecommunication				
8. Utilities	7,000			
9 Contracts	48,640			
10				
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19				
20				
<b>TOTAL OTHER CURRENT EXPENSES</b>	<b>82,282</b>			
<b>C. EQUIPMENT PURCHASES</b>	<b>15,500</b>			
<b>D. MOTOR VEHICLE PURCHASES</b>				
<b>E. CAPITAL</b>				
<b>TOTAL (A+B+C+D+E)</b>	<b>97,782</b>			
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	97,782	Charlie Young	(808) 987-9052	
(b) Total Federal Funds Requested		Name (Please type or print)	Phone	
(c) Total County Funds Requested			1/17/19	
(d) Total Private/Other Funds Requested		Signature of Authorized Official	Date	
<b>TOTAL BUDGET</b>	<b>97,782</b>	Charlie Young, Secretary Name and Title (Please type or print)		

## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2019 to June 30, 2020

Applicant: KUPA-Friends of the Ho'okena Beach Pa

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
Food Dehydrator	1.00	\$4,000.00	\$ 4,000.00	\$ 4,000.00
Food Canning Equipment	2	\$500.00	\$ 1,000.00	\$ 1,000.00
Gas Range	1	\$3,500.00	\$ 3,500.00	\$ 3,500.00
Food Grade Stainless Steel Work Tables	2	\$2,000.00	\$ 4,000.00	\$ 4,000.00
Ice Maker	1	\$3,000.00	\$ 3,000.00	\$ 3,000.00
<b>TOTAL:</b>	7		\$ 15,500.00	\$ 15,500.00

**JUSTIFICATION/COMMENTS:** Equipment will allow fishermen to produce value added products from freshly sourced fish (opelu). Dehydrating and/or Canning will lengthen shelf life and preserve freshness for use in higher value recipes. Processing will permit storage and distribution of value added products year around and reduce the pricing volatility from supply and demand of fresh fish. Fishermen will be able to manufacture new products for new value added markets that are currently non existent for opelu fishermen.

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
<b>TOTAL:</b>				

**JUSTIFICATION/COMMENTS:**



**GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID**

App: KUPA-Friends of the Ho'okena Beach Park

Contracts Total: 48,640

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S. / State / Haw / Hon / Kau / Mau)</b>	<b>CONTRACT VALUE</b>
1	'Ōpelu traceability effort to promote locally-sourced product for developed markets.	November 2019-March 2020	ThisFish		4,000
2	Branding and product development to support marketing of Kona 'Ōpelu brand.	October 2019-May 2020	Sig Zane Designs		6,000
3	Coordinate and facilitate branding and product development, coordinate and facilitate 'ōpelu traceability efforts, and organize and maintain all processing facility data (input/output).	August 2019-June 2020	Charlie Young		6,000
4	Processing facility management and oversight of 'ōpelu intake, processing, and distribution of 'ōpelu products.	August 2019-June 2020	Two (2) individuals: TBD		14,400
5	Coordinate and oversee traditional management practices with master 'ōpelu fishermen, maintain and facilitate communications between project leads, organize 'ōpelu fisheries data collected by fishermen.	August 2019-June 2020	Damien Kenison		8,160
6	Assist in the coordination of traditional management practices with master fishermen, assist with the organization and maintainance of fisheries data.	August 2019-June 2020	Jocina Alani		4,080
7	Engage South Kona master fishermen to establish a consistent source of locally-sourced and sustainably managed 'ōpelu.	October 2019-February 2020	Three (3) individuals: Douglas Alani, Alston Kaleohano, Craig Carvalho		6,000
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## APPENDIX A

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01/10/19  
Cash Basis

**KUPA Friends of The Ho'okena Beach Park**  
**Balance Sheet Prev Year Comparison**  
**As of December 31, 2018**

	Dec 31, 18	Dec 31, 17	\$ Change	% Change
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Checking/Savings</b>				
BOH Camping 7094	21,211.56	3,432.18	17,779.38	518.0%
BOH Concession 7108	10,225.28	18,104.68	-7,879.40	-43.5%
HCFCU 615868 - 90	18,000.00	0.00	18,000.00	100.0%
HCFCU Checking 615686 - 91	17,186.08	4,761.18	12,424.90	261.0%
HCFCU Savings	52.80	52.68	0.12	0.2%
Petty Cash	144.41	220.43	-76.02	-34.5%
<b>Total Checking/Savings</b>	66,820.13	26,571.15	40,248.98	151.5%
<b>Total Current Assets</b>	66,820.13	26,571.15	40,248.98	151.5%
<b>Fixed Assets</b>				
2009 Kayak Racks	0.00	0.00	0.00	0.0%
2009 Kayaks	0.00	0.00	0.00	0.0%
2012 Paddleboards	58.77	58.77	0.00	0.0%
2013 Paddleboards	167.00	167.00	0.00	0.0%
2015 Solar Panels	1,319.65	1,319.65	0.00	0.0%
2016 Honda Generator.	348.62	348.62	0.00	0.0%
2017 Computer	232.19	232.19	0.00	0.0%
2017 Printer	97.81	97.81	0.00	0.0%
2017 Truck	7,610.00	7,610.00	0.00	0.0%
2018 Generator	4,463.55	0.00	4,463.55	100.0%
2018 Kayaks	1,041.65	0.00	1,041.65	100.0%
Sold	0.00	0.00	0.00	0.0%
<b>Total Fixed Assets</b>	15,339.24	9,834.04	5,505.20	56.0%
<b>TOTAL ASSETS</b>	<b>82,159.37</b>	<b>36,405.19</b>	<b>45,754.18</b>	<b>125.7%</b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
<b>Credit Cards</b>				
Citi Card	2,570.81	0.00	2,570.81	100.0%
<b>Total Credit Cards</b>	2,570.81	0.00	2,570.81	100.0%
<b>Other Current Liabilities</b>				
Prepaid Camping Reservations	18,980.23	-6,867.96	25,848.19	376.4%
<b>Total Other Current Liabilities</b>	18,980.23	-6,867.96	25,848.19	376.4%
<b>Total Current Liabilities</b>	21,551.04	-6,867.96	28,419.00	413.8%
<b>Total Liabilities</b>	21,551.04	-6,867.96	28,419.00	413.8%
<b>Equity</b>				
Unrestricted Net Assets	43,273.15	39,644.84	3,628.31	9.2%
Net Income	17,335.18	3,628.31	13,706.87	377.8%
<b>Total Equity</b>	60,608.33	43,273.15	17,335.18	40.1%
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>82,159.37</b>	<b>36,405.19</b>	<b>45,754.18</b>	<b>125.7%</b>

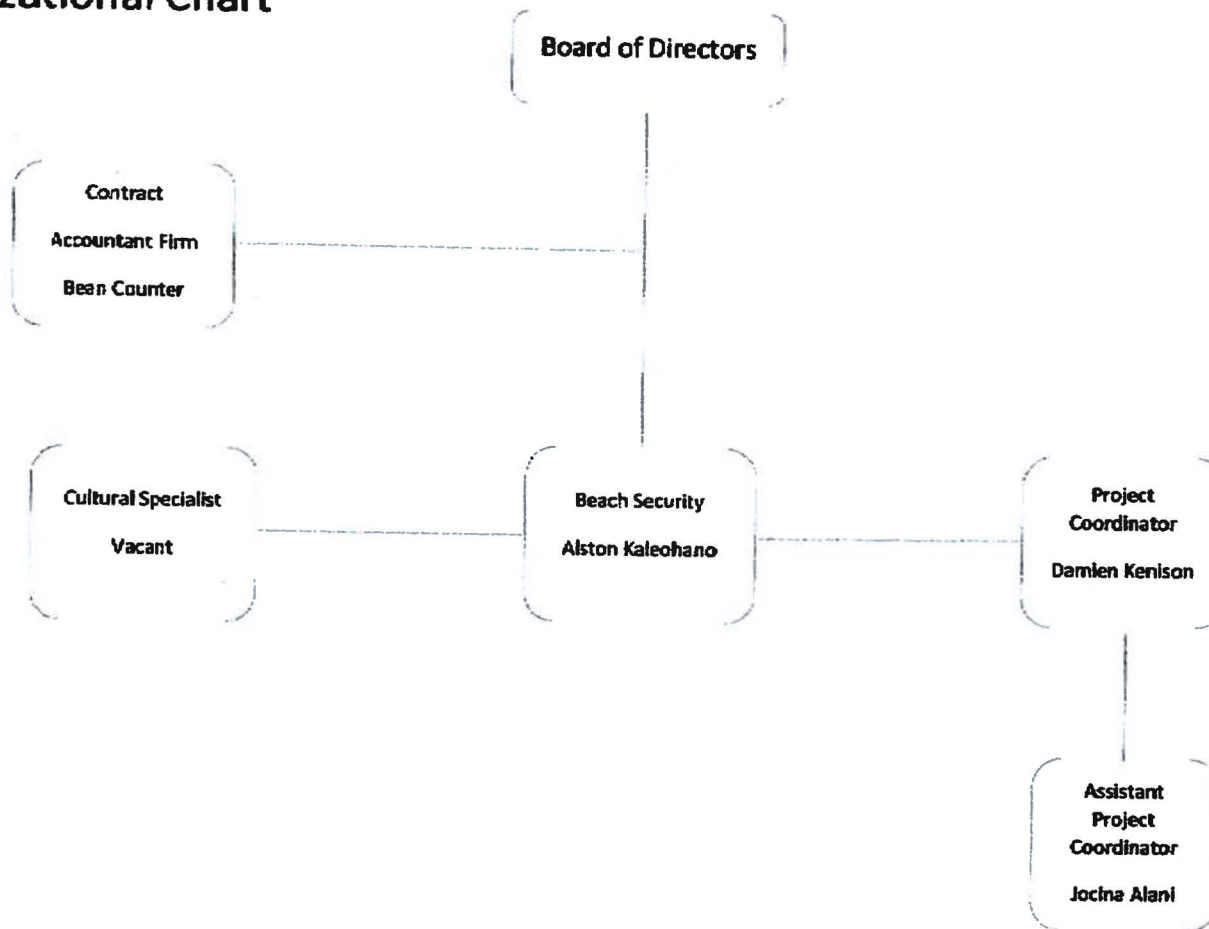
APPENDIX B

2:54 PM  
01/10/19  
Cash Basis

**KUPA Friends of The Ho'okena Beach Park**  
**Profit & Loss Prev Year Comparison**  
January through December 2018

	Jan - Dec 18	Jan - Dec 17	\$ Change
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
Camping Permits	0.00	0.00	0.00
Camping Permits HI Resident	28,160.00	26,001.00	2,159.00
Camping Permits Non Resident	115,983.00	96,957.00	19,026.00
Sales Concession	44,448.78	45,080.90	-632.12
<b>Total Income</b>	<b>188,591.78</b>	<b>168,038.90</b>	<b>20,552.88</b>
<b>Cost of Goods Sold</b>			
COG Supplies Concession	12,530.20	21,101.11	-8,570.91
Leased Employees	157,753.63	105,854.93	51,898.70
<b>Total COGS</b>	<b>170,283.83</b>	<b>126,956.04</b>	<b>43,327.79</b>
<b>Gross Profit</b>	<b>18,307.95</b>	<b>41,082.86</b>	<b>-22,774.91</b>
<b>Expense</b>			
Accounting	2,886.18	2,309.86	576.32
Auto Expenses	8,029.20	994.94	7,034.26
Auto Insurance	436.66	1,091.64	-654.98
Bank Service Charges	329.82	608.28	-278.46
Booking Fees Peek	2,152.17	0.00	2,152.17
Booking Fees Square	840.06	0.00	840.06
Depreciation	0.00	3,173.00	-3,173.00
Electricity	1,011.22	3,336.48	-2,325.26
GL Insurance	4,073.24	3,541.46	531.78
Interest	110.17	0.00	110.17
Office Supplies	4,014.73	2,998.26	1,016.47
Repairs	611.23	2,245.54	-1,634.31
Sanitation	5,333.36	6,247.51	-914.15
Supplies	769.32	3,477.39	-2,708.07
Taxes	1,915.08	1,558.32	356.76
Telephone Internet	1,675.01	3,971.79	-2,296.78
Tools & Equipment	736.87	0.00	736.87
Tournament Cost	3,677.83	1,439.57	2,238.26
Water	-200.00	500.00	-700.00
Webhost Service	130.21	251.04	-120.83
<b>Total Expense</b>	<b>38,532.36</b>	<b>37,745.08</b>	<b>787.28</b>
<b>Net Ordinary Income</b>	<b>-20,224.41</b>	<b>3,337.78</b>	<b>-23,562.19</b>
<b>Other Income/Expense</b>			
<b>Other Income</b>			
Grant Income	79,702.00	18,300.00	61,402.00
Interest Income	0.12	0.03	0.09
<b>Total Other Income</b>	<b>79,702.12</b>	<b>18,300.03</b>	<b>61,402.09</b>
<b>Other Expense</b>			
Grant Expense Labor	39,375.50	16,496.73	22,878.77
Grant Office Equipment	0.00	854.13	-854.13
Grant Supplies	2,767.03	658.64	2,108.39
<b>Total Other Expense</b>	<b>42,142.53</b>	<b>18,009.50</b>	<b>24,133.03</b>
<b>Net Other Income</b>	<b>37,559.59</b>	<b>290.53</b>	<b>37,269.06</b>
<b>Net Income</b>	<b>17,335.18</b>	<b>3,628.31</b>	<b>13,706.87</b>

# KUPA Friends of the Ho'okena Beach Park Organizational Chart





## Application Submittal Checklist

*The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.*

- 1) Certificate of Good Standing (If the Applicant is an Organization)
- 2) Declaration Statement
- 3) Verify that grant shall be used for a public purpose
- 4) Background and Summary
- 5) Service Summary and Outcomes
- 6) Budget
  - a) Budget request by source of funds ([Link](#))
  - b) Personnel salaries and wages ([Link](#))
  - c) Equipment and motor vehicles ([Link](#))
  - d) Capital project details ([Link](#))
  - e) Government contracts, grants, and grants in aid ([Link](#))
- 7) Experience and Capability
- 8) Personnel: Project Organization and Staffing

  
AUTHORIZED SIGNATURE

CHARLIE YOUNG

PRINT NAME AND TITLE

1/17/2019

DATE