

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:
Hawai'i Executive Collaborative Movers and Shakas

Amount of State Funds Requested: \$ 200,000

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

A program of the Hawai'i Executive Collaborative, Movers and Shakas focuses on "brain gain" to grow and diversity Hawaii's economy. Two place-based immersion programs aim to build enduring personal relationships, professional collaborations and long-term contribution to Hawaii by enabling participants to grow through three program components: LEARN about Hawaii's unique culture; CONTRIBUTE through volunteering; and CONNECT with community.

Amount of Other Funds Available:

State: \$ 0

Federal: \$ 0

County: \$ 0

Private/Other: \$ 370,259

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

\$ 99,950

Unrestricted Assets:

\$ 353,000

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:

1000 Bishop St, Ste 810

City: State: Zip:

Honolulu HI 96813

Contact Person for Matters Involving this Application

Name: Nicole Lim Title: Director, Movers & Shakas

Email: nicole@moversandshakas.org Phone: 808-304-5813

Federal Tax ID#:

[REDACTED]

State Tax ID#

[REDACTED]



Authorized Signature

Lynelle Marble, Executive Director

Name and Title

1/20/2022

Date Signed

Application Submittal Checklist

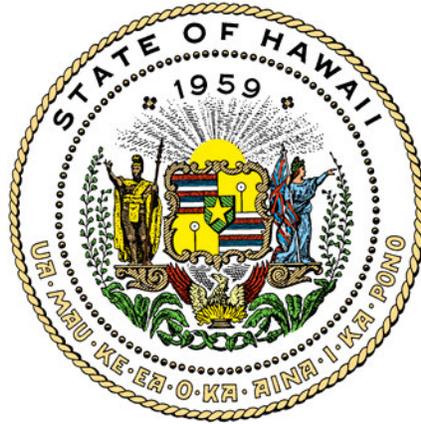
The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.

- 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

Lynelle Marble, Executive Director
PRINT NAME AND TITLE

1/15/2022
DATE



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

HAWAI'I EXECUTIVE COLLABORATIVE

was incorporated under the laws of Hawaii on 11/26/2019 ; 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: December 08, 2021

Director of Commerce and Consumer Affairs

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS PURSUANT TO
CHAPTER 42F, HAWAII REVISED STATUTES**

The undersigned authorized representative of the applicant certifies the following:

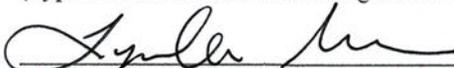
- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant is awarded;
 - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
 - c) Agrees not to use state funds for entertainment or lobbying activities; and
 - d) Allows the state agency to which funds for the grant were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant.
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is incorporated under the laws of the State; and
 - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided.
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is determined and designated to be a non-profit organization by the Internal Revenue Service; and
 - b) Has a governing board whose members have no material conflict of interest and serve without compensation.

Pursuant to Section 42F-103, Hawaii Revised Statutes, for grants used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant was awarded and disposes of the land in fee simple or by lease, the organization shall negotiate with the expending agency for a lump sum or installment repayment to the State of the amount of the grant used for the acquisition of the land.

Further, the undersigned authorized representative certifies that this statement is true and correct to the best of the applicant's knowledge.

Hawaii Executive Collaborative

(Typed Name of Individual or Organization)


(Signature)

1/15/2022

(Date)

Lynelle Marble

Executive Director

(Typed Name)

(Title)

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 (If the Applicant is an Organization)

If the applicant is an organization, the applicant shall submit one (1) copy of a certificate of good standing from the Director of Commerce and Consumer Affairs that is dated no earlier than December 1, 2021.

Attached.

2. Declaration Statement

The applicant shall submit a declaration statement affirming its compliance with Section 42F-103, Hawaii Revised Statutes.

Attached.

3. Public Purpose

The applicant shall specify whether the grant will be used for a public purpose pursuant to Section 42F-102, Hawaii Revised Statutes.

The Hawai'i Executive Collaborative confirms that the requested grant will be used for a public purpose pursuant to Section 42F-102, Hawaii Revised Statutes.

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.

The Hawai'i Executive Collaborative (HEC) is comprised of a group of leaders from all sectors committed to driving collective action to address our community's toughest challenges. The Collaborative is deeply rooted in Hawai'i's soul and the belief that Hawai'i's unique culture and values, built on the foundation of aloha, is essential in cultivating leadership that dedicates itself to the care and nurturing of Hawai'i's land and people, and that these assets can also be shared to benefit the world.

Movers and Shakas is a program of the Hawai'i Executive Collaborative, a 501(c)3 nonprofit. The mission of Movers and Shakas (M&S) is to attract, integrate and retain key talent, especially returning kama'āina, to create a more innovative, resilient and sustainable Hawai'i.

As the pandemic ravaged the tourism industry in 2020, a group of volunteer CEOs from different industries took it upon themselves to help the community and explore ways to revive our struggling economy. What resulted was a private/public partnership to build economic resilience and bring kama'āina home. With the increase in remote work, Movers & Shakas found new ways to attract a different type of more socially responsible, longer-stay, lower footprint visitor and resident, who wanted to actively contribute to Hawai'i.

2. The goals and objectives related to the request.

The request will help fund our two programs which are focused on the mission to **attract, integrate and retain key talent, especially returning kama'āina, to create a more innovative, resilient and sustainable Hawaii**. Our programs aim to create an immersive Hawai'i 101 experience, enabling our participants to thrive in Hawai'i and thereby benefiting other key stakeholders including local employers and the State of Hawai'i at large. We also hope to establish our program and Hawai'i as thought leaders in remote work and talent acculturation.

Our main goal is to deliver benefits to our major stakeholders for the overall betterment of our state through our two programs:

The **Cohort Fellow program** is a 30-day flagship experience directed towards remote workers, especially returning kama'āina, to relocate and/or build economic ties to Hawaii.

- For the State of Hawaii:
 - Strengthen economic ties to mainland: remote jobs/internships, mentorship, business relationships, funding
 - Encourage cohort fellows to relocate to Hawai'i to bring kama'āina home, grow the local talent pool and increase the tax base
 - Create a reputation for Hawai'i as a desirable destination for remote working
- For Volunteer Partner Organizations (VPO), who are local nonprofits / startups:
 - Foster strong relationships between the local community and cohort fellows for ongoing contribution beyond the program
 - Provide free, impactful pro bono consulting by understanding the community needs and then matching cohort fellows with relevant functional and industry expertise to help address those needs
- For Cohort Fellows:
 - Offer a unique, authentic experience in Hawaii
 - Provide the opportunity to volunteer unique skills to Hawai'i nonprofits
 - Test relocating (back) to Hawaii
 - Build social and professional networks
 - Learn about Hawai'i culture
 - Free flights, discounted hotel

Hawaii Talent Onboarding Program (HITOP) is an 8-week community orientation to facilitate newly relocated talent's cultural, social and professional transition to Hawaii.

- For the State of Hawaii:
 - Integrate and retain local talent pool
 - Increase economic growth and diversification
 - Foster better community members, spread the Aloha spirit
 - Improve resident/newcomer relations
- For Employers in Hawaii:
 - Increase retention, reduce churn costs
 - Raise business productivity
 - Improve PR and community relations
- For Newly-Relocated Workers to Hawaii
 - Get (re)acculturated with Hawaii
 - Be more effective at work
 - Build social and professional networks
 - Cultivate a sense of belonging for self and family

3. The public purpose and need to be served.

Background

As Hawai'i's number one industry, tourism, declined precipitously because of Covid-19, there was an urgent need to help fill the gap of the 7-day visitor and, at the same time, reverse Hawai'i's "brain drain." Recruiting key talent to Hawai'i, especially returning kama'āina, took priority as remote work gained a foothold.

A group of CEOs from different industries—along with volunteers from the local business community—created Movers and Shakas, a public/private partnership to attract and retain professionals who could contribute their talents to growing and diversifying the local economy. In return for volunteering with local nonprofit organizations, Fellows were provided free roundtrip tickets to Hawai'i, help with accommodations, and authentic local experiences.

Program Evolution

M&S has since evolved to focus on "brain gain" to grow and diversify Hawaii's economy so that local folks can come home or never have to leave in the first place.

In addition to the initial Cohort Fellow program, we are developing a new pilot called Hawaii Talent Onboarding Program (HITOP) to address "brain drain." From 2017-2020, O'ahu lost approximately 54,000 people in net domestic migration, resulting in unmet talent needs and cultural dilution (source: DBEDT, Census). This brain drain drives the need for many sectors such as healthcare, education, banking and hospitality to recruit from the mainland.

When mainland hires do not acculturate to Hawai'i (exacerbated by two years of COVID-19 isolation), local businesses can suffer costly churn, stunted strategic momentum, reduced business productivity and PR / community relations challenges. HITOP will help newcomers learn about Hawaii, increase work effectiveness and life satisfaction, build a social network and become better community members.

Many businesses have a company orientation, but very few have a place-based community orientation to facilitate the professional, social, and cultural transition of employees (and their partners) to Hawaii, boosting talent integration and retention. We hope to serve as an ad hoc HR talent onboarding program for the State of Hawaii.

Overview of Programs

Our two place-based immersion programs aim to build enduring personal relationships, professional collaborations and long-term contribution to Hawai'i by enabling participants to learn, contribute and connect:

- The **Cohort Fellow program** is a 30-day flagship experience directed towards remote workers, especially returning kama'āina, to relocate and/or build economic ties to Hawaii.
- A new pilot, **Hawaii Talent Onboarding Program (HITOP)**, is an 8-week community orientation to facilitate newly relocated talent's cultural, social and professional transition to Hawaii. We hope to serve as an ad hoc HR talent onboarding program for the State of Hawaii.

Through these programs, Movers and Shakas promotes brain gain by attracting, integrating and retaining key talent to build a more resilient, innovative and sustainable Hawaii.

4. Describe the target population to be served.

Returning Kama'āina: People who have lived in Hawai'i before, especially those born and raised here, who can work remotely and are considering moving back home. They may have also been recently hired by local companies and relocating back home. Sources may include alumni associations of private/public high schools, mainland chapters of Chamber of Commerce of Hawaii, Cohort 1 alumni.

Newly-Relocated Workers/Hires to Hawaii: Out-of-state newcomers who have recently been hired / placed in Hawai'i by local companies, national companies, or self-employed who have never lived in Hawai'i before. Sources may include local employers in key industries like healthcare, hospitality, banking, sciences.

Current Residents: People who have been currently living and working in Hawai'i for more than a year for local or mainland employers, remotely or in the office.

Permanent Remote Workers: People who can work from anywhere and have recently relocated permanently to Hawai'i in the past year. Sources may include Shakas Network (extended Movers & Shakas professional network), personal connections.

Temporary Remote Workers: People who can work from anywhere right now and are considering a permanent relocation to Hawai'i. They are still a valuable connection if they return to the continent and can build enduring economic ties to Hawai'i, including creating remote jobs/internships for Hawai'i residents and ongoing business relationships.

Intended target audiences by program:

- **Cohort Fellow program:** Returning Kama'āina, Current Residents, Permanent Remote Workers, Temporary Remote Workers
- **HITOP:** Newly-Relocated Workers/Hires to Hawaii, Returning Kama'āina, Permanent Remote Workers

5. Describe the geographic coverage.

The entire state of Hawai'i is served through the Movers and Shakas' two programs, as residents of all islands are encouraged to be participants. All 2021 and 2022 programs will take place physically on O'ahu, with an intention to roll out to the neighbor islands in 2023, starting with the Big Island.

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.

Scope of Work:

Movers and Shakas runs two place-based immersion programs designed to attract, integrate and retain key talent, to learn, contribute and connect in Hawai'i. These programs aim to build enduring personal relationships, professional collaborations and long-term contributions to Hawai'i.

Cohort Fellow program – This program selects cohort “fellows” who are welcomed with a free roundtrip ticket to Hawai'i, facilitated accommodations (optional and paid by the fellow) and authentic local experiences for a thirty-day experience. The programming provides fellows with the opportunity to gain a deeper understanding of Hawai'i, build strong personal relationships and actively contribute to the community.

Hawai'i Talent Onboarding Program (HITOP) - The Hawai'i Talent Onboarding Program is an eight-week community orientation program that will facilitate newly relocated talent's cultural, social and professional transition to Hawai'i. Many businesses have a company orientation, but very few have a place-based community orientation to facilitate the professional, social and cultural transition of employees (and their partners) to Hawai'i.

Both of these programs follow a three-pronged approach:

- LEARN about Hawai'i's unique culture from diverse, authentic voices
- CONTRIBUTE through community service projects for local nonprofits/startups and
- CONNECT with the community and cohort through networking events and social activities.

Tasks:

Cohort Fellows Program (30-day)

Each cohort will have three major program components:

- LEARN:
 - Full day kickoff and cultural orientation (including NaHHA on Cultural Meanings of Aloha, panel on the Challenges and Opportunities of Hawai'i as a Melting Pot, three-hour cultural training, Leadership Island Style, with Glenn Furuya and Debbie Bacon. First Sunday from 8:00 am - 5:00 pm)
- CONTRIBUTE:
 - 30 hours of skill-based pro-bono consulting project for a local nonprofit/startup (VPO, Volunteer Partner Org)
 - Four community service workdays on each Saturday, 8am – 12pm at a local nonprofit. Current projects (may change during different cohorts): Huilua Fishpond restoration with Kahana 'Ohana, Lo'i day at Ka'ala Farm, Bishop Museum, beach cleanup with UH College of Tropical Agriculture & Human Resources
- CONNECT:
 - Olympic Village: Although accommodations aren't subsidized, fellows are encouraged to stay in the "Olympic Village," hosted by Waikiki Malia by Outrigger, to create a welcoming environment for organic connections and to support the lodging industry. Waikiki Malia provides 4 hospitality rooms and a private lanai to create a M&S headquarters during the monthlong cohort
 - Pau Hana Panel on Sustainability and Innovation (co-hosted by United Airlines and Elemental Excelsior)
 - Informal dinners and events (e.g., Honolulu Museum of Art visit)
 - Opening Ceremony on first Sunday to meet the Volunteer Partner Orgs, Sponsors, Advisory Board
 - Closing ceremony with community on last week of program to showcase VPO project impact

Hawai'i Talent Onboarding Program (8-week)

Each class will have 3 phases that each participant will progress through:

- LEARN: Half day kickoff and cultural orientation (NaHHA, Glenn Furuya). First Saturday from 8:00 am - 12:00 pm
- CONTRIBUTE: Three community service workdays on Saturdays, 8am – 12pm; Current projects (may change during different cohorts): Huilua Fishpond, Lo'i day, Bishop Museum
- CONNECT: Pau Hana and Talk Story scheduled twice per month for learning and networking. Closing ceremony on last week of program

Responsibilities:

Lead Oversight:

Movers and Shakas was developed under the direct leadership of the three Board Members of the Hawai'i Executive Collaborative (HEC):

- Duane Kurisu, Founder of aio Group - Chairman/Director/President/Secretary
- Micah Kane, CEO & President of Hawai'i Community Foundation - Director/Vice President
- John Dean, Chairman Emeritus of Central Pacific Financial Corp. - Director/Treasurer

Program Strategy and Partnerships:

As a public/private partnership, the founding Advisory Board Members created the guidelines and strategy and actively manage Movers and Shakas. Each Advisory Board Member serves on the Fund Development, Cohort Selection or Volunteer Partner Org Relations committee:

- Jason Higa, CEO, Zippy's
- Rob Nobriga, President, Island Holdings
- Lynelle Marble, Executive Director, HEC
- Denise Yamaguchi, Executive Director, Hawai'i Ag Foundation & CEO, Hawaii Food & Wine Festival
- Ben Ancheta, President/Owner, Inkinen Executive Search
- Richard Matsui, CEO/Founder, kWh Analytics
- Lori Teranishi, Principal, IQ 360
- Kevin Yim, VP of Marketing, Zippy's Restaurants
- Na'alehu Anthony, Director, Hawai'i COVID Collaborative

Program Implementation:

As the primary staff member of Movers and Shakas, Nicole Lim, MBA, serves as the Director (full-time). Nicole is responsible for managing all aspects of Movers and Shakas, including the strategic vision, program delivery, partner management and fund development. An additional part-time program manager, Linda Lee, MBA, will provide communication, event logistics assistance with the cohorts.

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

During the budget timeframe of July 1, 2022 - June 30, 2023, two cohorts of the Fellows program and three classes of the Hawaii Talent Onboarding Program (HITOP) will take place. The preparation and schedule for each eight-week session will be similar.

Event Schedule

- Cohort Fellow Program Cohorts (30-days)
 - September 2022
 - April 2023
- HITOP Program Classes (8-weeks):
 - October-November 2022
 - February-March 2023
 - May-June 2023

Cohort Fellow Program Schedule

- Three months prior: Preparation and Marketing
 - Promote Cohort applications opening: send newsletters to past applicants, reach out to alumni orgs on the continent, pitch related media stories
 - Finalize Volunteer Partner Organizations and project overviews
 - Work with partners to set up cultural education, Saturday morning community service, Olympic Village and pau hanas
- Two months prior: Applications
 - Applications submitted
 - Finalists selected and additional info requested
 - M&S team reviews applications
 - Cohort Fellows selected and notified
- One month prior: Cohort Fellows confirmed and registered (travel booked)
- Two weeks prior: Pre-departure virtual orientation
- Program Week 1:
 - All-day program kick-off / cultural orientation with Native Hawaiian culture and language, local business culture, Hawai'i as Melting Pot panel
 - Opening Ceremony to connect cohort fellows, sponsors/partners, Volunteer Partner Orgs (VPO), and Advisory Board
 - Project teams of 5 work on their assigned project with their respective VPOs
 - Saturday AM Community Service #1
- Week 2:
 - Networking event with cohort fellows and local professionals
 - Saturday AM Community Service #2
- Week 3:
 - Networking event with cohort fellows and local professionals
 - Saturday AM Community Service #3

- Week 4:
 - Saturday AM Community Service #4
 - Closing Ceremony to showcase interim results of team-based volunteer projects; guests: cohort fellows, sponsors/partners, Volunteer Partner Orgs, and Advisory Board
- Month 2: Cohort Fellows complete the second half of the VPO projects
- Post-Program:
 - Debrief
 - Participant and employer survey every 6 months
 - Improve program
 - Begin recruiting for next cohort

HITOP Schedule

- Two months prior: Preparation and Marketing
 - Recruit HITOP class by reaching out to local and national employers in Hawaii
 - Work with partners to set up cultural education, Saturday morning community service, pau hanas and talk story sessions
- One month prior:
 - Survey class to identify their topics of interest
- Program Week 1:
 - Kickoff Cultural Education
 - Saturday AM Community Service #1
- Week 2: Talk Story Connect #1
- Week 3: Social Pau Hana #1
- Week 4: Saturday AM Community Service #2
- Week 5: Talk Story Connect #2
- Week 6: Social Pau Hana #2
- Week 7: Saturday AM Community Service #3
- Week 8: Closing Ceremony
- Post-Program:
 - Debrief
 - Participant and employer survey every 6 months
 - Improve program
 - Begin recruiting for next class

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

Data collection and tracking over time is critical to the continued improvement and success of Movers and Shakas. There will be quantitative and qualitative data collected including objective and self-reported measures.

For both programs, our primary method to gather qualitative and quantitative data is through surveys (via Google Forms) and in-depth interviews (conducted in-person or via Zoom). We want to track data over time to assess whether we are providing the stakeholder benefits we set out to.

Cohort Fellow Program

For the State of Hawaii:

- Objectives
 - Strengthen economic ties to mainland: remote jobs/internships, mentorship, business relationships, funding
 - Encourage cohort fellows to relocate to Hawai'i to bring kama'āina home, grow the local talent pool and increase the tax base
 - Create a reputation for Hawai'i as a desirable destination for remote working
- Measures
 - Follow-up surveys every 6 months with cohort fellow alumni to track
 - Professional / personal relationships created
 - Ongoing contributions to HI
 - Actual/intended return visits to Hawaii
 - Actual/intended relocation to Hawaii
 - M&S Net Promoter Score (NPS)
 - Post-program follow-up surveys every 6 months with VPO and other partners to track ongoing contributions

For Volunteer Partner Orgs (VPO; local nonprofits/startups):

- Objectives
 - Foster strong relationships between the local community and cohort fellows for ongoing contribution beyond the program
 - Provide free, impactful pro bono consulting by understanding the community needs and then matching cohort fellows with relevant functional and industry expertise to help address those needs
- Measures
 - Weekly surveys during program with VPO to track project benefits, satisfaction with cohort fellow volunteers and M&S program
 - Post-program follow-up surveys every 6 months with alumni, VPO and other partners to track ongoing contributions

For Cohort Fellows:

- Objectives
 - Offer a unique, authentic experience in Hawaii
 - Provide the opportunity to volunteer unique skills to Hawai'i nonprofits
 - Test relocating (back) to Hawaii
 - Build social and professional networks
 - Learn about Hawai'i culture
 - Free flights, discounted hotel

- Measures: Weekly surveys of Cohort Fellows during program to track
 - Detailed direct economic spend
 - Volunteering time and impact
 - Interaction with locals
 - M&S Net Promoter Score (NPS)

Hawaii Talent Onboarding Program (HITOP)

For the State of Hawaii:

- Objectives
 - Integrate and retain local talent pool
 - Increase economic growth and diversification
 - Foster better community members, spread the Aloha spirit
 - Improve resident/newcomer relations
- Measures
 - Analysis: Increase in tax base due to higher retention (based on survey data)
 - Post-program surveys
 - Participants: understanding of Aloha spirit, sense of belonging
 - Local residents from social pau hanas: attitude towards outsiders

For Employers in Hawaii:

- Objectives
 - Increase retention, reduce churn costs
 - Raise business productivity
 - Improve PR and community relations
- Measures:
 - Employer survey pre/during/post program
 - Employee performance and attitude
 - 360 feedback
 - Productivity measures
 - PR/community relationships
 - Retention rates over time vs. non-participants
 - Analysis: value of reduced churn (based on survey data, employer input)

For Newly-Relocated Workers to Hawaii:

- Objectives:
 - Get (re)acculturated with Hawaii
 - Be more effective at work
 - Build social and professional networks
 - Cultivate a sense of belonging for self and family
- Measures: Participant survey pre/during/post program
 - Company NPS
 - Work/life satisfaction
 - Relationships with locals

- Contributions to Hawai'i (actual/intended volunteering, mentoring, etc.)
- M&S NPS
- Actual/intended stay in Hawaii
- Sense of belonging

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.**

The measures of effectiveness that will be reported to the State agency through which grant funds are appropriated are as follows:

Cohort Fellow Program

1. 100% of participants who completed the Cohort Fellow program cultivated meaningful relationships with other cohort fellows, their Volunteer Partner Organizations, local people or family/friends in Hawaii
2. 80% of VPOs rated the volunteers' impact on their organization as "High Impact" or higher
3. 50% of participants increased their intention to visit or relocate to Hawaii
4. 70% of participants were active in the alumni community 6 months after their program wrapped

HITOP

5. 100% of participants who completed the HITOP were able to understand their personal impact on their community
6. 80% of participants remained successfully employed in Hawai'i for at least one year following the program
7. 80% of participants demonstrated increased job effectiveness as a result of their facilitated cultural, social and professional transitions
8. 100% of participants experienced a greater sense of belonging

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 (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)

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2023.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$50,000	\$50,000	\$50,000	\$50,000	\$200,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2023.

Movers and Shakas Sponsorship Requests for FY 2023 may include:

- Zippy's
- United Airlines (in-kind)
- Island Holdings, Inc.
- Inkinen
- Alaska Airlines (in-kind)
- Kosasa Family Fund
- iQ 360
- CPB Foundation
- Omidyar 'Ohana Fund
- Hawai'i Tourism Authority

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.

Not applicable.

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 2023 for program funding.

Movers and Shakas received a DBEDT Contract For Goods and Services for \$99,950 to provide a marketing program for the Movers and Shakas program to encourage former Hawai'i residents and others to temporarily relocate to Hawai'i while performing their remote work for their

mainland employers. This was a one-time contract (November 15, 2020 – April 30, 2021) and will not be renewed or sought for FY 2023.

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2021.

\$353,000

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.

In 2020, the pandemic halted the tourism industry while creating new opportunities for remote work. A group of Hawai'i business leaders launched Movers and Shakas to bring kama'āina home, explore a model to attract more socially responsible visitors who actively contribute to our community and seek a more authentic local experience, and to attract key talent to grow and diversify the local economy.

Lead Oversight

Movers and Shakas was developed under the direct leadership of the three Board Members of the Hawai'i Executive Collaborative (HEC):

- Duane Kurisu, Chairman of HEC and founder of aio Group, Director/President/Secretary
- Micah Kane, CEO & President of Hawai'i Community Foundation, Director/Vice President
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Program Strategy and Partnerships

As a public/private partnership, the founding Advisory Board Members created the guidelines and strategy and actively manage Movers and Shakas:

- Jason Higa, CEO, Zippy's
- Rob Nobriga, President, Island Holdings
- Lynelle Marble, Executive Director, HEC
- Denise Yamaguchi, Executive Director, Hawai'i Ag Foundation & CEO, Hawaii Food & Wine Festival
- Ben Ancheta, President/Owner, Inkinen Executive Search
- Richard Matsui, CEO/Founder, kWh Analytics
- Lori Teranishi, Principal, IQ 360
- Kevin Yim, VP of Marketing, Zippy's Restaurants
- Na'alehu Anthony, Director, Hawai'i COVID Collaborative

Experience

As a 30-day flagship experience in 2021, the Cohort Fellow Program was directed towards remote workers, especially returning kama'āina, to relocate and/or build economic ties to Hawaii. In the first two years, three cohorts were created, one completed in 2021 and one in spring 2022 (in-progress) and one planned for fall 2022. As an incentive and marketing decision, each of the 50 selected cohort fellows receive a free roundtrip flight to Hawai'i to participate in this place-based orientation.

During the first two-month cohort program in 2021, over \$1 million in direct economic spend per cohort, over \$6 million in marketing/branding value to Hawai'i, and \$300,000 in pro bono consulting to local nonprofits took place.

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.

The Movers and Shakas program does not operate out of a physical facility, as all work is done at partner or community venues. The many prominent business leaders, volunteer partner organizations and cultural/community service partners provide venues for each segment of the program implementation. Contracted program staff are fully-remote workers.

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.

Director, Movers and Shakas – Nicole Lim, MBA (independent contractor) (FT)

As the primary staff member of Movers and Shakas, Nicole Lim serves as the Director for the program and provides the supervision of all partners, contractors, finance, and administrative sub-contractors.

Her homecoming to Hawai'i mirrors the path of many program participants. Born and raised in Hawai'i, Nicole attended 'Iolani School and moved to the mainland for 20 years to attend school (Yale: BA, Wharton: MBA) and to build a career. Lim is a strategy consultant with more than 15 years of international experience in finance and technology. She also worked remotely around the world in the five years before the pandemic.

Nicole is responsible for managing all aspects of Movers and Shakas, including the strategic vision, program delivery, partner management and fund development.

Program Manager, Movers and Shakas – Linda Lee, MBA (independent contractor) (PT)
Linda Lee will provide assistance with the cohorts. Her role is to organize and execute the events, network and collaborate with the multiple stakeholders, administrative duties, and community building.

Linda is an accomplished marketing and business development professional with 20+ years track record of success; Executive presence in multiple organizations with degrees from UCLA Anderson and Stanford University.

Executive Director, Hawai'i Executive Collaborative – Lynelle Marble (independent contractor) (FT) As a previous marketing and communications professional (Vice President of Marketing & Strategic Partnerships at Hawai'i Community Foundation), Lynelle Marble brings her focus on achieving results and driving strategies to help strengthen Hawai'i as an Executive Director. Her areas of involvement for the Movers and Shakas program is to provide executive oversight, brand strategy, public relations, and strategic partnerships.

Additional Contractors:

Movers and Shakas also works with iQ 360 for media relations, Race Skelton (contracted social media manager), and 'Ōiwi TV for storytelling.

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.

Attached.

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.

Below are the salary ranges for the three highest paid positions within Hawai'i Executive Collaborative:

Executive Director	\$150,000 to \$175,000
Director, Movers and Shakas	\$130,000 to \$160,000
Director, TRUE	\$130,000 to \$160,000

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.

Not Applicable.

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.

Not Applicable.

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.

Not Applicable.

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2022-23 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2022-23, but
- (b) Not received by the applicant thereafter.

Movers and Shakas' intentional direction towards fee-for-service opportunities is the primary strategy for building out a second program (from the original flagship Cohort Fellows program). The Hawai'i Talent Onboarding program is the answer to the long-term sustainability model, by offering a set fee (\$5,000 per person) for organizations to onboard their new staff who are relocating to the state for employment. Each year, as this program viability increases, the goal will be to raise money to supplement the entire Movers and Shakas expenses annually.

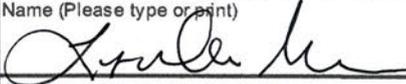
Movers and Shakas has created meaningful relationships with Human Resource Directors throughout the state, in an effort to gauge the future need for the HITOP program and to begin the pilot program in 2022. Additionally, the strength of the community leadership and backing for this program is building a pipeline of companies who may need this type of place-based orientation program.

In the meantime, community financial support of the Movers and Shakas pilot programs have been well-received, with sustainable funding provided by sponsors such as Zippy's, United Airlines, Alaska Airlines, CPB Foundation, Island Holdings, Inkinen, iQ 360, and many more. Strong stewardship efforts are being made to continue this type of corporate and foundation support to supplement the earned-income model.

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2022 to June 30, 2023

Applicant: Hawai'i Executive Collaborative - Movers and Shakas Program

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
A. PERSONNEL COST				
1. Salaries	100,000	0	0	124,469
2. Payroll Taxes & Assessments	0	0	0	0
3. Fringe Benefits	0	0	0	0
TOTAL PERSONNEL COST	100,000	0	0	124,469
B. OTHER CURRENT EXPENSES				
1. Airfare, Interisland	0	0	0	2,400
2. Insurance	0	0	0	0
3. Lease/Rental of Equipment	0	0	0	0
4. Lease/Rental of Space	10,000	0	0	4,100
5. Participant Training	17,000	0	0	8,262
6. Supplies	14,000	0	0	22,500
7. Telecommunication	0	0	0	0
8. Utilities	0	0	0	0
9. Airfare Coordination Fees	0	0	0	8,000
10. Transportation	6,000	0	0	0
11. Marketing, PR, Communications	23,300	0	0	89,514
12. Participant Meals	10,000	0	0	69,350
13. Technology	11,000	0	0	37,664
14. Advisory Board Meetings	0	0	0	1,000
15. Partner Honorariums	7,500	0	0	0
16. Scholarships	0	0	0	3,000
17. Administrative	1,200	0	0	0
18.				
19.				
20.				
TOTAL OTHER CURRENT EXPENSES	100,000			245,790
C. EQUIPMENT PURCHASES	0	0	0	0
D. MOTOR VEHICLE PURCHASES	0	0	0	0
E. CAPITAL	0	0	0	0
TOTAL (A+B+C+D+E)	200,000	0	0	370,259
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	200,000	Nicole Lim, Director		808-304-5813
(b) Total Federal Funds Requested	0	Name (Please type or print)		Phone
(c) Total County Funds Requested	0			1/20/22
(d) Total Private/Other Funds Requested	370,259	Signature of Authorized Official		Date
TOTAL BUDGET	570,259	Lynelle Marble, Executive Director		
		Name and Title (Please type or print)		

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2022 to June 30, 2023

Applicant: Hawaii Executive Collaborative

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Director, Movers and Shakas	1.0 FTE	\$164,469.00	45.00%	\$ 74,011.05
Program Manager, Movers and Shakas	.5 FTE	\$60,000.00	43.31%	\$ 25,988.95
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
TOTAL:				100,000.00
JUSTIFICATION/COMMENTS: The Director is responsible for managing all aspects of Movers and Shakas, including the strategic vision, program delivery, partner management and fund development. The Program Manager will provide direct assistance with the cohorts, primarily with communication, logistics, and event preparation.				

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2022 to June 30, 2023

Applicant: Hawai'i Executive Collaborative - Not Applicable

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS:				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS:				

BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2022 to June 30, 2023

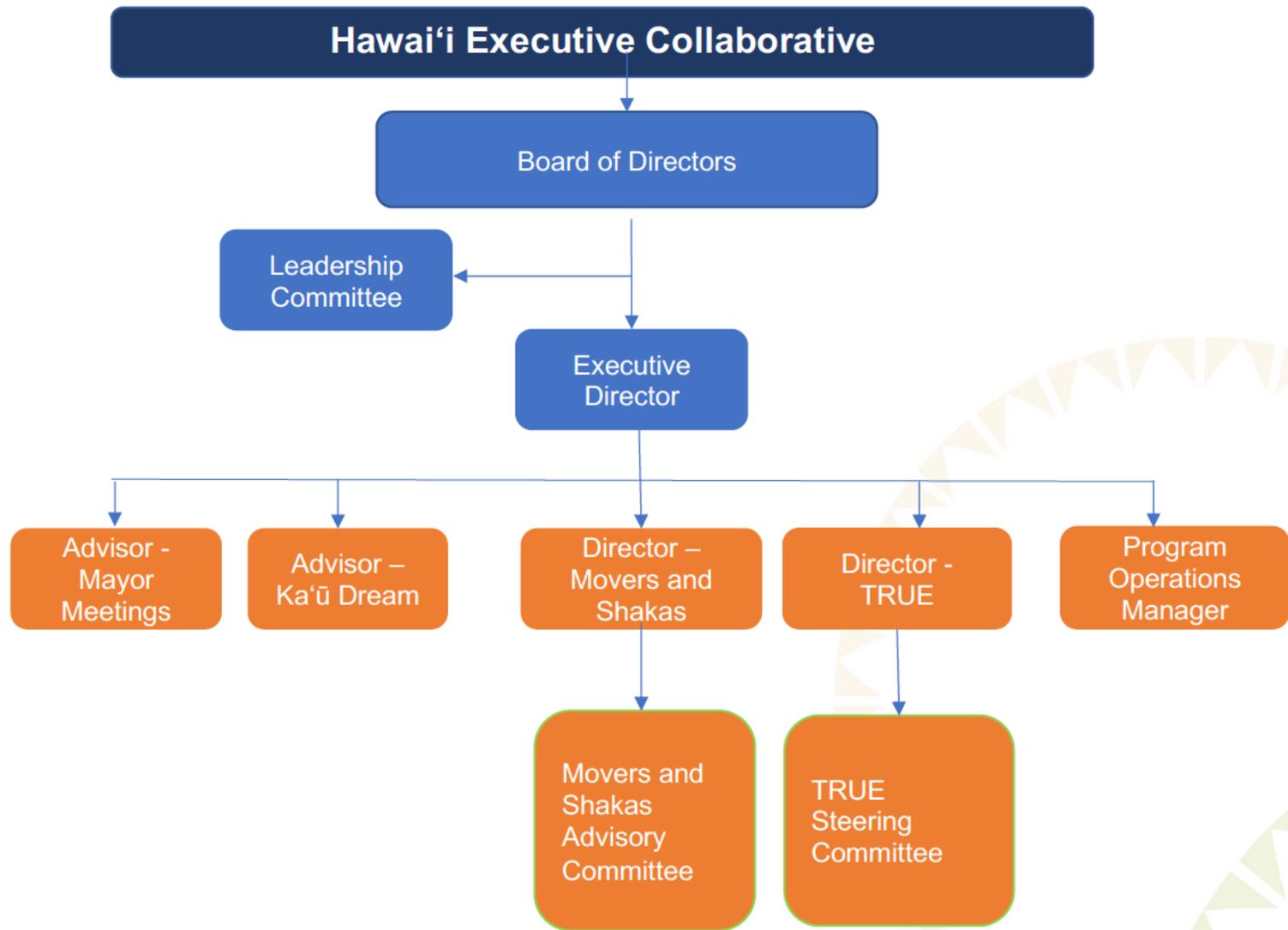
Applicant: Hawai'i Executive Collaborative - Not Applicable

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2020-2021	FY: 2021-2022	FY:2022-2023	FY:2022-2023	FY:2023-2024	FY:2024-2025
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
TOTAL:						
JUSTIFICATION/COMMENTS:						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: Hawai'i Executive Collaborative

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	Marketing Services for Movers and Shakas program	11/15/2020 - 4/30/2021	DBEDT	State of Hawaii	99,950
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HEC ORGANIZATIONAL CHART