

**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:
 Movers and Shakas Movers and Shakas

Amount of State Funds Requested: \$ 260,000

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

Movers and Shakas focuses on "brain gain" to grow and diversify Hawaii's economy. Its main offering, Hawaii Talent Onboarding Program, aims to help employers integrate and retain newly arrived talent through cultural education, community service and networking. Many businesses have a company orientation but very few have a place-based community orientation. Participants learn about Hawaii, increase work effectiveness, build lasting relationships, and

Amount of Other Funds Available: State: \$ <u>0</u> Federal: \$ <u>0</u> County: \$ <u>0</u> Private/Other: \$ <u>177,615</u>	Total amount of State Grants Received in the Past 5 Fiscal Years: <u>\$249,500</u> Unrestricted Assets: <u>\$12,360</u>
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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:
 827 Fort Street Second Floor
 City: Honolulu State: HI Zip: 96813

Contact Person for Matters Involving this Application

Name: Nicole Lim	Title: Executive Director
Email: nicole@moversandshakas.org	Phone: 808-304-5813

Federal Tax ID#: [REDACTED]	[REDACTED]
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	Nicole Lim, Executive Director	1/17/23
Authorized Signature	Name and Title	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.

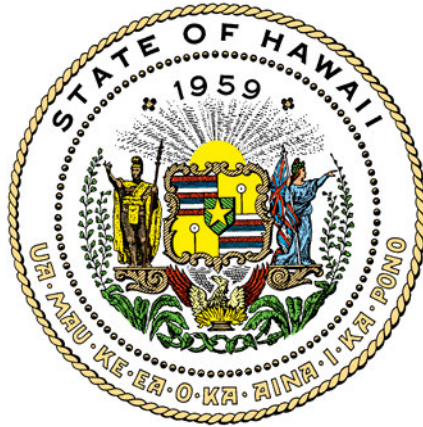
- 1) Certificate of Good Standing (If the Applicant is an Organization)
- 2) Declaration Statement
- 3) Verify that grant shall be used for a public purpose
- 4) Background and Summary
- 5) Service Summary and Outcomes
- 6) Budget
 - a) Budget request by source of funds ([Link](#))
 - b) Personnel salaries 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

PRINT NAME AND TITLE

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

MOVERS AND SHAKAS

was incorporated under the laws of Hawaii on 08/09/2022 ; 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 29, 2022

Director of Commerce and Consumer Affairs



**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS PURSUANT TO
CHAPTER 42F, HAWAII REVISIED 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; and
- 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.
- 4) The use of grant-in-aid funding complies with all provisions of the Constitution of the State of Hawaii (for example, pursuant to Article X, section 1, of the Constitution, the State cannot provide "... public funds ... for the support or benefit of any sectarian or nonsectarian private educational institution...").

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.

(Typed Name of Individual or Organization)



(Signature)

(Date)

(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, 2022.

Attached.

2. Declaration Statement

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

Movers and Shakas confirms that the requested grant will be used for a public purpose pursuant to Section 42F-102, Hawai'i 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 mission of Movers and Shakas is to **integrate and retain key talent, especially returning kama'āina, to tackle brain drain, grow the economy and build community**. Our program aims 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.

History

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 and Shakas found new ways to attract a different type of more socially responsible, longer-stay, lower footprint visitor, who wanted to actively contribute to Hawai'i.

As COVID subsided, tourism rebounded and remote work evolved, Movers and Shakas shifted away from our successful Remote Worker Program, towards helping newly relocated professionals, including returning kama'āina, to acclimate professionally, culturally and socially to Hawaii. Our aim is to integrate and retain talent in Hawai'i through a new program called Hawai'i Talent Onboarding Program (HITOP).

After operating as a program of the Hawai'i Executive Collaborative for the past two years, the success of Movers and Shakas' initiatives have created the momentum to organize into a separate 501c3 organization in 2022. The board of directors filed and received the 501c3 status in October 2022.

2. The goals and objectives related to the request;

Program: Hawai'i Talent Onboarding Program

The Hawai'i Talent Onboarding Program (HITOP) is a 6-week, place-based acculturation program designed to 1) help new and returning residents live and work successfully in Hawai'i and 2) support local employers in retaining and empowering their highly recruited leaders. Through cultural education, community service and networking, HITOP participants learn about Hawai'i, increase work effectiveness, build lasting relationships and develop a sense of belonging and shared stewardship for their new home.

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, boosting talent integration and retention. Leaders participate in industry-diverse cohorts of 30-50 to build cross-sector relationships and deepen their understanding of Hawai'i.

We hope to serve as an ad hoc HR talent onboarding program for the State of Hawai'i. We also intend to establish our program and Hawai'i as thought leaders in place-based talent acculturation and retention.

Our three main stakeholders and goals/objectives for each group:

- For the State of Hawai'i:
 - Integrate and retain local talent pool, especially key leaders
 - Increase economic growth and diversification through committed leaders
 - Develop leaders who are committed to caring for the community as individuals and leaders of their organizations/industries

- Improve resident/newcomer relations
- For Employers in Hawai'i:
 - Increase retention and reduce turnover costs (typically 50-100% of annual salary)
 - Raise business productivity by developing more effective leaders who are culturally aware and content in their new island home
 - Avoid PR and community relations issues
- For Newly-Relocated Participants to Hawai'i
 - Get (re)acculturated to Hawai'i with a cohort of other leaders going through similar transition challenges
 - Communicate and work more effectively
 - Build social and professional networks
 - Cultivate a sense of belonging and home in Hawai'i

3. The public purpose and need to be served;

Public Purpose

During the precipitous decline of tourism during Covid-19 in 2020, 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. 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.

With HITOP, we have shifted our focus to helping local businesses maximize their talent investments by acculturating their new leaders to Hawai'i to be effective leaders with a sense of kuleana for their new island home. To make this invaluable community orientation program available to leaders from different industries, we've offered scholarships to Department of Education teachers and administrators, nonprofit organizations, and hope to offer a scholarship via this State GIA grant to State of Hawai'i leaders, such as professors and administrators at the University of Hawai'i and key government workers.

Need to be Served

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, ineffective leaders, stunted strategic momentum, reduced business productivity and PR / community relations challenges. HITOP will

help newcomers and returning kama'āina learn about Hawai'i, increase work effectiveness and life satisfaction, build a social network and become better community members.

Program Evolution

As remote work evolved and tourism rebounded, Movers and Shakas shifted away from our successful Remote Worker Program, towards helping newly relocated professionals, including returning kama'āina, to acculturate professionally, culturally, and socially to Hawai'i. Our aim is to integrate and retain talent here in a program called Hawai'i Talent Onboarding Program (HITOP).

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

4. Describe the target population to be served; and

Newly-Relocated Workers/Hires to Hawai'i: Out-of-state newcomers who have recently been hired / placed in Hawai'i by local companies, national companies, or are self-employed and have never lived in Hawai'i before. Employees' partners may also join the program if employers wish to sponsor them. Sources may include local employers in key industries like healthcare, banking, education, energy, nonprofit.

State Workers: Out-of-state newcomers who have recently been hired by the State of Hawaii such as professors and administrators at the University of Hawai'i and key government workers. We plan to offer scholarships to 20 State Workers via this State GIA grant. Sources may include the University of Hawaii and state government.

Returning Kama'āina: People who have lived in Hawai'i before, especially those born and raised here, who have been recently hired by local companies and relocating back home. Employees' partners may also join the program if employers wish to sponsor them. Sources may include local employers, Chamber of Commerce Hawai'i, alumni associations of private/public high schools.

5. Describe the geographic coverage.

The primary focus is on O'ahu, as both 2023 HITOP cohorts will take place physically on O'ahu. In a previous cohort, we had a Maui-based participant fly in for each event. We will consider expanding to neighbor islands in 2024, likely starting with 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 the Hawai'i Talent Onboarding Program (HITOP), a place-based immersion program designed to integrate and retain key talent to learn, contribute and connect in Hawai'i.

HITOP is a 6-week, place-based acculturation program designed to:

- 1) Help new and returning residents live and work successfully in Hawai'i
- 2) Support local employers in retaining and empowering their highly recruited leaders

HITOP follows a three-pillared approach:

- LEARN about Hawai'i's unique culture through a mix of in-person discussions, immersive outdoors experiences, lectures, workshops, and guest speakers representing diverse and authentic voices
- CONTRIBUTE through community service for local nonprofits and
- CONNECT with the community and cohort through networking events and social activities

Tasks:

Each cohort of 30-50 will experience an intentionally laid out curriculum across the three pillars. We collaborate with respected community partners to deliver a diverse and authentic acculturation program. See below for a sample curriculum – actual plans may differ based on partner availability and program iterations:

- LEARN:
 - Sat. morning (8am-12pm): Half day kickoff, typically at Iolani Palace with Native Hawaiian Hospitality Association representative
 - Sat. morning (8am-12pm): Āina-based cultural education like lo'i day with Kāko'o 'Ōiwi or fishpond maintenance with Kahana Ohana at Huilua Fishpond
 - Thurs. evening (5:30-8:30pm): Business communication and culture training with Leadership Works and Glenn Furuya
- CONTRIBUTE:
 - Sat. morning (8am-12pm): Two community service workdays with local nonprofits for participants to learn about pressing community challenges and what they can do as individuals and leaders of their orgs/industries to help tackle those challenges. Past workday partners have included visiting shelters and doing volunteer planting at Institute of Human Services / Kahauiki Village to

showcase the challenge of houselessness and The Pantry by Feeding Hawai'i Together to showcase the challenge of food insecurity

- We also feature guest speakers who share opportunities for participants to contribute to the community such as ClimbHI Bridge (workforce development / student mentoring) and Hawai'i Alliance of Nonprofit Organizations (board leadership)

- **CONNECT:**
 - Thurs. evening (5:30-8:30pm): Talk Story where we cover practical tips like potluck etiquette, aloha attire, nonverbal communication; with guest speakers including successful transplants and community leaders
 - Thurs. evening (5:30-8:30pm): Closing Pau Hana where cohort members, participating employers, community partners, sponsors, and the Board come together to celebrate the successful completion of the cohort
 - Cohort members are broken down into smaller 5-6 person "pods" and encouraged to meet outside of program events (with partners) to build new relationships. Theme-based activities/projects may be recommended (e.g., throw a potluck, share with the cohort a nonprofit that resonates with the group)
 - An optional 30-minute, 1:1 coaching session with a certified leadership coach (typically Executive Director) is offered to participants to discuss specific personal and professional topics

Responsibilities:

Lead Oversight:

As a public/private partnership, the founding Board Members created the guidelines and strategy and actively managed Movers and Shakas until the Executive Director was brought on in 2020. Each Board Member serves on one or more committees including Governance, Finance, Fund Development, HITOP Sales and Recruiting, Curriculum Development, Cohort Management:

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

Program Implementation:

As the primary staff member of Movers and Shakas, Nicole Lim, MBA, serves as the Executive 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, Karen Kuniyuki, provides program execution, cohort communication, event logistics assistance and social media/marketing assistance.

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

During the budget timeframe of July 1, 2023 - June 30, 2024, two cohorts of the Hawai'i Talent Onboarding Program (HITOP) will take place. The preparation and schedule for each six-week session will be similar.

HITOP Event Schedule

- Fall 2023 Cohort (9/30/23 – 11/2/23)
- Spring 2024 Cohort (April/May 2024)

HITOP Planning Schedule

- Three months prior: Preparation and Marketing
 - Recruit HITOP cohort by reaching out to past customers, local and national employers in Hawai'i, and expanding to new customers/industries
 - Work with community partners to set up cultural education, community service, pau hanas and talk story sessions
- One month prior:
 - Send pre-program communications to cohort:
 - Survey to collect baseline data and identify key topics of interest
 - Program expectations, including detailed schedule
 - Finalize curriculum and plans with community partners
- Cohort Programming (sample curriculum – actual may vary)
 - Program Week 1: Kickoff Cultural Education
 - Week 2: Leadership Island Style
 - Week 3: Community Service – IHS/Kahauiki Village
 - Week 4: Talk Story
 - Week 5: Community Service – The Pantry
 - Week 6: Closing Pau Hana
- Post-Program:
 - Debrief on individual events
 - Conduct post-program surveys with participants, employers, and participant direct managers
 - Alumni survey for participants every 6 months

- Implement program improvements based on feedback and learnings
- Begin recruiting for next cohort

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

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.

Our primary method to gather qualitative and quantitative data is through surveys (via FormStack) 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.

Monitoring and Evaluating Hawai'i Talent Onboarding Program (HITOP)

For the State of Hawai'i:

- Objectives
 - Integrate and retain local talent pool, especially key leaders
 - Increase economic growth and diversification through committed leaders
 - Develop leaders who are committed to caring for the community as individuals and leaders of their organizations/industries
 - Improve resident/newcomer relations
- Measures
 - Post-program Participant surveys: understanding of local/Hawaiian culture, sense of belonging and Hawai'i as home, sense of shared stewardship, intention and awareness of opportunities to contribute to the community, intention to stay in Hawai'i
 - Alumni surveys (6 months and annual): retention rates over time in company / state

For Employers in Hawai'i:

- Objectives
 - Increase retention and reduce turnover costs (typically 50-100% of annual salary)
 - Raise business productivity by developing more effective leaders who are culturally aware and content in their new island home
 - Avoid PR and community relations issues
- Measures:
 - Post-program Employer and Direct Manager survey:
 - Increase in participant's workplace effectiveness
 - Benefits of HITOP to employer
 - Unmet employer needs

For Participants:

- Objectives:
 - Get acculturated to Hawai'i with a cohort of other leaders going through similar transition challenges
 - Communicate and work more effectively
 - Build social and professional networks
 - Cultivate a sense of belonging and home in Hawai'i
- Measures: Participant survey pre/post program
 - Understanding of local/Hawaiian culture
 - Workplace effectiveness / navigating professional challenges
 - Relationships with locals
 - Social satisfaction
 - Contributions to Hawai'i (actual/intended volunteering, mentoring, etc.)
 - M&S NPS
 - Actual/intended stay in Hawai'i
 - Sense of belonging and Hawai'i as home

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:

1. 90% of participants who complete HITOP increase their sense of shared stewardship for Hawai'i
2. 90% of participants who complete HITOP increase their understanding of local and Hawaiian culture
3. 80% of HITOP participants remained successfully employed in Hawai'i for at least one year following the program
4. 80% of participants felt increased job effectiveness after going through HITOP
5. 90% of HITOP participants experienced a greater sense of belonging
6. 20 State Workers participate across FY2024 cohorts

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 2024.**

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$90,000	\$40,000	\$90,000	\$40,000	\$260,000

3. **The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2024.**

Movers and Shakas Sponsorship Requests for FY 2024 may include:

FCH Enterprises
 Island Holdings, Inc.
 United Airlines

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 2024 for program funding.**

Movers and Shakas (while under the HEC umbrella) 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 2024.

An operating State Grant-in-Aid was awarded to Movers and Shakas in FY23 for \$150,000.

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2022.

\$12,360

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.

Lead Oversight

In 2020, the pandemic halted the tourism industry while creating new opportunities for remote work. A group of Hawai'i business leaders under the Hawai'i Executive Coalition launched the Movers and Shakas program to bring kama'aina 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 diversity the local economy. This same advisory board has now launched this separate 501c3 organization, Movers and Shakas.

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, Hawai'i 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

Movers and Shakas has run 4 cohorts as of Jan. 2023, including 2 cohorts of the Remote Worker Program (now ended) and 2 cohorts of the Hawai'i Talent Onboarding Program (ongoing).

REMOTE WORKER PROGRAM (Jan. 2021 – Feb. 2022)

As a 30-day flagship experience in 2021, the Remote Worker Program was directed towards remote workers, especially returning kama'āina, to relocate and/or build economic ties to Hawai'i. 2 cohorts were completed (Spring 2021 and Spring 2022 with a delay for COVID – Delta outbreak). 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 Remote Worker Program cohort 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.

HITOP (April 2022 – present)

We ran 2 cohorts of HITOP in the Spring and Fall of 2022. The program has been a huge success with 30 participants in each cohort across 20+ organizations and companies including Bank of Hawai'i, Booz Allen Hamilton, First Hawaiian Bank, Hawai'i Department of Education, Hawai'i Pacific Health, Hawaiian Airlines, HMSA, Kaiser Permanente, Kamehameha Schools, Pacific Current, Punahou School, Queen's Health System, Servco Pacific, SP Consulting, University of Hawai'i Foundation, U.S. Army, the YMCA of Honolulu and Zippy's.

Participant Impact

- **High Acculturation:** Over 90% improved their understanding of local and Hawaiian culture
- **High satisfaction:** 4.8/5 satisfaction; Net Promoter Score: 80
- **88% improved work effectiveness** since the beginning of the program
- **88% improved sense of belonging** since the beginning of the program
- Testimonial: "I deeply appreciated the sequence and breadth of experiences and discussions the program provided across the six weeks. It was incredibly valuable to have the opportunity to reflect as the sessions progressed and share with the facilitators, program partners, and the other participants." – Participant

Employer Impact

- Top 2 HITOP benefits
 - Increase employee effectiveness
 - Increase retention and reduce turnover costs
- **High overall satisfaction:** 4.6/5 satisfaction; Net Promoter Score: 67
- Testimonial: "Keep running a great program and the participants going through it will sell it for you!" – Employer

Direct Managers Impact

- **79%** of direct managers believe that their employee's relationship with the Hawai'i community improved since the beginning of the program
- 8.8/10 likelihood to recommend program to a colleague
- Testimonial: "[Participant] is a self-motivated and driven to grow individual. This program was incrementally positive for her, and she was quite happy to be included." – Direct Manager

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.

Movers and Shakas 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.

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.

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

As the primary staff member of Movers and Shakas, Nicole Lim serves as the Executive 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 – Karen Kuniyuki (independent contractor) (PT)

Karen will provide assistance with the cohorts. His role is to organize and execute the events, network and collaborate with the multiple stakeholders, administrative duties, social media/marketing, and community building.

With over 10 years of event marketing and management experience, Karen works with a wide range of clients, from individuals to corporations, nonprofits, and government agencies. Formerly the Event Marketing Manager for Olomana Loomis ISC (Client: Kamehameha Schools)

Strategic Partnerships and Event Manager at Howard Hughes, Karen specializes in community building through strategic events and marketing for real estate development companies.

Additional Contractors:

Movers and Shakas also works with Huy Vo for media relations 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 only two paid positions within Movers and Shakas:

Executive Director (FT)	\$150,000 to \$175,000
Program Manager (contractor)	\$25,000 to \$40,000

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 2023-24 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2023-24, 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 Remote Worker 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, 2023 to June 30, 2024

Applicant: **Movers and Shakas**

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	130,000	0	0	48,482
2. Payroll Taxes & Assessments	0	0	0	21,555
3. Fringe Benefits	0	0	0	6,000
TOTAL PERSONNEL COST	130,000	0	0	76,037
B. OTHER CURRENT EXPENSES				
1. Airfare, Interstates	0	0	0	0
2. Insurance	0	0	0	1,200
3. Lease/Rental of Equipment	0	0	0	0
4. Lease/Rental of Space	4,000	0	0	7,800
5. Participant Training	5,000	0	0	2,813
6. Supplies	0	0	0	10,080
7. Telecommunication	0	0	0	0
8. Utilities	0	0	0	0
9. Marketing, PR, Communications	12,000	0	0	6,000
10. Participant Meals	9,000	0	0	9,738
11. Technology	0	0	0	11,367
12. Volunteer Stipend	0	0	0	7,480
13. Administrative	0	0	0	36,700
14. Business Development	0	0	0	8,400
15. Scholarships	100,000	0	0	0
16.				
TOTAL OTHER CURRENT EXPENSES	130,000			101,578
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)	260,000			177,615
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	260,000	Nicole Lim Executive Director 808-304-5813		
(b) Total Federal Funds Requested	0	Name (Please type or print) Phone		
(c) Total County Funds Requested	0	1/15/23		
(d) Total Private/Other Funds Requested	177,615	Signature of Authorized Official Date		
TOTAL BUDGET	437,615	Nicole Lim Executive Director Name and Title (Please type or print)		

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2023 to June 30, 2024

Applicant: Movers and Shakas

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Executive Director, Movers and Shakas	1.0 FTE	\$150,000.00	86.67%	\$ 130,000.00
Program Manager, Movers and Shakas (contractor; \$40/hr.)	~0.35 FTE	\$80,000.00	0.00%	\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
TOTAL:				130,000.00
JUSTIFICATION/COMMENTS:				

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2023 to June 30, 2024

Applicant: **Movers and Shakas** - N/A

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, 2023 to June 30, 2024

Applicant: **Movers and Shakas** - N/A

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: 2021-2022	FY: 2022-2023	FY:2023-2024	FY:2023-2024	FY:2024-2025	FY:2025-2026
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
TOTAL:						
JUSTIFICATION/COMMENTS:						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: **Movers and Shakas**

Contracts Total:

99,950

	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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Org Chart

MOVERS AND SHAKAS

Board of Directors

Executive Director

Program Manager

