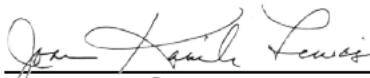


## Application Submittal Checklist

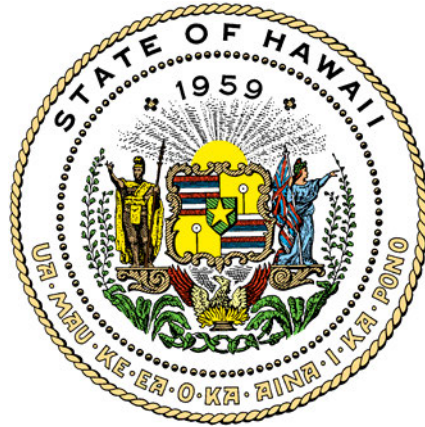
*The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.*

- 1) Hawaii Compliance Express Certificate (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 (GIA Page6)
  - b) Personnel salaries and wages (GIA Page7)
  - c) Equipment and motor vehicles (GIA Page8)
  - d) Capital project details (GIA Page9)
  - e) Government contracts, grants, and grants in aid (GIA Page10)
- 7) Experience and Capability
- 8) Personnel: Project Organization and Staffing

  
AUTHORIZED SIGNATURE

Joan Kamila Lewis, President  
PRINT NAME AND TITLE

1/18/2024  
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

HAWAII EDUCATION ASSOCIATION (HEA)

was incorporated under the laws of Hawaii on 12/16/1955 ; 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 16, 2024

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.

HAWAII EDUCATION ASSOCIATION

(Typed Name of Individual or Organization)

  
(Signature)

1/18/2024  
(Date)

JOAN KAMILA LEWIS  
(Typed Name)

PRESIDENT  
(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. Hawaii Compliance Express Certificate (If the Applicant is an Organization)**

A copy of the HEA Hawaii Compliance Express Certificate from the Comptroller of the Department of Accounting and General Services that is dated January 15, 2024, is inserted immediately after the Cover Page as requested.

#### **2. Declaration Statement**

The HEA declares that it is in compliance with Section 42F-103, Hawaii Revised Statutes, and that it:

- (a) Grants shall be awarded only to individuals who, and organizations that:
  - (1) HEA is not required to be licensed or accredited to conduct the activities or provide the services for which a grant is awarded;
  - (2) 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;
  - (3) Agrees not to use state funds for entertainment or lobbying activities; and
  - (4) 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.

**(b) In addition, that the HEA:**

**(1) Is:**

**(A) Incorporated under the laws of the State;**

**(B) Spends at least ninety per cent of its operating budget in the State;  
and**

**(C) Is registered with the department of commerce and consumer affairs and in possession of a valid certificate of vendor compliance issued by the State that documents the organization's compliance and good standing with the United States Internal Revenue Service, department of taxation, department of labor and industrial relations, and department of commerce and consumer affairs; and**

**(2) 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.**

**(c) Further, that the HEA is a nonprofit organization:**

**(1) It has been determined and designated to be a nonprofit organization by the Internal Revenue Service; and**

**(2) The HEA has a governing board whose members have no material conflict of interest and serve without compensation.**

**3. Public Purpose**

**The HEA will use funds from this grant solely to support the growth of new and existing Teaching as a Career (TAAC) Clubs and Career and Technical Education (CTE) Pathway classes at Hawaii public Department of Education and Hawaii Charter Schools.**

## **II. Background and Summary**

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

**The HEA was formed in 1921 to help Hawaii educators in their fight for better pay and work conditions. Since its founding, the HEA has been dedicated to affirming the professionalism of all of Hawaii's teachers, administrators, and higher education faculty.**

**HEA was the original advocacy organization and for nearly 50 years represented the education community before the Territorial and State Legislatures. During the State Constitutional Convention of 1968, HEA was the first to testify in support of public collective bargaining. HEA played a major role in the establishment of the Hawaii State Teachers Association (HSTA), the Hawaii Government Employee Association (HGEA) Unit 6, and the University of Hawaii Professional Assembly (UHPA). With the formation of the unions, HEA shifted its focus to promoting educator excellence and professional development.**

**HEA continues its mission by supporting the Teaching as a Career (TAAC) program and professional development opportunities and scholarships for Hawaii educators through its Excellence in Teaching and Learning initiatives.**

2. The goals and objectives related to the request;

- **To provide a vehicle for addressing the critical shortage of teachers in Hawaii by promoting the profession of teaching by supporting and enhancing existing Teaching as a Career (TAAC) clubs, CTE Education Pathways, and Education Academies in Hawaii public DOE and Charter high schools, and in supporting the development of new clubs, pathways, and academies in public high schools.**
- **To motivate and encourage Hawaii high school students to pursue a career in teaching in Hawaii public schools.**
- **To support the formation of pre- and youth apprenticeship programs in the Hawaii Department of Education and Charter Schools in collaboration with the US Department of Labor's apprenticeship programs.**
- **To inspire students in the University of Hawaii system to enroll in coursework and programs that prepare them for a position in Hawaii public schools;**
- **To involve Hawaii community stakeholders to support and participate in the Teaching as a Career (TAAC) Symposium, to highlight the importance of quality teaching and bring awareness to the need for local, "home grown" teachers to serve their communities.**

3. The public purpose and need to be served;

**One of the most pressing and critical needs of the State, the teacher shortage, will be addressed by:**

- **Supporting existing and creating new clubs, pathways, and academies in Hawaii public DOE and Charter School high schools;**
- **Creating excitement among high school students about a career in education while they are still in high school, connecting them to other students across the state via a collaborative convening of these students;**
- **Creating networks of support for the teachers of these students for recruitment and retention of aspiring teachers, in guiding them through the high school clubs and pathways to connect seamlessly with Hawaii Educator Preparation Programs to become licensed teachers in their communities.**

**The grant will be used to support the organization of new Teaching as a Career (TAAC) Clubs and Career and Technical Education (CTE) Education Pathways and Academies in Hawaii Department of Education and Hawaii Charter Schools, as well as the continued operation and enhancement of existing clubs, pathways, and academies.**

**More than 50% of new teachers leave the DOE within the first five years of their employment. No enterprise can survive this rate of turnover. The community must come to grips with the fact that the shortage of public-school teachers is a community crisis, and it is going to take the community to end it. (Hawaii Education Association Accent Hawaii, April - June 2017, Joan Husted)**

**The HEA proposes to support a “grow our own” solution by supporting existing and creating and enhancing new pathways, academies, and clubs in Hawaii public high schools to inspire and encourage Hawaii students to choose teaching as a profession and return to their communities to serve in Hawaii public schools.**

4. Describe the target population to be served; and

**Direct recipients of this grant are Hawaii DOE and Charter School high school students and teacher sponsors in education clubs, academies, and pathways. However, all Hawaii schools and communities will be served by increasing and retaining qualified Hawaii “home grown” teachers.**



5. Describe the geographic coverage.

**Hawaii public Department of Education and Charter School high school students and teachers participating in education clubs, academies, and pathways on all islands will be eligible to participate.**

### **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;

**Under the leadership of the HEA Board of Directors, the Hawaii Education Association will use funding to support Hawaii high school students who are aspiring teachers, therefor supporting overall teacher recruitment and retention in Hawaii public schools:**

- **Collaborate with the Hawaii DOE and Hawaii Charter Schools to develop new Teaching as a Career (TAAC) clubs, CTE Education Pathways, and Education Academies on public high school campuses;**
- **Provide financial and leadership support for existing Hawaii DOE and Charter School TAAC clubs, CTE Education Pathways, and Education Academies on public high school campuses;**
- **Provide scholarships to Hawaii public high school students in TAAC clubs, academies, and pathways who plan to enroll in Hawaii educator preparation programs to become licensed teachers;**
- **Conduct a statewide TAAC Symposium to highlight the importance of education as a profession, spotlight the work of TAAC students and teacher sponsors, and inspire other students to choose education as a career. This symposium will also connect high school students with faculty and teacher candidates in Hawaii teacher preparation programs to form a connection for our “grow your own” future teachers.**
- **Provide scholarships to Hawaii students who are enrolled in or have completed a Hawaii state approved educator preparation program who are employed in a Hawaii public school and to public high school students intending to become educators who are participating in a dual enrollment program at their high school in collaboration with a Hawaii institution of higher education;**

- **Create and disseminate a brochure to public high school and university students highlighting routes to becoming an educator in Hawaii public schools.**
  - **Associated administrative cost of the grant activities.**
2. Provide a projected annual timeline for accomplishing the results or outcomes of the service;

**School Year 2024-2025**

- **August 2024 - Provide scholarships to students who are enrolled in or have completed a preparation program which will enable them to become licensed teachers in Hawaii's public schools.**
  - **November 2024 - Conduct an annual TAAC Symposium for TAAC clubs and high schools with Education Pathway or Academy programs of study.**
  - **December 2024 - Provide grants to TAAC clubs and schools with Education Pathway or Academy programs of study.**
  - **January 2025 - Create and disseminate a brochure to public high school and university students highlighting the importance and routes to becoming an educator in Hawaii public schools.**
3. Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results; and

**The HEA will evaluate and monitor quality assurance by:**

- **Surveying TAAC club, Education Pathway and Education Academy teachers and advisors who receive grants and reviewing and evaluating data for future program improvement.**
- **Confirming scholarship and tuition support recipients are employed or on track to becoming educators in Hawaii public schools.**
- **Surveying Symposium attendees to strengthen the connection between Hawaii educators and stakeholders who benefit from a quality public education system.**

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.

**HEA will report the following:**

- **The number of new Teaching as a Career (TAAC) clubs, CTE Education Pathways, and Education Academies established or planned in the 2024-2025 and 2025-2026 school years.**
- **The number of students who receive a scholarship for completing an educator preparation program and becoming employed in a Hawaii public school as a teacher.**
- **The number of new high school partnerships with University of Hawaii system campuses for dual enrollment for early college credit for high school students intending to become an educator in Hawaii public schools.**
- **A report featuring details of the annual Symposia.**

**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 (GIA Page6)
  - b. Personnel salaries and wages (GIA Page7)
  - c. Equipment and motor vehicles (GIA Page8)
  - d. Capital project details (GIA Page9)
  - e. Government contracts, grants, and grants in aid (GIA Page10)
2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2025.

<b>Quarter 1</b>	<b>Quarter 2</b>	<b>Quarter 3</b>	<b>Quarter 4</b>	<b>Total Grant</b>
<b>\$20,000</b>	<b>\$30,000</b>	<b>0</b>	<b>0</b>	<b>\$50,000</b>

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2025.

**The HEA has annual income from membership dues and scholarship donations. It is also currently seeking donations from foundations and vendors.**

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 2025 for program funding.

**Kaiser Foundation: \$10,000**

**East Hawaii Community Foundation: \$2,000**

**Atherton Family Foundation: \$5,000**

**Atherton Family Foundation, second award: \$5,000**

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2023.

**HEA's estimated unrestricted current assets as of December 31, 2023, is \$2,908,912.70.**

## **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.

**The HEA Board of Directors, members, and staff are long-standing educators with experience in P-12, higher education, and educator preparation. As the oldest professional organization for educators in the state, the HEA continues to provide**

**quality professional development, scholarships, and support for aspiring teachers to fill the critical vacancies in Hawaii public schools.**

## **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 HEA maintains an office at 1953 South Beretania Street, Suite 5C, Honolulu, Hawaii, 96826. However, grant activities are focused on activities in Hawaii public high schools or online submission of scholarship requests.**

## **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 real strength of the HEA is in its leadership, which includes individuals who have dedicated their careers and lives to supporting a robust Hawaii public education system.**

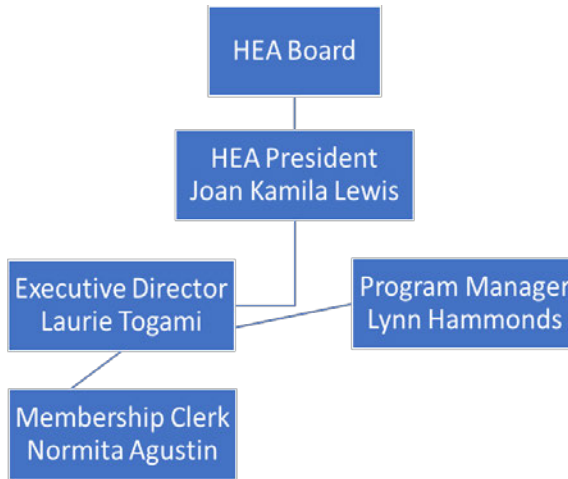
**Current Board members include those who have served as presidents and executive directors of the Hawaii State Teachers Association and the National Education Association; and nationally recognized teachers, school principals, and higher education faculty.**

**The HEA is currently a lean organization with respect to staffing. Three full time employees support the organizational and programmatic work of the association:**

- The Executive Director has supported the association for thirty plus years and has responsibility for all administrative and operational duties of the HEA office and supports the Board of Directors.**
- The Program Manager has responsibility for developing quality professional development for Hawaii educators. This staff person has a doctorate in education and decades of experience working with educator preparation, licensure, and professional development.**
- The Clerk/Receptionist has responsibility for clerical duties as well as website and social media account maintenance.**

## 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.



## 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.

**Executive Director: \$60,000 - \$85,000**

**Program Manager \$60,000 - \$85,000**

**Clerk/Receptionist \$30,000 - \$45,000**

## 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.

**This grant request is solely focused on Hawaii public schools, teachers, and students.**

**4. Future Sustainability Plan**

The applicant shall provide a plan for sustaining after fiscal year 2024-25 the activity funded by the grant if the grant of this application is:

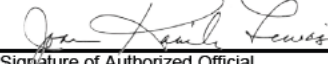
- (a) Received by the applicant for fiscal year 2024-25, but
- (b) Not received by the applicant thereafter.

**The HEA will continue to seek funding from increased membership, foundations, and stakeholders.**

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2024 to June 30, 2025

Applicant: Hawaii Education Association

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				
2. Payroll Taxes & Assessments				
3. Fringe Benefits				
TOTAL PERSONNEL COST				
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island				
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				
6. Supplies				
7. Telecommunication				
8. Utilities				
9. Scholarship to TAAC/CTE students	10,000			
10. Grants to existing TAAC Clubs	10,000			
11. Grants to fund new TAAC Clubs	10,000			
12. Symposium for TAAC/CTE	20,000			
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
TOTAL OTHER CURRENT EXPENSES	<b>50,000</b>			
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
<b>TOTAL (A+B+C+D+E)</b>	<b>50,000</b>			
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	50,000	Joan Kamila Lewis                      808-949-6657		
(b) Total Federal Funds Requested		Name (Please type or print)                      Phone		
(c) Total County Funds Requested				
(d) Total Private/Other Funds Requested		1/18/2024		
		Signature of Authorized Official                      Date		
<b>TOTAL BUDGET</b>	<b>50,000</b>	Joan Kamila Lewis, President		
		Name and Title (Please type or print)		





## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2024 to June 30, 2025

Applicant: Hawaii Education Association

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
Not applicable			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
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, 2024 to June 30, 2025

Applicant: Hawaii Education Association  
 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: 2022-2023	FY: 2023-2024	FY:2024-2025	FY:2024-2025	FY:2025-2026	FY:2026-2027
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
<b>TOTAL:</b>						
JUSTIFICATION/COMMENTS:						

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

Applicant: Hawaii Education Association

Contracts Total: -

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)</b>	<b>CONTRACT VALUE</b>
1	Not applicable				
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