

**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

Amount of State Funds Requested: \$96,511

Brief Description of Request (Please attach word document to back of page if extra space is needed):
Movers and Shakas focuses on retaining talent ("brain gain") to to grow and diversify Hawai'i's economy. Its main offering, Hawai'i Talent Onboarding Program, aims to help new and returning residents live and work successfully in Hawai'i and supports local employers in empowering and retaining their new leaders. Through cultural education, community service and networking, participants learn about Hawai'i, increase work effectiveness, build lasting relationships, and develop a sense of shared belonging and shared stewardship for their new home. Many businesses have a company orientation but very few have a place-based community orientation.

Amount of Other Funds Available:

State: \$0
Federal: \$0
County: \$0
Private/Other: \$226,531

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

\$249,500
Unrestricted Assets:
\$188,416

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]	State Tax ID#: [REDACTED]
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Authorized Signature

Nicole Lim, Executive Director

Name and Title

1/15/24

Date Signed

Application Submittal Checklist

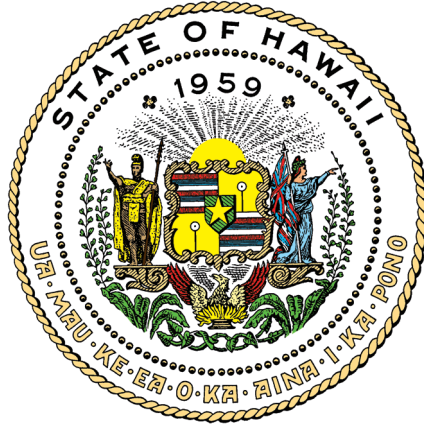
The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.

- 1) 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 ([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

Nicole Lim, Executive Director
PRINT NAME AND TITLE

1/15/24
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: January 15, 2024

Director of Commerce and Consumer Affairs

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)

If the applicant is an organization, the applicant shall submit one (1) copy of a Hawaii Compliance Express Certificate from the Comptroller of the Department of Accounting and General Services that is dated no earlier than December 1, 2023.

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](#).

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 retain and empower key talent to grow the economy and strengthen 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 retain and empower talent in Hawai'i through our flagship program called Hawai'i Talent Onboarding Program (HITOP).

After operating as a program of the Hawai'i Executive Collaborative for the first two years, the success of Movers and Shakas' initiatives 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 30-40 to build cross-sector relationships and deepen their understanding of Hawai'i.

With the completion of Cohort 4 at the end of 2023, HITOP has acculturated a total of 111 leaders across 25+ organizations and companies including Atlas Insurance, Bank of Hawai'i, Booz Allen Hamilton, Bowers + Kubota, First Hawaiian Bank, Hawai'i Department of Education, Hawaii Gas, Hawai'i Pacific Health, Hawaiian Airlines, HEI, Howard Hughes Corporation, HMSA, 'Iolani School, Kaiser Permanente, Kamehameha Schools, Mid Pacific Institute, Oceanit, Outrigger Hotels, Pacific Current, Punahou School, Queen's Health System, Servco Pacific, SP Consulting, University of Hawai'i Foundation, U.S. Air Force, U.S. Army, U.S. Marine Corps, U.S. Navy, the YMCA of Honolulu, Young Brothers and Zippy's.

Based on surveys from past cohorts, 100% of participants improved their understanding of the host culture, 90% improved their sense of Hawai'i as home, and 90% of participants improved their work effectiveness and deepened their sense of belonging in Hawai'i. Additionally, many of the companies that participated in the inaugural cohort continued enrollment in its subsequent cohorts including Cohort 4.

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
 - Accelerate time of impact and value of leaders new to Hawai'i
 - 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
 - Become contributing members of the community
 - Understand the impact of their decisions on the State

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 and nonprofit organizations.

Need to be Served

From 2020-2022, O'ahu lost approximately 31,682 people in net domestic migration, resulting in unmet talent needs and cultural dilution (source: Census). This brain drain drives the need for many sectors such as healthcare, education, banking and hospitality to recruit from the mainland.

Two years of COVID-19 highlighted big challenges in Hawai'i including the high cost of living, housing crisis, and stagnating economy. We need strong talent to build a sustainable future for our State, which sometimes requires organizations to hire from the continent. However, when mainland hires do not acculturate to Hawai'i, 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.

New Focus – Cohort Project

This grant will help fund a HITOP cohort to stay engaged for 9-12 months after the 6-week program to tackle an important State challenge. Cohort members will research, develop a strategic plan and share findings on a to-be-determined issue such as revitalizing Maui for long-term sustainability, supporting systems and infrastructure for disaster relief, upgrading the State's broadband system, updating the accounting system, or developing a food system on Kaua'i west side. Specific focus will depend on the cohort expertise, interests, and potential for impact.

This Cohort project allows driven and accomplished leaders to bring fresh perspectives, expertise, diverse experiences, and innovation to help improve our communities. It keeps the cohort engaged, provides a State benefit, but most importantly provides members of the cohort with a meaningful give back to the community. Giving is ingrained in the Hawaii community, and this “give back” is part of the acculturation process to help cohort members develop a deeper sense of belonging and boost retention.

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, military, business, banking, construction, real estate development, travel/tourism, education, energy, nonprofit; professional organizations like Chamber of Commerce Hawai‘i, Hawaii Business Roundtable, Hawaii Employers Council, Hawaii Executive Collaborative, General Contractors Association, Financial Executives International; and alumni associations of private/public high schools.

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. Similar sources as above.

5. Describe the geographic coverage.

The primary focus is on O‘ahu, as both 2024 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 also pilot one-day programs on O‘ahu targeted towards non-residents of O‘ahu. As outreach, we will fly to Neighbor Islands to build relationships with potential participants including the Economic Boards of Hawai‘i, Maui and Kaua‘i counties and key organizations including Mauna Kea Observatories, HPM Building Supply and HECO.

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 retain and empower 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 30-40 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 Ka'ala Farm and 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 and painting one of Hale Kipa's residences for young women in transition to showcase the challenge of houselessness. We have also partnered with The Pantry by Feeding Hawai'i Together in all our previous cohorts to pack client orders and highlight the challenge of food insecurity. We often break into industry groups to discuss how Hawai'i's big social challenges impact

participants' industries. For example, health care workers discuss how the houseless represents a large percentage of emergency department patients and what could be done to help combat houselessness to reduce hospital admissions and costs.

- We also feature guest speakers with unique business, government, and Native Hawaiian perspectives, including Sen. Wakai, Brandon Maka'awa'awa of Nation of Hawai'i and Jason Higa. We also bring nonprofit leaders to 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): Cultural Norms 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. Guest speakers have included Rep. Jill Tokuda and sponsors like United (who partner with Teach for America to provide scholarships for public school educators)
 - Cohort members are broken down into smaller 4-5 person "pods" and encouraged to meet outside of program events (with partners) to build new relationships. They also work on a project together to select and share with the cohort a nonprofit that they plan to support after the program
 - 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
- **Final Cohort Project:** cohort participants work for 9-12 months following the 6-week program to create a strategic plan to tackle an important State challenge. This project allows driven and accomplished leaders to bring fresh perspectives, expertise, diverse experiences and innovation to help improve our communities. In giving back to the community, they would develop a deeper sense of belonging, boosting retention.
 - HITOP alumni and M&S Executive Director will help guide the project and cohort participants as well as provide key connections with relevant State organizations and community partners

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 2021. 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
- 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. Additional part-time program managers provide program execution, cohort communication, event logistics assistance and social media/marketing assistance – Amanda Ishikawa and Linda Lee have previously assisted with the Remote Worker Program.

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

During the budget timeframe of July 1, 2024 - June 30, 2025, 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 2024 Cohort (9/7/24 – 10/9/23)
- Spring 2025 Cohort (April/May 2025)

HITOP Planning Schedule

- Three months prior (January-March, June-August): Preparation and Marketing
 - Recruit cohort of 30-40 participants by reaching to 80+ past and new customers, local and national employers in Hawai’i in key industries like healthcare, military, business, banking, construction, real estate development, travel/tourism, education, energy, nonprofit
 - Pitch program to 4+ professional organizations such as the Chamber of Commerce Hawai’i Board, Hawaii Business Roundtable Board, Hawaii Employers Council members, Hawaii Executive Collaborative members, General Contractors Association members, Financial Executives International members
 - Work with community partners to set up cultural education, community service, pau hanas and talk story sessions
- One month prior (March, August):

- 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: Cultural Norms Talk Story
 - Week 5: Community Service – The Pantry
 - Week 6: Closing Pau Hana
 - Cohort Project (9-12 months)
 - Month 1: Identify and align on key State challenge to address
 - Months 2-3: Develop relationships with key partners
 - Months 4-9: Research and solution creation
 - Months 10-12: Share findings and reports with key decisionmakers and partners
 - Post-Program:
 - Debrief on individual events
 - Conduct post-program surveys with participants, employers, and participant direct managers
 - Alumni survey for participants after first 6 months and annually thereafter
 - 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
- Cohort participants tackle a key State challenge and come up with a strategic plan / report
- 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
 - Final Cohort Project report: delivered to State organizations and partners; impact and adoption of report

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. 50% of HITOP cohort participates in Cohort Project to benefit State
7. Ho'ike of final Cohort Project report to relevant State organizations and communities

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 2025.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$24,000	\$24,000	\$24,000	\$24,511	\$96,511

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

Movers and Shakas Sponsorship Requests for FY 2025 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 2025 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 (via Hawaii Executive Collaborative) in FY23 for \$150,000.

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

\$188,416

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'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. This same advisory board has now launched this separate 501c3 organization, Movers and Shakas, focused on HITOP.

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 (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
- Kevin Yim, VP of Marketing, Zippy's Restaurants

Experience

Movers and Shakas has run 6 cohorts as of Jan. 2024, including 2 cohorts of the Remote Worker Program (now ended) and 4 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)

M&S has ran 4 cohorts of HITOP since Spring 2022. The program has been a huge success, graduating 110+ participants to date across 25+ organizations and companies including Atlas Insurance, Bank of Hawai'i, Booz Allen Hamilton, Bowers + Kubota, First Hawaiian Bank, Hawai'i Department of Education, Hawaii Gas, Hawai'i Pacific Health, Hawaiian Airlines, HEI, Howard Hughes Corporation, HMSA, 'Iolani School, Kaiser Permanente, Kamehameha Schools, Mid

Pacific Institute, Oceanit, Outrigger Hotels, Pacific Current, Punahou School, Queen’s Health System, Servco Pacific, SP Consulting, University of Hawai’i Foundation, U.S. Air Force, U.S. Army, U.S. Marine Corps, U.S. Navy, the YMCA of Honolulu, Young Brothers 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
- **90% improved work effectiveness** since the beginning of the program
- **90% 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: 72
- 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.

As Executive Director of Movers and Shakas, Nicole Lim spearheads the organization’s mission of enculturating newly relocated leaders and returning kama’āina into Hawai’i’s community. Born and raised in Hawai’i, Nicole moved to the continent for 20 years to attend college and build a career. While abroad, she traveled the world as an analog nomad in the five years before the pandemic, but was excited to return home to apply her experiences to build a more resilient Hawai’i, spend more time with family and friends, and be near the ocean and malasadas.

Her homecoming after two decades away mirrors the path of many returning kama’āina. Under her leadership, nearly 100 new executives and leaders were onboarded through the Hawai’i Talent Onboarding Program (HITOP), which was thoughtfully designed by Nicole and a group of local CEOs in 2022. HITOP is a highly selective community acculturation program that focuses on integrating and onboarding relocated residents and returning kama’āina into the community, while helping them build a sense of kuleana for their new island home. Through a thorough application process, employers select their top qualified leaders to join and represent their company or organizations through six weeks of cultural education, community work, leadership workshops and networking events. Many of the participants include c-level executives from some of Hawai’i’s top companies.

Nicole is a strategy consultant with nearly 20 years of international experience in finance and technology. She previously worked as a senior manager in corporate strategy and global expansion for eBay in San Jose, Calif., and as a management consultant for L.E.K. Consulting in Los Angeles and Sydney. A graduate of Iolani School, Nicole holds a bachelor’s degree from Yale University and a Master of Business Administration from the Wharton School, University of Pennsylvania. In 2022, she was recognized for her work and leadership in the community by Pacific Business News’ Pineapple Awards.

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 – Amanda Ishikawa and Linda Lee (independent contractors) (PT)

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

Amanda is a Lead Consultant and Business Analyst at WSP USA with experience working on projects ranging in size from infrastructure megaprojects to small-scale technology requests. A certified Project Management Professional, Amanda leads projects of various sizes to drive successful outcomes in the time and budget required. She is certified in business analysis (Project Management Institute – Professional in Business Analysis) and lean methodologies (American Society for Quality Certified Six Sigma Black Belt. She is a proud graduate of Mid-Pacific Institute and Cornell University (B.S.). Amanda participated in the first cohort of the Remote Worker Program (RWP) and helped with program management with the second cohort of the RWP.

Linda Lee is an accomplished marketing and business development professional with a track record of success at companies like Amgen and RGP. Throughout her career, she's excelled in fostering key partnerships and driving revenue growth for the organizations she's been a part of. She has an M.B.A. from UCLA Anderson and a B.A. from Stanford University. Currently, she is an independent consultant based in Hawai'i working with non-profit organizations and volunteering on the executive board of Island Pacific Academy's Parent-Teacher Association. Linda was the program manager for second cohort of the Remote Worker Program.

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
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Program Manager (contractor)

\$15,000 to \$25,000

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 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.

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 Chief Executive Officers and Human Resource Directors throughout the state to provide HITOP services. Many organizations have become repeat customers, sending participants to multiple cohorts. Additionally, the strength of the community leadership and backing for this program has built 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. We are exploring additional corporate sponsorships and potential federal funding with Hawai'i's federal legislators.

In 2024, Movers and Shakas will explore new pilot programs: 1) one-day programs targeted towards non-'Oahu residents including Neighbor Islands and continent-based professionals wanting to better serve their Hawai'i-based teams and clients and 2) half-day programs targeted towards other groups including middle and front-line managers, military spouses.

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS PURSUANT TO
CHAPTER 42F, HAWAI'I 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, Hawai'i 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, Hawai'i 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, Hawai'i 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, Hawai'i 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.

Movers and Shakas

(Typed Name of Individual or Organization)



(Signature)

1/15/24

(Date)

Nicole Lim

(Typed Name)

Rev 8/30/23

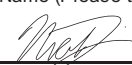
Executive Director

(Title)

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2024 to June 30, 2025

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	77,400	0	0	89,354
2. Payroll Taxes & Assessments	0	0	0	22,155
3. Fringe Benefits	4,811	0	0	3,000
4. Payroll Processing	0	0	0	1,080
TOTAL PERSONNEL COST	82,211			115,589
B. OTHER CURRENT EXPENSES				
1. Programming Costs - Venue Costs	5,900	0	0	5,900
2. Programming Costs - Participant Training	7,500	0	0	17,460
3. Programming Costs - Participant Meals	0	0	0	22,080
4. Programming Costs - Alcohol	0	0	0	1,895
5. Programming Costs - SWAG / Leis	0	0	0	6,500
6. Programming Costs - Volunteer stipend	0	0	0	1,000
7. Programming Costs - Miscellaneous	0	0	0	1,600
8. Marketing, PR, Communications	0	0	0	13,200
9. Technology	0	0	0	7,039
10. General & Administrative	0	0	0	28,268
11. Programming Development	0	0	0	6,000
12. Airfare to Neighbor Islands	900	0	0	0
13				
14				
15				
16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES	14,300			110,942
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)	96,511			226,531
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	96,511	Nicole Lim 808-304-5813		
(b) Total Federal Funds Requested		Name (Please type or print) Phone		
(c) Total County Funds Requested		 1/15/24		
(d) Total Private/Other Funds Requested	226,531	Signature of Authorized Official Date		
TOTAL BUDGET	323,042	Nicole Lim, Executive Director Name and Title (Please type or print)		

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2024 to June 30, 2025

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, 2024 to June 30, 2025

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: 2022-2023	FY: 2023-2024	FY: 2024-2025	FY: 2024-2025	FY: 2025-2026	FY: 2026-2027
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
2					
3					
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Org Chart

