

STATE OF HAWAI'I
WORKFORCE DEVELOPMENT COUNCIL

QUOTE FOR BOARD STRATEGIC PLANNING



Submitted by:
Olomana Loomis ISC
Aug. 23, 2019

Contact: Alan Tang
Chairman & CEO
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COVER LETTER

Aloha kākou,

Mahalo for the opportunity to submit a quote to the Workforce Development Council for board strategic planning.

We are passionate about projects that elevate the current and future workforce. We recently assisted the Workforce Development Council with the development of a comprehensive brand rollout and outreach plan for the American Job Center Hawaii to engage businesses statewide, and we are actively involved in the taskforce to develop an employer engagement pilot program.

We have a deep understanding of the Workforce Innovation and Opportunity Act (WIOA) and the changes it brought to workforce development programs across the United States when it was passed in 2014. Prior to WIOA, workforce development centers had focused primarily on serving job-seekers. Through WIOA, all Centers throughout the country have been mandated to become One-Stop Centers serving both job-seekers and employers, with services from federal, state and county departments co-located under one roof and unified under the brand of the “American Job Center.” WIOA has far-reaching implications and has significantly impacted the performance metrics, priorities and data-driven approach of WDC and its counterparts nationwide.

In addition to partnering with the Workforce Development Council, Olomana Loomis ISC has a unique background in serving both commercial businesses as well as many nonprofit organizations and government entities. Our team members have worked on numerous projects that involved strategic planning and meeting facilitation, including:

- The County of Kaua'i Comprehensive Economic Development Strategy (CEDS) update for 2016-2020.
- Hawai'i Emergency Management Agency strategic planning.
- University of Hawai'i Foundation stakeholder assessment, including group facilitation and one-on-one interviews.
- Kapiolani Community College's Office of Continuing Education and Training strategic planning retreats and meeting facilitation.
- Kamehameha Schools board strategic planning and Regional Action Plans (RAPs).
- Maryknoll School strategic planning.

We appreciate the leadership taken by the State of Hawai'i's Workforce Development Council, and we look forward to creating a visionary strategic plan that will engage employers and board members in championing the public workforce development system.

With aloha,



Alan Tang
Founder, Chairman & CEO
Olomana Loomis ISC

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ABOUT OLOMANA LOOMIS ISC

Olomana Loomis ISC (OLISC) is a full-service brand strategy, marketing and communications agency that specializes in creating innovative and compelling campaigns that connect with people, drive behavior and yield measurable results. We combine creativity with the power of data, merging art with science to grow distinctive brands and market share.

Our firm was formed in 2012, when Olomana Marketing, which was founded by our President Alan Tang in 1996, acquired the Loomis advertising agency. Alan had founded Olomana Marketing after having extensive experience in advertising and public relations agencies, as well as in-house agencies. He felt that an integrated approach that combines the disciplines of advertising, public relations, brand strategy, corporate communications and design would be more effective than a single-discipline agency. This conviction has served our firm well, particularly as technology has enabled even greater convergence.

Mission, Vision, Values

Olomana Loomis ISC is a values-driven company. Our mission is to help our clients grow and thrive through effective, efficient and elegant brand, marketing and communications solutions.

Our vision is to be a positive change agent in Hawai'i and the world, bringing people and ideas together to create a brighter future for our communities, our clients, our partners and our employees.

Our core values are summarized in the acronym, "TIDES," which stands for: Teamwork, Integrity, Diversity, Excellence and Service. We have embraced these values for the past 23 years, and we are pleased that they have served our clients well.

Differentiators

Our main differentiator is our people and the heart and collaborative spirit that they bring to our work and relationships with clients. We are your partner, and we will do everything we can to ensure your success. Olomana Loomis ISC is proud to be the exclusive Hawai'i partner for ICOM, the world's largest network of independent advertising and marketing communications agencies. This affiliation provides access to leading-edge industry practices and resources internationally, enhancing the thought leadership and insights we are able to provide our clients.

Services

Brand Strategy <ul style="list-style-type: none">● Assessment, Discovery● Brand, Rebrand, Refresh● Essence● Vision, Mission, Values● Identity, Personality, Positioning● Operationalization	Business Counsel <ul style="list-style-type: none">● Influencer Engagement● Multicultural Engagement● Strategic Planning● Organizational Development● Nonprofit Fund Development
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<p>Strategic Communications</p> <ul style="list-style-type: none"> • Reputation Management • Public Relations • Internal Communications • Crisis Communications 	<p>Data-Driven Marketing</p> <ul style="list-style-type: none"> • Inbound Marketing • Digital Marketing: Web, Search, Email, Mobile • Social Media • Market Research • Recruitment Marketing
<p>Design & Videography</p> <ul style="list-style-type: none"> • Multimedia Design • Motion Graphics/Animation • Graphic Design, Collateral, Signage • Infographic Design • Long, Short & Social Videos 	<p>Advertising</p> <ul style="list-style-type: none"> • Digital Advertising • Social Media Ads • Traditional Ads: TV, Radio, Print

Our Work Philosophy

Our work mantra is “POGAS,” which stands for: Purpose, Objectives, Goals, Actions and Standards. We use the 4 E’s to guide how we execute POGAS. With sound market research and analysis, we produce effective, efficient, excellent and elegant brand, marketing and communications solutions and campaigns.

Our Commitment to Hawai’i

Our agency believes in collaboration to develop sustainable solutions that contribute to the well being of our state and its people. Founder, Chairman, CEO & President Alan Tang serves as our chief strategist. He has been deeply impacted by Native Hawaiian cultural values and experiences throughout his career. Interacting with the crew of the Hōkūle’a and learning from Nainoa Thompson over the years, Alan understands the lessons of working well together on a small canoe in the middle of the ocean and how essential it is for our community to pull together in order to thrive. His commitment to our host culture, through his relationships with people like Thomas Kaulukukui, Jr., Ramsay Taum, Lulani Arquette and other Native Hawaiian leaders, has shaped the values of Olomana Loomis ISC.

Stellar Reviews from Our Peers

We are honored and humbled to consistently receive awards from the nest professionals in our industry, including:

- International Association of Business Communicators’ International Gold Quill, National Silver Quill and Hawaii Ilima and Best of Show awards
- American Advertising Federation – Hawaii’s Pele Awards
- Hospitality Sales & Marketing Association International’s Gold, Silver and Bronze Adrian
- Public Relations Society of America – Hawaii Chapter’s Koa Anvil and Koa Hammer
- Association of Fundraising Professionals – Aloha Chapter’s Outstanding Small Business award

LIST OF CLIENTS

Arts & Culture

Hawai'i Arts Alliance; Hawai'i Youth Symphony; Japanese Cultural Center of Hawai'i; Kohala Institute; Native Arts & Cultures Foundation; Native Hawaiian Hospitality Association; 'Ōlelo Community Media; Polynesian Voyaging Society

Building Industry

Alaka'i Mechanical Corporation; Clever Construction; HPM Building Supply; Innovative Painting & Concrete Restoration

Education

Chaminade University; Hanalani Schools; Hawai'i Pacific University; Hawai'i State Exemplary Foundation; Holy Nativity School; 'Iolani School; Kamehameha Schools; Maryknoll School; Mid-Pacific Institute; Saint Louis School; University of Hawai'i Foundation

Energy

Hawaii Gas; Photonworks; Waihonu Solar Farm; Kuokoa

Financial Services

Central Pacific Bank; Aloha Pacific Federal Credit Union; Bank of Hawaii; Chinen & Arinaga; Finance Factors; First Hawaiian Bank; Hawaii Bankers Association

Government

Hawai'i State Workforce Development Council; Hawai'i State Dept. of Education; Hawai'i State Dept. of Health; Hawai'i State Dept. of Human Services; Hawai'i State Executive Office on Aging

Health & Wellness

Diagnostic Laboratory Services; Hawai'i Covering Kids; Hawai'i Island Beacon Community; Hawaii Primary Care Association; Healthy Mothers Healthy Babies Coalition of Hawai'i; National Kidney

Foundation of Hawai'i; Maui Memorial Medical Center; Rehab Hospital of the Pacific; Shriners Hospitals for Children—Honolulu; Wai'anae Coast Comprehensive Health Center

Hospitality

Avis Budget Group; Mokulele Airlines

Nonprofit Human Services & Workforce Development

Aloha United Way; Child & Family Service; Coalition for a Tobacco Free Hawai'i; Feed My Sheep; Goodwill Industries of Hawai'i; Hina Mauka; Salvation Army Kroc Center Hawaii

Political Campaigns

2010 & 2014 Abercrombie for Governor; 2012 Caldwell for Mayor; 2010 & 2012 Democratic Party of Hawai'i; 2012 Ed Case for Senate; 2018 Ed Case for Congress

Real Estate

Kahala Associates; Towne Island Homes

Retail Service

Island Yumi; Kamehameha Shopping Center; Local Joe; Marukai Corporation; Poipu Shopping Village; Popeyes Louisiana Kitchen; Servco Pacific Inc.; The Wedding Ring Shop

Technology & Consulting

Booz Allen Hamilton; DataHouse; Mbloom

Other Trade & Industry

Association of Fundraising Professionals; Hawai'i Council on Economic Education; Hawaii Institute for Public Affairs; Hawai'i Science & Technology Council; Kaula'i Economic Development Board; National Association of Railroad Passengers; Society of Human Resource Management (SHRM) – Hawaii Chapter

PROJECT TEAM

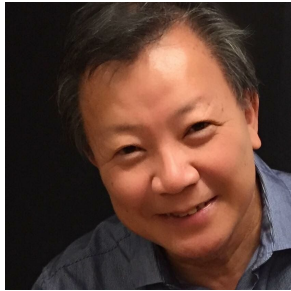
Chairman & CEO Alan Tang and the Olomana Loomis ISC executive team will oversee the Workforce Development Council board strategic planning project. The project will be led by Senior Communications Project Manager Liane Hu Okumura. Liane was the project lead for the development of the Workforce Development Council's brand rollout and outreach plan for the American Job Center Hawaii in 2018-19, and was also the project lead on several county and statewide projects including the Comprehensive Economic Development Strategy (CEDS) update for the County of Kaua'i.

Liane will be working with Ka'ala Souza, an independent market research and community facilitator. Ka'ala is a frequent collaborator with Olomana Loomis ISC on outreach and community engagement projects including the recent Workforce Development Council's brand rollout and outreach plan for the American Job Center Hawaii as well as Kamehameha Schools Regional Action Plans (RAPs).

Key Team Member Resumes

Alan Tang

Chairman & CEO



Alan serves as our chief strategist. He has more than three decades of experience in strategic counsel, marketing, branding, public relations, corporate communications, advertising, direct marketing, crisis communications, and nonprofit fund development. As a thought-leader, he has worked extensively with senior leadership in corporate and nonprofit organizations, and government to develop transformative and impactful changes.

Alan's consulting experience includes overseeing the Workforce Development Council brand rollout and outreach plan for the American Job Center Hawaii; brand strategy and identity initiatives for Kamehameha Schools' CEO Team, under Dee Jay Mailer, which resulted in a comprehensive brand strategy; image advertising campaigns for the organization and its Ho'oulu Hawaiian Data Center; and direct marketing campaigns. Alan also managed the integrated advertising campaign for "Abercrombie for Governor" for the Hawai'i primary and general elections in 2010 and 2014. He partnered with Maryknoll School on its overall brand strategy, positioning, and its slogan, "Creating 21st century learners, leaders and global citizens of character." Recently, he partnered with Maryknoll to brand and market its innovative Mx Scholar Programs, which are preparing students for the careers of the future. Alan also provided consultation and services for the school's \$21 million capital campaign for the Maryknoll Community Center. Alan has assisted Mid-Pacific Institute with its Technology and Science

Center capital campaign. He also was the lead project consultant for the planning of the Kaua'i Creative Technology Center, an initiative of the Kaua'i Economic Development Board to build a professional film studio and creative industries hub in Līhu'e. He led the project feasibility study, business plan development, and strategy development for the project's proposed \$20.5 million capital campaign.

Alan has served on a variety of local and national boards. He leads the Workforce Development Council taskforce to develop an employer engagement pilot program that can be replicated scaled across industries and islands. He is on the boards of Hope International and Hawaiian Islands Ministry and serves on the Long-Range Planning committee of the trustees for First Presbyterian Church of Honolulu. He is a past president of the Association of Fundraising Professionals (AFP) – Aloha Chapter. He served on the regional board of the International Association of Business Communicators and was Hawai'i chapter president. Alan has served on the Marketing Committee of the national board for the National Kidney Foundation of Hawaii.

Carole Tang

Chief Brand & Communications Officer and Executive Vice President



Carole provides senior leadership and oversees strategic brand management, corporate and marketing communications, and public and media relations. She joined the agency in 2005 and has provided strategic campaign expertise to a variety of clients in different industries, including: Hawaii Gas, Bank of Hawaii, Central Pacific Bank, University of Hawai'i Foundation, Kamehameha Schools, Goodwill Industries of Hawaii, Hawaii State Department of Health, Shriners Hospitals for Children® — Honolulu, Diagnostic Laboratory Services, National Kidney Foundation of Hawaii, Servco Pacific, Maryknoll School, Hanalani

Schools and The Salvation Army Kroc Center Hawaii.

Previously, she worked for sector leaders in education, financial services and health care. She was a brand manager at Kamehameha Schools, where she was responsible for system-wide brand management. Her responsibilities included developing enterprise brand strategies, brand counsel for senior leadership, and corporate identity and licensing. Prior to that, Carole served as vice president of corporate communications at Bank of Hawaii, where she was responsible for planning and implementing strategic internal and external communications. She served as a leading partner on teams that drove major branding campaigns, including “Tell Mike” and “Ask AI,” featuring the bank's chairman, CEO and President. She was also responsible for the bank's summary annual reports, economic reports, executive speeches, and communications supporting the bank's commitment to the community. Her background also includes healthcare communications and marketing. She managed public and media relations and internal communications for Kapi'olani Medical Center for Women and Children, where she worked to promote the hospital's impact.

Carole is an alumna of Punahou School and the University of Hawai'i at Mānoa. She is a past board member of the International Association of Business Communicators (IABC) – Hawaii Chapter and Trinity School.

Natalie Cook

Chief Operating Officer & Vice President of Marketing



Natalie oversees marketing strategy, advertising and data-driven direct marketing initiatives for the agency. She has 15 years of experience working with clients in healthcare, financial services, education, energy, construction, retail, government and nonprofit industries.

Since joining Olomana in 2002, Natalie has planned, managed and implemented dozens of integrated marketing and outreach campaigns encompassing advertising, digital communications, partnership collaboration and community marketing. Metrics-based data solutions are Natalie's forte, and she leads market research initiatives to inform brand strategies and campaigns. Natalie has worked on several statewide outreach campaigns that were highly inclusive with a number of stakeholder groups including: the 2010 and 2014 Abercrombie for Governor campaign where she spearheaded data marketing and contributed to advertising and grassroots initiatives; brand development and marketing for Hawai'i Island Beacon Community, a \$16M federal grant to transform healthcare on the Big Island; and the GFR campaign for the National Kidney Foundation of Hawaii that involved both physician and patient outreach. Originally from Chicago, Natalie is a graduate of Hawai'i Pacific University and has lived in Hawai'i for 20 years. She is a past president of Ad 2 Honolulu and an Outstanding Young Ad Person of the Year awardee.

Liane Hu Okumura, APR (WDC Project Manager)
Senior Communications Project Manager



Liane specializes in strategic communications, public and media relations, marketing communications and social media campaigns. She has served clients in economic development, education, energy, health care, nonprofit services and public policy.

Liane was the project manager for the Workforce Development Council brand rollout and outreach plan for the American Job Center Hawaii in 2018-19. She was also the project manager for the Kaua'i Comprehensive Economic Development Strategy (CEDS) Update for 2016-2020, and facilitated stakeholder discussions and outreach to inform strategic planning for six industry clusters with the potential to drive economic growth. She conducted an island-wide study through the Kaua'i Economic Development Board on the Kaua'i Arts & Culture sector to identify the community's greatest needs and opportunities to build a thriving arts industry. She has also led and supported other assessments to gauge brand strength, community needs, communications assets, and/or fund development effectiveness.

Liane earned her APR, or Accreditation in Public Relations, from the Public Relations Society of America (PRSA) in 2016, placing her among 28 accredited practitioners in Hawai'i who have been tested on 60 areas of public relations, strategic communications and ethical standards. Prior to joining our firm, An 'Iolani School alumna and valedictorian, Liane graduated summa cum laude as a Boston University Trustee Scholar with degrees in public relations and English. She is a board member of PRSA Hawaii and a former board member of Ad 2 Honolulu.



Ka'ala Souza

Project Consultant & Meeting Facilitator

Ka'ala Souza is an experienced facilitator, focus group moderator and interviewer. His diverse work experience contributes perspective and context to his role as strategic planning facilitator.

Ka'ala has collaborated with Olomana Loomis ISC on multiple projects. He was the lead investigator for the employer interviews in 2018-19 that informed the development of the Workforce Development Council brand rollout and outreach plan for the American Job Center Hawaii.

Ka'ala has also spent over 15 years involved in qualitative data collection through discussion/focus groups, community/town hall meetings, and one-on-one interviews. Over the years, Ka'ala has facilitated groups that include topics related to retail, real estate, political, and community issues. Relevant highlights include:

- Facilitated strategic planning retreats and meetings with Kapiolani Community College's Office of Continuing Education and Training;
- Developed a comprehensive 5-year strategic plan for the Hawaii Emergency Management Agency;
- Moderated statewide focus groups for families with children who were denied admittance to the Kamehameha Schools.
- Convened discussions with families frustrated with the process and extended wait times for land for the Department of Hawaiian Homes.
- Moderated focus groups for the U.S. Census, various legislative, mayoral and gubernatorial political campaigns.

Over the past 10 years, Ka'ala has also conducted various, highly sensitive mock jury focus groups for cases involving accidental deaths, dismemberments, and other, often tragic, events. Confidentiality, informed consent, and sensitivity during reporting, always important, are extremely vital with these groups.

The key characteristic contributing to Ka'ala's success and effectiveness is his genuine respect for the people involved in the group. His ability to help people relax and be comfortable helps them to share openly, honestly, and sincerely.

EXPERIENCE ON SIMILAR PROJECTS

Workforce Development Council



We assisted the Workforce Development Council with the development of a brand rollout and outreach plan for the American Job Center Hawaii to engage employers statewide. Our project began with an assessment of awareness, understanding and perceptions of the American Job Center Hawaii among employers. Our assessment included both quantitative and qualitative market research through a combination of a statewide employer survey conducted by SMS and one-on-one or small group interviews with executives and/or human resource professionals in a variety of industries.

To accelerate and aid the establishment of the American Job Center Hawaii brand, we created a tagline — “Working for Your Success” — that can be used with the American Job Center Hawaii logo to add immediate context and positioning, and that visually complies with the national American Job Center logo guidelines and style guide. We developed a brand rollout and outreach plan that included recommendations and strategies ranging from key messaging and the creation of communication assets to an employer engagement pilot and the implementation of a new website and customer relationship management (CRM) system.

University of Hawai‘i Foundation



After its highly successful Centennial Campaign, which raised more than \$330 million for the University of Hawai‘i ten-campus system, the University of Hawai‘i Foundation (UHF) wanted to assess the strength of its brand and perceptions of UH while it prepared to enter the planning stage of its next major capital campaign. UHF contracted our firm to conduct a comprehensive Brand Discovery assessment and analysis and to develop a Brand Identity system to articulate its essence, vision, mission, values, voice and promise/positioning. The Brand Discovery assessment involved conducting several focus groups and individual interviews with internal and external stakeholders, as well as a phone survey through the UHF Call Center. It also included a communications audit and review of the organization’s logo.

The Brand Discovery yielded many findings, including key themes and insights, which we used to articulate and refine the organization’s Brand Identity. We helped the Foundation create a new tagline: “For our University, our Hawai‘i, our Future.”

The assessment also highlighted certain gaps and barriers, which we provided the Foundation with and took into account in our recommendations for brand-building strategies and internal and external communications to help strengthen stakeholder understanding, engagement and support. We also provided findings on stakeholder perceptions of the UH Foundation’s logo and provided recommendations on refreshing the service mark to better reflect the organization’s essence and what it stands for.

Kamehameha Schools



KAMEHAMEHA SCHOOLS®

For more than a decade, Olomana Loomis ISC has worked with Kamehameha Schools (KS) — an \$11 billion private educational trust serving Native Hawaiians — in a variety of capacities including: brand strategy, brand-centric marketing, communication database management, and outreach through enterprise data-driven direct response marketing campaigns and advertising. We currently assist KS in managing a constituent database that engages families in highly targeted and relevant ways to effectively tell KS’ story and share resources and opportunities that aim to improve the quality of life for Native Hawaiians.

Kamehameha Schools, under former CEO Dee Jay Mailer, first engaged our agency for brand strategy work to assist the organization in defining and articulating its brand identity and to provide strategies to effectively communicate its brand to internal and external stakeholders. KS sought to foster engagement, understanding and support of the schools’ mission, outreach efforts, programs and services. Through stakeholder focus groups and individual interviews as well as a CEO Team retreat facilitated by OLISC, we assisted the leadership in identifying and articulating the organization’s brand essence, personality, identity and promise. We provided next-step recommendations on brand strategy, including brand-enhancing communications, “operationalization” of the brand (i.e. “living the brand”), brand architecture and corporate identity.

Kamehameha Schools applies the brand recommendations to its ongoing communications, community relations and outreach efforts. Olomana Loomis ISC subsequently assisted the organization with brand-centric communications, targeted marketing and outreach through enterprise data-driven direct response marketing campaigns, and advertising. The direct response outreach programs that Olomana Loomis ISC developed for Kamehameha Schools continue to result in positive response rates.

In 2016, OLISC was engaged by KS to facilitate the strategic planning process for Regional Action Plans (RAPs) for four of KS’ nine geographic regions statewide: Kona O’ahu, ‘Ewa, Waiialua, and Ko’olau. Our scope included: meeting design, planning and facilitation; collection and analysis of data including demographics, student achievement, community feedback and program effectiveness; and the final reports and five-year plans defining regional priorities.

Goodwill Industries of Hawaii

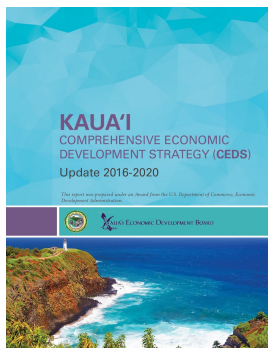


The mission of Goodwill Industries of Hawaii, Inc. is to be a leader in partnering with people with employment barriers to reach their full potential and become self-sufficient. Obstacles may include disabilities, welfare dependence, lack of education or work experience, economic barriers or illiteracy. For many years, we supported Goodwill in the areas of community outreach, brand awareness, mission marketing, retail sales and donation related communications to advance workforce development in Hawaii.

When Goodwill created the Supporting Employment Empowerment (SEE) program to connect employees with employers and assist them with their recruiting needs, we assisted in creating the program's branded elements and campaign launch. Employer engagement was critical to the SEE Program, and we believe wholeheartedly in the mission. Olomana Loomis ISC even employed one of the SEE program participants.

We also partnered with Goodwill to steward community engagement. For example, we created the marketing and outreach plan for the Goodwill Industries of Hawaii's 'Ohana Career and Learning Center in Kapolei. We assessed market needs, capacity and potential fit between the Center's offerings and the needs of Leeward Coast residents and employers. We conducted interviews with key community and area business leaders, and reviewed general employment and marketplace economic data to not only shape the plan, but also the programs themselves. The plan encompassed brand positioning, multi-channel marketing and communications, including face-to-face presentations, public and media relations, direct mail, advertising, electronic communications, tours and mixer events spanning the period before, during and after the opening. The 'Ohana Career and Learning Center successfully opened in 2010 and continues to grow.

The Kaua'i Comprehensive Economic Development Strategy (CEDS) Update, 2016-2020



We assisted the Kaua'i Economic Development Board (KEDB) with the update of the Comprehensive Economic Development Strategy (CEDS) for the County of Kaua'i for 2016-2020. The goal of the Kaua'i CEDS was to diversify the County's economy through economic development in six target industry clusters: Food & Agriculture, Sustainable Technologies & Practices, Science & Technology, Health & Wellness, Sports & Recreation, and Arts & Culture.

Over the course of five months, we facilitated stakeholder meetings for the Steering Committee and the six target industry cluster committees, reaching out to more than 100 community leaders to solicit insights about each industry cluster's strengths, weaknesses, opportunities and threats.

These stakeholder discussions were critical not only to define strategic priorities for each industry cluster but, more importantly, to foster connections and collaboration among those who were vested in the industry cluster's growth. We also created and administered an online survey that captured dozens of industry cluster section responses, documenting the community's input and ideas and demonstrating their engagement in the economic vision for the County.

The final report included economic data analysis including jobs and earnings for all six target industry clusters to substantiate vision with metrics. The Kaua'i CEDS report was finalized with the CEDS reports for the other Counties under the oversight of the State Office of Planning with funding from the U.S. Economic Development Administration.

SCOPE OF SERVICES & DELIVERABLES

Olomana Loomis ISC will partner with the Workforce Development Council (WDC) to produce a visionary and actionable board strategic plan that engages WDC board members who are employers and business representatives as active “champions” of the statewide public workforce development system. We will work closely and collaboratively with the WDC throughout the project.

Our services will include:

- Facilitation of in-person strategic planning sessions with WDC board members in either an all-day or two (2) half-day sessions during the week of October 8 to 11, 2019. We understand that dates may be subject to change to ensure quorum for the sessions. We will work with WDC staff and board members to plan and prepare an effective strategic planning session format and agenda.
- Additional meetings, interviews and discussions with WDC board members as needed to develop the strategic plan.
- Written updates and presentations to the WDC Executive Committee and at full board meetings, which are anticipated to take place in December 2019 and March 2020.
- Written updates and presentations at other meetings as needed.
- Delivery of a final board strategic plan for approval by the WDC Executive Committee and full board by Monday, Feb. 10, 2020. The strategic plan will include:
 - Vision, mission and values.
 - Overarching strategic priorities.
 - Outlined goals and objectives.

PROJECT TIMELINE

This chart outlines the suggested project schedule, subject to change per request or input from WDC.

	2019				2020		
	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Planning & prep for strategic planning sessions							
Strategic planning sessions							
Project status reports							
WDC Board meetings							
Delivery of final plan for WDC approval							

PROPOSED FEE

Fees include all work done by Olomana Loomis ISC and Ka'ala Souza.

Fees	\$14,250.00
Tax	\$ 671.46
TOTAL	\$14,921.46

REFERENCES

Cindy Adams

President & CEO

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**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs

Vendor Name: **OLOMANA LOOMIS ISC, INC.**

DBA/Trade Name: **Olomana Loomis ISC**

Issue Date: **06/12/2018**

Status: **Compliant**

Hawaii Tax#: W26994661-01

New Hawaii Tax#:

FEIN/SSN#: XX-XXX2500

UI#: XXXXXX2218

DCCA FILE#: 234831

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
	Internal Revenue Service (Compliant for Gov. Contract)	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Compliant
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	The entity is compliant with DLIR requirement
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information