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June 30th, 2024

Mr. Douglass Adams
Director of Research and Development
County of Hawai'i
25 Aupuni St, Suite 1301
Hilo, HI 96720

Dear Mr. Adams,

RE: SOQ for Economic Development Intermediary

Please find the attached Statement of Qualifications (SOQ) for your review. We are submitting this SOQ in consideration for a professional services contract to support the following categories of services in Hawai'i County:

- RD.1 - Community Planning (Community and Economic Development, Community Engagement, Culture and Indigenous Data Science, Strategic Planning, Sustainability Systems)
- RD.2 – Community Planning (Grant Writer)
- RD.4 – Economist
- RD.11 – Instructional Systems (Design of Training, Facilitation, and Evaluation Program)
- RD.12 – Operation Research
- RD.14 – Statistics (Statistician)
- RD.15 – Workforce Research and Analysis

We believe that our experience makes us well-suited to assist the county in facilitating community economic and agricultural development solutions. We look forward to continuing our collaboration with the County Research & Development Department.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Dennis Flemming', with a stylized flourish at the end.

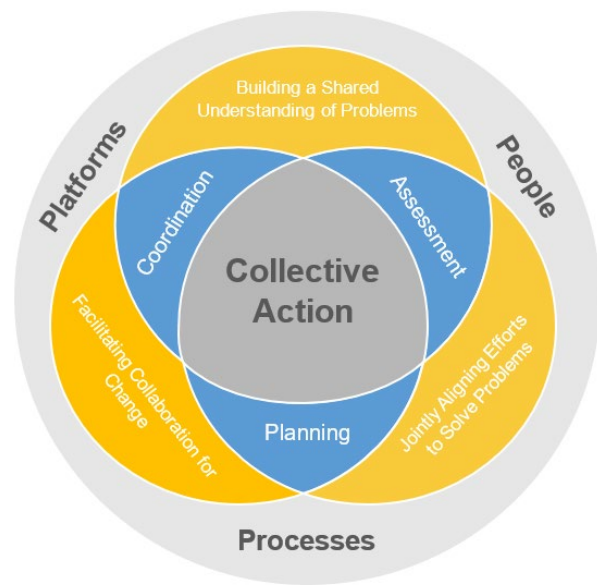
Dennis Flemming
Executive Director
Email: dennis@hamakuainstitute.org



Statement of Qualifications
Professional Services Contract for Economic Development Intermediary Organization

Introduction

Established in 2016, the Hāmākua Institute supports social and economic development through collective action. Although based in Hawai'i, the Institute works internationally in regions facing poverty and conflict to bring together communities, businesses, and governments to create healthier, more prosperous societies. Fundamental to the Institute's work is the belief that regardless of country or region, there's a multitude of people and organizations doing important and interesting development work. What is often lacking is a way to bring those efforts together in more effective, mutually complementary ways. The Institute focuses on resolving this problem by serving as a convener, connecting the dots to improve one of the most critical, yet often overlooked, parts of the development process – how people work together collectively.



Collective action process the Hāmākua Institute uses to build a shared understanding of problems, jointly align stakeholder efforts, and facilitate collaboration to resolve them.

Details of the Hāmākua Institute

Phone Contact:	(808) 937-7372
E-mail contact:	dennis@hamakuainstitute.org
Physical Address of Office:	34-4370 Pali Nana Rd, Ninole, 96773
Mailing Address:	P.O. Box 60 Ninole, HI 96773
Age of Firm:	The Hāmākua Institute was incorporated in December 2014, but started operations in 2016.
Aver. Number of Employees:	It has averaged five employees over the last five years.

Staff Education, Training, and Qualifications

The Hāmākua Institute has four consultants available to support economic development in Hawai'i County. These include Dennis Flemming, the Hāmākua Institute's Executive Director, Andrea Kuch, its

Development Manager, Katrina Zavalney, who serves as a Facilitation Coordinator, and a development economist, David Elliott. Their education, qualifications, and experience are summarized below:

- Dennis Flemming holds a Bachelor of Science in Business Administration with a major in Finance from the University of Florida, 1985. He also holds a Master of Science in Sustainable Development from the University of London, 2009. He has spent 14 years working as a small business development and training advisor, 16 years as an international development project manager and 5 years as a consultant and facilitator focused on rural community and economic development.
- Andrea Kuch holds a bachelor's degree in International Relations and Communications from the University of San Diego, 2010, and completed a year-long executive business education program from Stanford's Graduate School of Business in 2022. Andrea has spent more than a decade supporting international development projects within the private sector, holding various positions in corporate social investment and project management. Since joining the institute, she has served as a consultant and facilitator focused on rural community and economic development.
- Katrina Zavalney is an experienced strategic planning and organization development consultant with a Master's degree in Organization Development. She has 25 years of experience in community development, sustainability, event management, and nonprofit work. Katrina is dedicated to creating sustainable livelihoods globally and has been a leader in the sustainability movement. She has worked with Disney, where she wrote key environmental policies.
- David Elliott is a development economist with more than two decades of experience analyzing, leading, and supporting economic and market systems development projects globally. For more than 16 years, he served as Executive Director and Chairman of the Springfield Centre, the birthplace of market systems development.

The Hāmākua Institute also works in partnership with several organizations and individuals around the world to bring in specialized expertise and experience when needed. Some of its partners relevant skill areas include facilitation, mediation, dispute settlement, conflict resolution, social research and value chain analysis.

Experience and Recent Projects

Since its establishment in 2016, the Institute has focused its efforts on the analysis, design, and evaluation of rural economic development programs in Hawai'i and internationally in Africa, Latin America, and the South Pacific. The Institute uses a process to support multi-stakeholder efforts to assess, plan, and coordinate development efforts in collaboration with a diverse collection of key stakeholders.

Through the process, the Hāmākua Institute not only identifies social and economic needs, but focuses on building stakeholders' shared understanding of problems. The initial assessment helps ensure different viewpoints from community members, business professionals, elected leaders, and those responsible for implementing policy are considered when analyzing development challenges and proposing solutions. This participatory approach, which focuses on greater inclusivity, can be helpful in generating greater agreement on what the problems are and possible solutions.

The Hāmākua Institute has used, and is currently applying, these participatory and collective processes in a number of projects including the following:

1. As part of a contract from Kamehameha Schools, the Hāmākua Institute completed value chain analysis for three key agricultural sectors on Hawai'i Island – staple food crops, export crops, and agribusiness services. The project aimed to increase a shared understanding of systemic constraints holding back the island's agricultural economy and identify potential pilot solutions.
2. Under a contract with the County of Hawai'i Department of Research & Development, the Institute assisted in completing a Hawai'i Island Clusters of Opportunity (HICO) analysis to identify the island's significant economic clusters based on job growth over the past decade. Activities included cleaning and analyzing more than 100,000 data points from the Your Economy Time Series (YTS) database, producing data visualizations, and holding a leadership summit with business leaders to identify action plans that could support the island's economic growth.
3. Under a new Research to Grassroots (RGR) grant from the Western Sustainable Agriculture Research and Education (SARE) Council, the Institute is implementing a program to introduce and adapt new models for overcoming labor barriers to improve the economic viability of Hawai'i Island's small farms.
4. As part of USDA funding under a grant from the Western SARE Administrative Council, the Hāmākua Institute implemented a program to train individuals from the local agricultural community as market systems facilitators who can better understand, analyze, and solve problems for improving the growth and efficiency of Hawaii's small farms.
5. Under a Phase 1 grant from the Economic Development Agency for the Build Back Better Regional Challenge (BBBRC), the Hāmākua Institute developed the capacity of the Hawaii Island Agriculture Partnership (HIAP) as a mechanism for facilitating the public-private collaboration necessary to achieve impactful economic growth in the island's agriculture and food sector. Under the grant, the Institute is finalizing the incorporation of HIAP as a 501c6 membership-based organization, formalizing its governance and decision-making processes, and developing agreement templates members can use to make it easier for sharing farm assets, equipment, and services.
6. Under a contract with the County of Hawai'i Department of Research & Development, the Hāmākua Institute assisted in the preparation and stakeholder engagement process for a multi-stakeholder emergency feeding plan for the County. The project was completed and formed the basis for broad stakeholder alignment and awareness in preparation for future crises.
7. Under a grant from Kamehameha Schools and the Hawai'i Community Foundation in 2020, the Hāmākua Institute coordinated and facilitated a multi-stakeholder collective assessment of the agriculture and food system on Hawai'i Island. This project was completed and used as the basis for securing grant funding for agriculture and food system development strategies.
8. Under a grant from the Hawai'i P-20 Partnerships for Education within the University of Hawai'i, the Hāmākua Institute serves as the coordinators, conveners and fiscal agents for the Hawai'i Island Agriculture Partnership, developing the partnership mechanisms and establishing a website. The currently funded work is for the 2022 calendar year and focuses on generating collective action for agricultural development through public-private partnership.

9. Under a contract from Kamehameha Schools, the Hāmākua Institute carried out a Forestry Value Chain study in partnership with GDS Development Solutions. The study examined the economic viability of value-added processing options for forestry products on harvested on Hawai'i Island. The study was completed and presented to Kamehameha Schools in 2019.
10. Under a contract from the Baylor International Pediatric AIDS Initiative, the Hāmākua Institute facilitated a participatory stakeholder evaluation of a mother-child health program in Colombia, South America. The evaluation brought together health workers, government officials and representatives from remote indigenous communities to collectively evaluate the program and recommend improvements. The evaluation was completed in April, 2018.

References

The following clients can be contacted for references associated with the above work carried out in recent years:

For Project 1, 3, 4 and 7:

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For Projects 2 and 5,6:

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For Project 8:

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For Project 9:

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For Project 10:

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