



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 (DCCA).

Vendor Name: HAWAIIAN SANCTUARY, INC.

Issue Date: 12/06/2024

Status: **Compliant**

Hawaii Tax#: 55286303-01
New Hawaii Tax#: T-5528630301
FEIN/SSN#: XX-XXX2497
UI#: XXXXXX4427
DCCA FILE#: 224721

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
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	A status determination has not yet been made
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

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:

Amount of State Funds Requested: \$ _____

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

Amount of Other Funds Available:

State: \$ _____

Federal: \$ _____

County: \$ _____

Private/Other: \$ _____

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

\$ _____

Unrestricted Assets:

\$ _____

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:

City:

State:

Zip:

Contact Person for Matters Involving this Application

Name:

Title:

Email:

Phone:



Authorized Signature

Name and Title

Date Signed

Katherine Marchese

PO BOX 1907

PAHOA, HI 96778

Phone: 808-937-0904

kapohokatie@gmail.com

Objective

To be a key player, in a dynamic work environment, in the administrative and accounting department of a local company with advancement potential.

Ability Summary

administrator/accountant/full-charge bookkeeper/office manager 25 years plus

Employment History

Bookkeeper

1/2020 - Present Hawaiian Sanctuary, Inc. Pahoa, HI

***full charge bookkeeper performing all essential functions of organization accounting

*** human resources functions including new employee orientation, payroll & maintaining employee files

*** monthly financial reporting, bank reconciliation,

*** annual financial reporting to CPA for Tax Preparation

Computer Skills: QuickBooks Pro, Microsoft Office, excel, internet/email

Office Manager/Bookkeeper

1/2015 - 3/2018 California & Hawaii Foliage Growers Papaikou, HI

***full charge bookkeeper performing all essential functions of organization accounting

*** responsible for billing & collections of 100+ customers & 3 million in sales

*** human resources functions including new employee orientation, payroll & maintaining employee files

*** accounts payables for 100+ vendors ; reconciling bills & cutting checks

*** monthly financial reporting, bank reconciliation, inventory control

*** quarterly & annually financial reporting to CPA

Computer Skills: QuickBooks Pro, Microsoft Office, excel, internet/email

Office Manager/Bookkeeper

11/2011 – 1/2014

Hawaiian Shores Community Assn

15-2793 Honu St, Pahoa, HI

- **Perform all functions of office and accounting management for non-profit community association
- **Prepare & send out monthly water bills for 450 members
- **Prepare & send out annual assessment dues for 1300 members
- **Receive payments, post to member accounts daily & make weekly bank deposits
- **Perform bi-weekly payroll for staff and prepare & file all payroll taxes
- **Reconcile vendor invoices, post payables, print checks on bi-monthly basis & present to treasurer for signature
- **Reconcile petty cash & present check for replenish fund on monthly basis
- **Reconcile 6 bank accounts monthly and prepare reconciling journals for review by treasurer
- **Prepare quarterly financial statements for review by the Board of Directors
- **Assist the Board of Directors in determining the objectives for fiscal year and preparing the operating & capital budgets accordingly
- **Facilitate member concerns & comments to promote harmony in the community
- **Attend Monthly Board of Directors Meetings to relay member concerns & communications & to present financial reports and office manager report
- ** Participate in annual audit & prepare any reconciling entries recommended by auditors
- **Analyze financial information and prepare financial reports to determine or maintain record of assets, liabilities, profit and loss, tax liability, or other financial activities within an organization.

Computer Skills: Quickbooks Pro for Accountants, Microsoft Office & Excel, Quickwater Rural Water Software, internet, email

Bookkeeper, Payroll

07/2008 - 09/2011

Puna Pharmacy, Inc.

Pahoa, HI

- * process accounts receivables, payables, & payroll
- * track income & expenses; itemize tax deductions
- * reconcile bank & credit card statements
- * office management & computerize accounting systems
- * prepare financial statements & audit financial data
- * prepare worksheets/statements for Tax Consultant/CPA
- * computer skills: Pharmserve, Quickbooks Pro, ms office, excel, internet

Owner/Manger

06/2005 - 11/2011

Aloha Accounting

Pahoa, HI

- * office management & computerize accounting systems
- * track income & expenses by class/funding source
- * process accounts receivables, payables, & payroll
- * reconcile bank & credit card statements
- * prepare financial statements & audit financial data
- * prepare worksheets/statements for Tax Consultant/CPA
- * computer skills: Quickbooks Pro, ms office, excel, internet, email
- * office management & computerize accounting systems
- * track income & expenses; itemize tax deductions
- * process accounts receivables, payables, & payroll
- * reconcile bank & credit card statements
- * prepare financial statements & audit financial data
- * prepare worksheets/statements for Tax Consultant/CPA
- * computer skills: Quickbooks Pro, ms office, excel, internet, email

Accounting Manager of New York Division

07/2000 - 12/2005. Hilo Fish Company.

Hilo, HI

A/P, A/R, general ledger, bank recon, inventory control, financial reporting & audit preparation

- * computer skills: Mas 90, Frozen Fish Software, excel, internet

Education and Training

Completion Date	Issuing Institution	Location	Qualification	Course of Study
05/01/1992	UH-Hilo	HI	Bachelor's Degree	Business Administration/Accounting

Honors & Activities

UNIVERSITY OF HAWAII AT HILO
BACHELOR OF BUSINESS ADMINISTRATION
May 1992 GPA 3.6/4.0

Additional Information

PERSONAL ATTRIBUTES

Strong Communication Skills - written & oral
Self-directed Performance
Highly Motivated
Team Player and Work well with a variety of personalities
Loyalty & Confidentiality

Detailed References

Heather Hedenschau
Big Island Brokers
Pahoa, HI 96720
808-345-9800
Business reference known for 30 year(s)

Kevin Wibberley,
K.W. Construction, President
Pahoa, HI 96778
808-965-8424
Supervisor reference known for 10 year(s)

Scott Reiling, Former General Manager
Hawaiian Paradise Park Community Association
Keaau, HI 96749
808-937-0262
Supervisor reference known for 10 year(s)

Jeff Gray, President
Netcom Enterprises, Inc.
Keaau, HI 96749
808-938-8888
Business reference known for 15 year(s)

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **FEB 24 2012**

HAWAIIAN SANCTUARY INC
PO BOX 1222
PAHOA, HI 96778

Employer Identification Number:
26-3882497
DLN:
17053340350041
Contact Person:
GARY MUTHERT ID# 31518
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
509(a)(2)
Form 990 Required:
Yes
Effective Date of Exemption:
March 5, 2003
Contribution Deductibility:
Yes
Addendum Applies:
No

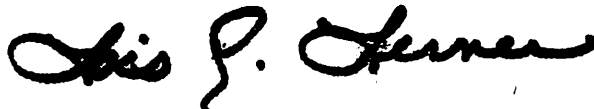
Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Lois G. Lerner
Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

Hawaiian Sanctuary Inc. Organizational Chart:

- ❖ Founder & CEO: Steve Lund
- ❖ General Manager 1: Anita Mitchell
- ❖ General Manager 2: Tammy Shores
- ❖ Human Resources Director / Project Director: Robert Bogle
- ❖ Chairman of the Board: Robert Bogle
- ❖ Professional Bookkeeper / Accountant: Katherine Marchese

NOTE: Pay scale shown as highest to lowest of listed roles.

Roles and Responsibilities:

1. Founder & CEO:
 - Overall strategic direction and vision for the organization
 - Grant program oversight and decision-making
 - Liaison with funding agencies and stakeholders
 - Ensures compliance with grant requirements and regulations
2. General Manager 1:
 - Program management and implementation
 - Event planning and scheduling
 - Personnel management and supervision
 - Budgeting and financial management (in collaboration with the Professional Accountant)
 - Reporting and evaluation
3. General Manager 2:
 - Operational management and logistics
 - Human resources support and administration
 - Marketing and outreach
 - Community engagement and partnerships
4. Human Resources Director/Project Director:
 - Recruitment, Project guidance, budget and Grants writing
 - Benefits administration and employee relations
 - Training and professional development
 - Compliance with labor laws and regulations
 - Supports General Managers with personnel management
5. Chairman of the Board:
 - Governance and oversight
 - Strategic planning and guidance
 - Fundraising and resource development
 - Community outreach and advocacy
 - Ensures organizational compliance with laws and regulations
6. Professional Accountant:
 - Financial management and accounting

- Budgeting and forecasting
- Grant financial reporting and compliance
- Auditing and financial statement preparation
- Provides financial guidance and support to General Managers

Grant Program Responsibilities:

1. Administering the budget: Project Director, Professional Accountant, General Manager 1
2. Scheduling events: General Manager 1, General Manager 2
3. Managing personnel: General Manager 1, General Manager 2, Human Resources Director
4. Grant reporting and evaluation: Project Director, Professional Accountant, GM 1
5. Grant compliance and oversight: Founder & CEO, Chairman of the Board

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, 2024.

2. Declaration Statement

The applicant shall submit a declaration statement affirming its compliance with [Section 42F-103, Hawaii Revised Statutes](#).

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](#).

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;
2. The goals and objectives related to the request;
3. The public purpose and need to be served;
4. Describe the target population to be served; and
5. Describe the geographic coverage.

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;
2. Provide a projected annual timeline for accomplishing the results or outcomes of the service;
3. Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results; and
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.

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 2026.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2026.
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.

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 2026 for program funding.
6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2024.

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.

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.

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.

2. Organization Chart

The applicant shall illustrate the position of each staff and line of responsibility/supervision. If the request is part of a large, multi-purpose organization, include an organization chart that illustrates the placement of this request.

3. Compensation

The applicant shall provide an annual salary range paid by the applicant to the three highest paid officers, directors, or employees of the organization by position title, not employee name.

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.

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.

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.

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2026 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2026, but
- (b) Not received by the applicant thereafter.

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2025 to June 30, 2026

Applicant: Hawaiian Sanctuary, Inc.

POSITION TITLE		FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Project Manager		2	\$72,800.00	15.00%	\$ 10,920.00
Instructor (Experienced Farmers + Kumu Guests)		12	\$83,200.00	20%	\$ 16,640.00
Onsite Intern Mentor / Instructor		3	\$48,000.00	60.00%	\$ 28,800.00
Skilled Intern/Farm worker/Instructor Assistant		2	\$38,400.00	80.00%	\$ 30,720.00
Avian Care Specialist		2	\$38,400.00	70.00%	\$ 26,880.00
					\$ -
TOTAL:					113,960.00
JUSTIFICATION/COMMENTS: Salaries based on recent local polls and estimates. Total full time committments are also market estimates					

Bob Bogle
808-333-7556



Adult educator, vocational trainer, Bob is also a core facilitator and Strategic Consultant. Participant and mentor with the ManKind Project of Hawaii and Boys 2 Men programs, and private consultant, Bob has worked as an independent trainer, facilitation communication and process improvement consultant and coach with individuals and leaders helping create success through innovation since 1995.

After 18 years as a technician, Bob was wooed into a position as Senior Technical Trainer for Lockheed Martin Space Systems, his creative and disciplined technical skills training and practical certification methods produced remarkable results. Bob's group facilitation and strategic mentoring of multiple communication, process improvement and problem solving teams at Lockheed Martin, Rolls-Royce, Computer Sciences Company, NASA, General Dynamics, PEMCO, Northrup-Grumman and others helped the resulting teams spread innovation and improvement throughout each organization.

After a three-year tour as a flight line sailor in the US Navy Bob flowed into civilian life building airplanes and satellites next. After eighteen years and a boatload of experience Bob was offered a position as Senior Technical Trainer / Process Improvement and Communications Improvement Facilitator for a large aerospace corporation. Additional experience include small business and health and fitness; Creatively Gated Hawaii Entry Control Systems, Civic Program Coordinator for the YMCA of USA with certifications in Fitness Instruction, Strength Training, holistic nutrition and weight management.

Located on Hawaii Island since 2004, Bob grows food while nurturing his passion for working with people, plants and the environment. Training in sustainable building techniques, managing organic farm activities, facilitating Strategic Planning sessions, Technical training sessions as well as group facilitation events with farms and community organizations are a few areas of interest.

Resume: Robert G Bogle Jr
13-3194 Pahoa Kalapana Rd
Pahoa HI 96778
808-333-7556

Hawaii Community College, Hilo HI **February 2018 to present**

Instructor / Trainer, EdVance Apprentices Programs

Teaching at HCC Campus, University of Hawaii at Hilo and Kulani Correctional Facility. Design and deliver dynamic instruction to provide cognitive learning and practical applications aimed at apprentice level certification skills for trades in Mechanical, Electrical, Electrical Motors and Controls, Solar Electric, Small Engines, Basic Automotive Repair.

Hawaiian Sanctuary Retreat Center, Pahoa HI **March 2009 to present**

**Human Resources Director, Chairman of the Board of Directors,
Permaculture Design Certification instructor**

Administer Human Resources, Provide Leadership and direction to the organization and its governing body, Design and present Permaculture and Regenerative Agriculture classes and hands-on training clinics. Produce management and team building events and Strategic Planning periodicals. Direct Food Production teams.

ReMax Real Estate Brokerage, Hilo HI., **December 2006 to November 2013**

Real Estate Sale Agent

Market, advertise and sell real estate properties including listings, representing sellers and buyers, staging properties for sale and assisting buyers and sellers in all aspects of sales and purchasing transactions. Specialist in off-grid properties and quality customer care.

Lockheed Martin Space Systems

Oct. 1982 to March 2006

Electro-Mechanical Technician and Certification Instructor to the Industry

Mechanical-Electrical Technician - Peacekeeper, Atlas, Titan and Space Shuttle Launch and control systems. Assemble, transport and launch booster rocket systems. Service and maintenance of hypergolic, cryogenic and high-pressure gas systems, launchpad systems and related facilities maintenance and supervision. Clean room certification and secret clearance.

Feb 1999 to Feb 2006 - Skills Certification Instructor certifying over 3000 individuals per year in 23 different disciplines within the aerospace industry including; Safety, HazMat Handler, Forklift and Scissor Lift operator, Crane Operator, Ordinance Handler, Launch Pad Safety, High and Low Pressure Gas systems, Torque and Safety Wire, Electrical Connectors and Circuits, Micro-soldering and PPE certifications.

Certifications:

1999 to present; Leadership Strategies Inc., Core Facilitator / Trainer

1983 to 2006; Lockheed Martin Space Systems, Electro-Mechanical Technician, Skills Trainer / Senior Technical Trainer

1988 to present; Refrigeration Engineers Society of USA, Refrigerant Handler

1977 Airframes and Powerplants certification US Navy

Memberships

ManKind Project Hawaii, Boys 2 Men Hawaii

Hawaii Farmers Union

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