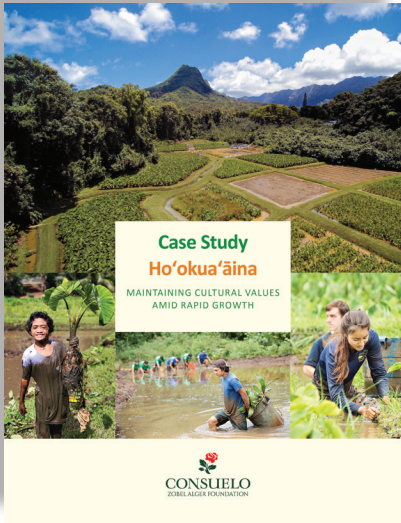


Case Study Ho'okua'āina

MAINTAINING CULTURAL VALUES
AMID RAPID GROWTH



CONSUELO
ZOBEL ALGER FOUNDATION



Case Study: Ho'okua'aina

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Cover images: A 7.5-acre plot on the island of O'ahu is home to Ho'okua'aina, a non-profit organization using Hawaiian traditions of taro cultivation to improve the lives of youth and build a healthy community. *Photos by Cassie Nichols*

Photos on pages 3, 7, 13 and 15 by Cassie Nichols



Glossary

ʻĀina	Land, earth, that which feeds
Aloha	Love, affection, compassion. The concept has complex spiritual and cultural significance.
Aloha ʻāina	Love of the land, patriotism
Imu	Pit oven
Kalo	Taro, a traditional and current Hawaiian staple. Honored as an ancestor of the Hawaiian people.
Kuaʻāina (back land)	Countryside, person from the countryside, one who maintains traditional cultural practices
Kuleana	Responsibility
Kupuna	Elder
ʻOhana	Family, relative, kin. Root word <i>ʻohā</i> is taro corm, i.e., offspring, youngsters.
ʻŌlelo noʻeau	Proverb
Poi	Traditional Hawaiian staple food made of taro
Mālama ʻāina	Care for and honor of the land

Contents

- EXECUTIVE SUMMARY 1**
 - Key innovations 3

- CASE STUDY 4**
 - Purpose and background 4
 - Literature review 4
 - Methodology 6

- FINDINGS 8**
 - How did Ho’okua’āina develop over the last five years? 8
 - What were Ho’okua’āina’s strengths and challenges during this time? 10
 - How do the Ho’okua’āina’s strategies target resilience and community well-being? 12
 - How does Consuelo’s approach to capacity-building with culturally based programs work? If successful, how can the Foundation learn to do it in a systematic way? 13

- APPENDICES**
 - Appendix A: List of structured interviews 14
 - Appendix B: Growth (2013-2018) 15
 - Appendix C: Assessing philanthropic approach 16
 - Appendix D: Foundations that use model approaches 17
 - References 18

Executive Summary

Ho'okua'aina, an 'aina-based nonprofit organization, has been a Consuelo Foundation (CF) partner since 2014. Founders Dean and Michele Wilhelm have a deep commitment to caring for 'aina and community. In 2007, this led them to buy a 7.5-acre parcel of land in Maunawili, in Kailua on the island of O'ahu, and start an organization with a mission to empower youth to develop life strategies and skills through Hawaiian values-based coaching and the cultivation of *kalo* (taro). By 2013, they had gained nonprofit status, in-kind support from the community and modest financial donations. However, it was the initial \$60,000 from Consuelo—which at the time was looking for 'aina-based partners to increase protective factors¹ for at-risk youth—that catapulted the organization into the five-year growth period that followed.

Ho'okua'aina has been successful in growing the quality of its programs and its farm capacity. How it developed, Consuelo Foundation's role in that process, and their mutual relationship is the focus of this report.

How did Ho'okua'aina develop over the last five years?

- **Strong foundation.** The family-centered beginnings laid the foundation for an intimate, culturally based program.
- **Intentional community engagement.** Local residents and family friends volunteered to establish initial wetland patches of *kalo* on the farm.
- **Responsible, thoughtful management of growth.** Board and staff managed and balanced the simultaneous rapid growth of youth participation, community interest, and *poi* sales with a primary focus on growing and maintaining quality relationships. Succession planning is ongoing in the organization.
- **Development of a five-point bottom line Indigenous approach.** Programming evolved into a holistic approach, the quintuple bottom line: impact on social, economic, environmental, cultural and spiritual areas.

Between 2013 and 2018, Ho'okua'aina experienced exponential growth:

Measurement indicators	2013	2018
Individuals visiting farm	500	3,747
Number of visits hosted	21	132
Kūkuluhou mentor program participants	15	29
Number of <i>kalo</i> patches planted	9	21
Income earned	\$735.00	\$98,491.00
Operating budget	\$5,000.00	\$640,000.00

1. Protective factors are behaviors and/or conditions that may reduce or buffer against the risk of delinquency and problem behaviors. They include connection/commitment to caring adults and prosocial peers; a safe place to be; conflict resolution and coping skills; positive self-esteem; healthy physical development; emotional self-regulation; and life/work skills development.

What were Ho'okua'aina's strengths and challenges during this time?

STRENGTHS

- **Indigenous engagement practices.** A welcoming environment centered on the inherent value of each person through the practice of *aloha* and its intrinsic qualities that include love, care and compassion.
- **Commitment to growth and learning.** All visitors to the farm, interns and staff felt valued and were encouraged to develop emotional and physical health. Key Hawaiian values detailed later in this report were practiced and taught through all interactions, not just during structured programming.
- **Professional, cultural and emotional capacity of leadership.** Administrative staff brought skills from previous employment such as teaching, architectural design, music, and knowledge of Native Hawaiian traditional practices.

CHALLENGES

- **Reliable and consistent funding.** Although earned income and grant revenue greatly increased, sustainability is an ongoing goal.
- **Measuring impact.** Improved protective factors for at-risk youth are difficult to measure. Despite this, Ho'okua'aina has developed and continues to evolve strategies to assess how its programs impact youth.
- **Establishing boundaries between family and organizational life.** Balancing farm and family life remains challenging, but the Wilhelms have found ways to maintain this balance.
- **Staff transition at the Consuelo Foundation.** Changes in staffing and administration at the Foundation disrupted communication and the relationship with Ho'okua'aina.
- **Mitigating effects of rapid growth.** An increase in funding and opportunities sometimes put pressure on staff's skills and capacity.

How do Ho'okua'aina's strategies target resilience and community well-being?

- **By targeting at-risk youth in the mentoring program,** staff focus on breaking the cycle of abuse and incarceration by connecting youth to caring adults and the land itself. These relationships help to foster emotional growth through the learning and enacting of cultural values and concepts.
- **Community is defined broadly,** thus the program outreach includes anyone who benefits from a connection to the *'aina*. This approach builds connectedness and provides access to culturally pertinent resources.
- **Enhancing protective factors through the internship program, K-12 education program and community work days,** is done through cultural pedagogy, personal relationship-building and challenging work on the land.

What are the characteristics of the Consuelo Foundation's approach to capacity building with culturally based programs?

- **Responsiveness, transparency and person-centered relationships.** Consuelo staff were flexible, listened to the organization's needs and supported it in different ways (volunteer work in the taro patches, helping with events, brainstorming on the phone, and providing technical consultants).
- **Multi-year unrestricted funding.** Resources for a full-time executive director were crucial for building the organization's capacity to grow.
- **Supporting a community of cultural and 'aina-based/place-based practitioners.** Consuelo created opportunities for Ho'okua'aina staff to meet with and learn from similar organizations across Hawai'i.
- **Simplified reporting.** Utilizing conversation and visits to the farm relieved the stress of producing formal reports and promoted capacity building at a pace suitable to Ho'okua'aina.



“This is my home away from home. My peaceful place. This is where I wanted to go every day. This is where I can take a deep breath.” – Former intern

Key innovations

QUINTUPLE BOTTOM LINE

While a triple bottom line—social, environmental and financial—is a common model in social enterprises or social justice oriented nonprofits, Ho’okua’āina is creating an Indigenous model for organizational growth and development tied to place and ancestral knowledge.

The organization uses seven *‘ōlelo no’eau*, or Hawaiian proverbs, to undergird this model:



TRUST-BASED PHILANTHROPY MODEL

Consuelo’s strategy involved contracting the organization to provide mission-aligned direct services while also providing technical assistance. This strategy eliminates the typical one-directional grantor–grantee relationship in favor of a partnership model.

Over the past five years, Consuelo and Ho’okua’āina have developed a robust relationship. During this time, Ho’okua’āina successfully entered the growing field of culturally influenced *‘āina* programs. The organization can meet upcoming challenges—managing rapid growth, solidifying the program model and measuring impact—with a stronger infrastructure and the support of an engaged community.

Case Study

Ho'okua'āina is not simply about growing kalo. It's about embracing and living the values of kua'āina and all that comes with that. – Dean Wilhelm

Purpose and background

This case study was commissioned by the Consuelo Foundation and explores its five-year partnership with the nonprofit organization, Ho'okua'āina.

Conducted from December 2018 to July 2019, the purpose of this case study was twofold: to learn more about the evolution of Ho'okua'āina over the past five years, and to determine the role of the Consuelo Foundation in Ho'okua'āina's growth during that period. Included in the inquiry were the staff, farm and activities at Ho'okua'āina as well as the Consuelo staff. A series of qualitative interviews, academic literature and an analysis of documents and reports served as data sources. The findings will serve as a guide for a documentary that is being produced alongside this report.

Case study questions were formulated by the stakeholders to ensure they focused on elements of interest. The Consuelo staff outlined the following questions:

- How did Ho'okua'āina develop over the last five years?
- What were its strengths and challenges during this time?
- How do its strategies target resilience and community well-being?
- What are the characteristics of Consuelo's approach to capacity-building with culturally based programs?

Literature review

There is a growing field of community-based programming in Hawai'i that uses cultural and 'āina-based approaches to foster youth development, economic development, education, food security and overall health and well-being. MA'O Organic Farms, Ho'oulu 'Āina Nature Preserve, and Paepae o He'eia are just a few examples of programs or nonprofits on the island of O'ahu that have helped solidify this field and its vibrant, holistic approaches.

Ho'okua'āina represents an important contribution to the field, explicitly combining culture and place-based approaches with relationship-building that fosters community bonds as a central focal point, rather than a by-product of its work.

CULTURE-BASED PROGRAMS

The benefits of incorporating culture into prevention and intervention programs has been well-documented in the literature (Ka'opua et al. 2019; Kim and Jackson 2009; Yamauchi 2009; Mokuau 2002; Powers 2007; Uttal 2006). In discussing culturally based interventions for substance abuse and child abuse among Native Hawaiians, Mokuau (2002) explains the importance of Native Hawaiians being central to the work:

One aspect of cultural competency is the empowerment of diverse populations to develop and use their own interventions for resolving problems, drawing from the parameters and strengths of their culture. Cultural strengths may be viewed as protective factors and should be the focus of prevention and treatment efforts. (p. 583).

Reese and Vera (2007) studied cultural competence and cultural relevance as integral to developing prevention strategies for mental health programs. They explain, however, that there is not enough literature on *how* programs successfully integrate culture into their delivery of services: "as often as the importance of cultural relevance is mentioned in the prevention literature, few concrete descriptions are found of the processes by which culture is incorporated into prevention efforts" (p. 766). Mokuau, Garlock-Tuiali'i, and Lee (2008) suggest that there needs to be more publications on Native Hawaiians and other Pacific Islanders, and that information on this population be "anchored in cultural values and culturally based models of practice" (p. 115).

Cultural humility is an emerging philosophy in human services, which is seen as an evolution from cultural awareness, cultural diversity or cultural competence frameworks (Fisher-Borne, Cain and Martin, 2015). Cultural humility is characterized by self-reflection and self-critique, the fluidity and subjectivity of culture, and emphasizes active engagement in the process of relationships with individuals, communities, and institutions.

The philosophy also challenges the practitioner to address institutional failings, in addition to individual behavioral change (Fisher-Borne, Cain and Martin, 2015).

In Hawai'i, *'āina*-based programming has emerged as an approach that can provide renewed cultural focus to Native Hawaiian populations. This approach, as with other culturally based models, can also benefit non-Hawaiian populations.

‘ĀINA-BASED PROGRAMS

The importance of culture, place, land and historical context is relevant when serving any population. For Native Hawaiian communities though, these elements are even more crucial to ensuring that an intervention or service is appropriate and effective (Mokuau 2002; Trinidad 2012). Place, in the Native Hawaiian context, for example, can refer to “the process of critical consciousness of historical trauma of one’s community, and community knowledge of how to live well and be healthy in one’s environment” (Trinidad, 2009, p. 2). Incorporating historical context along with culture is extremely important. “For Native Hawaiian youth and young adults to live well and overcome these socio-historical-political conditions, access to opportunities for them to engage in culturally appropriate, community-based social justice work is vital” (Trinidad, 2012, p. 2). Native Hawaiian epistemology, or ways of knowing, is also crucial for developing a programmatic approach that can speak more directly to the needs of this population (Trinidad, 2012). A Critical Indigenous Pedagogy of Place (CIPP), when incorporated into community-based work, can “serve as a process and

method to motivate youth and young adults to learn about their cultural knowledge, histories, collective values, and healing practices” (Trinidad, 2012, p. 2).

Aloha ‘āina, sometimes used interchangeably with *mālama ‘āina*, is another approach that centers on relationship with land, and includes “the notion that if you take care of the land, the land takes care of you ... the restoration of that reciprocal relationship between Hawaiians and their land, both through political means to regain land rights and through a resurgence of traditional conservation-oriented land stewardship and subsistence practices” (Gupta, 2015, p. 530). In programs addressing substance abuse, Mokuau (2002) describes how *aloha ‘āina* programs “reflect the Native Hawaiian cosmography that people originate from the land, are stewards of the land, and are recipients of its bounty” (p. 585). She describes that working in *kalo* terraces has benefits:

Such work entails physical discipline, cognitive attention, emotional reflection, and spiritual openness ... In doing such culturally significant work, participants learn values such as cooperation, and reciprocity, engage in self-reflection on cultural identity and cultural pride, and have opportunities to explore their spirituality (p. 586).

Programs that use either culturally relevant practices, CIPP, or *aloha ‘āina*, can be more impactful due to their ability to connect with the program participants by embracing Hawaiian epistemology and connection to land. These practices can provide benefits to other populations (other Asian Americans, Pacific Islanders, etc.) as well as with Native Hawaiians (Trinidad, 2012).

RELEVANT THEMES IN PHILANTHROPY

Conolly (2011), suggests that effective philanthropy combines humanistic and technocratic approaches. Many organizations, however, embrace one over the other. The chart over the page shows the differences between the two paradigms.



Humanistic	Overall approach to philanthropy	Technocratic
Values – passion-driven, expressive, heart-centered	Role of values	Objective, dispassionate, instrumental, head-centered
Responsive, opportunistic and intuitive	Grantmaking style	Proactive, rationalistic and disciplined
Hands-off, bottom-up, flexible, nonprofit as innovator	Relationship with grantees	Hands on, top-down, nonprofit as contractor
More qualitative and learning-oriented	Approach to evaluation	More quantitative and accountability-oriented
An art and craft that is difficult to codify	Ability to teach and learn philanthropic techniques	A science and discipline with neat frameworks and tools

Conolly, 2011, p. 123

A healthy balance between the two approaches is ideal. Interestingly, this framework aligns with some Indigenous values. For example, when describing how staff can reach a balance between the two approaches:

Staff must lead with an open heart, exercise humility, pay attention to their gut sense, attend to relationships authentically, and renew their own spirits. Much of their work is not easily defined and calls for a combination of skill sets and a blend of the rational and instinctual (Conolly, 2011, p. 131).

Conolly outlines the following steps toward achieving this nuanced, strategic framework: aligning goals and strategies and grounding them in clearly expressed values; making sure strategy is sound and well-executed, using a dynamic and tailored mix of proactive and responsive approaches; employing a full set of tools and choosing the right one for the job; and making performance assessment more than just a report card. See Appendix C for questions that a foundation can ask to determine where it is located along the continuum from humanistic to technocratic.

Trust-based philanthropy, which falls within the humanistic frame, focuses on partnership through core values of power-sharing, equity, humility, transparency, curiosity and collaboration (Conolly, 2011, p. 1). This approach focuses on rebalancing power in philanthropy through the following action steps: give multi-year, unrestricted funding; do the homework; simplify and streamline paperwork; be transparent and responsive; solicit and act on feedback; and offer support beyond the check.

Although it is difficult to say whether these philanthropic philosophies produce better results from their grantees, the approaches are being followed by a number of well-respected foundations. See Appendix D for more information on funders who are utilizing these approaches.

Methodology

Case study research is a qualitative research method and empirical inquiry that investigates a phenomenon within its real-life context. Case studies are based on in-depth investigation of a single individual, group or event to explore the causes of underlying principles.

Qualitative research is characterized by an interpretive paradigm, which emphasizes subjective experiences and the meanings they have for an individual. Therefore, the subjective views of a researcher on a particular situation play a vital part in the study results (Starman, 2013, p. 30).

For this case study, the research consultant met with Consuelo and Ho’okua’āina staff to discuss the study’s purpose and the research questions. Foundation reports, online documents and previously recorded videos were reviewed to provide context. Interview questions were developed to form the outline of most interviews, although a free-flowing, conversational method was used to engage individuals in conversation beyond a traditional structured interview.

DATA COLLECTION: INTERVIEWS

Consuelo and Ho'okua'aina staff created a list of potential interviewees to represent a variety of stakeholders. Structured qualitative interviews were conducted either on site at Ho'okua'aina, at the Foundation, or at a mutually agreed location. All interviews were videotaped. The list of interviewees by their role and organization can be found in Appendix A.

Another set of interviews was conducted by filmmaker Matt Yamashita to film key themes elicited by the first round of conversations. Since these brought forth new data (or reinforced existing themes), they were included in the data analysis.

DATA ANALYSIS: GROUNDED THEORY

Interview transcripts were then coded for themes. Open coding helps to identify concepts that are categorized into themes for analysis. The theoretical relevance of the concepts was then used to link categories and develop main themes that were organized to answer each research question. Guided by a process called grounded theory, the researcher used deductive reasoning to understand and analyze these themes and concepts. A debrief with Consuelo Foundation and Ho'okua'aina staff on July 21, 2019, was used to elicit feedback on the data analysis. Further data was captured through a "talk story" session on larger themes of the study. Video and detailed notes were taken at this session and incorporated into the final analysis. The technical consultant submitted a draft to Consuelo in October 2019 that was edited into this final draft.



Findings

This section outlines the findings, which answer each of the four research questions.

How did Ho'okua'āina develop over the last five years?

HO'OKUA'ĀINA ORIGINS AND HISTORY

When Dean and Michele Wilhelm lived in a suburban neighborhood with their young family, they began hosting casual gatherings for others longing for the opportunity to come together, build community and discuss issues impacting their families. These gatherings revolved around preparing and sharing Hawaiian food often grown in their garden, fellowship and music. As the gatherings grew, their dream to build a meeting place for community members was born. The couple sold their house, moved their family into a local church, and worked as caretakers while saving money for their vision. In 2007, after three years of searching, they purchased the 7.5-acre parcel of land known as Kapalai in Maunawili, located in Kailua on the windward side of O'ahu.

The organization gained nonprofit status in 2009 and its early years focused on developing the farm and on nonprofit administration. Dean worked full-time teaching youth in the juvenile justice system and his spare time was spent clearing the land, while Michele focused part-time on administration. Community engagement was crucial during this period, as many local residents and family friends volunteered to establish the initial wetland *kalo* patches.

NAMING THE ORGANIZATION

Uncle Earl Kawa'a, a *kupuna* (elder) in the community, began helping to restore the land early in the process. Upon his suggestion, the organization was named Ho'okua'āina.

Dean recalls Uncle Earl's explanation:

I am *kua'āina*: *Kua* literally means "back" and *'āina* means "land". So, back-land. But *kua* is a word that generally refers to those that lived in the back land, those who were really the backbone of society, those who were the *mahi'ai kalo*—the taro farmers. For me, I am *kua'āina*, but for you, and others in your generation, you are to become *kua'āina*. So, I think you should name your organization *Ho'okua'āina*.

The organization's website indicates that this naming "refers to our dedication to keeping the traditions and values of our *kūpuna* alive by restoring *'āina* back to abundance, building community through the sharing of traditions and passing on ancient knowledge to future generations."

The central vision of strengthening community bonds and Dean and Michelle's commitment created the foundation for a strong mission-driven organization. Restoration and reclamation were key themes mentioned in the interviews.

CONSUELO FOUNDATION FUNDING

Prior to establishing a relationship with Ho'okua'āina, programs using cultural and *'āina*-based approaches to promote well-being gained Consuelo's attention. Consuelo consultant Andrew Aoki met Dean and Michele Wilhelm and was impressed by their mission and work. After attending some community workdays, he noted that the organization touched on environmental, cultural, social, spiritual and financial goals—a holistic approach. Consuelo staff visited and were impressed by the farm, and the Wilhelm's *aloha* and vision, recognizing that Ho'okua'āina was a fit with Consuelo's mission. The Wilhelms also felt a connection with the Foundation and were impressed that the resulting relationship felt like a true partnership.

Michele said:

That’s how they presented it, “we would really like to partner with you because we think collectively we could really make an impact in the community, together, with our combined values.” It was the first organization that we sat at the table with that we felt that our values were completely aligned. They [CF] want to give hope to those that don’t have hope, specifically women, children and orphans. We were working with the same kind of people in mind, with the same kind of heart. They saw that we had the potential to be a social enterprise.

A number of similar conversations led to the initial funding of \$60,000 from Consuelo in 2014.

It was due to this initial contract that Dean Wilhelm was able to quit his job to focus full-time on the farm. This was a major turning point for the organization, since it enabled it to expand its efforts to restore the land by engaging more community volunteers, planning for a farm internship program, and working in the taro patch whenever possible. Michele Wilhelm worked part-time for Ho’okua’āina and focused on learning more about nonprofit administration and fund development. This period, although challenging, helped establish relative stability for the future growth.

ORGANIZATIONAL GROWTH

By 2018, the organization had blossomed into a full-fledged working farm with four full-time staff, one part-time education director and twelve interns at any given time. The flagship mentoring program, Kūkuluhou, for boys in the juvenile justice system, served over 150 boys during this time period. Program staff reported positive outcomes, including a reduction in behavioral issues and increased self-esteem among the boys.

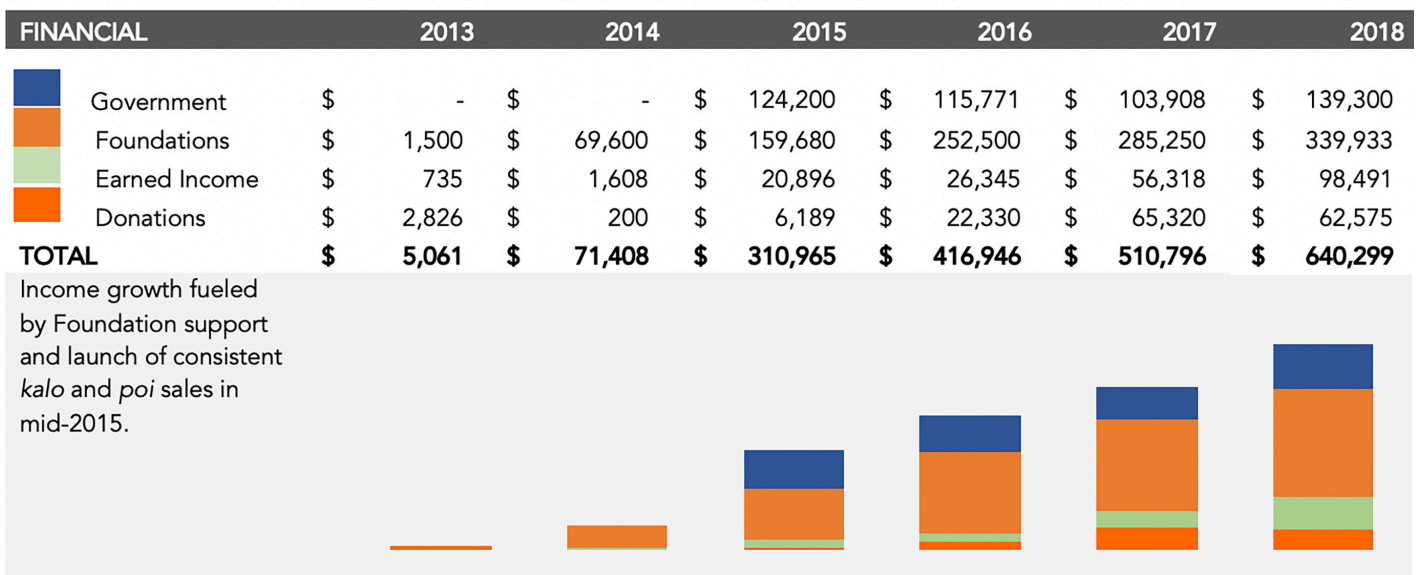
The exponential growth of the organization can be seen in Table 1 below, which shows the budget from 2013 to 2018. It now employs a full-time farm manager, a full-time program coordinator, and a part-time education director along with 20 program interns throughout the year.

EVOLUTION OF PROGRAMS

Dean Wilhelm says, “We grow *kalo*, but we also grow people. We are in the people business.”

Using Hawaiian traditional methods of growing *kalo* is not only a reclamation of traditional practices and customs, but also a means to restore health in living, relationships and communities. The array of programs has grown to not only serve more people, but to further refine and solidify the culturally based pedagogy.

Table 1. Financial Growth, 2013-2018



A more detailed version of this table is found in Appendix B.

Kūkuluhou mentoring program: The flagship program, Kūkuluhou, has served over 150 participants since its first contract in 2013. Although Dean Wilhelm remains the lead instructor of the program, the farm manager, education director and interns have all become more involved in providing mentorship. All staff are intentional about modelling a positive work ethic, teamwork and *kuleana* (responsibility) to the farm and to each other.

Internship program: The internship program has grown in size and scope, having provided over 60 paid internships in five years. Interns are trained in traditional, organic Hawaiian farming methods, which are often a draw for individuals interested in the environment, organic agriculture and sustainability. Interns are also trained in the “people” part of Ho’okua’āina’s model. Thus, the *’ōlelo no’eau* (proverbs) that guide the curriculum of the mentoring and education programs also guide the interactions with interns. Dean Wilhelm reminds interns about their *kuleana* as mentors to the youth that come to the farm. Although interns do not necessarily come from at-risk backgrounds, many do come with histories of trauma, homelessness, mental health needs and other issues that may have impacted their overall health and well-being. Interns have experienced dramatic shifts in their life plans as well as within their own personal lives as a result of their work at the farm. In one case, a student changed her plans of attending college on the continent, in favor of remaining on O’ahu to work on the farm and attend college locally. Another intern was previously homeless and describes his involvement in Ho’okua’āina as life-changing. Here he describes why Dean Wilhelm is so important to his growth at the farm:

I see him as pretty much another father figure. He’s helped me out through a lot of hard times. He’s been my mentor. He’s the person I would want to model myself most as. He just seems relaxed and at peace ... talking to him inside the patch, he’s always giving words of wisdom, all the time. Something you can use outside of work, something you can use in the real world. Very useful, self-guiding tools, and I have used those tools in my own life. It’s amazing. I do appreciate him more than anybody else that I’ve met so far, he’s just awesome, they’re an awesome family.

Community days: Although there are some days off, most Saturdays are community work days at the farm. These have grown in number and regularity since the beginning of the program. In 2018, over 3,700 people from the community visited the farm.

Education program: The K-12 education program has probably gone through the most transformation since its beginnings. The curriculum has been formalized, and the education specialist has taken on more responsibility to help develop relationships with the schools and in teaching the lessons when youth come to the farm. Although Dean Wilhelm is still involved in these visits, transferring some of the leadership to the education specialist is part of the succession planning that he has intentionally implemented. Rather than single visits, this program focuses on developing ongoing relationships with a school, so that a relationship with the land can build over time.

What were Ho’okua’āina’s strengths and challenges during this time?

Ho’okua’āina’s organizational strengths can be summed up in three main points. The first encompasses its ability to attract and keep people who are committed to the mission and the taro. Because staff and interns feel they are part of the family and that the Wilhelms invest in their growth, there is a high satisfaction with the farm as a workplace. Second, the Wilhelms have been adaptable and flexible in tackling program growth; they made tough decisions about how to grow and what projects to take on. Third, relationship-building with funders, the board and community has been a core element that has enabled the organization’s survival. Additionally, a learning environment is fostered for all those who come to the farm. People feel valued and gain something from their connection with Ho’okua’āina, so they return and remain connected.

In achieving its programmatic goals, the organization’s strengths have been related to an approach characterized by values of *aloha* and *’ohana* (family). The Wilhelms view these values as a process or journey, the driving force behind the farm and the operations. All interviewees reiterated how the Wilhelms made them feel welcome and a part of the family.

Table 2. Strengths and challenges

Organizational objectives					
	Strategy	Driving values and principles evident in interviews			
STRENGTHS	“Attract people committed to mission”	Created serene learning environment with direct connection to <i>‘āina</i>	Invested in people and developed leadership	Created a safe space with mutual trust and respect	Rediscovered <i>aloha</i> , <i>‘ohana</i> and <i>‘āina</i>
	“Grow with flexibility and adaptability”	Exercised reflexivity and facilitated group metacognition	Incorporated individual psycho-spiritual needs into overarching organizational vision	Focus on <i>‘āina</i> , <i>‘ohana</i> and <i>aloha</i>	Provided place and space where the <i>‘āina</i> taught fundamental skill sets
	“Build strong relationship with funders, board, community groups and local residents”	Fostered compassion in approach and communication	Constant check-in with the spirit of <i>aloha</i>	Maintained connectedness to the <i>‘āina</i>	Built trust by being impeccable with their words
CHALLENGES	“Achieve sustainable growth, funding and practices”	Balancing technocratic and humanist skill sets	Establishing clear boundaries between family and organization	Balancing tough decisions with the speed of contemporary demands and traditional perceptions of time	Scalability that balances traditional perceptions of time and real space

Programmatic objectives					
	Strategy	Driving values and principles evident in interviews			
STRENGTHS	“Place of <i>aloha</i> ”	Mutual trust and respect	<i>Aloha</i>	Indigenous values – the seven lessons	Commitment to every individual
	“ <i>‘Ohana</i> ”	Importance of place	Reflexivity and intention	Cultivating place of <i>aloha</i>	Respect for space and growth
CHALLENGES	“Formalizing curriculum”	Identifying and dissecting authentic skill sets	Combining skill sets into competencies that balance the traditional and the contemporary	Developing new leadership that harbors authentic characteristics	Discussing program approach amid expeditious growth

The challenges are similar to those of any nonprofit. For example, securing reliable and consistent funding is an ongoing concern. Organizationally, challenges were found in the areas of rapid growth. The Wilhelms were new to nonprofit administration so there was a very fast learning process that is ongoing. Because of the quality of the program and its strong reputation, at times it was overwhelming to consider the many options for growth that were encountered. Keeping boundaries between family life and the organization was also difficult.

Michele Wilhelm said, “We have to be really deliberate about it. We have been more cautious about programming and about making sure we have evenings and Sundays to ourselves. It doesn’t always happen, but we try.”

Programmatically, measuring the impact of the prevention and community-building functions has been a challenge. New methods and attention to process-oriented outcomes are working, but more development in this area could be helpful. Although Dean Wilhelm is proactively engaged in succession planning, his ability to develop new leadership is sometimes constrained by competing responsibilities on the farm.

Other strategies that were deemed central to success included:

- Strong adherence to mission
- Inspirational leadership
- Connection to the larger movement of *aloha ʻāina* practitioners
- Focus on growth of people (staff and program participants)
- An intersectional approach (focus on culture, environment, health and social ties)
- Positive and meaningful relationships with seed funders were crucial to the establishment of innovative approaches to community development

How do Hoʻokuaʻāina’s strategies target resilience and community well-being?

The program goals of Hoʻokuaʻāina serve to enhance protective factors in the local community. The programming aims to build more support for youth and the broader community. The assumption that “everyone is at-risk in some way” reinforces the organization’s need to use the seven lessons in all interactions and programs. Three of its four programs are open to everyone (not just at-risk youth) and build support within the broader community.

To varying degrees, the following protective factors are addressed by the programs and operations of the farm: community connectedness; connection to school; connection to a caring adult; emotional health; equitable access to education and jobs; and embracing cultural attitudes, norms and values. Below are some examples of how these protective factors are enhanced through the work of Hoʻokuaʻāina:

- The community work days reach thousands of individuals per year. These build on the community connectedness that began in the early days with the initial clearing of the land. Through the community investment of “sweat equity” into the land at the farm, people feel connected to the place and to each other.
- Dean Wilhelm, the staff and interns serve as caring adults for the youth that come to the farm. The ongoing relationship between Dean and the Kūkuluhou Mentorship Program participants serves as the heart of the organization. With the increased involvement of the staff and interns, connections with many caring adults are facilitated at the farm.
- The Education Program and Intern Program provide access to youth and young adults who are actively engaged in education. Through their involvement and work at Hoʻokuaʻāina, the importance of culturally based education is coupled with mainstream education programs.
- Native Hawaiian cultural knowledge, values and practices that are established by the program serve as protective factors for youth of all ethnicities.

“I know it has an impact. Their time here shows they can work as a team, that they can achieve a goal and that they can respect each other. It is in line with the other lessons we try to teach at our program.” – A program staff member of a partner organization that houses the Kūkuluhou mentees



How does Consuelo’s approach to capacity-building with culturally based programs work? If successful, how can the Foundation learn to do it in a systematic way?

RELATIONSHIPS AND SUPPORT

Consuelo’s distinct approach to relationship-building was a central finding. Ho’okua’āina staff identified the importance of the Foundation staff’s approach, which built trust and an environment of growth rather than one of anxiety (over reporting or funding requirements).

Michele Wilhelm said: “I never felt micromanaged, but I always felt I could call on Consuelo for support.”

The program manager said, “Consuelo provided so many different opportunities for us to meet other like-minded individuals and programs. It was super helpful! They also gave us technical assistance through workshops, trainings and consultants. All were valuable.”

Besides tangible support, Ho’okua’āina staff felt emotionally supported when Consuelo staff took time to visit the site, work in the *taro*, help with their events or otherwise become involved in different ways.

FLEXIBILITY AND SPACE

The breathing room fostered by the Foundation’s operational support that facilitated Dean’s full-time employment allowed the Wilhelms to think deeply about the vision of the organization. Consuelo’s program officers were flexible in terms of reporting and other requirements. For example, in the early days of the relationship, a program officer would meet with the Ho’okua’āina leadership to discuss progress and program outcomes, and would write up a report based on the meeting. By relieving the stress of writing a progress report, Ho’okua’āina staff could grow into their administrative capacity over time. Now they feel confident in producing their own reports.

FOSTERING CONNECTIONS AND GROWING CAPACITY

By creating space for Ho’okua’āina staff to meet with other similar agencies and funders, and by providing consultants and technical assistance through consultants, the Foundation has provided tangible skills and added value to the work of the agency. These elements were seen as crucial to the further growth of the organization.

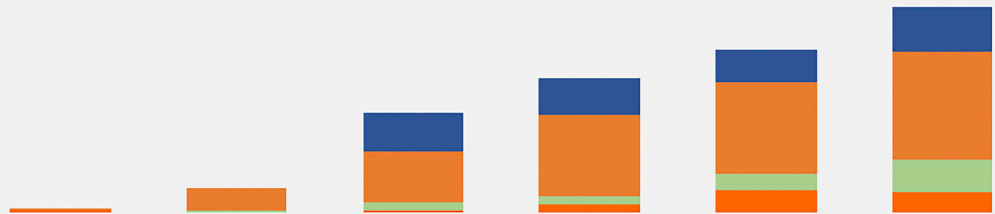
Appendix A: List of Structured Interviews

Date	Role	Organization
12/11/18	Program Officer	Consuelo
12/12/18	Program Director	Partners in Development: Ke Kama Pono
12/12/18	Science Instructor	Partners in Development: Ke Kama Pono
12/12/18	Program Manager	Ho'okua'aina
12/18/18	Executive Administrator and Executive Director	Ho'okua'aina
1/9/19	Educational Specialist Executive Director	Ho'okua'aina
1/10/19	Consultant Board Member	Volunteer Volunteer
1/11/19	Executive Administrator Farm Manager	Ho'okua'aina
1/12/19	Former Intern Intern Intern Intern	Ho'okua'aina
7/16/19	Former Intern	Ho'okua'aina

Appendix B: Growth (2013-2018)

FINANCIAL	2013	2014	2015	2016	2017	2018
Government	\$ -	\$ -	\$ 124,200	\$ 115,771	\$ 103,908	\$ 139,300
Foundations	\$ 1,500	\$ 69,600	\$ 159,680	\$ 252,500	\$ 285,250	\$ 339,933
Earned Income	\$ 735	\$ 1,608	\$ 20,896	\$ 26,345	\$ 56,318	\$ 98,491
Donations	\$ 2,826	\$ 200	\$ 6,189	\$ 22,330	\$ 65,320	\$ 62,575
TOTAL	\$ 5,061	\$ 71,408	\$ 310,965	\$ 416,946	\$ 510,796	\$ 640,299

Income growth fueled by Foundation support and launch of consistent *kalo* and *poi* sales in mid-2015.



OUR PEOPLE	2013	2014	2015	2016	2017	2018
Staff	0	1	2	3	4	5
Youth interns			9	15	16	16
Board members	3	6	6	7	8	7
Funding partners	1	2	5	6	7	8

OUR IMPACT	2013	2014	2015	2016	2017	2018
Visits hosted	21	48	70	72	140	132
Visitors and volunteers	500	700	2500	3000	3677	3747
Kūkuluhou Youth	15	20	29	43	44	29
Kalo patches in production	9	12	15	18	19	22

We have increased our partnerships, cohort participation, investment in facilities, and board and staff leadership. With it, we have grown our *kalo* production and our capacity to reach at-risk youth and serve as a gathering place for our community.



Appendix C:

Assessing Philanthropic Approach

Questions for humanistic funders	Questions for technocratic funders
How can we incorporate and gain from more dispassionate analysis in our philanthropy work, without losing too much of the joy and heartfulness?	How can we do a better job clarifying and expressing the values and passions that guide our philanthropic work?
When would it be valuable for us to offer more direction to grantees and less flexibility and lenience?	In what cases might it be beneficial for us to be less directive and more nimble, opportunistic, and patient with grantees?
Could we profit from more research on needs and best practices to avoid duplicating effort and reinventing the wheel?	How can we get a broader array of constituents (beyond outside “experts”) to weigh in on what they see as the needs and how to address them?
Can we do a better job articulating what specifically we are trying to achieve and explaining the interconnections between the inputs, strategies, and outcomes?	Is our theory of change really feasible? Might there be opportunities for us to improvise more and make more “leaps of faith,” based on intuition?
Are there times when we delegate too much to a grantee so that our own knowledge is not tapped sufficiently and the nonprofit is not accountable enough for its performance?	Are there times when our engaged relationship with grantees ends up being too meddlesome, putting them in a servile role, creating too many hoops to jump through, suppressing their innovation, and overlooking their full organizational capacity? How and when could we give grantees more leeway?
How can we build more rigorous performance measurement into our evaluation so that we document evidence of success and inform our future funding decisions?	How can we share evaluation findings with a broad array of stakeholders – including nonprofit grantees and maybe even beneficiaries – and refine program strategy based on reflection and learning about what worked, why, and under what conditions?
What is the best way for us to learn more about and become more at ease with the disciplines, tools, and frameworks associated with strategy and performance measurement? What might nonprofits be able to learn from business?	How can we learn more about the softer, “art and craft” side of philanthropy, including practicing and grooming bold leadership, making sound judgements, encouraging innovation, and building trusting relationships and collaborations? What might business be able to learn from nonprofits?

Connolly, 2011, p. 134

Appendix D:

Foundations that use Model Approaches

The following foundations utilize the “ambidextrous” approach to philanthropy that includes both humanistic and technocratic methods.

F.B. Heron Foundation

- Is deeply committed to providing high-quality customer service to grantees – and holding them accountable for achieving measurable results.
- Does not impose plans or initiatives onto grantees since it believes that their efforts must be informed and led by community members – and declares a narrow set of goals and strategies related to community wealth creation that it supports in five specific geographic areas.
- Provides accommodating, multi-year core support to nonprofits – and expects them to demonstrate performance at a consistently high level, assess their tangible impacts, and use data to continually improve performance.

The Skillman Foundation

- Is guided by a powerful code of ethics and values – and detailed theory of change.
- Devotes flexible funding for strategic opportunities that arise that can make a difference – and concentrates its grantmaking to support proven models in two specific program categories in six Detroit neighborhoods.
- Uses what it learns through evaluation to help communities devise better strategies – and rigorously measures performance and accountability.

Rockefeller Brothers Fund

- Supports cross-national efforts to advance social change in an interdependent world – and concentrates its funding in three “pivotal places”; the western Balkans, southern China, and New York City.
- Dedicates funds to some special opportunities that may surface – and awards grants mostly in three main program areas.
- Receives high marks from grantees for being responsive to their needs – and is highly engaged with them in the development of programs.

Cleveland Foundation

- Invests in plans developed by community leaders – and exercises leadership by helping to set a visionary agenda for the region and acting as a community think tank and incubator.
- Systematically requests input from grantees about ways to enhance the foundation’s practices – and provides feedback and support to help nonprofits strengthen their organization and programs.
- Provides responsive funding to address pressing short-term human service needs – and makes practice grants to devise long-term solutions for such fundamental issues as regional education systems and economic development.

The David & Lucile Packard Foundation

- Is receptive to taking risks to support unsolicited and innovative “big ideas,” has a focused set of funding priorities, clearly articulates strategies and takes the initiative on certain major efforts.
- Seeks out and listens to grantees’ ideas and carefully monitors the foundation’s performance in meeting grantee experience standards – and, when appropriate, provides direction to grantees
- Is committed to conducting external evaluations to encourage continuous learning – and to document outcomes and track dashboard indicators.

Connolly, 2011, p. 135

For foundations that use a trust-based philanthropic approach, see the [Trust-based Philanthropy Project](#).

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CONSUELO

ZOBEL ALGER FOUNDATION

The mission of Consuelo Foundation is to promote the well-being of at-risk children, women and families in the Philippines and Hawaii, and to prevent and treat their abuse, neglect and exploitation. We do this through innovative and effective strategies and services that engage and empower individuals, families and communities.