



GUAM PRESERVATION TRUST

INANGOKKON INADAHI GUA'HAN

P.O. Box 3036, Hagåtña, Guam 96932 * Tel: 671-472-9439/40 * Fax: 671-477-2047

THE GUAM PRESERVATION TRUST
REGULAR BOARD OF DIRECTORS VIRTUAL MEETING
THURSDAY, MARCH 9, 2023; 4:00 P.M.

A G E N D A

- | | | |
|--------|--------|---|
| Action | 1.0. | CALL TO ORDER / ROLL CALL |
| Action | 2.0. | APPROVAL OF MINUTES (February 8, 2023 Meeting) |
| | 3.0. | OLD BUSINESS |
| Action | 3.1. | GPT Three Year Organizational Growth Plan 2023-2026 |
| Info | 3.2. | Cliff Condominium |
| Action | 3.3. | Marianas History Conference Sponsorship |
| | 4.0. | NEW BUSINESS |
| Info | 4.1. | Malesso Village Revitalization Plan |
| | 5.0. | COMMITTEE REPORTS |
| | 5.1. | Budget & Finance Report
Refer to Report |
| Info | 5.1.a. | YTD Balance |
| | 5.2. | Architecture Committee Report
Refer to Report |
| Info | 5.3. | Archaeology Committee Report
Refer to Report |
| Info | 5.4. | Planning Committee Report
Refer to Report |
| Info | 5.5. | CHamoru Culture Committee Report
Refer to Report |
| Info | 5.6. | History Committee Report
Refer to Report |
| | 6.0. | OPEN DISCUSSION/ANNOUNCEMENTS |
| | 7.0. | ADJOURNMENT |

ITEM 2.0

APPROVAL OF MINUTES

(February 8, 2023 Meeting)



**THE GUAM PRESERVATION TRUST
REGULAR BOARD OF DIRECTORS VIRTUAL MEETING
WEDNESDAY, FEBRUARY 8, 2023; 3:00 P.M.**

M I N U T E S

Present:	Michael Makio, Architecture – Principal	Zina Ruiz, Chamoru Culture - Principal
	Dave Lotz, Planning – Principal	Edwin Reyes, Planning - Alternate
	Pale’ Eric Forbes, History – Principal	Vince Leon Guerrero, History - Alternate
Also Present:	Joe Quinata, GPT – CPO	Andrew Tenorio, GPT – PO
	Vanessa Williams, Legal Counsel	Lawrence Borja, GPT - DO
	Ruby Santos, GPT – ASC	

1.0. CALL TO ORDER / ROLL CALL

Chairman Makio called the meeting to order at 3:25 p.m. and conducted roll call.

2.0. APPROVAL OF MINUTES (January 11, 2023, Meeting)

Chairman Makio opened the floor for discussion on the minutes of January 11, 2023.

Motion

There being no changes, Zina Ruiz motioned to approve the minutes as read.

Pale’ Eric Forbes seconded the motion.

With no further discussion, the Board unanimously approved the motion.

3.0 OLD BUSINESS

3.1. GPT Three-Year Organizational Growth Plan 2023-2025

Chairman Makio reported the committee reviewed the Three-Year Organizational Growth Plan.

Year 1 proposed the following:

- Raise the titles and salaries of current program and administrative officers to senior managers and increasing their salaries by \$5000.00 to include the Chief Program Officer.
- Amend the budget to allow for two additional Program Officers at \$45,000.00 and salary can be determined by the Board level depending on the individual’s experience and capability
- Hiring of administrative assistant at a salary of \$30,000.00.
- Acquiring office space rental for two (2) years for personnel and archival storage space.
- Allocation of \$1000.00 for furniture for additional personnel and storage
- Streamlining and improving existing Board policies and procedures (i.e., employee handbook, investment, travel, credit card)

Year 2 proposed the following:

Adjustment to salaries to be determined by the Board and based on performance, need and availability of funds.

The Board discussed the staffing pattern, positions titles, and their responsibilities.

Dave Lotz noted Board members need clarity on the legal roles of Principal and Alternate Board members.

Dave Lotz recommended to refer the plan back to the committee for additional work and clarification for presentation at the next Board meeting.

Action

Chairman Makio tabled discussion and referred the Three-Year Organizational Growth Plan to committee for presentation at the next Board of Directors meeting.

Action Joe Quinata requested Board's approval to fill the two (2) Program Officer positions as approved in the FY2023 Administration and Operations Budget. Chairman Makio agreed and expressed his and the Board's interest in participating in the hiring and the evaluation process.

3.2. Baptist Church, Inalahan – Transfer of Property Jurisdiction

Joe Quinata reported a letter was addressed and delivered to Governor Lou Leon Guerrero and Lt. Governor Josh Tenorio requesting the transfer of the Baptist Church in Inalahan to GPT. Senator Roy Quinata, Oversight Chair of Historic Preservation will follow up with the Governor and advise GPT of his meeting with the Governor. The Inalahan Mayor's staff cleared the vegetation around the site.

4.0. NEW BUSINESS

4.1. Cliff Condominium

Action Joe Quinata reported the GPT unit at the Cliff is being prepared as a rental. Staff is currently in process to obtain a business license. The unit has passed fire inspection and scheduled for Public Works inspection next week. A PhD candidate in archaeology has expressed interest in renting the unit. Staff requested Board's approval to proceed in obtaining the business license and renting the unit to recuperate the common area and Association fees. Staff is obtaining quotes for condominium insurance coverage for the unit. Upon receipt of the quotes, the Board will review for approval.

The Board discussed determining the rental rate, recovery of expenses, and occupancy. Joe Quinata reported he tentatively quoted a rental of \$800 but did not include power.

Motion Dave Lotz motioned to authorize the Chief Program Officer to secure for the Cliff condominium unit, a business license for rental, and the insurance to be followed by Board's authorization to rent out the unit. Zina Ruiz seconded the motion.

Eric Forbes expressed concerns of the process and guidelines of awarding the rental. Vince Leon Guerrero wanted to insulate the Board of criticism of underselling, favoritism, or unfair practices in renting the unit. The Board discussed establishing a rental policy.

The Board discussed proceeding with obtaining the license and simultaneously working to develop a fair and equitable rental policy.

Amended Motion Dave Lotz amended the motion to include insurance premiums in the proposed rental price. Zina Ruiz seconded the amended motion. Chairman Makio commented there exists compatible preservation advocacy policies for discussion in a separate meeting to formulate the rental policy that meets the Fair Housing Act. Dave Lotz suggested prioritizing the rental to students in historic preservation. Edwin Reyes suggested to allow the Board to put forth their priorities, a ranking or clustering process trying to get enough narrative for specific criteria for rental (i.e. a student, a linguist, cultural practitioner), so there is a structure, form, and process in voting with a tangible policy. Dave Lotz expressed concern of staffing to manage the rental unit.

Joe Quinata reported the quote of \$800.00/month was based on the current expenses of \$774.65 for the common area and association fees. The additional \$25.00 could offset the cost for insurance. The quote did not include power. GPT has not signed an agreement.

Chairman Makio restated the amended motion to authorize the Chief Program Officer to obtain the business license, cost of the insurance condominium policy to

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be included in the price of the rental proposed, meeting the Fair Housing Act, and proceed with the rental of the Cliff unit.
Zina Ruiz agreed to second the amended motion as stated.

Chairman Makio opened the floor for discussion.
The Board discussed the need to include legal counsel in establishing the rental policy.

Amended Motion Dave Lotz amended the re-stated motion, in addition to the business license, insurance, for the condominium, GPT can move forward with the initial rental for a one-year trial basis.
Zina Ruiz seconded the amended motion.

Chairman Makio noted the language of the motion can read the rental for twelve (12) months and not worded on a trial basis.

Amended Motion Dave Lotz revised the amended motion to authorize the Chief Program Officer to secure for the Cliff condominium unit, a business license for rental, and the insurance, to include the insurance premium in the proposed rental rate, to be followed by Board's authorization to rent out the unit for a period of one (1) year.
Zina Ruiz seconded the amended motion.
Chairman Makio entertained discussion on the motion.

Vince Leon Guerrero noted the rental fee in most rental agreements include a percentage reserved for repairs and maintenance.

Joe Quinata noted those additional fees can be in the lease agreement with a punch list.
The Board recommended to include legal counsel in the draft of the lease agreement.

With no further discussion, the motioned passed by a majority of the Board members with four (4) votes in favor and one (1) opposed.

Action Chairman Makio directed staff to schedule a meeting to develop GPT's rental policy.

4.2. FQ Sanchez Elementary Rehabilitation

4.2.a. Archaeological Consultant Services

Joe Quinata reported GPT received a total of two (2) proposals in response to the Request for Proposals (RFP) for Archaeological Consultant Services. Staff recommended approving the proposal submitted by the Kleinfelder Archaeological firm. The total proposal cost of \$27,362.00 presented as follows: Archaeological Monitoring Plan \$10,192.00, Daily Monitoring \$4000.00 (\$800 day for daily monitoring – estimating 5 days), Draft Archaeological Monitoring Report \$11,469.00, Final Archaeological Report \$1,701.00. Staff recommended approving a not-to-exceed amount of \$30,000.00,

GPT did not receive any bids for construction of the school.

The lack of bidders is attributed to the difficulty of contractors providing a schedule of values for materials.

Motion Edwin Reyes motioned to approve the proposal from Kleinfelder for Archaeological Consultant Service for the FQ Sanchez Elementary Rehabilitation project for archaeology monitoring plan, daily monitoring, draft archaeology monitoring report, and final archaeological monitoring report for a not-to-exceed amount of \$30,000.00.

Vince Leon Guerrero seconded the motion.

Chairman Makio opened the floor for discussion.

Joe Quinata reported the archaeological monitoring service is a condition required by the SHPO's office for permitting clearance.

Joe Quinata disclosed Kleinfelder's Principal Investigator is a former GPT Board member (Cacilie Craft) and Project Director is former GPT intern (Jacy Miller).

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With no further discussion, the Board unanimously approved the motion.

4.3. Atantano

4.3.a. Atantano Cultural Resource Inventory

Joe Quinata reported GPT received three (3) proposals in response to the RFP.

Staff reviewed the proposals and recommended approval of the Kleinfelder proposal of \$115,766.00 to conduct the cultural resource inventory at Atantano.

The service will be funded by a grant awarded to GPT from the Dept. of Interior.

GPT will not need to allocate matching funds.

Motion

Dave Lotz motioned to approve the proposal from Kleinfelder to conduct the cultural resource inventory. Vince Leon Guerrero seconded the motion.

With no further discussion, the Board unanimously approved the motion.

4.4. Marianas History Conference Sponsorship

Joe Quinata reported Humanities Guahan will be coordinating the 2023 Marianas History Conference scheduled for September in Saipan. GPT was a founding member of the conference and has supported and contributed each year and GPT will be asked to support this year's conference.

4.5. Grounds Cleaning Service - Archbishop Flores House

Joe Quinata reported staff obtained quotes for the cleanup of the Archbishop Flores House. The lowest quote received was \$1,140.00. Staff requested the Board's approval to fund a not-to-exceed amount of \$1,200.00 for the cleanup.

Motion

Eric Forbes motioned to approve a not-to-exceed amount of \$1,200.00 for the cleanup of the Archbishop Flores House. Edwin Reyes seconded the motion.

Chairman Makio opened the floor for discussion.

Joe Quinata reported GPT received a "right of entry" for the site.

With no further discussion, the Board unanimously approved the motion.

5.0. COMMITTEE REPORTS

5.1. Budget & Finance Report

Refer to Report

5.1.a. YTD Balance

Joe Quinata reported GPT received \$450,000.00 from the collection of building permit fees. The current fund balance is \$5,862,833.49. The total obligated fund for approved grants and projects is \$5,304,417.34. The remaining balance for grants and projects is \$558,416.15. Chairman Makio requested to add the Inalahan Baptist Church onto the list of projects in queue.

5.2. Architecture Committee Report

Refer to Report

George Flores House

Joe Quinata reported the A&E plans for George Flores House is near completion.

FQ Sanchez Elementary School Facility

Joe Quinata reported GPT will be re-advertising the Invitation for Bids (IFB) for the construction of the FQ Sanchez Elementary Facility.

5.3. Archaeology Committee Report

Refer to Report

Joe Quinata reported existing archaeology grants are still ongoing.

5.4. Planning Committee Report

Refer to Report

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Atantano

Joe Quinata reported work is ongoing on the plant inventory.

Hila'an Conservation Easement

Joe Quinata reported GPT received \$150,000.00 to conduct the appraisal and land survey. GPT solicited an RFP to conduct the land survey. Proposals are due February 17, 2023. GPT solicited Request for Quotations (RFQ) to conduct appraisal services for Hila'an. Staff will present the results of the appraisal submittals for Board's approval at the next Board meeting. GPT will schedule a meeting with the landowners and REPI representatives for updates.

5.5. CHamoru Culture Committee Report; 5.6. History Committee Report Refer to Report

No discussion.


6.0. OPEN DISCUSSION/ANNOUNCEMENTS


No announcements or discussion.

7.0. ADJOURNMENT

Motion

There being no further discussion, Vince Leon Guerrero motioned to adjourn the meeting. Dave Lotz seconded the motion. There being no objection, the Board unanimously approved the motion. The meeting adjourned at 5:05 p.m.

Transcribed by: 
Date: 3/9/2023

Approved by: 
Date: 3/10/2023

GUAM PRESERVATION TRUST

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ITEM 3.1.

GPT Three-Year

Organizational Growth Plan

2023-2026



GUAM

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**THREE-YEAR
ORGANIZATIONAL
GROWTH PLAN
2023 – 2025**

**Last Revised
March 3, 2023**

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I. EXECUTIVE SUMMARY

The Guam Preservation Trust *Three-Year Growth Plan (2023-2025)* is a roadmap that defines the strategies that the Trust will follow to reach well-established growth targets especially as we embark on new projects and programs and the *Guam Preservation Trust Five-Year Strategic Plan (2023-2027)*.

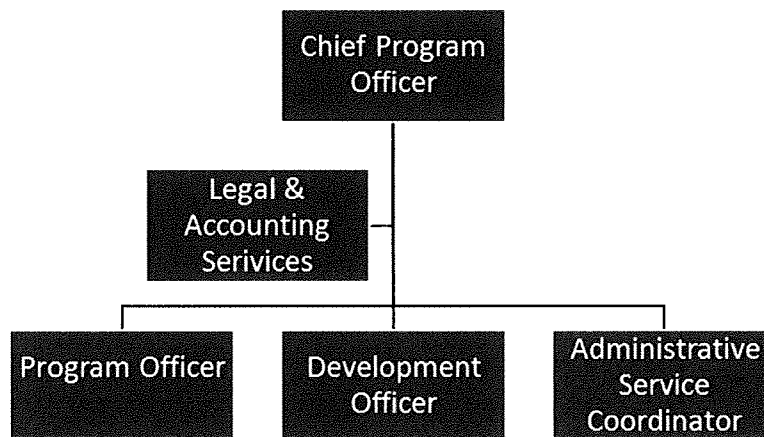
The Guam Preservation Trust has been in operations for over thirty years and has grown in demand to carry out its mandates through grants and initiatives guided by board policies and strategic objectives brought forth by the preservation community. The next three years are critical years as the growth in the demand for heritage programs and projects become apparent and to avoid taking unnecessary risks, a prudent business approach will be to develop a detailed plan to achieve this growth.

The Growth Plan will include aspects such as

1. The main characteristic of the plan and measures adapted to the growing needs of the Trust's operations;
2. An analysis of the viability of the steps or procedures that will be carried out; and
3. The framework under which the plan will be developed.

Guam Preservation Trust Management

The Trust is a 501(c) 3 Non-profit Corporation comprised of ten board members representing five disciplines (Archaeology, Architecture, Chamorro Culture, Community Planning, and History). Each discipline is represented by a primary and an alternate Board Member. Board Members appointed by the Governor and approved by the Legislature to the Historic Review Board of the Guam Department of Parks and Recreation, automatically sit on the Trust Board.



The Trust is currently staffed by Joseph Quinata, Chief Program Officer; Ruby Santos, Administrative Services Coordinator; Andrew Tenorio, Program Officer, and Lawrence Borja, Development Officer. The Trust personnel are non-government employees and are governed by the Trust's personnel handbook. Legal and accounting services are contracted by the Trust.

The Trust's Vision

Historic Preservation on Guam is a public responsibility that is shared through education, cooperation, and advocacy all linking to Guam's Cultural Heritage.

The Trust's Mission

The Trust will preserve and protect Guam's historic sites, culture, and perspectives for the benefit of our people and our future.

Current Highlights

The year 2022 gave the preservation community many blessings from two major government initiatives that allocated \$3.5 million for the rehabilitation of the F.Q. Sanchez School in Humåtak, and the full restoration of the building permit fees to the Guam Preservation Trust that will project an estimated \$500,000.00 toward saving places that matter to the people of Guam and empowerment programs for our community. Another fusion of \$200,000 from the Attorney General's Office from the Marbo Cave Settlement toward preservation and conservation work on Trust properties.

Guam Preservation Trust Five-Year Strategic Plan

(<https://www.pacificpreservation.org/2023>)

The Guam Preservation Trust and about one hundred community stakeholders present the five-year GPT Historic Preservation Strategic Plan (2023-2027) as a statement of our community's bold step towards taking action to preserve and protect our heritage for all to benefit. The plan's framework is goal-oriented and therefore provides strategies that if coordinated well, will bring together Guam's citizens and the preservation community to identify where our diverse goals complement historic preservation and how we can all work together to ultimately preserve Guam's heritage.

Capacity Building, Education, and Outreach

The Guam Preservation Trust continues to provide for education and outreach such as the Pacific Preservation Summit that brought together about 150 local and regional preservation stakeholders to share and inspire with best practices and new findings. The annual Guam History Day (www.guamhistoryday.weebly.com) competition for middle and high school students that was conducted virtually in place of the traditional face-to-face event. Ekungok Estoriã-ta (www.pacificpreservation.org/eie) professional development workshop for CHamoru teachers resumed face-to-face to complete the workshop objectives and the overall project goals. Series II manuscripts for ten additional historic sites were completed. Marianas History Conference was held virtually with sponsorship assistance from the Guam Preservation Trust. I Hinanao-ta 500 Años - Our Journey, 500 Years scripts were completed with an exhibition held at the Historic Lujan House and soon to held at the Guam Museum. Archaeology Fieldwork Technician Certificate Course was conducted with 25 participants completing the certificate program and being given the opportunity to work with Cultural Resource Management firms on island. Cultural Resource Management Course provided much needed capacity building for our community.

Restoration, Rehabilitation, and Reconstruction of Historic Structures

The Architectural and Engineering Design Plans for the George Flores House in Inalåhan and the Rosario House in Hagåtña are completed which will bring a total of four (4) historic structures that will be shovel-ready for the construction phase.

II. GROWTH PLAN GOALS

- 1. To provide resources to support current demand for heritage programs and projects;**
- 2. To strengthen current partnerships and seek new public-private partnerships;**

III. THE GROWTH PLAN FRAMEWORK

The Guam Preservation Trust Growth Plan Framework is structured by

- 1. The strengths of the Trust;**
- 2. Growth strategies that sustain the measurable, actionable, and achievable solutions or objectives that produce results;**
- 3. GPT's Five-Year Strategic Plan;**

GPT'S STRENGTHS

The growth of GPT is attributed by three important strengths that GPT currently possess:

Strength 1: Financial Sustainability

For period ending October 31, 2022, the Guam Preservation Trust total equity (assets) is \$15.8 million with liability of \$92,032.58 (see attached GPT Balance Sheet for Period Ending 10/31/2022). The full restoration of GPT's revenue source (Building Permit Fees) is an indicator of increased annual revenues of about \$500,000.00 and an added financial strength to GPT's portfolio.

The total projection of about \$3.9million is anticipated for the three-year period:

Projected Revenues (Annually)

Fiscal Year 2023	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	TOTAL
Building Permits*	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 1,000,000.00
Interest on Investments**	\$ 58,750.00	\$ 58,750.00	\$ 58,750.00	\$ 58,750.00	\$ 235,000.00
Grants	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 40,000.00
TOTAL	\$ 318,750.00	\$ 318,750.00	\$ 318,750.00	\$ 318,750.00	\$ 1,275,000.00

* BUILDING PERMIT: Formula: FY2018, 2019 & 2020 permit fees collection (\$3m)/3 = Estimated Average Building Permit for 2023 (\$1m) .

** INTEREST ON INVESTMENT: Formula: Total Investment (\$4.7M) x 5% = Estimated Interest in Investment (\$235,000)

(Source: GPT FY23 Budget)

Strength 2: Committed Partnerships

In 2022, the Trust partnered with over 30 public and private organizations, and individuals from the community to oversee grants and projects to accomplish our proposed outcomes (Goals) for the year. All have been successful in their respective delivery to the community for their benefit and appreciation.

The Trust made strides in developing partnerships with technical and professional resources in the preservation arena. These resources are invaluable and contribute to the capacity building of our community in advancing preservation on Guam. The following are preservation partners in the region, the nation, and international:

Friends of the Mariana Trench, Palau Conservation Society, Micronesia Conservation Trust, Conservation Society of Pohnpei, St. Croix Crucian Heritage and Nature Tourism, Asian & Pacific Islanders American for Historic Preservation (APIAHiP); National History Day, Inc. (NHD); The National Trust for Historic Preservation (NTHP); National Park Service; Association for Preservation Technology International (APT); U.S. Department of Interior (OIA/TAP); National Preservation Partners Network; University of Pompeu Fabra Barcelona, Spain.

(Source: GPT FY22 Audit)

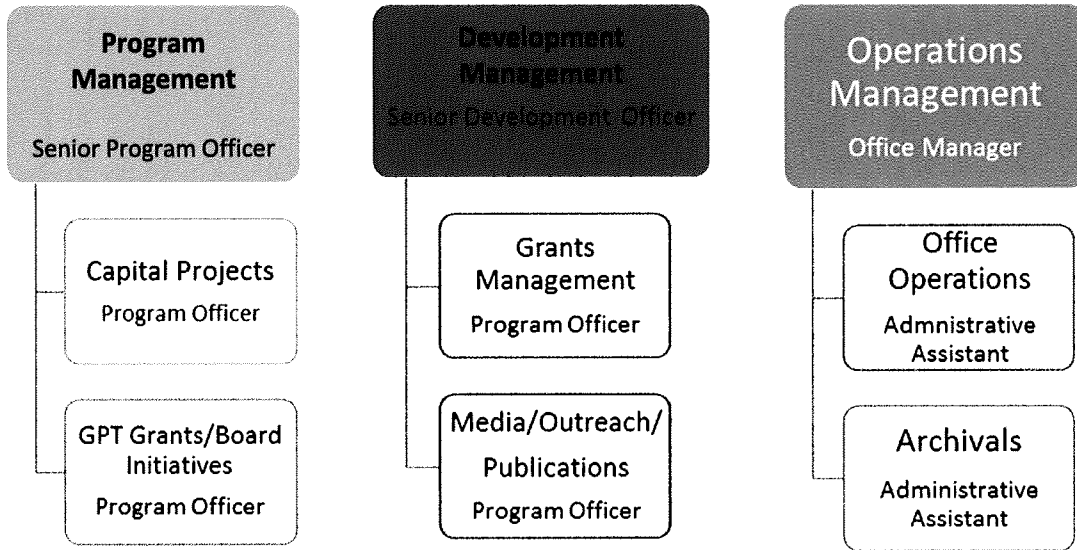
Strength 3: Trust Board and Management Capacity

The Guam Preservation Trust board of directors represents a large cross section of the preservation community in the disciplines of architecture, archaeology/anthropology, Guam history, planning, and Chamoru culture and as decisions are made at the board level, these decisions are based on information gathered and presented by GPT staff skilled in research, analysis, and development. Staff combined years of preservation experience is 50 years with skilled expertise in business administration, economic and finance, marketing, and office management.

GPT'S GROWTH STRATEGIES

Strategy 1: Support Resources

The re-organization of personnel with a vertical expansion and a gradual increase in personnel to oversee new programs and projects, an increase in outreach and education, and overall operations expansion.



Year 1 (2023)

Personnel

1. Convert existing Program Officer to Senior Program Officer; Convert existing Development Officer to Senior Development Officer; Convert Administrative Service Coordinator to Office Manager
2. Salary adjustments of 5%-10% increase for senior positions: Chief Program Officer, Senior Program Officer, Senior Development Officer, and Office Manager
3. Hiring of two (2) Program Officers at the starting salary of \$45,000.00;
4. Budget for one (1) Administrative Assistant; starting salary at \$30,000.00
5. Hiring of one (1) Administrative Assistant

Office Space

1. Acquire a two-year lease agreement for 1,500 square feet of office space for personnel and record/archival storage (\$27,000.00 annually)
2. Furniture for personnel and storage (\$1,000.00)

Organizational Streamline (programmatic policies)

1. Review and streamline programmatic policies to reflect recommendations from stakeholders and other professionals (legal and accounting, audit and record management, partners and professionals, etc.)

Strategy 1 Support Resources *(continued)*

Year 2 (2024)

Personnel

1. Salary adjustments for senior positions (Chief Program Officer, Senior Program Officer, Senior Development Officer, and Office Manager) will be determined by the Board of Directors.
2. Budget for two (2) additional Program Officers; starting salary at \$45,000.00
3. Hiring of two (2) Program Officers based on evaluation of GPT overall program/project needs.

Year 3 (2025)

Personnel

1. Salary adjustments for all staff positions will be determined by the Board of Directors.
2. Budget for one (1) Administrative Assistant; starting salary at \$30,000.00
3. Hiring of one (1) Administrative Assistant based on evaluation of GPT operational needs.

Strategy 2: Partnership Development & Evaluation

Year 1 (2023)

Planning and Development

1. Review current partnership agreements to strengthen collaborative goals.
2. Develop prospectus for new and proposed partners (public, private, and NGO)

Year 2 (2024)

Initiation, Implementation, Evaluation and Analysis

1. Develop testing and evaluation for programs and projects.
2. Conduct evaluation and analysis

Year 3 (2025)

1. Review and evaluate overall growth plan outcomes.

IV. ANALYSIS AND VIABILITY

1. Financial Analysis

Projected Revenues (Annually)

Fiscal Year 2023	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	TOTAL
Building Permits*	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 1,000,000.00
Interest on Investments**	\$ 58,750.00	\$ 58,750.00	\$ 58,750.00	\$ 58,750.00	\$ 235,000.00
Grants	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 40,000.00
TOTAL	\$ 318,750.00	\$ 318,750.00	\$ 318,750.00	\$ 318,750.00	\$ 1,275,000.00

Personnel Budget

Personnel Budget		Change from Previous Year	% Change
Baseline 2023	\$346,042	*	*
Proposed 2023	\$538,090	\$192,048	55%
Proposed 2024	\$769,690	\$231,600	43%
Proposed 2025	\$788,635	\$18,945	2%
Overall Increase from Baseline		\$442,593	128%

GPT Full Time Employees (FTE)

GPT Budgeted FTE		Change from Previous Year	% Change
Baseline 2023	6 FTE	*	*
Proposed 2023	7FTE	(+ 1)	17%
Proposed 2024	11FTE	(+ 4)	57%
Proposed 2025	11 FTE	No change	No change
Overall Increase from Baseline		5FTE	83%

The proposed estimated increase in personnel for Year 1 is \$192,048.00 or 55% from the baseline budget of \$346,042.00. This proposed figure represents salary adjustment for senior positions and the creation and hiring of one (1) Administrative Assistant. The proposed estimated increase for Year 2 is \$231,600.00 or 45%. This represents the increase of three (3) Full Time Employees (FTE) . By Year 2024 the Trust will have a total of eleven (11) full time employees. The viability of this strategy is reflected in the projected revenues for FY2023 and annually thereafter.

2. Guam Preservation Trust Performance Indicators

The Guam Preservation Trust subscribes to objectively measure its performance with key financial indicators that will help policy decisions based on its financial standing. These financial ratios will provide guidance for policy and organizational growth.

The financial ratios below will serve as the Trust's baseline data for policy/operational decision-making tool (internal) and Trust Performance Portfolio (external) for public and partners consumption.

Fundraising Performance Ratio

The fundraising performance ratio measures the Trust's fundraising activities (grants and donations). Simply put, it measures how much fundraising revenue is being generated over all revenues (such as government revenue).

Fundraising Performance Ratio <i>(Total Fundraising/ Total Revenue)</i>	
FY 2018	37.04%
FY 2019	42.05%
FY 2020	28.79%
FY 2021	38.34%
FY 2022	4.76%

FY 2022 revenues reflect the F.Q. Sanchez Project contribution from Government of Guam (\$3.5million).

Government Reliance Ratio

The government reliance ratio measures Trust's reliance on governmental funding. This ratio is important, particularly when overall levels of government funding are declining. The higher this ratio is, the less likely that the Trust will be able to continue to support its programs in the event that funding goes away.

Government Reliance Ratio <i>(Total Gov Funding/Total Revenue)</i>	
FY2018	81.83%
FY 2019	94.80%
FY 2020	64.91%
FY 2021	71.50%
FY 2022	103.80%

FY 2022 revenues reflect the F.Q. Sanchez Project contribution from Government of Guam (\$3.5million).

Program Expense Ratio

The program expense ratio measures the percentage of expenses that Trust is spending on its core mission. This financial ratio is key for Trust portfolio for donors or public information. The ideal recommended percentage is 65% or higher.

Program Expense Ratio	
<i>(Program Expense/Total Expense = Program Expense Ratio)</i>	
FY2018	75%
FY 2019	101%
FY 2020	38%
FY 2021	80%
FY 2022	51%

Program activities during FY2020 were impacted by the COVID Pandemic and therefore the ratio dropped from 101% in 2019 to 38% in 2020/ FY2022 program activities dropped to 51% due to community funding availability through COVID's American Rescue Plan (ARP).

Net Margin Ratio

This ratio measures the Trust's ability to operate at a surplus. In simple terms, it's what is left at the end of the day to reinvest into the Trust's mission. Nonprofits should not be expected to not make a profit. They should, however, be expected to be good stewards of the profit that is generated.

GPT Net Margin Ratio	
<i>(Total Expense/Total Revenues= Net Margin Ratio)</i>	
FY 2018	109.56%
FY 2019	83.07%
FY 2020	54.93%
FY 2021	69.84%
FY 2022	19.58%

FY 2022 reflect large revenues (F.Q. Sanchez's \$3.5million) and therefore was not spent on any project for the year. Once F.Q. Sanchez project is awarded, you will see that ration increase.

V. ANTICIPATED PRESERVATION ACTION

2023

Historic Structures Capital Projects	Planning, Economic Development, and Heritage Preservation
<p>F.Q. Sanchez School Current (Construction Phase) Estimated Cost: \$3,500.00 Milestone: 1st Quarter</p> <p>Inaláhan Baptist Church Current (Historic Structures Report Phase) Estimated Cost: \$5,000.00 Milestone: 2nd Quarter</p> <p>George Flores House, Inaláhan (Construction Phase) Proposed Lead Organization(s): GPT Proposed Funding Source(s): GPT, USDA Estimated Cost: \$1,172,036 Milestone: 4th Quarter FY 2023</p>	<p>Develop heritage trails in villages. Proposed Lead Organizations(s): Proposed Funding Source(s): GTTA, GVB, DPR, NPS, DoAg, MGOC Estimated Cost: \$100,000 Milestones: Continuous</p> <p>Support the integration of planning and zoning regulations and heritage preservation. Proposed Lead Organizations(s): BPS, SHPO, DLM Proposed Funding Source(s): BSP, DOI, GPT, NOAA, NPS Estimated Cost: \$10,000 Milestones: Continuous</p>
Village Revitalization Plans	Community Archaeology and Heritage Preservation
<p>Malesso Village Proposed Lead Organizations(s): GPT, AIA, MCOG Proposed Funding Source(s): MCOG, GPT, OIA TAP Estimated Cost: \$50,000 Milestones: 3rd Quarter FY 2023</p>	<p>Coordinate the preservation of burial grounds and artifacts. Proposed Lead Organizations(s): SHPO, DCA, Guam Museum, MARC/UOG Proposed Funding Source(s): IMLS, NPS, DOD Estimated Cost: \$50,000 Milestones: Continuous</p>
Capacity Building Workshops and Seminars in Heritage Preservation	Professional and Grassroots Partnerships in Heritage Preservation
<ul style="list-style-type: none"> • Cultural Landscapes Preservation • Traditional Building Design/Construction • World Heritage Application Workshop • Traditional Cultural Properties • Traditional Craftsmanship <p>Proposed Lead Organizations(s): GPT, GUMA Inc. Proposed Funding Source(s): OIA TAP, NPS, NEH, OAG, CAHA, DCA Estimated Cost: \$60,000 Milestones: 2nd Quarter FY 2023</p>	<p>Support the development of village-level preservation organizations or Movements Proposed Lead Organizations(s): MCOG, Americorp Proposed Funding Source(s): GPT, OAG Estimated Cost: \$25,000 Milestones: 2nd Quarter FY 2023</p>
CHamoru Traditional Cultural Knowledge	Board Initiatives
<p>Support CHamoru language-based publications (legends, environment life cycle CHamoru beliefs, traditions, etc.) Proposed Lead Organizations(s): GDOE CSSPD, UOG Press, UOG MARC, Kumisión i Fino' CHamoru yan i Fina'ná'guen i Historia yan i Lina'la' i Taotao Tâno' Proposed Funding Source(s): GPT, NEH, HG, PBS Estimated Cost: \$100,000 Milestones: 1st Quarter FY 2023</p>	<p>Atantâno Heritage Preserve Development of Masterplan Plant/Cultural Resources Inventory Architectural Conceptual Design Estimated Cost \$400,000.00</p> <p>Hila'an Heritage Preserve Appraisal (current) & Land Survey (current) Estimated Cost: \$150,000.00</p>

2024

Historic Structures Capital Projects	Youth and Education in Heritage Preservation
<p>San Nicolas House, Inaláhan (Construction Phase) Proposed Lead Organizations(s): GPT Proposed Funding Source(s): GPT, USDA Estimated Cost: \$1,000,000 Milestones: 4th Quarter FY 2024</p> <p>F.Q. Sanchez School Current (Construction Phase) Estimated Cost: \$3,500.00 Milestone: 1st Quarter</p> <p>Inaláhan Baptist Church Current (A/E Design Phase) Estimated Cost: \$75,000.00 Milestone: 2nd Quarter</p>	<ul style="list-style-type: none"> • Develop training for historic sites docents. • Support conversational CHamoru language classes • Coordinate fieldtrips, site visits, and walking tours that teach with historic/cultural sites <p>Proposed Lead Organizations(s): GPT, MCOG, GDOE CSSPD, Guampedia, PHP Proposed Funding Source(s): GPT, NPS, OIA TAP, NEH, Judiciary of Guam, MCOG, P.I.P.I.T, Inc, Americorps Estimated Cost: \$45,000 Milestones: 1st Quarter 2024</p>
	<h3>Planning, Economic Development, and Heritage Preservation</h3>
<h3>Village Revitalization Plans</h3>	<p>Develop heritage trails in villages. Proposed Lead Organizations(s): Proposed Funding Source(s): GTTA, GVB, DPR, NPS, DoAg, MGOC Estimated Cost: \$100,000 Milestones: Continuous</p>
<p>Hágat Village Proposed Lead Organizations(s): GPT, AIA, MCOG Proposed Funding Source(s): MCOG, GPT, OIA TAP Estimated Cost: \$50,000 Milestones: 3rd Quarter FY 2024</p>	<p>Support the integration of planning and zoning regulations and heritage preservation. Proposed Lead Organizations(s): BPS, SHPO, DLM Proposed Funding Source(s): BSP, DOI, GPT, NOAA, NPS Estimated Cost: \$10,000 Milestones: Continuous</p>
<h3>Capacity Building Workshops and Seminars in Heritage Preservation</h3>	<p>Support the restoration of traditional landscapes and CHamoru place names Proposed Lead Organizations(s): Kumisión I Na’an Lugát Guáhan, MCOG Proposed Funding Source(s): DCA, MCOG, NPS Estimated Cost: \$40,000 Milestones: 4th Quarter FY 2024</p>
<ul style="list-style-type: none"> • Cultural and Natural Resources Management • Ancient Village Maintenance • Cultural knowledge and Historic sites courses for guides and interpreters <p>Proposed Lead Organizations(s): GPT Proposed Funding Source(s): OIA TAP, NPS, NEH, OAG, CAHA, DCA, GVB, TNC Estimated Cost: \$45,000 Milestones: 2nd Quarter FY 2024</p>	<p>Coordinate research and development of historical economic development of Guam linking heritage preservation and economic development. Proposed Lead Organizations(s): GEDA, SHPO Proposed Funding Source(s): UOG MARC, NEH, HG, GCoC, GEDA Estimated Cost: \$25,000 Milestones: 4th Quarter FY 2024</p>
<h3>CHamoru Traditional Cultural Knowledge</h3>	<h3>Community Archaeology and Heritage Preservation</h3>
<p>Support traditional fishing and seafaring practices Proposed Lead Organizations(s): TASA, TASI, UOG, DCA, CAHA Proposed Funding Source(s): NEH, PBS, GPT Estimated Cost: \$100,000 Milestones: 1st Quarter FY 2024</p>	<p>Coordinate the preservation of burial grounds and artifacts. Proposed Lead Organizations(s): SHPO, DCA, Guam Museum, MARC/UOG Proposed Funding Source(s): IMLS, NPS, DOD Estimated Cost: \$50,000 Milestones: Continuous</p>

2025

Historic Structures Capital Projects	Youth and Education in Heritage Preservation	
<p>Lujan House, Hagåtña (Repair) Proposed Lead Organizations(s): GPT Proposed Funding Source(s): GPT, OIA MAP, NTHP Estimated Cost: \$50,000 Milestones: 4th Quarter FY 2025</p>	<ul style="list-style-type: none"> • Coordinate the Pacific Youth Summit • Support Intergenerational activities such as storytelling, cultural practices, and family. • Support the integration of History in Educational Curriculum <p>Proposed Lead Organizations(s): GPT, NPS, GDOE, MCOG, DYA, PHP, Guampedia, DODEA, Private Schools, Guam Academy Charter School Council Proposed Funding Source(s): GPT, OIA TAP, NPS, NHD, NTHP, ANA Estimated Cost: \$50,000 Milestones: 3rd Quarter FY 2025</p>	
Village Revitalization Plans		
<p>Talofof Village Proposed Lead Organizations(s): GPT, AIA, MCOG Proposed Funding Source(s): MCOG, GPT, OIA, TAP Estimated Cost: \$50,000 Milestones: 3rd Quarter FY 2025</p>		
Capacity Building Workshops and Seminars in Heritage Preservation	Planning, Economic Development, and Heritage Preservation	
<p>Section 106 Vernacular Architecture Historic Structures Report Proposed Lead Organizations(s): GPT Proposed Funding Source(s): OIA TAP, NPS, NEH, OAG, CAHA, DCA, GVB, BSP Estimated Cost: \$60,000 Milestones: 2nd Quarter FY 2025</p>	<p>Develop heritage trails in villages. Proposed Lead Organizations(s): Proposed Funding Source(s): GTTA, GVB, DPR, NPS, DoAg, MGOE Estimated Cost: \$100,000 Milestones: Continuous</p> <p>Support the integration of planning and zoning regulations and heritage preservation. Proposed Lead Organizations(s): BPS, SHPO, DLM Proposed Funding Source(s): BSP, DOI, GPT, NOAA, NPS Estimated Cost: \$10,000 Milestones: Continuous Develop visitor centers in historic districts. Proposed Lead Organizations(s): MGOE Proposed Funding Source(s): GEDA, USDA, HUD, GHURA, DLM, GVB Estimated Cost: \$75,000 Milestones: 4th Quarter FY 2025</p> <p>Coordinate a forum on land rights, property ownership, and heritage preservation. Proposed Lead Organizations(s): DLM, SHPO Proposed Funding Source(s): DOI OIA, DLM, NPS, Estimated Cost: \$30,000 Milestones: 1st Quarter FY 2025</p>	
CHamoru Traditional Cultural Knowledge		
<p>Support traditional folk arts Proposed Lead Organizations(s): CAHA, DCA, Guam Museum, P.I.P.I.T Proposed Funding Source(s): CAHA, GVB, GCoC Estimated Cost: \$50,000 Milestones: Continuous</p> <p>Support Cultural dance Proposed Lead Organizations(s): P.I.P.I.T., GPT Proposed Funding Source(s): CAHA, GVB, GCoC Estimated Cost: \$50,000 Milestones: Continuous</p>		
Community Archaeology and Heritage Preservation		
<p>Coordinate the preservation of burial grounds and artifacts. Proposed Lead Organizations(s): SHPO, DCA, Guam Museum, MARC/UOG Proposed Funding Source(s): IMLS, NPS, DOD Estimated Cost: \$50,000 Milestones: Continuous</p> <p>Coordinate Latte site assessment and narrative Proposed Lead Organizations(s): GPT, SHPO, NPS, NAVFAC, Proposed Funding Source(s): NPS, GPT, DOI OIA Estimated Cost: \$200,000 Milestones: 2nd Quarter FY 2025</p>	<p>Develop Interpretive signage for historic sites and landmarks. Proposed Lead Organizations(s): GPT, DPR, PHP Proposed Funding Source(s): DOI OIA, NPS, DPR, GEDA, MCOG, GVB Estimated Cost: \$100,000 Milestones: 1st Quarter FY 2025</p> <th data-bbox="803 1640 1425 1724">Professional and Grassroots Partnerships in Heritage Preservation</th> <p>Coordinate the development of partnership with Chamber of Commerce Proposed Lead Organizations(s): GPT Proposed Funding Source(s): TBD Estimated Cost: TBD Milestones: 1st Quarter FY 2025</p>	Professional and Grassroots Partnerships in Heritage Preservation

ITEM 3.3.

Marianas History Conference



MARIANAS HISTORY
Conference
One Archipelago, Many Stories

Conference Planning Partners

Guampedia | Guam Preservation Trust | CNMI Public School System | CNMI Department of Community and Cultural Affairs | Humanities Guåhan | Northern Marianas Humanities Council | Northern Marianas College | University of Guam

Fiscal Sponsor

Northern Marianas Humanities Council | P.O. Box 506437 Saipan, MP 96950 | mhc@nmhcouncil.org | 670-235-4985

March 3, 2023

Michael Makio
Chairman
Guam Preservation Trust
Historic Lujan House
167 Padre Palomo Street
Hagåtña, Guam 96910

Hafa Adai Mr. Makio,

Thank you for your ongoing support and commitment to the Marianas History Conference: One Archipelago, Many Stories!

I am pleased to announce that the 6th Marianas History Conference be held on Saipan between September 1-3, 2023 at the Saipan World Resort. This biannual conference brings communities on Guam, the Northern Mariana Islands, and the diasporas together to examine and share the deep and rich history and experiences of the people of our islands. During the last conference held in 2021, we saw a record number of participants with 644 total registrants representing twelve countries, including the United States, Guam, and the Northern Mariana Islands.

This year's conference theme, "Healing the Wounds of History", will feature shared stories and memories, historical research, analysis, and interpretations of local healing practices; health care issues; the prevalence of diseases that have plagued our islands; sources of environmental contamination; and all sources of historical division in need of remedy, including the separation of Guåhan from the rest of the Marianas.

We will integrate a conference app and adopt a hiflex conference model to expand participant access and invite both in-person and virtual participation into conference activities. These features are expected to provide additional avenues to promote the visibility of our sponsors, including logo imprints on film and other media that will remain accessible online long after the conference proceedings.

We invite you and your organization to participate in this conference as a presenter and/or participant, but most especially as a financial sponsor. We need our community partners to help cover some of the necessary costs for this conference which is expected to exceed \$40,000. We humbly request for Guam Preservation Trust's sponsorship of \$5,000.00 to defray cost of the event's technology support services such as the event App, Zoom Platform, streaming integration, and other digital support services. Attached is the sponsorship package that leverages the full scope of our traditional and social marketing activities to promote your organization..

Thank you for your kind consideration and support. Please feel free to contact us by phone: 670-235-4785 or via email: mhc@nmhcouncil.org for more details.

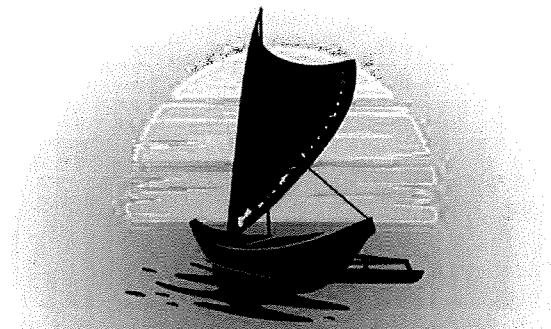
Kon rispetu yan guinaiya,

Dr. Lawrence F. Camacho, Co-Chair

Leo G. Pangelinan, Co-Chair

2023

Sponsor Packages



MARIANAS HISTORY

Conference

One Archipelago, Many Stories



Exclusive Opportunity **GOLD SPONSOR**

\$7,500.00

Leading sponsor of the Marianas History Conference. Includes:

- **Event Partner Branding:** Premium positioning of logo on all pre-event, on-site, and post-event promotional materials including:
 - Press releases
 - Event web page
 - Event app
 - Electronic communications
 - Signage
 - Email and social media marketing
- **Recognition before, during, and after the conference as the platinum sponsor for the Marianas History Conference**
- **Conference app integration**
 - Featured placement of virtual booth on Conference app (Whova) with the ability to upload promotional materials including a video or document
 - Display of a digital ad on the Social Wall
 - Special recognition with 3 e-blasts featuring information on your organization
 - Logo placement on all e-blasts

Limited Opportunity **SILVER SPONSOR (2 available)**

\$5,000.00

Includes:

- **Event Partner Branding:** Tiered positioning of logo on all pre-event, on-site, and post-event promotional materials including:
 - Event web page
 - Event app
 - Electronic communications
 - Signage
 - Email and social media marketing
- **Recognition before, during, and after the conference as a gold for the Marianas History Conference**
- **Conference app integration**
 - Featured placement of virtual booth on Conference app (Whova) with the ability to upload promotional materials including a video or document
 - Display of a digital ad on the Social Wall
 - Special recognition with 2 e-blasts

BRONZE SPONSOR (multiple available)

\$3,000.00


Includes:

- **Tiered positioning of logo on all pre-event, on-site, and post-event promotional materials including:**
 - Event web page
 - Event app
 - Signage
 - Email and social media marketing
- **Conference app integration**
 - Featured placement of virtual booth on Conference app (Whova)
 - Display of a digital ad on the Social Wall



MARIANAS HISTORY

Conference

One Archipelago, Many Stories 

ITEM 4.1.

Malesso Village

Revitalization Plan



Mr. Joseph Quinata
Chief Program Officer
Guam Preservation Trust
P.O. Box 3036
Hagatna, Guam 96932

February 27, 2023

Subject: Malesso Village Revitalization Plan Scope of Work and Fee Proposal

Hafa adai Mr. Quinata,

The American Institute of Architects (AIA), Marianas Chapter is pleased to provide the Guam Preservation Trust (GPT) with a Scope of Work and Fee Proposal for the Malesso Village Revitalization Plan. The project aims to provide concept planning and design recommendations for revitalizing the village of Malesso.

Resources for use as basis for the Revitalization Plan will include:

- Development Goals of the Malesso Residents and the Mayor's Office as identified through Surveys and Focus Group Meetings facilitated by the Guam Preservation Trust
- Guam Zoning Regulations and applicable Local Ordinance
- DPW Highway & Storm Water Master Plans
- Guam EPA Regulations
- Utility Agency Master Plans (GPA & GWA) and Telecommunications Company Master Plans
- Guam Public Transportation and Private Tour Bus Routes
- Parks and Recreation and State Historic Preservation Office Maps and Regulations
- Guam Housing and Urban Renewal Authority Plans
- Guam Visitors Bureau Tourism Plans and Programs
- Previous AIA Revitalization Plan Projects (Inalahan & Humatak)

A team of architect and associate members of AIA Marianas will gather information, process pertinent data, and integrate agency master plans in the recommendations. The plan will address the stakeholder's needs and will ensure that Malesso's physical attributes and history are featured accordingly. Schematic designs will be executed for key projects that the stakeholders identify as priorities. The team will produce a holistic planning tool that outlines the revitalization of the village.

Project Milestones & Deliverables:

The anticipated timeframe for the project is 12 months, with the following milestones:

- 30% PROGRESS SUBMITTAL, 4 months from NTP
Submittal: Preliminary Research Report comprised of: Questionnaire & Interview Notes, Background Drawings and related Maps, Photographs,



Recommendations with Preliminary Concept Designs in electronic (pdf) format

Activity: Site Walk Thru, Site Visit and Interview, Village Kick Off Meeting

- 60% PROGRESS SUBMITTAL, 3 months from receipt of 30% comments

Submittal: Draft Revitalization Plan with developed Schematic Designs in electronic (pdf) format

Activity: Village Meeting- Presentation of Draft Plan and Schematic Designs

- 90% PRE-FINAL SUBMITTAL, 3 months from receipt of 60% comments

Submittal: Pre-Final Revitalization Plan with refined Schematic Designs in electronic (pdf) format

Activity: Village Meeting- Presentation of Pre-Final Schematic Designs

- 100% FINAL SUBMITTAL, 1 month from receipt of 90% comments

Submittal: Final Document: Malesso Revitalization Plan in electronic (pdf) format

Activity: Village Meeting- Final Presentation

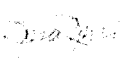
Fees and Payment Schedule:

The project will require services from the AIA Marianas revitalization project team over the project timeframe noted above. The effort required is anticipated to be a minimum of 860 man-hours, which equates to a fee of approximately \$130,000. AIA Marianas proposes a fee of \$65,000, accounting for 50% pro bono time & materials donated as a service to the community and the profession. Additionally, AIA Marianas intends to contribute \$10,000 of this fee towards the AIA Marianas Scholarship Program. \$2,500 will be deposited to AIA Marianas' scholarship account at each progress payment. Another \$5,000 will be allotted for the AIA Marianas Emerging Professionals (EP) Group, for use in the purchase of ARE study materials and/or in support of EP Group leadership development and mentoring programs.

Invoices will be submitted following progress submittal schedule and percentages of work completed noted above. Payments are due within 30 days upon receipt of invoices.

We hope that this proposal meets the requirements of the Guam Preservation Trust. AIA Marianas looks forward to commencing this endeavor in June 2023.

Si Yu'us Ma'ase,

 Digitally signed by
Inna Wiese
Date: 2023.02.27
10:38:57+10'00'

Inna J. Wiese, AIA
President- AIA Marianas

ITEM 5.1.

Budget & Finance Committee Report

5.1.a. YTD Balance

GUAM PRESERVATION TRUST ACCOUNTING SUMMARY For Period Ending February 28, 2023

ADMIN & OPERATIONS		BOARD APPROVED	YTD EXPENSE	BALANCE
		\$ 740,995.59	\$ 249,451.89	\$ 491,543.70

BOARD FUNDED INITIATIVES	PROJ #			
Capital Campaign	BP17-10	\$ 20,000.00	\$ 266.25	\$ 19,733.75
Teaching with Historic Places	BP15-16	\$ 14,400.00	\$ 7,352.50	\$ 7,047.50
Archbishop Flores Hse Purchase		\$ 250,000.00	\$ -	\$ 250,000.00
Board Orientation	BP20-11	\$ 800.00		\$ 800.00
Archaeology Workshop-Atantano	BP20-07b	\$ 2,500.00		\$ 2,500.00
Strategic Plan	BP22-02	\$ 25,000.00	\$ 3,734.70	\$ 21,265.30
Atantano - Plant Inventory	BP22-05	\$ 49,999.30	\$ -	\$ 49,999.30
APT Conference	BP23-02	\$ 3,038.42	\$ 3,038.42	\$ -
Architecture Book for Guam - Reprint	BP23-03	\$ 8,000.00	\$ 7,686.00	\$ 314.00
CHamoru Language Competition	BP23-04	\$ 5,000.00	\$ 5,000.00	\$ -
Archbishop Flores - Cleanup	BP23-05	\$ 1,200.00	\$ 1,140.00	\$ 60.00
SUBTOTAL		\$ 379,937.72	\$ 28,217.87	\$ 351,719.85

ETHNOGRAPHY & ORAL HISTORY				
The Lanchu Project	GPTG22-01	\$ 15,500.00	\$ 12,400.00	\$ 3,100.00
SUBTOTAL		\$ 15,500.00	\$ 12,400.00	\$ 3,100.00

REPAIR, REHABILITATION, RESTORATION AND RENOVATION				
George Flores A&E	HS21-01	\$93,935.70	\$ -	\$ 93,935.70
Addendum - HSR		\$18,027.65		\$ 18,027.65
FQ Sanchez PL36-82		\$3,500,000.00	\$ -	\$ 3,500,000.00
SUBTOTAL		\$3,611,963.35	\$ -	\$ 3,611,963.35

ARCHAEOLOGY RESEARCH				
Guam Rock Art Study	GPTG19-03	\$ 12,000.00	\$ 9,600.00	\$ 2,400.00
SUBTOTAL		\$ 12,000.00	\$ 9,600.00	\$ 2,400.00

PUBLIC INTERPRETATION AND PRESENTATION				
Learning Chamoru Preserving Values	GPTG19-04	\$ 9,950.00	\$ 9,950.00	\$ -
Modern Guam Rises from Destruction of War 1945-1970	GPTG21-01	\$ 37,962.00	\$ 34,096.16	\$ 3,865.84
SUBTOTAL		\$ 47,912.00	\$ 44,046.16	\$ 3,865.84

ARCHIVAL RESEARCH				
SUBTOTAL		\$ -	\$ -	\$ -

ARCHITECTURAL RESEARCH				
FQ Sanchez A & E	HS15-01	\$ 208,054.00	\$ 207,554.00	\$ 500.00
Amendment 1		\$ 35,608.00	\$ 35,608.00	\$ -
Amendment - Update for permitting		\$ 51,913.00	\$ 50,123.69	\$ 1,789.31
Amendment 2		\$ 189,450.00	\$ -	\$ 189,450.00
Guam Courthouse Restoration	GPTG19-06	\$ 50,000.00	\$ 50,000.00	\$ -
SUBTOTAL		\$ 535,025.00	\$ 343,285.69	\$ 191,739.31

HISTORIC PROPERTY DOCUMENTATION & REGISTER NOMINATION				
SUBTOTAL		\$ -	\$ -	\$ -

GRANTS AWARDED TO GPT*				
Latte in the Marianas (Ayuda Found)	BP19-02	\$ 1,700.00	\$ 1,700.00	\$ -
Take Care Heritage/Health Comm	BP19-04	\$ 3,000.00	\$ 2,027.16	\$ 972.84
Pacific Pres Technology - DOI	BP19-10	\$ 94,801.00	\$ 94,451.00	\$ 350.00
AIA		\$ 3,000.00	\$ 3,000.00	\$ -
World Heritage Workshop - DOI	BP19-14	\$63,217.00	\$ 42,029.25	\$ 21,187.75
Humanities Guahan-Kumision	BP21-01	\$ 7,400.75	\$ 7,884.00	\$ (483.25)
Esoriata - Hinanao-ta Exhibit				
Atantano Heritage Preserve - DOI	BP21-05	\$ 200,000.00	\$ 1,536.35	\$ 198,463.65
I Hinanao-ta Exhibit (GU Museum)	BP21-06	\$ 33,599.00	\$ 16,985.00	\$ 16,614.00
GEDA - Refurbishment of 8 Cannons	BP22-01	\$ 25,000.00	\$ -	\$ 25,000.00
Dept. of Navy - Hila'an Survey/Appraisal	BP22-03	\$ 150,000.00	\$ 720.00	\$ 149,280.00
Attorney General - Education/ Cooperation/Advocacy Programs	BP23-01	\$ 200,000.00	\$ -	\$ 200,000.00
Sub-Total		\$ 781,717.75	\$ 170,332.76	\$ 611,384.99

TOTAL OBLIGATED FUNDS		\$ 6,125,051.41	\$ 857,334.37	\$ 5,267,717.04
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CURRENT FUND BALANCES				
Bank of Guam Checking		\$ 210,085.56	As of 2/28/23	
Bank of Guam Trust		\$ 27,508.68	As of 2/28/23	
Merrill Lynch		\$ 2,064,269.26	As of 2/28/23	
*RBC Capital Markets LLC		\$ 1,844,833.47	As of 1/31/23	
Raymond James		\$ 1,658,219.55	As of 2/28/23	
SUB-TOTAL		\$ 5,804,916.52		
RESERVED FOR GRANTS & PROJECTS				\$ 537,199.48

*February Statement not received as of this report

PROJECTS IN QUEUE		
<i>San Nicolas House - Construction</i>		\$ 920,000.00
<i>Rosario House - Construction</i>		\$ 1,265,000.00
<i>George Flores House - Rehab</i>		\$ 1,172,036.25
<i>Agana Basilica Bell Tower</i>		\$ 150,000.00
<i>Archbishop Flores - A&E</i>		\$ 150,000.00
<i>Inalahan Baptist Church</i>		TBD
TOTAL		\$ 3,707,036.25

GPT FY23 ADMINISTRATION & OPERATIONS EXPENDITURE REPORT AS OF FEBRUARY 28, 2023

PERSONNEL	APPROP	OCT	NOV	DEC	JAN	FEB	YTD EXP	BALANCE
CPO	\$ 89,674.78	\$ 6,898.06	\$ 10,347.09	\$ 6,898.06	\$ 6,898.06	\$ 6,898.06	\$ 37,939.33	\$ 51,735.45
ASC	\$ 71,618.30	\$ 5,509.10	\$ 8,263.67	\$ 5,509.10	\$ 5,509.10	\$ 5,509.10	\$ 30,300.07	\$ 41,318.23
Program Officer	\$ 53,655.94	\$ 4,127.38	\$ 6,191.07	\$ 4,127.38	\$ 4,127.38	\$ 4,127.38	\$ 22,700.59	\$ 30,955.35
Program Officer	\$ 52,000.00	\$ 2,000.00	\$ -	\$ -	\$ -	\$ -	\$ 2,000.00	\$ 50,000.00
Program Officer	\$ 45,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45,000.00
Development Officer	\$ 52,093.08	\$ 4,007.16	\$ 6,010.74	\$ 4,007.16	\$ 4,007.16	\$ 4,007.16	\$ 22,039.38	\$ 30,053.70
Performance Incentives	\$ 33,202.11	\$ -	\$ -	\$ 10,270.85	\$ -	\$ -	\$ 10,270.85	\$ 22,931.26
FICA	\$ 27,849.22	\$ 1,724.44	\$ 2,357.16	\$ 2,357.16	\$ 1,571.44	\$ 1,571.44	\$ 9,581.64	\$ 18,267.58
Insurance	\$ 75,000.00	\$ 5,814.00	\$ 5,814.00	\$ 5,814.00	\$ 6,082.00	\$ 6,082.00	\$ 29,606.00	\$ 45,394.00
Wkms Comp	\$ 500.00	\$ 742.85	\$ -	\$ -	\$ -	\$ -	\$ 742.85	\$ (242.85)
Retirement	\$ 9,571.27	\$ 864.00	\$ 1,296.00	\$ 864.00	\$ 864.00	\$ 864.00	\$ 4,752.00	\$ 4,819.27
Utility/Comm/Insur	\$ 50,000.00	\$ 8,243.80	\$ 7,151.90	\$ 7,286.47	\$ 7,157.30	\$ 1,346.72	\$ 31,186.19	\$ 18,813.81
TRAVEL	\$ 15,000.00	\$ 5,550.90	\$ 384.00	\$ 5,361.53	\$ (4,234.76)		\$ 7,061.67	\$ 7,938.33
EQUIPMENT	\$ 6,500.00	\$ 282.27		\$ 589.16	\$ 291.53	\$ 283.28	\$ 1,446.24	\$ 5,053.76
SUPPLIES	\$ 1,800.00	\$ 237.75	\$ 393.09	\$ 558.25	\$ 122.41	\$ 694.03	\$ 2,005.53	\$ (205.53)
CONTRACTUAL								
Accounting	\$ 29,000.00	\$ 368.42	\$ -	\$ -	\$ -	\$ -	\$ 368.42	\$ 28,631.58
Audit	\$ 25,000.00	\$ -	\$ 24,800.00	\$ -	\$ -	\$ -	\$ 24,800.00	\$ 200.00
Legal	\$ 7,000.00	\$ -					\$ -	\$ 7,000.00
Tech Maintenance	\$ 1,000.00	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00	\$ 750.00	\$ 250.00
Landscaping	\$ 5,000.00	\$ 480.80	\$ 730.80	\$ 730.80	\$ 730.80	\$ 730.80	\$ 3,404.00	\$ 1,596.00
Atantano Prop Plan	\$ 30,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30,000.00
Preservation Interns	\$ 10,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000.00
Architect	\$ 25,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 25,000.00
VEHICLE EXPENSES	\$ 6,500.00	\$ 2,299.32	\$ -	\$ -	\$ 163.28	\$ 1,833.29	\$ 4,295.89	\$ 2,204.11
STIPEND	\$ 7,000.00	\$ 200.00	\$ -	\$ 250.00	\$ 300.00	\$ 300.00	\$ 1,050.00	\$ 5,950.00
ADVERTISEMENT	\$ 4,076.00	\$ 168.00	\$ 784.00	\$ 224.00	\$ 336.00	\$ 880.00	\$ 2,392.00	\$ 1,684.00
POSTAGE	\$ 386.00	\$ 238.20	\$ -	\$ -	\$ 36.00	\$ 25.20	\$ 299.40	\$ 86.60
DUES/SUBSCRIPTN	\$ 1,350.00	\$ 250.00	\$ -	\$ -	\$ -	\$ 100.00	\$ 350.00	\$ 1,000.00
MISCELLANEOUS	\$ 6,218.89	\$ -	\$ -	\$ -	\$ -	\$ 109.84	\$ 109.84	\$ 6,109.05
SUB-TOTAL		\$ 50,156.45	\$ 74,673.52	\$ 54,997.92	\$ 34,111.70	\$ 35,512.30	\$ 249,451.89	
TOTAL	\$ 740,995.59	\$ 690,839.14	\$ 616,165.62	\$ 561,167.70	\$ 527,056.00	\$ 491,543.70		\$ 491,543.70

ITEM 5.2.

Architecture Comm. Report

ITEM 5.3.

Archaeology Comm. Report

ITEM 5.4.

Planning Comm. Report

ITEM 5.5.

CHamoru Comm. Report

ITEM 5.6.

History Comm. Report

		6/22/22	\$189,450.00	<p>construction of F. Q. Sanchez School Facility (\$3.5Million)</p> <ul style="list-style-type: none"> • Testimony submitted. • Recent Legislative action approved \$3.5 Million • Pending Executive Order • Governor Lou Leon Guerrero signed bill 172-36 into law on March 11, 2022, approving \$3.5 million for construction • June 22, 2022, Board approved proposal for Construction Administration and amendment to current contract. • Construction Agreement signed. • Construction Bidding process to start August 15, 2022 • Bid Opening extended to October 14 (No response) • Second Bid Advertisement was on November 18, 2022. Pre-bid conference is scheduled for December 14, 2022. • Bid Opening scheduled for 10am January 11, 2023. • Bid Opening extended to February 1, 2023. • RFP for Archaeological Services received several proposals and NOA to be issued upon approval by board. • Third Bid Advertisements on Feb 24th & March 1 and pre-bid scheduled for March 17
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GUAM PRESERVATION TRUST
ANTHROPOLOGY/ARCHAEOLOGY COMMITTEE

PROJECT NAME	APPLICANT	DATE APPROVED/C COMPLETION	AMOUNT APPROPRIATED	MILESTONES
Guam Rock Art Study Grant (AT)	Drs. Andrea Jalandoni & Boyd Dixon	8/9/19 Completion Date: 7/31/2022	\$12,000	<ul style="list-style-type: none"> • Contract signed. Fieldwork to begin February 2020. Report 1 due March. • Report #2 received. Request for project extension due to COVID-19. • Report #3 received and request for extension until December 2021 due to COVID as grant applicant is unable to travel to Guam and conditions do not allow for field work to be done. Only \$340 has been spent from total grant funding. • Project to be extended to July 2022 with field work to be completed by year end 2021. • Project funds returned to GPT by grantee to be held until grantee is able to submit a revised plan and is free to travel to Guam to conduct study. • Report #1 received; team to present findings at Preservation Summit in May. • GRAS applying for ARPA permits from

				<p>USFWS/Ritidian Unit for next phase of project.</p> <ul style="list-style-type: none"> • Project no-cost extended to August 2023. Field work proposed to start in beginning of 2023. • Project Ongoing
<p>Archaeology Training for High School Students (JQ)</p>	<p>NTHP Grant/GPT Matching</p>	<p>7/08/2020 TBD</p>	<p>\$5,000.00</p>	<ul style="list-style-type: none"> • Project on hold until further notice.

GUAM PRESERVATION TRUST

PLANNING COMMITTEE

PROJECT NAME	APPLICANT	DATE APPROVED/ COMPLETION	AMOUNT APPROPRIATED	MILESTONES
Atantãno Master Plan (JQ)3/3/2023	GPT Board Initiative/ DOI Grant	June 26, 2021 6/22/2022	\$200,000.00 \$49,999.30	<ul style="list-style-type: none"> • The Nature Conservancy has agreed to lead/facilitate the planning process to develop the masterplan. • Plant Inventory Contract (UOG) currently being conducted. • Cultural Resources Inventory contract currently with BOD for approval.
Hila'an Proposed Conservation Easement	GPT Board Initiative/REPI Program	September 23, 2021 (Agreement Signed)		<ul style="list-style-type: none"> • Polaris LTD (Hila'an Property Owner) has agreed to carve out about 100 acres of property for cultural and natural resources preservation and conservation programs. • JRM, through the REPI program will provide the funding to initiate and sustain the programs (agreement approved and signed by the Department of Defense and GPT). • Governor's office is being solicited to support the program. • \$150,000 received September 27 from DOD. • Appraisal quotes received and under review. • Land Survey placed for RFP (23-03) due February 17. • Second RFP for land survey advertised 2/28 & 3/6/23 • Project Ongoing

GUAM PRESERVATION TRUST
CHAMORU CULTURE/HISTORY COMMITTEES

PROJECT NAME	APPLICANT	DATE APPROVED/ COMPLETION	AMOUNT APPROPRIATED	MILESTONES
I Hinanao-Ta Exhibition (Kumision Estoria-ta)	Guahan Humanities CARES Act Grant	10/30/2020 Completion Date: 6/30/2021	\$7,400.75	<ul style="list-style-type: none"> • Temporary display at the Lujan House on Jul 30. • Guam Museum Exhibition is scheduled for December 2021. • Delay of exhibit due to pandemic restrictions. • Exhibit now tentatively scheduled for October/November 2022 • Exhibit moved to March 2023 per Guam Museum. • Exhibit Opening was held Feb 23rd at Guam Museum
	MOA with Guam Museum for the Museum Exhibition	09/16/2021 (Guam Museum Funds)	\$33,599.25	
Modern Guam Rises from the Destruction of War: 1945-70 (Phase II) Grant	Guampedia	10/14/20 Completion Date: 10/14/2021	\$37,692.00	<ul style="list-style-type: none"> • Grant agreement signed. • Report #2 received. Project is commencing with reopening of business on Guam. • No cost extension granted until March 2022. Report #3 due in September. • Report #3 and #4 received. Awaiting Final report.
Learning CHamoru- Discovering Guam's History Grant (AT)	Dr. Gerhard Schwab	8/9/19 Completion Date: 4/15/2021	\$9,950	<ul style="list-style-type: none"> • Contract signed and awaiting report 1 due Nov 30. • Report 1 received. Project on schedule • Report 2 Received. Project on schedule. • Report 3 Received. Project on schedule for completion in August • Report #4 received. Couple of items on the trail on their website. Project extended to April 2021.

				<ul style="list-style-type: none"> • Report #5 received December 2020. Project on track. • Final report to be received in April 2021. Remaining work are mostly video production. • Interim report received 7/31. Project is extended until December 2021 as grantee still needs to film 3 more sites along the heritage trail. 2 sites complete and links given to GPT. • No cost extension granted until Dec 2021 • Project Report #9 received. Last 2 videos completed. A request for a no-cost extension to finalize the last elements of the project (posting, editorials, data entry, drills to the website) to June 2022. • Project is complete per grantee. Closeout in progress. • Project completed and closed.
Teaching w/Historic Places (LB)	Board Initiative	8/13/2015	\$14,400.00	<ul style="list-style-type: none"> • A total of over 250 students participated in this program. Program is still ongoing – https://historymethods.weebly.com/ • As face-to-face is limited, only 10% of project is complete and will resume once restrictions are removed. • 100 students from MULES visited Litekyan Jan 20. Report from instructor within 2 weeks.