



**House Committee on Finance**

**Informational Briefing**

**January 11, 2023, Begins 9:00 a.m.,**

**2<sup>nd</sup> on Agenda**

**Biennium FY 24 and FY 25**

**Board of Trustees**

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**Administration**

Sylvia M. Hussey, Ed.D.

Ka Pouhana, Chief Executive Officer

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## OVERVIEW

### A. Office of Hawaiian Affairs Background and Mission

#### 1. Background

Upon statehood in 1959, Section 5(f) of the Admission Act directed the State to hold lands in trust for five purposes, one of which was “the betterment of the conditions of Native Hawaiians,” as defined in the Hawaiian Homes Commission Act of 1920. In 1978, a Constitutional Convention reviewed and revised the responsibilities of Hawai‘i’s government. Among the provisions incorporated into the new state constitution was the establishment of the Office of Hawaiian Affairs (“OHA”), as a public trust with mandates to better the conditions of Native Hawaiians and the Native Hawaiian community in general. In 1979, the legislature enacted Chapter 10 of the Hawai‘i Revised Statutes (“HRS”) which further defined OHA as a semi-autonomous self-governing body to address the needs of the aboriginal class of people of Hawai‘i.

Hawai‘i is an ethnically-diverse state. Currently, approximately one in five (21.67%) people in our Island population identify and define themselves as Native Hawaiian. Native Hawaiian households typically consist of larger multi-generational families with more children, yet have less income per person than other populations residing in the State of Hawai‘i (American Community Survey, U.S. Census Bureau, 2015). Native Hawaiians live in each county, with greater density in rural areas than metro cities.

OHA’s Board of Trustees (“BOT”, “Board” or “Trustees”) is composed of nine elected trustees, five of whom represent specific island districts and four at-large positions. OHA’s key administrators include a Chief Executive Officer, Chief Operating Officer, Chief Financial Officer and General Counsel, in addition to Division Directors.

#### 2. Mission

OHA’s mission is to mālama (protect) Hawai‘i’s people, environmental resources and assets, toward ensuring the perpetuation of the culture, the enhancement of lifestyle and the protection of entitlements of Native Hawaiians, while enabling the building of a strong and healthy Hawaiian people and lāhui, recognized nationally and internationally. According to Hawai‘i Revised Statutes Chapter 10, OHA is the principal public agency in the State of Hawai‘i responsible for:

- Betterment of conditions of Native Hawaiians;
- Performance, development and coordination of programs and activities relating to Native Hawaiians;
- Assessing the policies and practices of other agencies impacting Native Hawaiians;
- Conducting advocacy efforts for Native Hawaiians; and
- Serving as a receptacle for reparations.

OHA carries out its mission through the strategic allocation of its resources. Consistent with best practices among foundations and endowments, and with the purpose of ensuring the continued viability of its Native Hawaiian Trust Fund (“NHTF”), OHA’s Board of Trustees adopted its first Spending Policy in 2003 and last amended it in 2021. The Spending Policy limits OHA’s annual

spending up to 5% of the rolling 20 quarter average of the NHTF to ensure sufficient resources are available each year and in perpetuity by not diminishing the corpus.

For the fiscal year ended June 30, 2022 (unaudited), total assets are illustrated below in Figure 1<sup>2 3</sup>

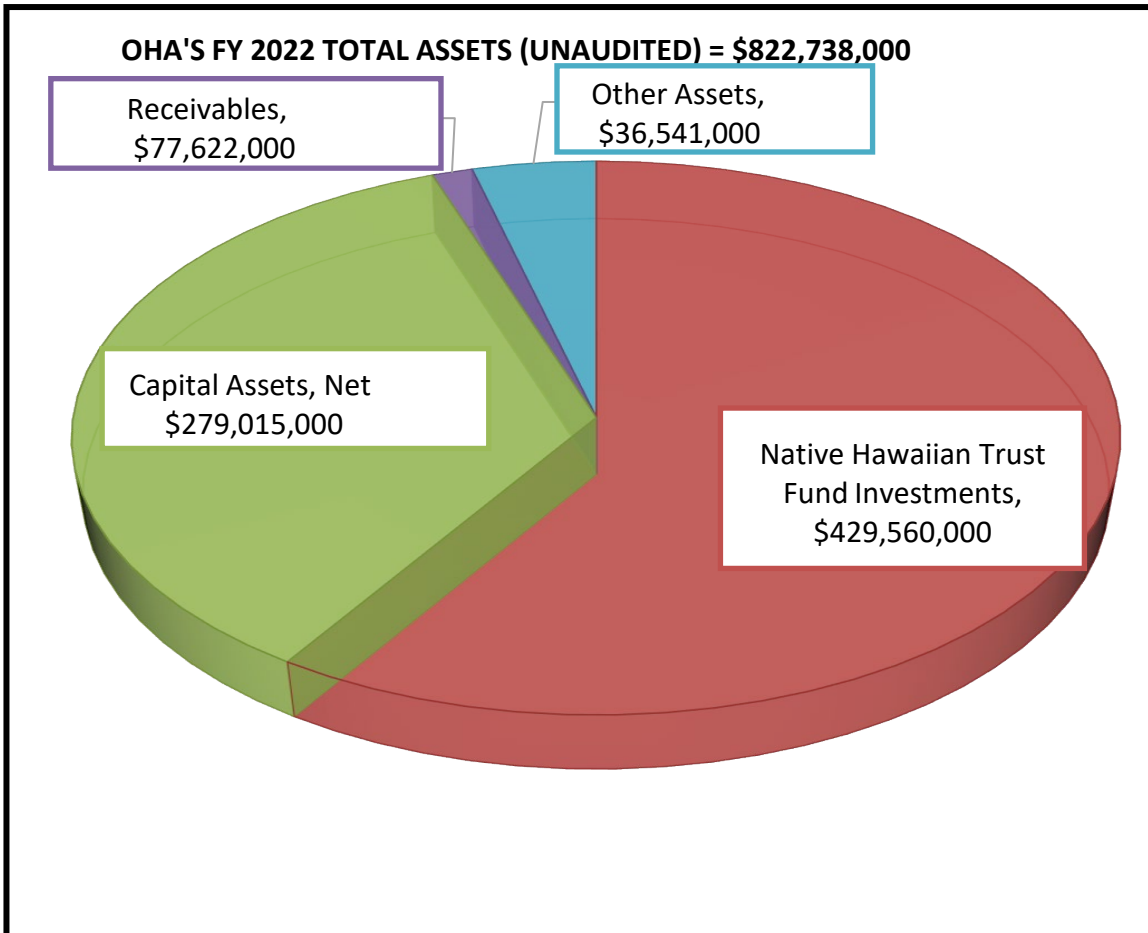


Figure 1. OHA's FY 2022 Total Assets (Unaudited) = \$822,738,000

<sup>2</sup> Source: Annual Report

<sup>3</sup> Note the Native Hawaiian Trust Fund investments are reflected in the annual report based on applicable accounting and financial reporting principles.

## B. Current State-Wide Conditions & Notable Performance

### 1. Current State-Wide Conditions

The Economic Research Organization at the University of Hawai'i's (UHERO) December 2022 global outlook and forecast<sup>4</sup> for Hawaii remained largely unchanged from the last report (Q3). Rising interest rates, dwindling pandemic era savings, and the coming US downturn will cause a pause in growth next year. But the belated recovery of the Japanese visitor market and surging public sector construction will prevent a recession in the Islands.

- **Global Outlook.** The global outlook continues to deteriorate. Persistent high inflation is driving aggressive interest rate hikes, slowing growth. Energy constraints from Russia's war in Ukraine are sending Europe into recession. While supply chain woes have receded, China's COVID-19 struggles threaten further disruptions. The weak yen is weighing on Japanese consumer spending, including on vacations in Hawaii.
- **Interest Rates.** The sharp rise in interest rates is battering the US housing market. Transient factors that contributed to high inflation have eased, and core inflation will trend lower. While the labor market remains tight, job growth is easing and signs of broader economic slowing are emerging. The US economy will enter a mild recession by the middle of next year.
- **United States Congress.** Mixed control of Congress following the midterm elections will mean no major policy changes. The biggest risk is of temporary government shutdowns resulting from disputes over budget extensions and the federal debt ceiling.
- **Hawaii Visitor Numbers.** By some measures, Hawaii visitor numbers have recovered to pre-pandemic levels. The return of Japan visitors, which has been hindered by the late removal of travel restrictions and the weak yen, will offset a pullback of mainland arrivals next year. Rising room rates in Hawaii have stabilized, even as occupancy remains below the 2019 level. The Mauna Loa eruption is boosting Hawaii Island tourism, but the potential breaching of the Daniel K. Inouye highway threatens the broader Big Island economy.
- **Hawaii Inflation.** Hawaii inflation remains high, if lower than for the US overall. Rising housing costs have yet to feed through fully, but the slowing of rent appreciation will bring relief. Together with declining energy and food costs, this will allow inflation to ease to less than 4% in 2023, cooling to roughly 2.5% by 2024.
- **Hawaii Labor Market.** Hawaii's labor market is not as tight as the mainland, with employment in some sectors still below their pre-COVID level. Still, excess demand for workers is driving up wages, even as inflation undercuts the purchasing power of income.

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<sup>4</sup> [https://uhero.hawaii.edu/wp-content/uploads/2022/12/22Q4\\_Forecast.pdf](https://uhero.hawaii.edu/wp-content/uploads/2022/12/22Q4_Forecast.pdf), retrieved January 1, 2023

Pandemic school closures and abundant employment opportunities have reduced the rate of college enrollment, particularly among lower-income students. This will reduce future earnings and widen inequality.

- **Interest Rates, Income Impact.** The drag from high prices and interest rates, coupled with the US recession, will cause a pause in job growth next year and an uptick in unemployment, before growth resumes in 2024. Inflation-adjusted income will rise just 1% in 2023, but improve to about 2% thereafter.
- **Housing.** Housing affordability has taken a big hit from soaring mortgage interest rates. As a result, home prices have begun to fall. Reduced affordability will increase the cost of developments with affordable unit requirements, likely resulting in some project delays or cancellations. Permitting delays also add to development costs. Large federal contracts and new hotel projects will support the construction sector, more than offsetting softer residential building.
- **Inflation Impacts.** Forecast uncertainty has increased since our last report. A best case scenario would see rapid decline in US inflation, allowing an early interest rate retreat. If inflation proves intractable, the Fed will raise rates higher and longer. A stepped-up Ukraine War and greater COVID challenges in China could further worsen global conditions. Poorer external and local demand might then precipitate an outright contraction here. Even in that case, a severe downturn remains unlikely.

## 2. Notable Performance, Results and Expected Outcomes

- **Managing Native Hawaiian Trust and Public Land Trust Funds.** Trust funds available to OHA, within investment and spending policy parameters, is moderated by the overall 20 quarter average computation methodology. Budgets are developed and constructed with all sources of funds (e.g., general, trust, federal) and purposes (e.g., core, non-core) identified. In addition, a change approved by the Board, resulted in the prioritization of the interim annual public land trust annual amount to beneficiary and community investments for the fiscal biennium 22-23 in the amount of \$30.2 million.
- **Increasing Commercial Property Activities.** On September 30, 2021, OHA purchased Iwilei Properties which included, 1) 500 N. Nimitz Hwy, a retail property with three national retail chain tenants; and 2) 501 Sumner Street, an industrial property. The purchase price was \$47 million. Gross rents from the properties, including tenant recoveries is estimated to be \$2.5 million and net income \$1.5 million for the period October 1, 2022 to June 30, 2022. The acquisition resulted in three sites comprising OHA's commercial property holdings as of June 30, 2022: 30 acres at Hakuone, formerly known as Kaka'ako Makai, Nā Lama Kukui, the site of OHA's headquarters, and the Iwilei Properties.
- **Act 226 (2022).** In June 2022, Governor Ige signed into law Act 226 which enacted the following three key elements from SB2021 SD1 HD2 CD1: 1) Established \$21,500,000 as OHA's interim annual share of the income and proceeds of the public land trust beginning

in fiscal year 2022-2023; 2) Appropriated \$64,000,000; and 3) Established a working group to determine the pro rata share of income and proceeds from the public land trust annually to the OHA. Refer to Section H for further discussion regarding the implementation of Act 226.

- **Continuing Beneficiary Disparities.** Due to many factors, Hawai'i continues to experience increases to costs of living (i.e., housing and food) that exceed increases in wage and income. This has exacerbated Native Hawaiians' housing instability, high rates of homelessness and higher rates of poverty. Additionally, although Native Hawaiians participate in the labor force at higher rates than the state average (66.7% versus 65.3%), Native Hawaiian per capita income is substantially lower than the state population, \$24,188 compared to \$33,882 (U.S. Census Bureau, 2018; U.S. Census Bureau, 2018).

Since 2019, OHA's Board of Trustees, has been strengthening the organization, from within, via governance and policy related work, complemented by Administration's operational infrastructure related work (e.g., focusing on beneficiaries and communities, strengthening organizational capacity, activating enabling technologies, creating operating efficiencies). Governance, policy and operations combine to strengthen the OHA to enable its fiduciary responsibilities to the Lāhui.

Refer to Section G for additional information and organizational updates regarding: Mana i Maui Ola – Strategic Plan approval and implementation; 2022 Annual Report; Governance Structure, Board Governance Framework, including Policy Framework; Reorganization; Status of Audits and Reviews; Limited Liability Companies; and Plante Moran – 38 Transactions Analysis.

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## FEDERAL FUNDS

### C. Lost or at Risk of Losing Federal Funds

OHA currently administers one Federally funded pass-through program and one Federally funded direct program. As of this time, these programs have not lost, nor are at risk, of losing federal funding. They are summarized as follows:

<u>Federal Grantor / Pass-through Grantor / Program Title</u>	<u>Federal CFDA Number</u>
<b>U.S. Department of Transportation - Federal Highways --</b> Pass-through Program: Department of Transportation, State of Hawai'i Interstate Route H-3	20.205
<b>U.S. Department of Health and Human Services --</b> Direct Program: Native American Program, Native Hawaiian Revolving Loan Program	93.612

1. The Hālawā Luluku Interpretive Development (“HLID”) Project is a pass-through from the State Department of Transportation. Its three basic goals are compliance, mitigation and community support relating to the adverse impacts as a result of construction of Interstate Highway H-3.
  
2. The Native Hawaiian Revolving Loan Fund (“NHRLF”), whose mission is to enhance access for all persons of Native Hawaiian ancestry to credit, capital and financial services to create jobs, wealth and economic and social well-being, issued its first loan in 1989. The Native American Programs Act (“NAPA”) of 1974, as amended, (“the Act”) requires the Administration for Native Americans to submit an Annual Report to the Congress on the NHRLF and requires a report on the effectiveness of the operation of the fund in improving the economic and social self-sufficiency of Native Hawaiians.

OHA completed the *Office of Hawaiian Affairs Native Hawaiian Revolving Loan Fund Program Outcome Evaluation 2020* (“2020 Evaluation”) based on a survey of 244 borrowers who had NHRLF loans from 2008 to 2020. Surveyed borrowers provided responses for three time periods: pre-loan, 2019, and November 2020. The survey evaluated economic wellbeing including financial management and economic fragility, debt to income ratio and credit scores (i.e., creditworthiness), income including employment, individual income and household income, housing, wealth and other quantitative measures and qualitative feedback.

While the results varied among the loan products (i.e., education, debt consolidation, home improvement and business), the overall results confirmed that the OHA loans are effective in improving the financial wellbeing of Native Hawaiian borrowers.

Some of the key takeaways of the 2020 Evaluation included the following:

1. Native Hawaiian business borrowers demonstrated the highest levels of improvement among most outcomes evaluated and the businesses experienced improvements over the course of the loan.
2. Before receipt of OHA loans, education and debt consolidation borrowers reported lower indicators of overall economic wellbeing as compared to home improvement and business borrowers, however education and debt consolidation borrowers showed the greatest improvements following receipt of OHA loans.
3. The loan program is effective in supporting Native Hawaiians in shorter-term outcomes such as increasing earning potential or improving creditworthiness.
4. Longer-term outcomes, such as improving employment or housing conditions are not detectable in the short timeframe of the 7-year loan terms.

The 2020 Evaluation found the 2020 statewide economic crisis resulting from the COVID-19 pandemic had adverse impacts on Native Hawaiian’s economic wellbeing. As a result, further data collection will be necessary to determine the longer-term impact of the global crisis on Native Hawaiians. Update work is in progress for completion of the 2022 Annual Report, including incorporation of survey and other data analysis.

Based on survey responses from 209 borrowers who had open NHRLF loans as of December 2021 and assessed changes in borrowers’ economic and social self-sufficiency through outcome indicators including financial management; economic fragility; debt to income ratio; credit score;

	Before OHA Loan	2021	Change over Loan Period
<b>ECONOMIC WELLBEING</b>			
Positive Financial Management	60%	72%	12%
Economic Fragility	29%	36%	7%
<b>PRECONDITIONS TO FINANCIAL STABILITY</b>			
Median Debt to Income Ratio	47%	47%	0%
Credit Score Above 650	71%	88%	17%
<b>INCOME</b>			
Annual Mean Individual Income	\$62,721	\$69,150	10%
Annual Mean Household Income	\$90,290	\$105,865	17%
<b>HOUSING</b>			
Housing Conditions (own/rent)	85%	88%	4%
Satisfied with Housing Quality	82%	90%	8%
Affordable Housing Cost	44%	56%	12%
<b>WEALTH</b>			
Average Financial Assets	\$55,138	\$73,419	33%
Average Non-Financial Assets	\$196,494	\$292,977	49%
Average Total Assets	\$258,213	\$370,252	43%
Average Debt	\$240,101	\$292,537	22%
Average Net Worth	\$64,866	\$123,432	90%

Figure 2. NHRLF Survey Results

income; housing conditions, quality, and affordability; financial and non-financial assets; debt; net worth and other quantitative and qualitative measures. While the results vary among the loan products (i.e., education, debt consolidation, home improvement, and business) and the specific measures, the overall results indicated that Native Hawaiian loan borrowers improved their economic and social self-sufficiency over the course of the loan.

## **NON -GENERAL FUNDS**

### **D. Reports to the Legislature on Non-General Funds pursuant to HRS 37-47**

Refer to Appendix F - 37-47 Report or accessible by Ctrl + Clicking on the following link:

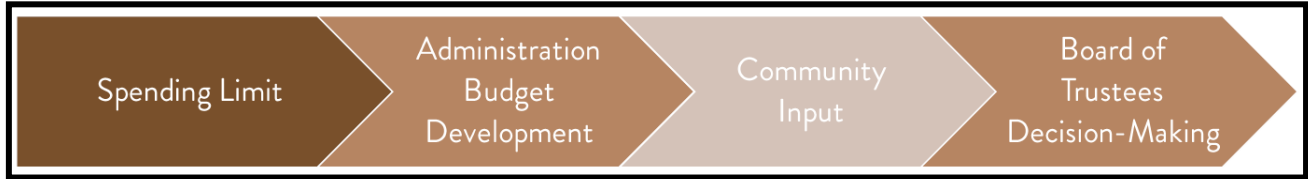
[OHA HRS 37-47 Report](#)

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## BUDGET REQUESTS

### E. Budget Development Process and Priority Requests

#### 1. Budget Development Process



**Figure 3. Budget Development Process**

The development of OHA’s biennium budget begins with the Strategic Plan. The budget is a financial expression of plans and activities that OHA intends to undertake in the next two fiscal years. These activities are guided by the Strategic Plan and reflect tactical and operational implementation plans and activities. The budget construction starts with all the funding sources available, i.e., a percentage of OHA’s Investment Portfolio, Public Land Trust amount, General Funds appropriations and Commercial Property revenue. These funding sources create the ceiling for budget expenditures. Personnel and non-personnel related budgets are constructed with related assumptions. For non-personnel budgets, beneficiary and community investments are established, after which recurring expenses, which account for normal on-going operations, are accounted for. Any remaining identified funds at this stage are to be considered, managed and deployed by the Office of Strategy Management aligned to OHA’s Strategic Plan, and related tactical and operational plans and activities (including the operational program unit.).

In October 2022, the Board approved the FY24 and FY25 general funds priority request as summarized in Table 1 below.

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**2. Summary of Priority Requests and Act 29 (2021) and Act 226 (2022) Outcomes**

a. **Summary of Priority Requests.** Refer to Appendix A – 2023 Bill Submission – RELATING TO THE BUDGET OF THE OFFICE OF HAWAIIAN AFFAIRS for Fiscal Year 2024 and 2025, including the following Program ID OHA 175 – Beneficiary Advocacy summarized in Table 1.

Legislative Provision (Proviso)	Prog ID	FY2023-2024 (FY24)	FY2024-2025 (FY25)
Occupancy Ready	OHA 175 – Beneficiary Advocacy	\$500,000	\$500,000
Social Services		\$415,000	\$415,000
Education		\$615,000	\$615,000
Legal Services		\$600,000	\$600,000
<u>‘Āina</u> Addressing impacts of Climate Change		\$500,000	\$500,000
<u>‘Ōhana</u> Economic Stability		\$370,000	\$370,000
<b>Total</b>		<b>\$3,000,000</b>	<b>\$3,000,000</b>

**Table 1. – FY24 and FY25 General Funds**

b. **Act 29 (2021) Outcomes.** OHA’s budget for FY 2022 and FY 2023 General Funds, Program ID 175 Beneficiary Advocacy, via Act 29 (2021), were matched and leveraged by Trust Funds for grants and professional services contracts as summarized in Table 2.

Legislative Provision (Proviso)	Prog ID	FY2021-2022 (FY22)	FY2022-2023 (FY23)
Occupancy Ready	OHA 175 – Beneficiary Advocacy	\$500,000	\$500,000
Social Services		\$415,000	\$415,000
Education		\$615,000	\$615,000
Legal Services		\$524,400	\$524,400
Follow Up Report <sup>1</sup>		\$200,000	
Legal Services <sup>2</sup>			\$200,000
<b>Total</b>		<b>\$2,245,400</b>	<b>\$2,245,400</b>

**Table 2. – FY22 and FY23 General Fund Appropriations**

Act 29 (2021), SECTION 11. Provided that of the general funds appropriated for beneficiary advocacy (OHA175), the sum of \$200,000 for fiscal year 2021-2022 shall be expended to conduct or contract or a follow-up contract and disbursement review of the CliftonLarsonAllen (“CLA”) OHA & LLCs Contract and Disbursement Review – Report, dated December 4, 2019. The December 2019 report is available on the OHA website under the Financial Transparency tab: <https://www.oha.org/oha-llcs-contract-and-disbursement-review/>

The subsequent October 2022 Plante Moran (“PM Report”), is a follow up review of the 38 CLA transactions identified for possible fraud, waste and abuse in the CliftonLarsonAllen (“CLA”) report entitled “OHA & LLC’s Contract and Disbursement Review” (“CLA Report”), dated December 4, 2019. OHA’s Administration supported the Board in its initial Ad-Hoc Committee work (September 2021) providing project management supports; assisted with the processes associated with RFP-BOT-2022-009, including RFP posting, and facilitation of the Board evaluation, awarding and contracting activities (October 2021-February 2022); and supported the Board’s monitoring of Contract 4262 (February 2022-October 2022). The PM Report can be found at Appendix G and is available on the OHA website under the Financial Transparency tab: <https://www.oha.org/wp-content/uploads/Plante-Moran-OHA-Transactions-Report-October-2022-WEB.pdf>

- c. **Act 226 (2022) Outcomes.** As noted above, in June 2022, Governor Ige signed into law Act 226 which enacted the following three key elements from SB2021 SD1 HD2 CD1: 1) Established \$21,500,000 as OHA’s interim annual share of the income and proceeds of the public land trust beginning in fiscal year 2022-2023; 2) Appropriated \$64,000,000; and 3) Established a working group to determine the pro rata share of income and proceeds from the public land trust annually to the OHA. Refer to Section H for further discussion regarding the implementation of Act 226.

In July 2022, the Board: 1) Approved the inclusion of the interim annual share of the income and proceeds of the public land trust amount of \$21,500,000 in the biennium budgeting process in accordance with the Budget Management Policy beginning in fiscal year 2022-2023; 2) Invested the \$64,000,000 general revenues appropriation, for a portion of the income and proceeds from the public land trust, into the Native Hawaiian Trust Fund, consistent with the Investment Policy and related asset allocation; and 3) Activated planning and other activities in preparation for implementation of the working group further described in Section 3 of Act 226 (2022) in calendar year 2023.

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**F. Significant Budget Adjustments and Related Outcomes**

No significant budget adjustments are contemplated at this time for either FY 2024 or FY 2025.

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## ADDITIONAL INFORMATION - ORGANIZATIONAL UPDATES

In addition to the budgetary updates provided earlier, since 2019, the OHA Board of Trustees (BOT) has been strengthening the organization, from within, via governance and policy related work, complemented by Administration’s operational infrastructure related work (e.g., focusing on beneficiaries and communities, strengthening organizational capacity, activating enabling technologies, creating operating efficiencies). Governance, policy and operations combine to strengthen the OHA to enable its fiduciary responsibilities to the Lāhui.

### G. Organizational Updates

1. **Mana i Maui Ola – Strategic Plan.** Approved in final form by the OHA Board of Trustees in September 2020, OHA’s 2020-2035 Strategic Plan serves as OHA’s guide to achieve and implement the agency’s vision, mission and legal mandates over the next 15 years. OHA’s Strategic Plan establishes three Strategic Foundations of ‘Ohana (Family), Mo’omeheu (Culture) and Āina (Land and Water) that will serve as the lens through which decisions, planning, activities, initiatives, policies, processes, procedures and practices are made. The new Strategic Plan also identifies the following Strategic Directions: Educational Pathways, Health Outcomes, Quality Housing and Economic Stability. Since the OHA Board’s approval of the Strategic Plan in September 2020, the Administration has been developing and implementing tactical and operational plans to further implement the Strategic Plan. Refer to Appendix B for further details.

### Mana i Maui Ola: OHA’s 15-Year Strategic Plan For 2020-2035

OHA’s Strategic Plan “Mana i Maui Ola” (Strength to Wellbeing) includes three foundations: ‘Ohana (family), Mo’omeheu (culture), and Āina (land and water). OHA recognizes these foundations have the power to affect the wellbeing of Native Hawaiians. Therefore, they are woven into OHA’s plans to affect change in the areas of education, health, housing, and economics. These four directions will be used to guide OHA’s work to better the conditions of Native Hawaiians.

Over the next 15 years, OHA will be implementing eight (8) external strategies (at right), aligned with our foundations and directions to achieve our envisioned outcomes for a thriving and abundant lāhui.

**Direction: Educational Pathways**  
 STRATEGY 1: Support development and use of educational resources for all Hawaiian lifelong learners in schools, communities and ‘ohana.  
 STRATEGY 2: Support education through Hawaiian language medium and focused Charter Schools.

**Direction: Health Outcomes**  
 STRATEGY 3: Advance policies, programs, and practices that strengthen Hawaiian wellbeing, including physical, spiritual, mental and emotional health.  
 STRATEGY 4: Advance policies, programs and practices that strengthen the health of the ‘āina and mo’omeheu.

**Direction: Quality Housing**  
 STRATEGY 5: Advance policies, programs and practices that strengthen Hawaiian resource management knowledge and skills to meet the housing needs of their ‘ohana.  
 STRATEGY 6: Support implementation of the Hawaiian Homes Commission Act and other efforts to meet the housing needs of ‘ohana.

**Direction: Economic Stability**  
 STRATEGY 7: Advance policies, programs and practices that strengthen ‘ohana’s ability to pursue multiple pathways toward economic stability.  
 STRATEGY 8: Cultivate economic development in and for Hawaiian communities.

‘Ohana

Mo’omeheu

Āina

7

**Figure 4. Overview of Mana i Maui Ola: OHA’s 15-Year Strategic Plan for 2020-2035**



2. **2022 Annual Report.** In accordance with HRS Chapter 10-15, each year, OHA publishes its activities and financial performance in its Annual Report. This year’s annual report intentionally aligns beneficiary, community, financial and organizational activities to OHA’s strategic foundations---‘ohana, mo’omeheu, ‘āina; strategic directions—educational pathways, health outcomes, quality housing, economic stability; and our kuleana as advocates, community engagers, researchers, and resource managers.

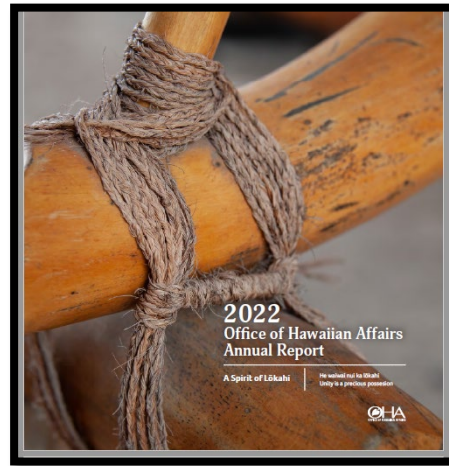


Figure 5. 2022 Annual Report Cover

Highlights of the 2022 Annual Report include: Community Rallies Behind Public Land Trust Bill; Awarding of 2022 Grants and Sponsorships; Working Together to Support Miloli‘i’s Community-Based Subsistence Fishing Area; Native Hawaiian Organizations Sharing their Stories in Ka Wai Ola; Collectively Addressing COVID-19; and OHA Research Collaborations.

Refer to the 2022 Office of Hawaiian Affairs Annual Report at Appendix C. All annual reports can be viewed and downloaded from the website:

[www.oha.org/about/annual-reports/](http://www.oha.org/about/annual-reports/).

3. **Governance Structure<sup>5</sup>, Board Governance Framework, including Policy Framework.** In April 2019, the BOT approved a new Board Governance Framework to better align the establishment of policies and related decision making. The BOT then completed related work and approved: L-Lāhui Level policies (May 2019), BOT By-Laws (March 2020); and the OHA Policy Framework Elements (December 2021). The interlude between March 2020 and December 2021, found the organization, like the entire state, country and world, focused on the impacts of COVID-19 and bringing resources to families and communities.

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<sup>5</sup> Working definition of governance, “[Establishment](#) of policies, and continuous [monitoring](#) of their proper implementation, by the members of the governing body of an [organization](#). It includes the mechanisms [required](#) to [balance](#) the powers of the members (with the [associated](#) accountability), and their [primary duty](#) of enhancing the [prosperity](#) and viability of the organization.”, <http://www.businessdictionary.com/definition/governance.html>, retrieved 1/1/2019.

## Governance Structure

The Office of Hawaiian Affairs is a public agency with a high degree of autonomy, principally responsible for the betterment of conditions of Native Hawaiians. OHA is governed by a Board of Trustees (BOT) made up of nine (9) members who are elected statewide to serve four-year terms, setting policy for the agency. The agency is administered by a Chief Executive Officer (Ka Pouhana) who is appointed by the BOT to oversee operations, including staffing.

### Board of Trustees

Four of the nine positions on the Board are designated as at-large seats representing the state as whole, while the five other trustees represent each of the following districts: Hawai'i Island, Maui, Moloka'i and Lāna'i, O'ahu, and Kaua'i and Ni'ihau. While there are residency requirements for candidates seeking the district seats, all voters statewide are permitted to vote in each of the OHA races.

The BOT is responsible for setting OHA policy and determining the strategies of the agency's trust. Prior to COVID-19 restrictions, the Board met regularly at the agency's headquarters in Honolulu, and at least once annually on each of the major islands. Board meetings are currently held virtually, and proceedings live streamed.

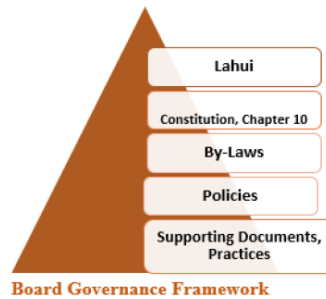
Each of the trustees sits on the Board's two standing committees: Resource Management (RM) and Beneficiary Advocacy and Empowerment (BAE).

The RM Committee handles all fiscal and budgetary matters and ensures proper management, planning, evaluation, investment and use of OHA's trust funds, including policies, related to land use, native rights and natural and cultural resources.

The BAE Committee focuses on the agency's legislative and advocacy efforts, that encourage Hawaiians to participate in governance; as well as programs that address issues relating to beneficiary health, human services, economic stability, education, housing, environment and natural resources.

The RM and BAE Committees convene regularly and approve actions and recommendations that are forwarded to the full Board for consideration and action.

In April 2019, the BOT approved a new Board Governance Framework to better align the establishment of policies and related decision making. The new Board Governance Framework articulates OHA's dual identity as an organization serving the lāhui, balanced with its legal mandates as a state agency, its fiduciary duties as a trust, and its operating values, policies and practices.



**Figure 6. Governance Structure and Board Governance Framework**

Figures 7. and 8. below illustrates the approved OHA Policy Framework elements depicted in two ways. Governance and policy work continued in 2022 with the BOT addressing policies re: retention and delegation of Trustee authorities; fiscal policies (e.g., endowment, spending, investment, asset allocation, debt management, cash management); land policies (e.g., legacy, commercial property); and beneficiary advocacy related policies (e.g., ceded lands, public land trust, water, iwi kupuna, military engagement). Policy work will continue in 2023.

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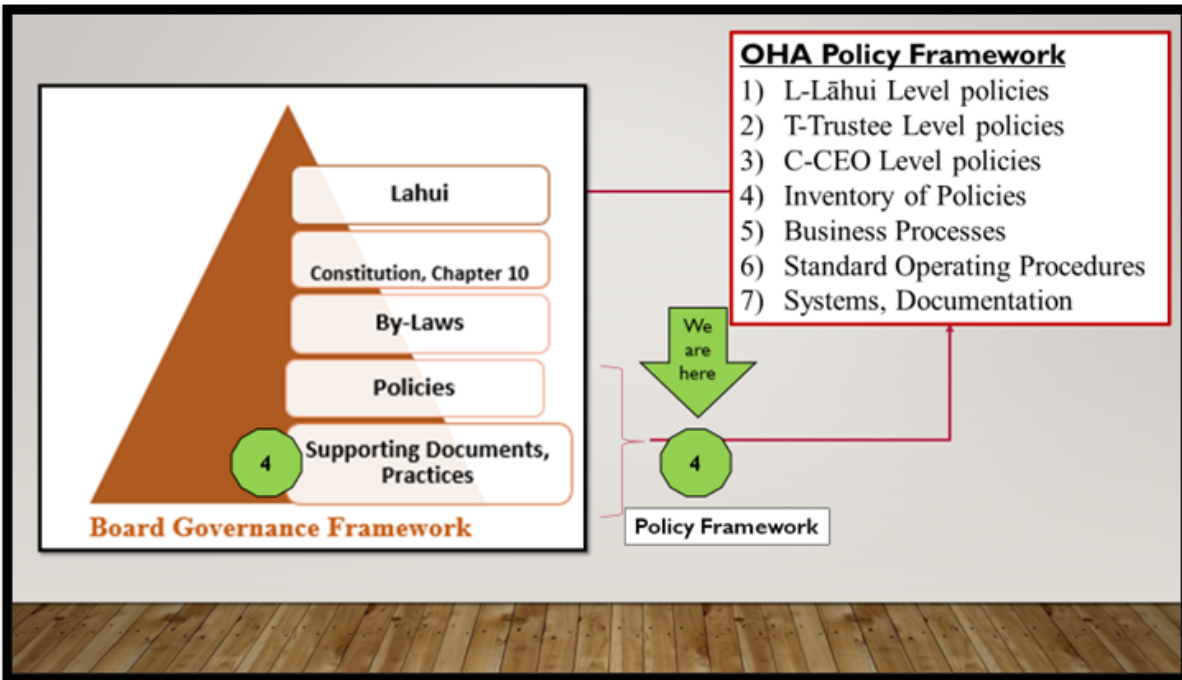


Figure 7. OHA Policy Framework Elements (Depiction 1)

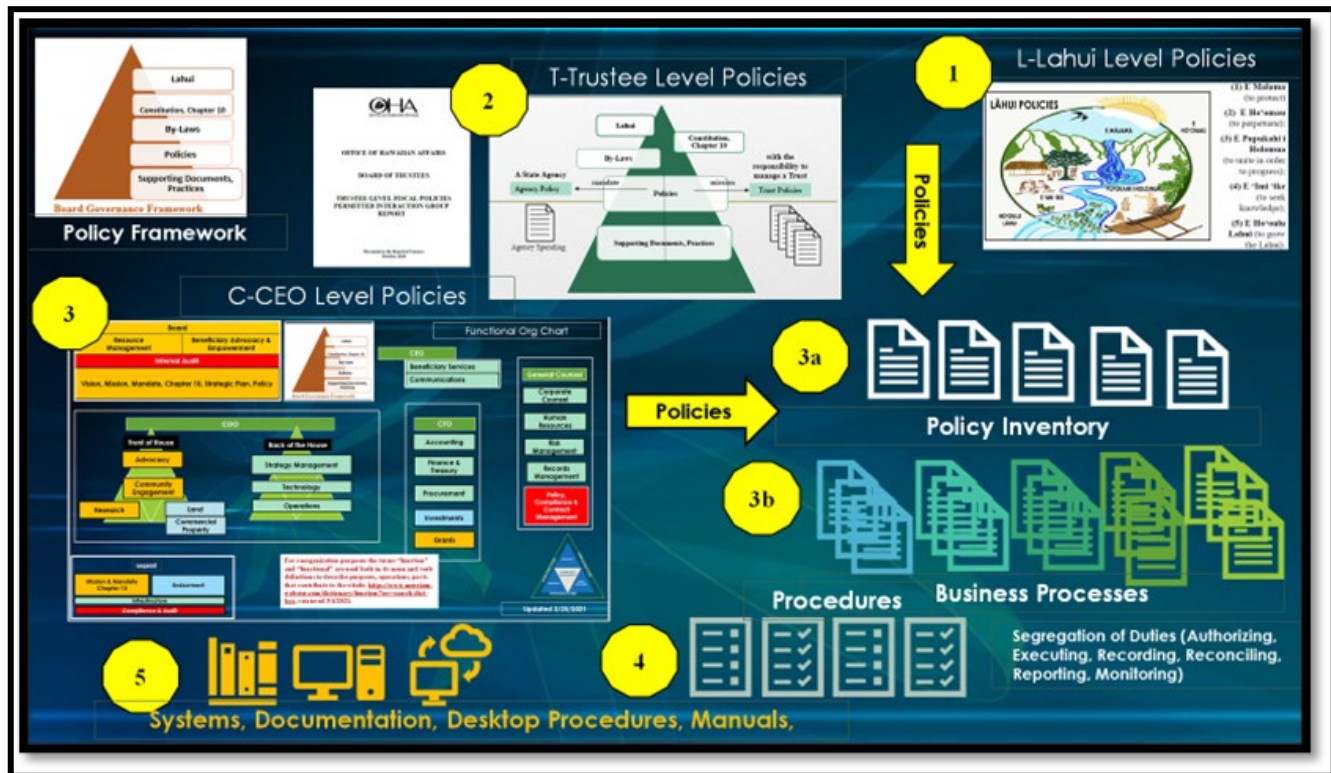
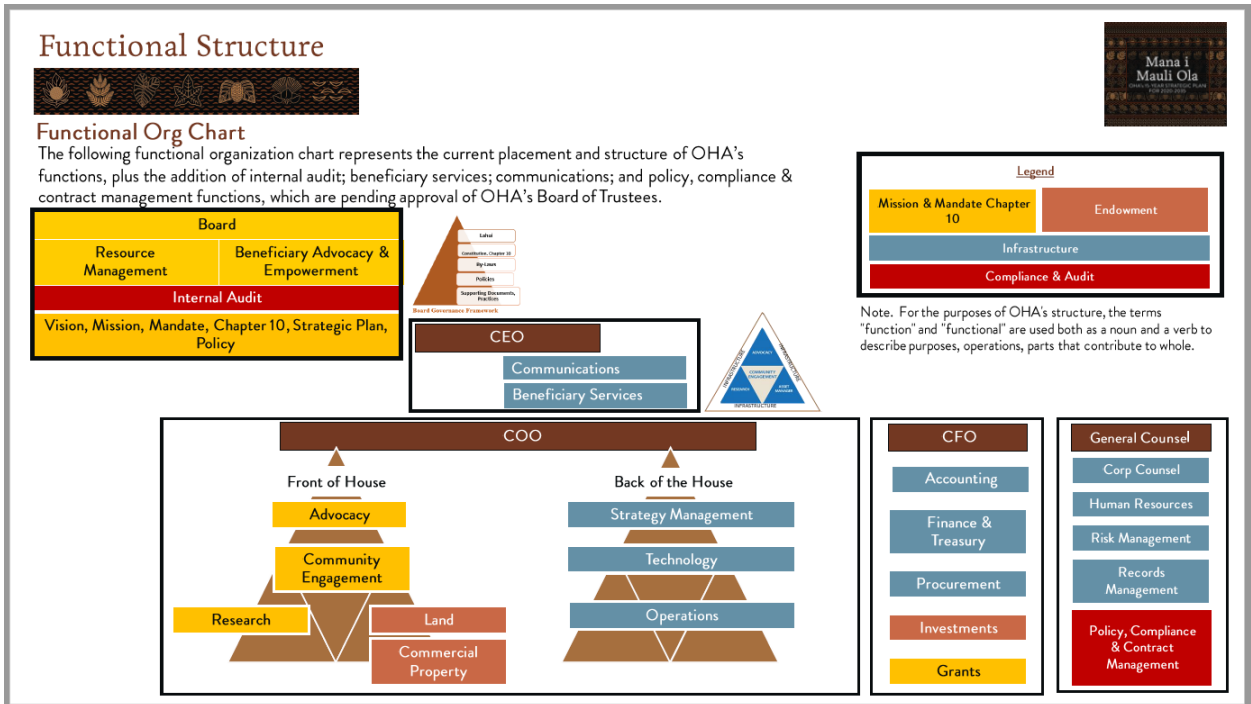


Figure 8. OHA Policy Framework Elements (Depiction 2)

4. **Reorganization.** With the approval of the Strategic Plan in the fall of 2020, the OHA needed an organizational operating structure that enabled the implementation of strategies and tactics to achieve outcomes outlined in Strategic Plan 2020-2035 and the related implementation plans. The reorganization of the OHA administration structure is based on the functional structure design depicted in Figure 9 below. The Board of Trustees, Trustee Aides, Chief of Staff or Board Secretary positions were not impacted by the reorganization.



**Figure 9. Functional Organization Chart**

In June 2021, the BOT approved the total operating budget for the biennium periods 2021-2022 (FY 2022) and 2022-2023 (FY 2023) as depicted in Figure 9 above which included a full-time equivalent (FTE) count of 153 employees compared to 179 FTEs in the prior biennium period (FY 2020 and FY 2021). For comparative purposes, the annual personnel and fringe related amounts for fiscal biennium FY 2020, and 179 FTEs, was approximately \$18MM; compared to the fiscal biennium FY2022, and 153 FTEs, is approximately \$14MM. Via the reorganization, beginning with the 179 FTEs (as of June 2020), 14 positions, already frozen, were permanently eliminated; 60 positions were eliminated; and 48 new positions created, equaling the resultant 153 FTEs. Included in the 48 new positions are beneficiary services agents, public policy advocates, grants, and operations positions, located throughout our island communities.

As approved by the BOT, final separation activities were completed by December 30, 2021. Recruitment for the newly created positions began in August 2021 and continued through the 2022 calendar year and will continue to through 2023. Refer to Appendix E for the organization charts for all units as of December 2022, noting vacancies as a result of unfilled positions created via the reorganization compared to vacancies created due to non-reorganization reasons. As of December 2022, of the 153 authorized positions (Board and

Administration, core and non-core), there are 45 positions unfilled, almost 1/3 of the authorized positions (29%); with 16 positions vacant due to new positions created as a result of newly created positions in the re-organization (about 10%), and the remaining 29 positions (about 19%) are due to post-reorganization separations, resignations or not intending to fill positions (e.g., Trustee Aides). Personnel functions are supplemented by continuous recruitment, contracting, and temporary hires.

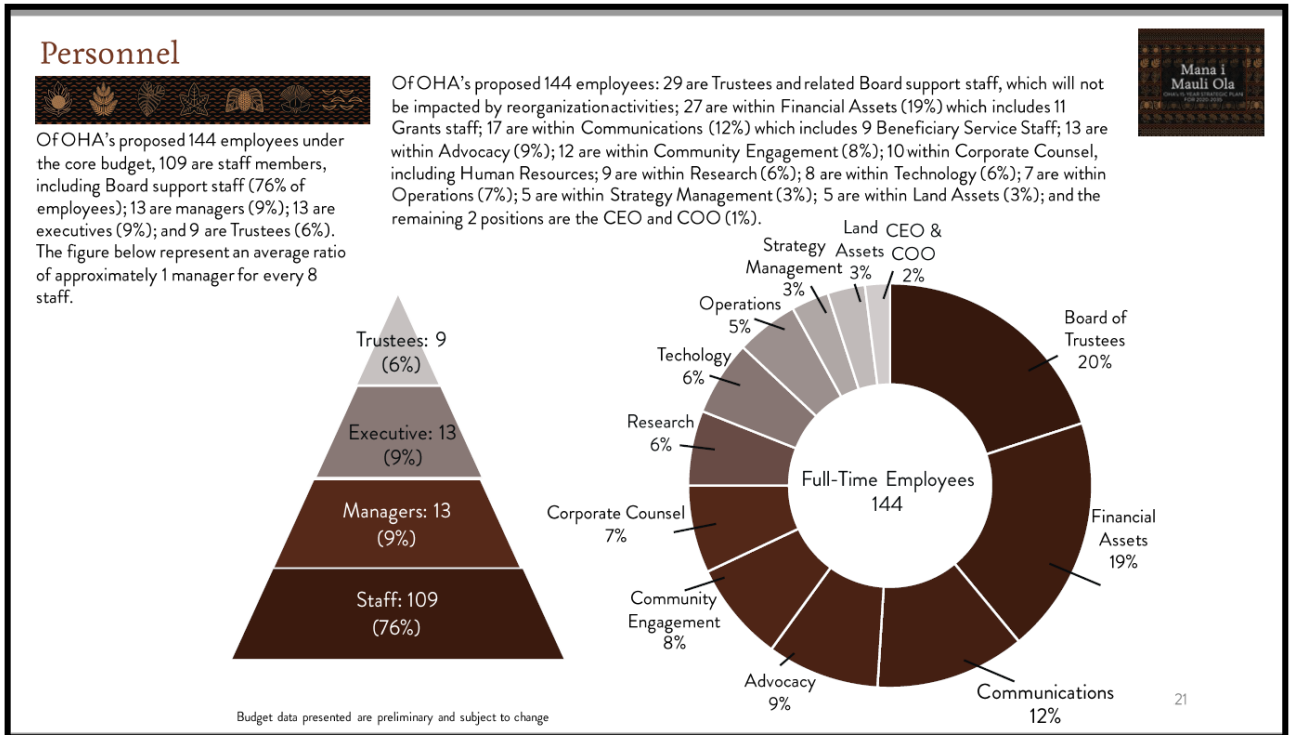


Figure 10. Positions by Organization Unit by Classification

5. **Status of Audits and Reviews.** In accordance with HRS Chapter §10-14.55, “The auditor shall conduct an audit of the office at least once every four years and shall submit a report on findings and recommendations to the governor and the legislature on or before the convening of the next immediate legislative session” (“Performance Audit”). The following is a status of the various audits and review currently in progress with the State Auditor:

- a. **2017 Performance Audit.** *Audit of the Office of Hawaiian Affairs, Report No. 18-03, published February 2018 (2017 Performance Audit)*

*Follow-Up on Recommendations from Report NO. 18-03, Audit of the Office of Hawaiian Affairs, Report No. 22-04, published March 2022 - Closed*

- b. **Competitive Grants Audit.** *Audit of the Office of Hawaiian Affairs’ Competitive Grants and Report on the Implementation of 2013 Audit Recommendations, Report No. 18-08, published June 2018*

*Follow-Up on Recommendations from Report No. 18-08, Audit of the Office of Hawaiian Affairs’ Competitive Grants and Report on the Implementation of 2013 Audit Recommendations, Report No. 21-10, published August 2021 - Closed*

- c. **Review of Special Funds, Revolving Funds, Trust Funds, and Trust Accounts.** As required by Section 23-12 of the Hawai'i Revised Statutes (HRS), and beginning in July 2021, the associated funds and accounts are currently under review by the State Auditor's office.

*Review of Special Funds, Revolving Funds, Trust Funds, and Trust Accounts of the Office of Hawaiian Affairs, Report No. 22-02, published February 2022 - Closed*

- d. **2021 Performance Audit.** Initiated in July 2021 by the State Auditor's office, the planning phase just ended with the issuance of the objectives for the engagement in December 2021. Fieldwork commenced in January 2022 and continued through July 2022, with information and responses provided to the State Auditor's office. As of December 2022, the OHA has not received any further communication from the State Auditor's office or an initial draft of the report.

In addition to audits and reviews conducted by the State Auditor's office, OHA completes annual financial audits with independent auditors, including the single audit of the Native Hawaiian Revolving Loan Fund. The financial audit of the Financial Statements for the fiscal year ended June 30, 2022 is in progress with N&K CPAs, Inc., independent auditor, and a projected completion date of March 2023.

All annual reports, audits, trustee protocol allowance reports and the OHA & LLCs Contract and Disbursement Review and Plante Moran reports are available at the OHA website: <https://www.oha.org/financials>

6. **Limited Liability Companies.** In May 2019, the Board of Trustees (BOT) approved the: 1) Amendment of the Operating Agreement of Hi'ilei Aloha LLC ("Hi'ilei") to permit persons who are not OHA executives to serve as managers (Managers) of Hi'ilei, and to ratify and approve the decision of the OHA executives who presently serve as Managers of Hi'ipaka to amend the Operating Agreement of Hi'ipaka permitting persons who are not OHA executives to serve as managers of Hi'ipaka; 2) Dissolution of Hi'ikualono; and 3) Dissolution of Ho'okele Pono, following the completion of the Department of Defense Procurement Technical Assistance Center grant to Ho'okipaipai, including the dissolution of Ho'okipaipai prior to the dissolution of Ho'okele Pono.

Administration tracked the completion of the dissolution, operational winddown, funding and reporting, and community-based, non-OHA executives Managers' recruitment and seating activities. New non-OHA executives as Managers were approved by the Board in February 2021 and began management of the remaining entities of Hi'ilei Aloha and Hi'ipaka, effective April 1, 2021.

Administration tracked the transition to community based, non-OHA executives as Managers, including continued and tracked the winddown activities from 2019, through COVID-19 2020 and 2021. Final separation activities were completed by August 2022 and the resultant Hi'ipaka (doing business as Waimea Valley) and its sole owner, Hi'ilei Aloha LLC remain as the intended limited liability companies.

- 7. Plante Moran – 38 Transactions Analysis.** As noted above, Act 29 (2021) appropriated general funds (FY2022) in the amount of \$200,000, for the following purpose as stated in *“SECTION 11. Provided that of the general funds appropriated for beneficiary advocacy (OHA175), the sum of \$200,000 for fiscal year 2021-2022 shall be expended to conduct or contract or a follow-up contract and disbursement review of the CLA – OHA & LLCs Contract and Disbursement Review – Report, dated December 4, 2019.”*

The subsequent October 2022 Plante Moran (“PM Report”), is a follow up review of the 38 CLA transactions identified for possible fraud, waste and abuse in the CliftonLarsonAllen (“CLA”) report entitled “OHA & LLC’s Contract and Disbursement Review” (“CLA Report”), dated December 4, 2019. OHA’s Administration supported the Board in its initial Ad-Hoc Committee work (September 2021) providing project management supports; assisted with the processes associated with RFP-BOT-2022-009, including RFP posting, and facilitation of the Board evaluation, awarding and contracting activities (October 2021-February 2022); and supported the Board’s monitoring of Contract 4262 (February 2022-October 2022). The 239 page PM Report cover can be found at Appendix G and is available on the OHA website under the Financial Transparency tab: <https://www.oha.org/wp-content/uploads/Plante-Moran-OHA-Transactions-Report-October-2022-WEB.pdf>

- 8. Hakuone (formerly known as Kaka’ako Makai).** In 2012, the state and OHA agreed to settle the 32-year past-due Public Land Trust revenue debt by conveying 30 acres of land on 10 parcels in Kaka’ako Makai, now known as Hakuone. The state’s own appraiser valued the land at approximately \$198 million, assuming a 400-foot height limit for bookend Parcels E and I, located along Ala Moana Boulevard. The reality is that the state conveyed parcels E and I to OHA with only a 200-foot height limit and prohibited residential uses. These inequitable conditions have reduced the true value of the 2012 “settlement”. Refer to Appendix I – Office of Hawaiian Affairs, Kaka’ako Makai Lands, November 2022, a presentation given at the Association of Hawaiian Civic Clubs annual convention in Seattle.

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**H. Public Land Trust – Act 226 (2022) – RELATING TO INCREASING THE PAYMENT AMOUNT FOR THE OFFICE OF HAWAIIAN AFFAIRS’ PRO RATA SHARE OF THE PUBLIC LAND TRUST**

The Office of Hawaiian Affairs (“OHA”) submitted a bill relating to increasing the Office of Hawaiian Affairs’ pro rata share of the public land trust (“PLT”) for introduction in the 2022 State Legislature that highlights the:

1. **Federal Trust Responsibility** to Native Hawaiians;
2. **State’s Responsibility for Holding Certain Lands in Public Trust** for five purposes, including the betterment of the conditions of native Hawaiians, as defined in the Hawaiian Homes Commission Act, 1920, as amended; and
3. **State’s Obligation to Convey a Pro-Rata Share of Income and Proceeds from the Public Land Trust** to the constitutionally created OHA.

OHA’s contractors completed financial reviews by testing FY 2012 and FY 2016 Act 178 (2006) reports for accuracy and completeness, investigating and identifying gaps in reported receipts and explained methods used by agencies to determine and report gross receipts.

Specifically in the 2016 financial review, beginning January 2017, N&K CPAs contacted agencies and provided each with an agency-specific PLT inventory report that lists the PLT parcels for that agency. N&K CPAs reviewed audited financial statements and revenue schedules for revenue sources on the agency’s PLT inventory report, reconciling audited financial statements and revenues scheduled with Act 178 (2006) report information.

The bill further:

1. **Computes** an increase in the annual pro-rata share of the Public Land Trust revenue amount to \$78,900,000; and then compares the amount to the Act 178 (2006)<sup>6</sup> interim measures amount of \$15,100,000.

PLT Revenue Sources	FY2016 Act 178 Gross Receipts	20% of Gross Receipts	Cumulative Share of Receipts
1. Historical Agreement	\$173,874,929	\$34,774,986	\$34,774,986
A. Receipts that State currently transfers to OHA, per Act 178 (2006) [e.g., lease rents, parking meters, public school use fees]			
B. State accounting errors			

<sup>6</sup> Related to accounting of receipts, “A single accounting will provide the Legislature, OHA, the general public, and even the state administration with a clearer financial picture of the public land trust”; SECTION 5 – DLNR, “with cooperation of any other agency that uses or manages public lands”, shall provide “an accounting of all receipts” from lands described in Admission Act section 5(f)



PLT Revenue Sources	FY2016 Act 178 Gross Receipts	20% of Gross Receipts	Cumulative Share of Receipts
<p>C. Inconsistent transfers</p> <p>D. Past Precedent  <b>Airports:</b> [e.g., landing fees, concessions, terminal and ground rent]; \$73,102,955 (FY2016 Act 178 gross receipts)/\$14,620,591 (20% of gross receipts)</p> <p>E. <b>Non-Patient Hospital Revenue:</b> [e.g., food sales, laundry services, employee housing rentals, clinical rent revenue]; \$1,683,181 (FY2016 Act 178 gross receipts)/\$361,751 (20% of gross receipts)</p>			
<p>2. No Historical Agreement--          -“Newly” Identified Sources [e.g., Made in Hawai’i trademark (NELHA); library fees for advanced services (DOE); offshore property management fees (DLNR-DOBOR); hunting receipts (DLNR-DOFAW).</p>	\$941,291	\$188,258	\$34,963,244
<p>3. Heeley revenue sources (hospital patient service fees, public housing revenue, interest)</p>	\$219,505,943	\$43,901,189	\$78,864,432 <u><b>\$78,900,000 rounded</b></u>

**Table 3. Annual Pro Rata Computation**

2. **Aggregates** the difference multiplied by the 10-year projected period (2013<sup>7</sup>-2022); (\$78,900,000 minus \$15,100,000 = \$63,800,000 x 10 = \$638,000,000), Figure 9.

Annual Amount	2013-2022 (10 Years)	Extended Amount	Description
\$78,900,000	10	\$789,000,000	Annual and accumulated amount based on 2015-2016 OHA initiated review
(\$15,100,000)	10	(151,000,000)	Act 178, Session Laws of Hawaii 2006, interim annual amount and accumulated amount
\$63,800,000	10	\$638,000,000	Annual and accumulated difference

**Table 4. Aggregated Difference Over 10 Year Period**

3. **Act 226 (2022) Outcomes.** As noted above, in June 2022, Governor Ige signed into law Act 226 which enacted the following three key elements from SB2021 SD1 HD2 CD1: 1) Established \$21,500,000 as OHA’s interim annual share of the income and proceeds of the public land trust beginning in fiscal year 2022-2023; 2) Appropriated \$64,000,000; and 3) Established a working group to determine the pro rata share of income and proceeds from the public land trust annually to the OHA. Refer to Section H for further discussion regarding the implementation of Act 226.

In July 2022, the Board: 1) Approved the inclusion of the interim annual share of the income and proceeds of the public land trust amount of \$21,500,000 in the biennium budgeting process in accordance with the Budget Management Policy beginning in fiscal year 2022-2023; 2) Invested the \$64,000,000 general revenues appropriation, for a portion of the income and proceeds from the public land trust, into the Native Hawaiian Trust Fund, consistent with the Investment Policy and related asset allocation; and 3) Activated planning and other activities in preparation for implementation of the working group further described in Section 3 of Act 226 (2022) in calendar year 2023.

4. **Carry-Forward Trust Holding Account.** The balance in the Carry-Forward Trust Holding Account<sup>8</sup> as of 6/30/2022 is \$35.2 million.

<sup>7</sup> In 2012, the State conveyed 30 acres of lands in Kaka’ako Makai to OHA, with a value of \$200,000,000, in settlement for back pro-rata public land trust revenues, hence the 2013 to 2022 prospective period referenced above.

<sup>8</sup> The aggregate amount of public land trust revenue transfers from all of the departments in excess of the quarterly amount of \$3,775,000 (\$15,100,000/4) is transferred to the Carry-Forward Trust Holding account.

# Appendix A

## 2023 Bill Submission – RELATING TO THE BUDGET OF THE OFFICE OF HAWAIIAN AFFAIRS



.B. NO.          

1 positions and a pound (#) sign for temporary full-time  
2 equivalent positions.

3        "Program ID" means the unique identifier for the specific  
4 program and consists of the abbreviation for the Office of  
5 Hawaiian Affairs (OHA) followed by the organization number for  
6 the program.

7                               **PART II. PROGRAM APPROPRIATIONS**

8        SECTION 3. APPROPRIATIONS. The following sums, or so much  
9 thereof as may be sufficient to accomplish the purposes and  
10 programs designated herein, are hereby appropriated or  
11 authorized from the means of financing specified to the Office  
12 of Hawaiian Affairs for the fiscal biennium beginning July 1,  
13 2023, and ending June 30, 2025. The total expenditures and the  
14 number of positions in each fiscal year of the biennium shall  
15 not exceed the sums and the numbers indicated for each fiscal  
16 year, except as provided elsewhere in this Act, or as provided  
17 by general law.

.B. NO.    

P R O G R A M   A P P R O P R I A T I O N S

ITEM NO.	PROG. ID	PROGRAM	EXPENDING AGENCY	APPROPRIATIONS			
				FISCAL YEAR	M O	FISCAL YEAR	M O
				2023-24	F	2024-25	F
1							
2		<b>Hawaiian Affairs</b>					
3							
4	1.	OHA150 - OFFICE OF THE TRUSTEES					
5					0.00*		0.00*
6					0.00#		0.00#
7		OPERATING	OHA	00,000A		00,000A	
8					0.00*		0.00*
9					0.00#		0.00#
10			OHA	000,000T		000,000T	
11							
12	2.	OHA160 - ADMINISTRATION					
13					0.00*		0.00*
14					0.00#		0.00#
15		OPERATING	OHA	0,000,000A		0,000,000A	
16					0.00*		0.00*
17					0.00#		0.00#
18			OHA	0,000,000T		0,000,000T	
19							
20	3.	OHA175 - BENEFICIARY ADVOCACY					
21					0.00*		0.00*
22					0.00#		0.00#
23		OPERATING	OHA	3,000,000A		3,000,000A	
24					0.00*		0.00*
25					0.00#		0.00#
26			OHA	3,000,000T		3,000,000T	

# .B. NO.

1                                   **PART III. PROGRAM PROVISIONS**

2           SECTION 4. Provided that the general fund appropriations  
3 in part II of this Act shall be expended by the Office of  
4 Hawaiian Affairs.

5           SECTION 5. Provided that of the funds appropriated for  
6 beneficiary advocacy (OHA175), the sum of \$500,000 in general  
7 funds and \$500,000 in trust funds for fiscal year 2023-2024 and  
8 the same sums for fiscal year 2024-2025 shall be expended for  
9 office of Hawaiian affairs beneficiaries for occupancy ready  
10 housing needs.

11          SECTION 6. Provided that of the funds appropriated for  
12 beneficiary advocacy (OHA175), the sum of \$415,000 in general  
13 funds and \$415,000 in trust funds for fiscal year 2023-2024 and  
14 the same sums for fiscal year 2024-2025 shall be expended to  
15 provide for social services, including referral services and  
16 case management, to at-risk Office of Hawaiian Affairs  
17 beneficiaries to immediately address unexpected crises; provided  
18 further that program activities shall be designed with an  
19 overall objective to provide financial assistance to improve  
20 stability during emergency situations; and provided further that  
21 notwithstanding section 10-17(e), Hawaii Revised Statutes, any  
22 funds expended for the purpose of this section shall be in

# .B. NO.

1 accordance with chapter 103D or 103F, Hawaii Revised Statutes,  
2 or a competitive grants process, as appropriate.

3         SECTION 7. Provided that of the funds appropriated for  
4 beneficiary advocacy (OHA175), the sum of \$615,000 in general  
5 funds and \$615,000 in trust funds for fiscal year 2023-2024 and  
6 the same sums for fiscal year 2024-2025 shall be expended to  
7 provide for educational improvement programs for Native Hawaiian  
8 students; provided further that program activities shall be  
9 designed to help Native Hawaiian students prepare for post  
10 secondary education and economic stability pursuits to support  
11 families and communities; and provided further that  
12 notwithstanding section 10-17(e), Hawaii Revised Statutes, any  
13 expenditures for the purposes of this section shall be in  
14 accordance with chapter 103D or 103F, Hawaii Revised Statutes,  
15 or a competitive grants process, as appropriate.

16         SECTION 8. Provided that of the funds appropriated for  
17 beneficiary advocacy (OHA175), the sum of \$600,000 in general  
18 funds and \$600,000 in trust funds for fiscal year 2023-2024 and  
19 the same sums for fiscal year 2024-2025 shall be expended to  
20 provide for legal services and legal representation to Office of  
21 Hawaiian Affairs beneficiaries for:

22             (1) The assertion and defense of quiet title actions;



.B. NO.    

- 1           (2) Assistance with ahupua‘a and kuleana tenant rights,  
2                   including rights of access and rights to water;
- 3           (3) Land title assistance, including review of title and  
4                   genealogy;
- 5           (4) Preservation of traditional and customary practices;
- 6           (5) Protection of culturally significant places, including  
7                   iwi kūpuna protections;
- 8           (6) Preservation of Native Hawaiian land trust  
9                   entitlements;
- 10          (7) Home ownership retention strategies for Native  
11                   Hawaiians;
- 12          (8) Family law related matters including adoption, foster  
13                   care, child welfare, incarcerated individuals,  
14                   guardianship, elder care and similar matters;

15 Provided further that, notwithstanding section 10-17(e), Hawaii  
16 Revised Statutes, any funds expended for the purposes of this  
17 section shall be made in accordance with chapter 103D or 103F,  
18 Hawaii Revised Statutes, as appropriate.

19           SECTION 9. Provided that of the funds appropriated for  
20 beneficiary advocacy (OHA175), the sum of \$500,000 in general  
21 funds and \$500,000 in trust funds for fiscal year 2023-2024 and  
22 the same sums for fiscal year 2024-2025 shall be expended for

# .B. NO.

1 protections of 'āina (land and water), including climate change  
2 adaptation and mitigation strategies and practices.

3 SECTION 10. Provided that of the funds appropriated for  
4 beneficiary advocacy (OHA175), the sum of \$370,000 in general  
5 funds and \$370,000 in trust funds for fiscal year 2023-2024 and  
6 the same sums for fiscal year 2024-2025 shall be expended for  
7 'ohana (families and communities) economic stability.

## 8 **PART IV. MISCELLANEOUS PROVISIONS AND EFFECTIVE DATE**

9 SECTION 11. Provided that, whenever necessary, the board  
10 of trustees of the Office of Hawaiian Affairs or the board's  
11 designee may transfer sufficient funds and positions between  
12 programs for operating purposes; provided further that these  
13 transfers shall be consistent with legislative intent; and  
14 provided further that the Office of Hawaiian Affairs shall  
15 submit a report to the legislature of all uses of this authority  
16 for the previous twelve-month period from December 1 to November  
17 30, no later than twenty days prior to the regular sessions of  
18 2024 and 2025.

19 SECTION 12. If any portion of this Act or its application  
20 to any person, entity, or circumstance is held to be invalid for  
21 any reason, the legislature declares that the remainder of the  
22 Act and each-and-every other provision thereof shall not be

**.B. NO.**           

1 affected thereby. If any portion of a specific appropriation is  
2 held to be invalid for any reason, the remaining portion shall  
3 be expended to fulfill the objective of such appropriation to  
4 the extent possible.

5 SECTION 13. In the event manifest clerical, typographical,  
6 or other mechanical errors are found in this Act, the board of  
7 trustees of the Office of Hawaiian Affairs is authorized to  
8 correct these errors. All changes made pursuant to this section  
9 shall be reported to the legislature at its next session.

10 SECTION 14. This Act shall take effect on July 1, 2023.

11

INTRODUCED BY: \_\_\_\_\_

BY REQUEST

\_\_\_\_\_.B. NO.\_\_\_\_\_

**Report Title:**

[**Click** here and type **Report Title** (1 line limit)]

**Description:**

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*The summary description of legislation appearing on this page is for informational purposes only and is not legislation or evidence of legislative intent.*

# Appendix B

## Mana i Maui Ola Strategic Plan 2035

# Mana i Maui Ola

## OHA's 15-YEAR STRATEGIC PLAN FOR 2020-2035

OHA's Strategic Plan "Mana i Maui Ola" (Strength to Wellbeing) includes three foundations: 'Ohana (family), Mo'omeheu (culture), and 'Āina (land and water). OHA recognizes these foundations have the power to affect the wellbeing of Native Hawaiians. Therefore, they are woven into OHA's plans to affect change in the areas of education, health, housing, and economics. These four directions will be used to guide OHA's work to better the conditions of Native Hawaiians. Over the next 15 years, OHA will be implementing strategies, aligned with our foundations and directions to achieve our envisioned outcomes for a thriving and abundant lāhui.



## OUR 3 FOUNDATIONS



### 'Ohana | 'Ulu

'Ohana is represented here with 'ulu (breadfruit). According to mo'olelo, the god Kū fell in love with a human woman. He married her and together they raised a family until a time of terrible famine. Driven by love for his 'ohana, Kū transformed himself into an 'ulu tree so they would not starve. That was the first 'ulu tree; all 'ulu trees are descended from Kū.



### Mo'omeheu | Palapalai

In the time before, our kūpuna had no written language. The 'ike and mo'olelo of our people were passed from one generation to the next through oli and hula. Palapalai was one of the plants kapu to Laka, the goddess of hula. Palapalai is often worn by dancers or used to adorn the hula kuahu (altar). Because of this connection, it has been chosen to represent culture.



### 'Āina | Kalo

According to tradition, Wākea and Ho'ohōkūkalani had a stillborn son they named Hāloa. The grieving parents buried their child and from that spot the first kalo plant began to grow. They later had another, healthy boy, who they also named Hāloa. He became the first Hawaiian, and thus, kalo is considered the older brother of the Hawaiian people. Today, Kalo has become a modern symbol of mālama 'āina.

## OUR 4 DIRECTIONS



### Educational Pathways | Kukui

In traditional times, the oily kernal of the kukui nut was used for lamps. Indeed, "kukui" also means lamp, light or torch, and because of this, the kukui tree has long been a symbol of enlightenment. Education is a path towards enlightenment; acquiring 'ike (knowledge) and no'eau (wisdom), learning to think critically and to apply what is learned – these skills are critical to moving our lāhui forward.



### Health Outcomes | Noni

Noni is a "canoe plant" brought to Hawai'i from the South Pacific by the earliest Hawaiian voyagers specifically for its numerous medicinal properties. While its taste and smell are rather unpleasant, noni was known to boost the immune system and to purify the blood. It was used to treat diabetes, heart disease, high blood pressure, and as a poultice to treat various skin diseases.



### Quality Housing | 'Ōhia

As beautiful as they are strong, 'ōhia lehua are the first trees able to grow on barren lava fields and re-claim the land. It is a dominant tree of the Hawaiian rainforest, and considered a manifestation of the god, Kū. While the tree's delicate blossoms and liko (leaf buds) are used to fashion lei, 'ōhia wood is exceptionally hard and was used traditionally for many purposes, such as framing houses.



### Economic Stability | Wai

Pure, fresh water (wai) is the essence and source of all life. The word "wai" also means to retain, leave or earn, while "waiwai" means wealth, emphasizing the value of water. Our kūpuna understood that this precious resource was a gift to be carefully managed and shared. Wai flowed down from upland rainforests, nourishing the lands below which led to abundance and prosperity that enriched the entire community.

# Mana i Maui Ola

OHA's 15-YEAR STRATEGIC PLAN FOR 2020-2035



## Our Mission

To mālama Hawai'i's people and environmental resources, and OHA's assets, toward ensuring the perpetuation of the culture, the enhancement of life-style and the protection of entitlements of Native Hawaiians, while enabling the building of a strong and healthy Hawaiian people and lāhui, recognized nationally and internationally.

## Our Vision

### *Ho'oulu Lāhui Aloha*

OHA's vision statement (To Raise a Beloved Lāhui) blends the thoughts and leadership of both King Kalākaua and his sister, Queen Lili'uokalani. Both faced tumultuous times as we do today, and met their challenges head on.

"Ho'oulu Lāhui" was King Kalākaua's motto. Aloha expresses the high values of Queen Lili'uokalani.

## Our Roles



### ADVOCATE

As an advocate, OHA speaks, writes and acts in favor of effective policy development, including changing of laws and strengthening implementation of policies and practices that impact the foundations and directions outlined in the organization's strategic plan. Advocates also monitor and evaluate policies and garner public support for causes through community outreach efforts, identifying potentially harmful or ineffective policies and laws, and supporting initiatives that enable communities to advocate to improve the conditions for Native Hawaiians.

### RESEARCHER

As a researcher, OHA serves by gathering, compiling and analyzing data that identifies issues important to the Native Hawaiian community including policies and practices, making observations and recommendations, informing the organization and communities' advocacy efforts, evaluating policies, programs and practices, providing and ensuring that the actions and initiatives undertaken inform actions by OHA, beneficiaries and communities as a whole.

### COMMUNITY ENGAGER

As a community engager, OHA works collaboratively with the Native Hawaiian community and general public by sharing information through multiple communication channels that connect the organization with beneficiaries, communities and networks.

### ASSET MANAGER

As an asset manager, OHA makes mindful investment decisions that help maximize the value of the organization's portfolio. These fiduciary duties and responsibilities include managing financial, land, and community property assets prudently, and preserving and perpetuating legacy land holdings.





*Direction:*  
**Educational Pathways**

*Directional Outcome:*

**STRENGTHENED AND INTEGRATED COMMUNITY, CULTURE-BASED LEARNING SYSTEMS**

**STRATEGY 1:** Support development and use of educational resources for all Hawaiian lifelong learners in schools, communities and 'ohana.

**STRATEGIC OUTCOMES:**

- 1.1. Increase number or percent of Native Hawaiian students who enter educational systems ready to learn;
- 1.2. Increase number or percent of Native Hawaiian students graduating high school who are college, career, and community ready; and
- 1.3. Increase number of Native Hawaiians engaged in traditional learning systems (e.g., hale, hālau, mua, hale pe'a) that re-establish/maintain strong cultural foundations and identity.

**STRATEGY 2:** Support education through Hawaiian language medium and focused Charter Schools.

**STRATEGIC OUTCOMES:**

- 2.1. Adequately resource Hawaiian Focused Charter Schools and Hawaiian-medium schools, including funding of transportation, special education, facilities, meals, and availability of qualified teachers;
- 2.2. Increase availability of Hawaiian Focused Charter Schools and Hawaiian-medium schools; and
- 2.3. Establish a Native Hawaiian Charter School and Hawaiian-medium learning system.



*Direction:*  
**Health Outcomes**

*Directional Outcome:*

**STRENGTHENED 'ŌIWI (CULTURAL IDENTITY), EA (SELF-GOVERNANCE), 'ĀINA MOMONA (HEALTHY LANDS AND PEOPLE), PILINA (RELATIONSHIPS), WAIWAI (SHARED WEALTH), KE AKUA MANA (SPIRITUALITY)**

**STRATEGY 3:** Advance policies, programs, and practices that strengthen Hawaiian wellbeing, including physical, spiritual, mental and emotional health.

**STRATEGIC OUTCOMES:**

- 3.1. Increase availability of and access to quality, culturally based, and culturally adapted prevention and treatment interventions in 'ohana, schools, and communities; (E Ola Mau a Mau)
- 3.2. Establish a fully functional, high-quality, culturally adapted, primary Native Hawaiian Health System which coordinates effective wellness activities/ programs; (E Ola Mau a Mau)
- 3.3. Decrease the number / percent of Native Hawaiians in jails and prison; and
- 3.4. Empower communities to take care of iwi kūpuna.

**STRATEGY 4:** Advance policies, programs and practices that strengthen the health of the 'āina and mo'omeheu.

**STRATEGIC OUTCOMES:**

- 4.1. Preservation and perpetuation of Hawaiian language, culture, traditions, identity and sense of lāhui;
- 4.2. Increase community stewardship of Hawai'i's natural and cultural resources that foster connection to 'āina, 'ohana, and communities; and
- 4.3. Increase restoration of Native Hawaiian cultural sites, landscapes, kulāiwi and traditional food systems.



*Direction:*  
**Quality Housing**

*Direction:*  
**Economic Stability**

*Directional Outcome:*

**STRENGTHENED CAPABILITY FOR ‘OHANA TO MEET LIVING NEEDS, INCLUDING HOUSING; STRENGTHENED EFFECTIVE IMPLEMENTATION OF THE HAWAIIAN HOMES COMMISSION ACT**

**STRATEGY 5:** Advance policies, programs and practices that strengthen Hawaiian resource management knowledge and skills to meet the housing needs of their ‘ohana.

**STRATEGIC OUTCOMES:**

- 5.1. Increase numbers/percent of Native Hawaiians who rent housing that meets their ‘ohana’s financial and wellbeing needs;
- 5.2. Increase numbers/percent of Native Hawaiians who own housing that meets their ‘ohana’s financial and wellbeing needs; and
- 5.3. Increase safety, stability, social support networks, and cultural connection in Native Hawaiian communities.

**STRATEGY 6:** Support implementation of the Hawaiian Homes Commission Act and other efforts to meet the housing needs of ‘ohana.

**STRATEGIC OUTCOMES:**

- 6.1. Increase affordable non-traditional housing options (e.g., accessory dwelling units/tiny houses, large multi-generational lots or homes) in communities of ‘ohana’s choice;
- 6.2. Increase housing unit supply on Hawaiian Home Lands; and
- 6.3. Decrease rate of Native Hawaiian ‘ohana out of state migration.

*Directional Outcome:*

**STRENGTHENED CAPABILITY FOR ‘OHANA TO MEET LIVING NEEDS, INCLUDING HOUSING; STRENGTHENED EFFECTIVE IMPLEMENTATION OF THE HAWAIIAN HOMES COMMISSION ACT**

**STRATEGY 7:** Advance policies, programs and practices that strengthen ‘ohana’s ability to pursue multiple pathways toward economic stability.

**STRATEGIC OUTCOMES:**

- 7.1. Increase number/percent of Native Hawaiian ‘ohana who are able to provide high-quality keiki and kūpuna care;
- 7.2. Increase access to capital and credit for community strengthening Native Hawaiian businesses and individuals;
- 7.3. Increase number of Native Hawaiian ‘ohana who are resource stable (e.g., financial, subsistence, other); and
- 7.4. Increase Native Hawaiian employment rate.

**STRATEGY 8:** Cultivate economic development in and for Hawaiian communities.

**STRATEGIC OUTCOMES:**

- 8.1. Increase the number of successful, community strengthening Native Hawaiian-owned businesses;
- 8.2. Establish new markets for Native Hawaiian products (e.g., kalo, loko i’ā grown fish) that can provide Native Hawaiian producers a livable wage; and
- 8.3. Establish and operationalize an Indigenous economic system consistent with Native Hawaiian knowledge, culture, values, and practices.



*Makakoho Hikiāloa:*  
**‘Ike Na‘auao**

*Makakoho Hikiāloa:*  
**Nā Hopena Olakino**

*Hopena Makakoho:*

**HO‘OIKAKA ‘IA NĀ PAPAĦANA  
KAIĀULU NONIAKAHI A MAULI  
OLA HAWAI‘I**

**KA‘AKĀLAI 1:** E kāko‘o i ka ho‘omōhala a ho‘ohana ‘ia ‘ana o nā kumuwaiwai a‘oa‘o no nā Kānaka Maoli a pau e ‘imi ‘ike hikiāpuaaneane nei ma nā kula, nā kaiāulu, a me ka ‘ohana.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 1.1. Ho‘onui ‘ia ka heluna a i ‘ole ka pākēneka o nā haumāna Kānaka Maoli komo ma nā papahana ho‘ona‘auao me ka mākaukau e a‘o;
- 1.2. Ho‘onui ‘ia ka heluna a i ‘ole ka pākēneka o nā haumāna Kānaka Maoli puka kula mai ke kula ki‘eki‘e i mākaukau no ke komo ‘ana i ke kula nui, i nā ‘oihana, a me nā hana kōkua kaiāulu; a
- 1.3. Ho‘onui ‘ia ka heluna o nā Kānaka Maoli komo ma nā papahana ‘ike ku‘una (e.g., hale, hālau, mua, hale pe‘a) i mea e pa‘a hou/mau ai nā kahua mo‘omeheu/ka mau li lāhui.

**KA‘AKĀLAI 2:** E kāko‘o i ka ho‘ona‘auao ma o nā Kula Kaia‘ōlelo-Kaiapuni Hawai‘i a me nā Kula Ho‘āmana Hawai‘i.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 2.1. Lako pono ‘ia nā Kula Kaia‘ōlelo-Kaiapuni Hawai‘i a me nā Kula Ho‘āmana Hawai‘i, i ke kālā alakau, ka ho‘ona‘auao haumāna kīnānā, nā pono lako, nā ‘aina, a me ka loa‘a o nā kumu laikini ‘ia;
- 2.2. Ho‘onui ‘ia ka loa‘a o nā Kula Kaia‘ōlelo-Kaiapuni Hawai‘i a me nā Kula Ho‘āmana Hawai‘i; a
- 2.3. Ho‘okahua ‘ia kekahi ‘ōnaehana Papahana Ho‘ona‘auao Kaia‘ōlelo-Kaiapuni Hawai‘i a me nā Kula Ho‘āmana Hawai‘i.

*Hopena Makakoho:*

**HO‘OIKAIKA ‘IA KA MAULI HAWAI‘I, KE  
EA HOME LULA, KA ‘ĀINA MOMONA A ME  
KE OLAKINO O KĀNAKA, KA PILINA, KA  
WAIWAI, A ME KA PILI ‘UHANE.**

**KA‘AKĀLAI 3:** E ho‘one‘emua i nā kulekele, nā polokalamu, a me nā ka‘ina hana ho‘oikaika mau li ola kānaka Hawai‘i, e la‘a me ke ola kino, ka pili ‘uhane, ke ola pono o ka no‘ono‘o, a me ke ola pono o ka na‘au.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 3.1. Ho‘onui ‘ia ma nā ‘ohana, nā kula, a me nā kaiāulu, ka loa‘a a me ke komo ‘ana o nā papahana kahapale kāohi a lapa‘au kūlana ki‘eki‘e, i hakuloli ‘ia a kumu mai nō ma loko o ka mo‘omeheu Hawai‘i, ma nā ‘ohana, nā kula, a me nā kaiāulu; (E Ola Mau a Mau)
- 3.2. Ho‘okumu ‘ia he ‘Ōnaehana Olakino Kānaka Maoli holopono, kūlana ki‘eki‘e, i hakuloli ‘ia a kū i ka mo‘omeheu Hawai‘i e ho‘olauka‘i ai i nā hana a me nā polokalamu mau li ola i kūle‘a; (E Ola Mau a Mau)
- 3.3. Hō‘emi ‘ia ka heluna / pākēneka o nā Kānaka Maoli ma nā hale pa‘ahao; a
- 3.4. Ho‘āmana ‘ia nā kaiāulu e mālama i nā iwi kūpuna.

**KA‘AKĀLAI 4:** E ho‘one‘emua i nā kulekele, nā polokalamu, a me nā ka‘ina hana ho‘oikaika i ke ea o ka ‘aina a me ke ola o ka mo‘omeheu Hawai‘i.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 4.1. Ka mālama a ho‘omau ‘ia o ka ‘ōlelo Hawai‘i, ka mo‘omeheu, nā ‘ike ku‘una, ka piko‘u a me ka mau li lāhui;
- 4.2. Ho‘onui ‘ia ko ke kaiāulu mālama ‘ana i ka ‘aina a me nā wahi kūpuna e kahukahu ana i ka pilina ‘aina, ‘ohana, a me ke kaiāulu; a
- 4.3. Ho‘onui ‘ia ka ho‘iho‘i hou ‘ana i nā wahi pana, nā wahi kūpuna, nā kulāiwi, a me nā ‘ōnaehana mea‘ai kahiko a i ke kūlana mua.



Makakoho Hikiāloa:  
**Hale Kūlana Maika‘i**

Makakoho Hikiāloa:  
**Kālaiho‘okele Waiwai Pa‘a Loa**

*Hopena Makakoho:*

**HO‘OIKAIKA ‘IA KA HIKI I NĀ ‘OHANA KE NOHO ULAKOLAKO, ME KA LOA‘A O KA HALE; HO‘OIKAIKA ‘IA KA HOLOPONO ‘ANA O KA HHCA**

**KA‘AKĀLAI 5:** E ho‘one‘emua i nā kulekele, nā polokalamu, a me nā ka‘ina hana ho‘oikaika i ka ‘ike ho‘okele kumuwaiwai a nā Kānaka Maoli, a me nā mākau e lako ai ka hale a me nā pono no kā lākou ‘ohana.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 5.1. Ho‘onui ‘ia ka heluna/ pākēneka o nā Kānaka Maoli e ho‘olimalima nei i nā hale i kūpono no ko lākou nohona;
- 5.2. Ho‘onui ‘ia ka heluna/pākēneka o nā Kānaka Maoli ‘ona i ka hale i kūpono no ko lākou nohona; a
- 5.3. Ho‘onui ‘ia ka palekana, ke kūpa‘a, ka pilina kānaka, a me ka pilina mo‘omeheu i loko o nā kaiāulu Kānaka Maoli.

**KA‘AKĀLAI 6:** E kāko‘o i ke kō o ke Kānāwai Komisina ‘Āina Ho‘opulapula a me nā papahana ‘ē a‘e e noke nei i ka ho‘olako pono i nā ‘ohana.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 6.1. Ho‘onui ‘ia nā koho hale ma‘amau ‘ole (e.g., ADUs/hale li‘ili‘i, nā kauhale a i ‘ole nā hale nui) ma nā kaiāulu i koho ‘ia e ka ‘ohana;
- 6.2. Ho‘onui ‘ia ka heluna o nā hale ma nā ‘Āina Ho‘opulapula; a
- 6.3. Hō‘emi ‘ia ka heluna o nā ‘ohana Kānaka Maoli pukane‘e aku ma waho o ka moku‘āina.

*Hopena Makakoho:*

**HO‘OIKAIKA ‘IA KA HIKI I NĀ ‘OHANA KE NOHO ULAKOLAKO, ME KA LOA‘A O KA HALE; HO‘OIKAIKA ‘IA KA HOLOPONO ‘ANA O KA HHCA**

**KA‘AKĀLAI 7:** E ho‘one‘emua i nā kulekele, nā polokalamu, a me nā ka‘ina hana e ho‘oikaika ana i ka hiki i nā ‘ohana Kānaka Maoli ke koho i nā ala kūpono e pa‘a loa ai ke kālaiho‘okele waiwai.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 7.1. Ho‘onui ‘ia ka heluna / pākēneka o nā ‘ohana Kānaka Maoli i hiki ke hai i kahu mālama (keiki a kūpuna) kūlana ki‘eki‘e;
- 7.2. Ho‘onui i ka loa‘a ma‘alahi mai i nā ‘oihana a Kānaka Maoli ho‘oikaika kaiāulu ke ahu kāloa‘a a kumu hō‘ai‘e;
- 7.3. Ho‘onui i ka heluna o nā ‘ohana Kānaka Maoli i pa‘a loa kā lākou mau kumuwaiwai (e.g., ke kālā, ka mea‘ai, a pēlā aku); a
- 7.4. Ho‘onui ‘ia ka heluna hana o nā Kānaka Maoli.

**KA‘AKĀLAI 8:** Ho‘oulu ‘ia ka ho‘omohala waiwai no/ma loko o nā kaiāulu Kānaka Maoli.

**HOPENA KA‘AKĀLAI HIKIĀLOA:**

- 8.1. Ho‘onui ‘ia ka heluna o nā ‘oihana ‘ona ‘ia e nā Kānaka Maoli e ho‘oikaika ana i ke kaiāulu i kule‘a;
- 8.2. Ho‘okumu ‘ia nā hokona hou no nā huahana Hawai‘i (e.g., e la‘a me ke kalo, i‘a i hānai ‘ia ma ka loko i‘a, a pēlā aku) i lako pono ai nā kānaka i hana i ke kālā no ka nohona; a
- 8.3. Ho‘okumu ‘ia a holo pono ‘ia he ‘ōnaehana ho‘okele waiwai i kūlike i ka ‘ike, ka mo‘omeheu, ka loina, a me nā hana a ka po‘e Kānaka Maoli.

## ABOUT THE ARTWORK

Upland rain provides life-giving water that sustains the ‘āina, mauka to makai. Captured in the watershed of mauka rainforests, the wai flows down into lush valleys and onto vast agricultural plains, touching and nourishing all within the ahupua‘a as it journeys to the sea. The artwork for OHA’s new strategic plan reflects this journey, with each element representing a foundational or directional aspect of the plan as we move collectively toward a more vibrant future.



### NELSON MAKUA



Nelson Makuā has been an artist for nearly 40 years. Although classically trained, he has focused on digital art for over 20 years. Nelson specializes in image development and logo design and has clients in Hawai‘i, on the continent and in Japan. Nelson’s accolades include a Pele Award for best illustration from the Hawai‘i Advertising Federation for his 2008 Merrie Monarch Festival poster design, and two Nā Hōkū Hanohano awards for best graphic design. He co-owns Nā Mākuā Original Hawaiian Designs with his son, Kainoa. Nelson lives with his ‘ohana in Puna on Hawai‘i Island.

Appendix C

2022 OHA  
Annual Report

# 2022 Office of Hawaiian Affairs Annual Report

A Spirit of Lōkahi

He waiwai nui ka lōkahi  
Unity is a precious possession

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## About OHA

### Our Mission

To mālama Hawai‘i’s people and environmental resources, and OHA’s assets, toward ensuring the perpetuation of the culture, the enhancement of lifestyle and the protection of entitlements of Native Hawaiians, while enabling the building of a strong and healthy Hawaiian people and lāhui, recognized nationally and internationally.

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OHA’s vision statement (To Raise a Beloved Lāhui) blends the thoughts and leadership of both King Kalākaua and his sister, Queen Lili‘uokalani. Both faced tumultuous times as we do today, and met their challenges head on.

“Ho‘oulu Lāhui” was King Kalākaua’s motto. Aloha expresses the high values of Queen Lili‘uokalani.



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OHA believes building connections to ‘ohana (family), mo‘omeheu (culture) and ‘āina (land and water) is very important. As we increase these foundational strengths, we increase our mana, and ability to create greater wellbeing in other areas of our lives, such as education, health, housing and economic stability.



## Messages from the Chair & the CEO



### Welina me ke aloha.

It is my honor to present the Annual Report for the Office of Hawaiian Affairs (OHA), encompassing the activities of the agency from July 1, 2021, through June 30, 2022.

From the moment I was elected board chair in December 2020, we have emphasized a message of lōkahi, and this fiscal year we are pleased to report multiple examples of organizations working in unity to help raise a beloved lāhui.

OHA was proud to serve on both the Native Hawaiian Pacific Islander COVID-19 Collective Awareness and Prevention Campaign and the Native Hawaiian Pacific Islander Hawai'i COVID-19 Response, Recovery and Resilience Team, commonly known as NHPI 3R, with Papa Ola Lōkahi serving as the backbone for the organization.

In April 2022, we announced the availability of some \$15.1 million in grant solicitations to support 12 granting categories intended to help Hawaiians. Grants and sponsorships comprise most of our budget expenditures; it is our belief that supporting outstanding community nonprofits already serving our beneficiaries compounds our impact in the Hawaiian community.

Solicitations cover community grants to strengthen 'ohana, mo'omeheu and 'āina connections, and increase supports to Native Hawaiians for education, health, housing and economic stability. OHA's 'Ahahui Grant Program has doubled its available budget to support sponsorship of community events. Additionally, grant applications will now be reviewed quarterly instead of every six months in order to accommodate community needs.

We have reorganized and streamlined our operations, so that all funds received from the Public Land Trust can go directly to our beneficiaries and support them.

Perhaps the highlight of the fiscal year was the June 27, 2022, signing of Act 226 by Gov. David Ige. Act 226 establishes \$21.5 million as our new interim annual share of the proceeds of the Public Land Trust beginning in fiscal year 2023; appropriated \$64 million to OHA; and establishes a working group to determine the pro rata share of the proceeds from the Public Land Trust due annually to OHA.

We mahalo the governor, our legislators and, most of all, our beneficiaries for their support in helping us to move forward together on this long-debated topic. We acknowledged and were grateful for the more than 80 pieces of testimony from local organizations and citizens that echoed OHA's sentiments.

We are committed to participating in the working group and together finding a pono resolution to this issue that is fair and just for our people. This was not a bill for OHA – this is a bill for all Hawaiians. Act 226 represents important progress and is a win for our lāhui.

It is our duty as trustees under the Hawai'i State Constitution to "better the conditions of Native Hawaiians." It is a kuleana we gladly accept. But it is only through working together with all agencies and organizations that serve the Native Hawaiian people with common goals and objectives that we can truly make a difference for our beneficiaries.

We are all striving to Ho'oulu Lāhui Aloha – raise a beloved lāhui.

Me ke aloha pumehana,

Carmen "Hulu" Lindsey  
Chair | Trustee, Maui



### Aloha mai kākou.

As I reflect on the Office of Hawaiian Affairs' (OHA) accomplishments over the past fiscal year, there is no doubt that OHA's efforts to work in unity with other Native Hawaiian-serving organizations and the Native Hawaiian community in general has been a key element of our success.

Examples include OHA's incremental, hard-won, victory to secure a greater share of the state's annual Public Land Trust (PLT) revenues owed to Native Hawaiians; OHA's collaboration on COVID-19 campaigns pointing our people

to resources for testing, vaccination and prevention; and sharing one of our main communications platforms, our monthly *Ka Wai Ola* newspaper, to give voice, via regular columns, and kāko'o (support) the efforts of our Native Hawaiian communities.

We are proud of these achievements and are committed to continue cultivating this precious lōkahi within our lāhui. However, achieving lōkahi is easier said than done.

We are an extremely diverse people. We have different upbringings, life experiences, spiritual beliefs, cultural knowledge, strengths, gifts, and political views. Our educational backgrounds, training and skills vary. We are represented at all economic levels. And half of us now live outside of our kulāwi (native homeland).

It would be naive to expect our lāhui to agree on everything. And so lōkahi must be developed with intentionality as we focus together on bettering the conditions of our people.

Despite good intentions and efforts, conflict is inevitable. There will be different priorities to sort through and solutions to vet. And no one can control the external environment that we must all function within – or the actions of others. Lōkahi is the goal, but the journey is not easy and sometimes discouraging.

Public displays of unity are important, but unless they are grounded in genuine aloha, our efforts will fall short. Differences aside, we must come together as a lāhui to realize the kind of holistic, systemic, intergenerational change that will propel our people forward to make pono (right) the things that are hewa (wrong) in critical areas like education, health, housing and economic stability. There is no time to waste.

Lōkahi requires active listening, open mindedness, mutual respect and humility. Personal agendas and fragile egos must be put aside as we focus on that which unites, rather than divides us. That is why our strategic plan is founded upon three things all Native Hawaiians can agree on: 'ohana, mo'omeheu (culture), and 'āina (our land and ocean).

When our very foundation is threatened – and make no mistake, it is – Native Hawaiians must come together in lōkahi. OHA's role is to lead that charge because our families, our culture and our lands are worth fighting for, worth preserving, worth dying for.

When the obstacles we face seem overwhelming, and the criticism of our efforts are exhausting, I rely on pule (prayer) and my faith in Ke Akua (God) to carry me through and forward. We need to keep focused on the end game and not on the individual players.

E ho'omau pū kākou i ka lōkahi.

Sylvia M. Hussey, Ed.D.  
CEO | Ka Pūhāna

# Board of Trustees



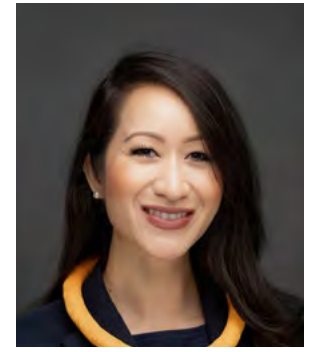
**Carmen "Hulu" Lindsey**  
Chair  
Trustee | Maui



**Leina'ala Ahu Isa, Ph.D.**  
Vice Chair  
Trustee | At-Large



**Dan Ahuna**  
Trustee | Kaua'i & Ni'i'hau



**Kalethikina Akaka**  
Trustee | O'ahu



**William Keli'i Akina, Ph.D.**  
Trustee | At-Large



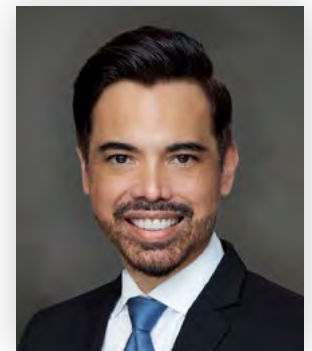
**Luana Alapa**  
Trustee | Moloka'i & Lāna'i



**Brendon Kalei'aina Lee**  
Trustee | At-Large



**Mililani B. Trask**  
Trustee | Hawai'i Island



**John D. Waihe'e IV**  
Trustee | At-Large

The Board of Trustees approves the policy positions of OHA and manages the Native Hawaiian Trust Fund. The Executive Team carries out the policies set by the Board of Trustees and oversees operations and staff who fulfill OHA's role as an advocate, researcher, community engager, and resource manager.

## Executive Team

(AS OF JUNE 30, 2022)



**Sylvia M. Hussey, Ed.D.**  
Ka Pouhana  
Chief Executive Officer



**Casey K. Brown**  
Ka Pou Nui  
Chief Operating Officer



**Ramona G. Hinck**  
Chief Financial Officer



**Na'unanikina'u Kamali'i**  
Chief Advocate  
(until July 2022)



**Everett Ohta**  
Interim General Counsel



**Kalani Fronda**  
Land Assets Director  
(until August 2022)



**Carla Hostetter**  
Systems Office Director



**Kai Mana Perez-David**  
Human Resources director



**Capsun M. Poe**  
Community Engagement Director



**Alice Malepeai Silbanuz**  
Communications Director



**Lisa Watkins-Victorino, Ph.D.**  
Research Director

## Community Rallies Behind Public Land Trust Bill

As a Public Land Trust bill worked its way through the state legislature, OHA launched a media campaign highlighting the issues involved to support advocacy efforts and raise awareness of the topic.

More than 40 years have passed since the state formally recognized that “twenty percent of all funds derived from the public land trust” must be set aside for the Office of Hawaiian Affairs specifically to better the conditions of Native Hawaiians.

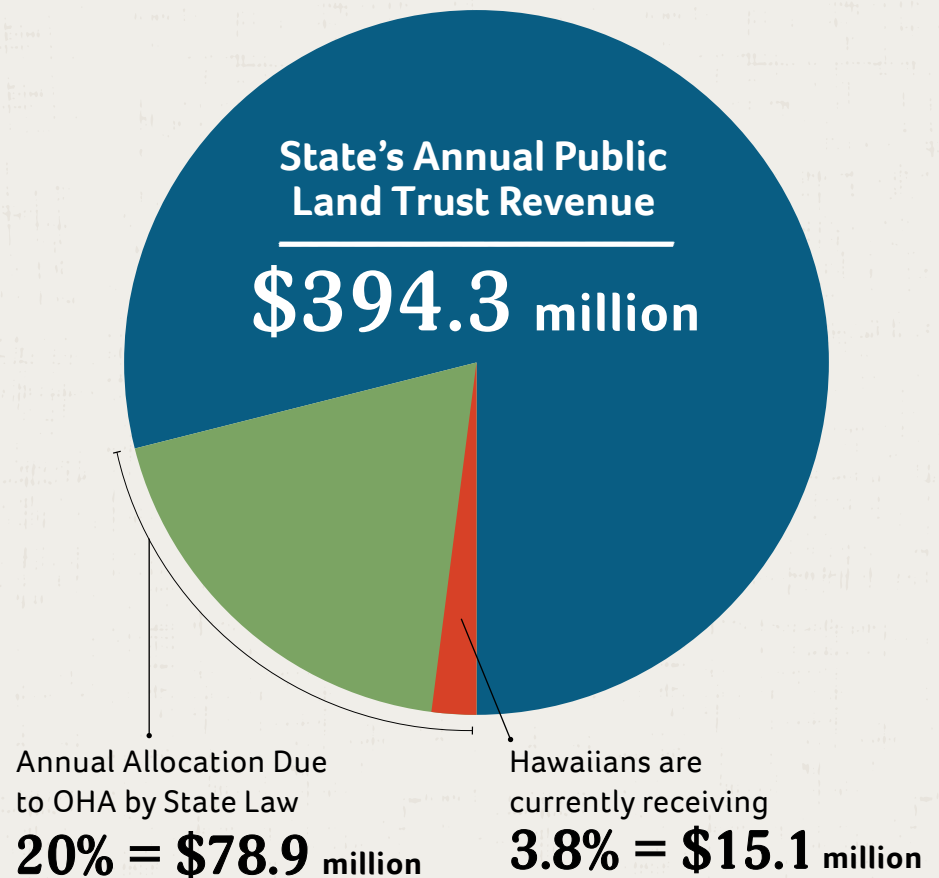
A special section in *Ka Wai Ola News* and a section on OHA’s website framed a history of the struggles the agency has experienced to have the state fulfill its constitutional obligation to Hawaiians and offered a historical timeline and a background video. A television commercial was produced that effectively portrayed how 20 percent of the Public Land Trust revenue was estimated at \$78.9 million per year while OHA was receiving only \$15.1 million per year (3.8 percent).

With the support from key legislators in both the House and Senate, the general public and the Hawaiian community, a Public Land Trust bill was passed that raised annual payments to OHA from \$15.1 million to \$21.5 million per year, provided an additional sum of \$64 million and outlined plans for the formation of a working group to continue discussion on this crucial issue.

OHA received supportive testimony from more than 80 individuals and organizations who responded to the call for *kōkua* in addressing this historical injustice. This was not a bill for OHA, this was a bill for the Hawaiian people.

The bill represents important progress that will lead to increased dialogue and a better understanding of the state’s constitutional obligation to the Hawaiian people, and strategies to fulfill it.

## Hawaiians are **NOT** getting their rightful share of the Public Land Trust



“  
Our vision of a healthy and abundant future includes working toward meeting state and national commitments of reconciliation and justice with the Native Hawaiian community which are embodied in much of the language of this bill.

”  
Kevin Chang  
Kua'āina Ulu 'Auamo

“  
Passage of this bill will lead to justice for the Native Hawaiian community and will result in the state honoring its commitments – commitments made in both the State Constitution and in the 1980 legislation setting OHA’s pro rata share at twenty percent. Resolving this issue is one of the most impactful and important actions this Legislature could take....Your action now would truly help to put the State on the path toward justice.

”  
Melody Kapilialoha MacKenzie, JD

“  
Our organization has benefited from OHA’s support and their programs since 1999. By the state meeting its financial obligation to OHA, we feel that Indigenous and community-based organizations like ours could benefit in many more ways.

”  
Presley Wann  
Hui Maka'āinana o Makana

*Quotes are from public testimony submitted in support of OHA's PLT bill.*

## OHA's Grants Programs Supports Hawaiian-focused Community Nonprofits

The needs of the Hawaiian people are many, and the Office of Hawaiian Affairs recognizes that it cannot accomplish its mission of raising a beloved lāhui alone.

By supporting organizations that are already aiding the lāhui by strengthening 'ohana, mo'omeheu and 'āina and striving to improve the education, housing, health and economic conditions of our people, OHA makes a greater impact on the Hawaiian community.

OHA's Grants Program supports Hawai'i-based nonprofit organizations that have projects, programs and initiatives that serve the lāhui in alignment with OHA's strategic plan.

OHA's Grants Program comprises the largest chunk of OHA's annual budget.

Here's a quick look at some of the work these community nonprofits are doing in the Hawaiian community...

*Photos provided courtesy of our grantees unless otherwise indicated.*

See page 8 for complete list of FY22 Grantees



Photo: Jason Lees

### Bringing Hope and Recovery to the Lāhui

**Big Island Substance Abuse Council**  
Hawai'i Island

“

I believe that OHA's programs help address issues in our community that have the greatest need and provide the foundation to help improve the overall health and wellness of our lāhui.

”

*Dr. Hannah Preston-Pita*

Dr. Hannah Preston-Pita is the chief executive officer at the Big Island Substance Abuse Council (BISAC), where she has led the organization for more than 10 years.

BISAC's services include a 24-hour Therapeutic Living Program (TLP), intensive outpatient treatment, and running a clean and sober house.

This fiscal year BISAC was awarded two OHA grants – a \$150,000 'Ohana and Community Based Grant and a \$150,000 COVID-19 Impact Response Grant.

Preston-Pita said the grants will help implement a COVID-19 operational plan and support a therapeutic living treatment program to adults previously incarcerated.

“These grants will allow us to prepare to move toward a one-stop-shop and have a micro-unit campus that will expand the number of individuals that we treat from 24 to 100. They will also provide needed services to those individuals who don't have the resources to be in treatment,” Preston-Pita said.



Wailuku, Maui

### Developing Conservation Professionals

**KUPU**  
Statewide

“

At Kupu we picture ourselves as a connector to a network of hundreds of organizations. And through partnerships, we can do great things. We focus on the things that we're good at. And then we work with our partners, like OHA, to have an impact that none of us could achieve on our own.

”

*Kawika Riley*

Kawika Riley is the senior director for External Affairs at Kupu.

Through its Conservation Leadership Development Program, Kupu provides entry-level employment opportunities for developing 'Ōiwi professionals who want to commit to a career in conservation.

The program currently has about 100 participants, with about a dozen of those participants across the pae 'āina receiving funding through an Office of Hawaiian Affairs (OHA) grant awarded in response to the COVID-19 pandemic with the goal of getting Native Hawaiians back to work.

“This partnership with OHA is solely focused on providing training, income and opportunity for Native Hawaiians. But another thing that we've worked hard to do is to place them at organizations that are owned, led or managed by Native Hawaiians as well,” Riley said.



Moanalua, O'ahu

Photo: Jason Lees

## Perpetuating Lā'au Lapa'au

### Hālau O Huluena O'ahu

“

The OHA grants program is part of a greater movement toward the collective healing of our people. It's a collaboration of the restoration of our community health and lifestyle. This initiative provides an opportunity for programs like ours to revitalize and perpetuate cultural practices and stewardship that help our people, our community, and ourselves.

”

Tina Tagad

Tina Tagad is the executive director of Hālau O Huluena.

An OHA grant awarded to Hālau O Huluena via the Pacific American Foundation is helping to assure 'ike pertaining to the traditional Hawaiian medical practice of lā'au lapa'au is being passed on.

“Our project is fulfilling the legacy of the late Po'okela Kahuna Lā'au Lapa'au 'Papa' Henry Auwae including Kahuna Lā'au Lapa'au and Kahu of Moanalua Roddy Akau's lineal legacy. It's about the continuity of the stewardship of this knowledge and the preservation and perpetuation of lā'au lapa'au,” Tagad said.

She said OHA's funding is helping establish the foundation for the program, which has learners who attend class twice a month in Moanalua's Kamananui Valley. Classes and mālama 'āina community days are also held at Waikalua Loko I'a in Kāneohe.



Anahola, Kaua'i

## Strengthening Anahola

### Kūkulu Kumuhana O Anahola Kaua'i

“

OHA's grants are literally changing the landscape of the 'āina in the Anahola community, which is triggering a chain reaction that isn't only affecting the 'āina, but it's affecting people and moving them to participate and not just be bystanders. OHA's assistance is helping KKOA to trigger all the possibilities of drawing out the very best from this community.

”

Rae Nam

Rae Nam is the executive director at Kūkulu Kumuhana O Anahola (KKOA).

Coming together to address youth suicide in the community, concerned residents formed KKOA as a community nonprofit with a mission to provide safe places to deter suicide.

Three grants from the Office of Hawaiian Affairs are helping the organization to achieve its vision of a thriving Hawaiian community in Anahola.

A key piece to KKOA's overall strategy has been the ongoing development of the Ulupono Anahola Agricultural Community and Youth Center.

“The OHA grants will help our youth be resilient and realize their value and worth to their families and community, allow them to continue to perpetuate their culture, and provide a healthy and thriving food system in the community,” Nam said.



KUPU - Ke'anae, Maui



The Kohala Center - Hawai'i Island



Maui Family Support Services, Inc.  
Serving Children and Families in Maui Since 1986  
808-242-0900  
www.mfss.org  
Maui Family Support Services  
- Kaunakakai, Moloka'i



INPEACE - Wai'anae, O'ahu



HuiMAU - Hāmākua, Hawai'i Island



Hālau o Huluena - Moanalua, O'ahu

# 2022 Grantees

The Office of Hawaiian Affairs' Grants Program is integral to the agency's efforts to increase wellness for our beneficiaries. For fiscal year 2022, OHA designated \$15,200,000 for grants and sponsorships to our beneficiaries. The total Public Land Trust revenue of \$15,100,000 directly funds grants and sponsorships for fiscal year 2022. The additional \$100,000 is funded from OHA's operating budget.

## 'Ahahui Grant Program

\$72,170

### Adult Friends for Youth

\$5,050 » Kaua'i, O'ahu

**PEARL Convention (Promoting Peace, Empathy, Acceptance, Respect, and Love)**

Support development and the use of educational resources for all Hawaiian lifelong learners in schools, communities and 'ohana. Positive social interaction/competency is a key component in the development of all youth. Often, traditional academic curriculum does not address those needs.

### Aloha Week Hawai'i DBA Aloha Festivals

\$10,000 » O'ahu

**Aloha Festivals Parade**

Provide an ongoing opportunity for Native Hawaiians to share their history and culture and participate in activities that honor, preserve and maintain the knowledge and traditions of our physical and spiritual domains.

### Big Island Substance Abuse Council

\$9,000 » Hawai'i

**Summer Jam**

Celebrate and promote strength, fitness, physical health, emotional wellbeing and positive life choices.

### Hana Arts

\$4,600 » Maui

**Uniting the East Maui Community**

Bring together 'ohana of East Maui during the holiday season for a series of events designed to engage creativity and stimulate economic activity through arts and culture.

### Ka La'i a 'Ehu

\$2,520 » Hawai'i

**Lā Kūpuna and Lā 'Ehunui**

Support Lā Kūpuna and Lā 'Ehunui events in an effort to uplift Kealakekua's K-12 immersion school Ke Kula o 'Ehunuikaimalino.

### Kaikeha, INC.

\$5,400 » Maui, O'ahu

**4th Annual Garden Island Boogie Board Classic and 14th Annual Hubb Keiki Fest**

Advance policies, programs and practices that strengthen Hawaiian wellbeing, including physical, spiritual, mental, and emotional health.

### Ke Ao Hali'i

\$8,200 » Maui

**Pule 'Āina o Mokae a me Maka'ālae**

Strengthen Native Hawaiian wellbeing (physical, spiritual, mental and emotional health), and restore access, stewardship and a subsistence relationship between the land and the people with a generational connection to it.

### La'i'ōpua 2020

\$10,000 » Hawai'i

**Kona Mele - A Tribute to Kona**

Support the launch of Kona Mele, Kona's first Hawaiian music video honoring its wahi pana and its celebrated practitioners of mele and hula.

### Nā Mamo o Mu'olea

\$7,500 » Maui

**Hanana no nā Limu**

This is the reemergence of the annual Hāna Limu Festival after nearly three years. The event celebrates limu as a traditional Hawaiian food that is important to the health of Native Hawaiians.

### ODKF Support, Inc

\$9,900 » O'ahu

**Duke's Oceanfest Waikiki Nights Presented by OHA - Waterman (the life of Duke Kahanamoku)**  
Evening film screening on Kūhiō Beach of the locally made documentary film, Waterman, that shares the life and achievements of Duke Kahanamoku.

## Community Grants (Education)

\$541,000

### Educational Services Hawai'i Foundation

\$180,000 » Hawai'i, Kaua'i, Maui, Moloka'i, O'ahu

**'Imi 'Ike Learning Centers**

Increase the number of Native Hawaiian youth who meet the grade-level standard or proficiency levels and increase the number of Native Hawaiian who graduates from high school and are college, career, and community ready.

### Ho'okāko'o Corporation

\$220,000 » Hawai'i, Moloka'i

**Ke Awa Ho'omalū (Safe Harbor)**

Address the lack of resources available at island schools and help students and families access needed services to improve student educational and social-emotional learning outcomes.

### La'i'ōpua 2020

\$141,000 » Hawai'i

**The Wa'a Project**

Provide high-quality Hawaiian culture-based educational opportunities to increase the academic achievement and learning of Native Hawaiian haumāna in West Hawai'i.

## Community Grants (Housing)

\$4,500,000

### Department of Hawaiian Home Lands

\$3,000,000 » Statewide

**Infrastructure Support**

Funds to cover debt service on bonds issued by DHHL that will be used to establish infrastructure support for Native Hawaiian affordable housing opportunities.

### Honolulu Habitat for Humanity

\$1,500,000 » O'ahu

**Affordable Homeownership for Native Hawaiian Families**

Provide permanent, affordable, occupancy-ready housing to 36 Native Hawaiians in our community. This project goal will move us closer towards our long-term community goal of an island where everyone has a decent place to live.

## COVID-19

\$20,000

### Papa Ola Lōkahi

\$20,000 » Statewide

**COVID-19 Vaccination Sites and Clinics**

Provide COVID-19 vaccinations and testing services in rural areas and areas with high concentrations of Native Hawaiians. This includes pop-up clinics that offer Native Hawaiian kauka (doctors) to provide reliable health information.

## Disaster Aid

\$83,000

### Waimea Hawaiian Homesteaders' Association Inc.

\$83,000 » Hawai'i

**Hawai'i Island Fires**

Emergency funding approved by OHA Board of Trustees to restore productivity to fire-ravaged lands.

## Emergency Financial Assistance

\$1,660,000

### Alu Like, Inc.

\$830,000 » Statewide

**Kūlia Like**

Provide emergency financial assistance to more than 415 Native Hawaiians experiencing financial hardship.

### Office of Hawaiian Affairs

\$830,000 » Statewide

*(In-house Administered in 2023)*

**Lima Kanāho**

Access to Emergency Financial Assistance Funding resolve their life challenges in rent, utilities, mortgages, car repairs, funeral expenses, medical bills.

## Hawaiian-Focused Public Charter Schools

\$3,000,000

### Kanu o ka 'Āina Learning 'Ohana

\$2,750,589 » Hawai'i, Kaua'i, Maui,

Moloka'i, O'ahu

**16 Charter School Fund Administration**

Administer charter school funding, facilitate reporting, submit reports, conduct site visits, and administer funds for the annual charter school conference coordination and program.

### Kanu o ka 'Āina New Century Public Charter School

\$249,411 » Hawai'i

Charter school disbursement for SY2022-23.

# Total Grants = \$9,876,170

Awarded as of June 30, 2022.

Since June 30, 2022, an additional \$2,100,000 has been awarded.

# 2022 Sponsorships

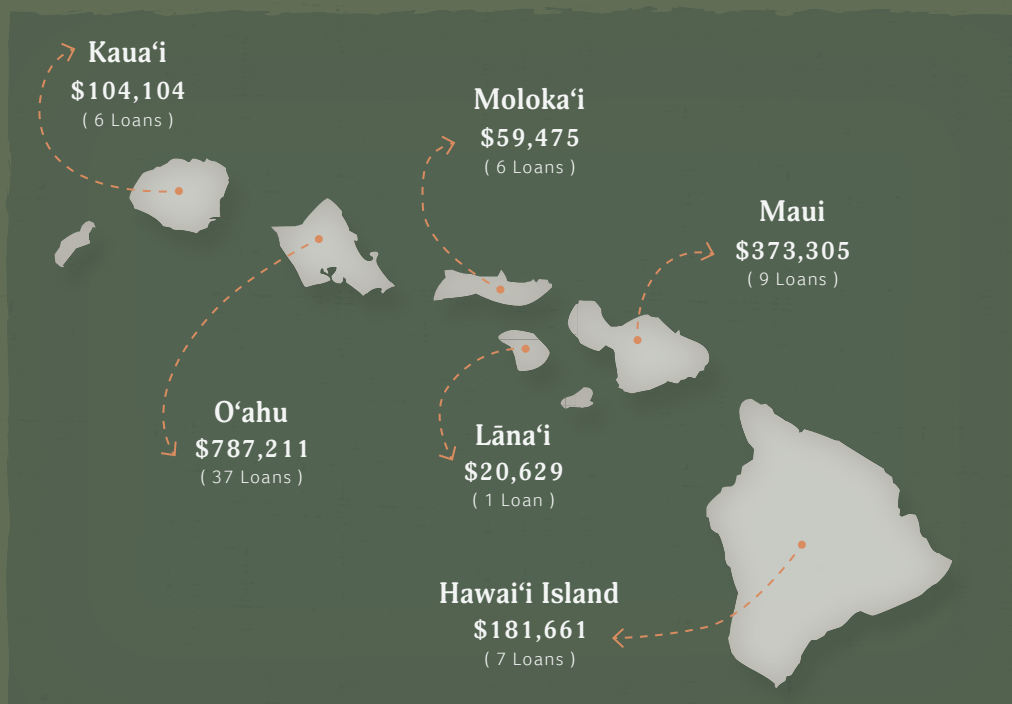
The Office of Hawaiian Affairs provides funding support to eligible organizations that have events, projects or programs that serve our lāhui in alignment with OHA's strategic plan.

Organization	Purpose	Award
'Aha Pūnana Leo	Openings of Pūnana Leo o Nu'uuanu and Pūnana Leo o Waialua	\$15,000
'Iolani Palace	Queen Kapi'olani Evening Tours	\$15,000
Kalihi-Palama Culture & Arts Society	2022 Queen Lili'uokalani Keiki Hula Celebration	\$15,000
Lunalilo Home	Lunalilo Home	\$15,000
Merrie Monarch Festival	59th Merrie Monarch Hula Festival	\$15,000
Moanalua Gardens Foundation	45th Anniversary Prince Lot Hula Festival	\$15,000
Polynesian Voyaging Society	Polynesian Voyaging Society	\$15,000
Association of Hawaiian Civic Clubs	Association of Hawaiian Civic Club 62nd Annual Convention	\$10,000
Council for Native Hawaiian Advancement	20th Annual Native Hawaiian Convention	\$10,000
Sovereign Council of Hawaiian Homeland Association (SCHHA)	SCHHA Homestead Summit	\$10,000
Alaska Federation of Natives	2022 Annual Alaska Federation of Natives Convention	\$5,000
Hawai'i Pono'i Foundation	15th Annual 'Onipa'a Celebration & Hawaiian History Month	\$5,000
Native Hawaiian Chamber of Commerce	2022 'O'ō Awards Gala	\$5,000
National Congress of American Indians	79th Annual National Congress of American Indians Convention	\$5,000
National Indian Education Association	53rd Annual National Indian Education Association Convention and Trade Show	\$5,000
Moloka'i Community Service Council	Moloka'i Cadet Leadership Program	\$1,000

**Total Sponsorships = \$161,000**

## FY2022 Consumer Micro-Loan & Mālama Loan Disbursement

July 1, 2021 to June 30, 2022



Total value and number of loans disbursed across the pae 'āina:

**\$1,526,385**  
( 66 Loans )

### Hua Kanu & Mālama Loan Disbursement

Purpose	No. of loans	\$ Amount
Business - Mālama	8	\$594,679
Debt Consolidation	32	\$526,804
Disaster Relief	1	\$20,000
Home Improvement	16	\$336,967
<b>Total</b>	<b>57</b>	<b>\$1,478,450</b>

### Consumer Micro-Loan Disbursement

Purpose	No. of loans	\$ Amount
Auto Repairs	3	\$12,700
Home Repairs	5	\$31,235
Other	1	\$4,000
<b>Total</b>	<b>9</b>	<b>\$47,935</b>

## Working Together to Support Miloli'i's Community-Based Subsistence Fishing Area (CBSFA)

In August 2021, lineal descendants of Miloli'i and local nonprofit Kalanihale submitted a marine management plan proposal to the Department of Land and Natural Resources (DLNR) Division of Aquatic Resources (DAR). The plan included proposed rules and boundaries for the Miloli'i Community-Based Subsistence Fishing Area (CBSFA), which was designated in 2005 but at the time had no established rules.

In August 2022, Gov. David Ige signed administrative rules to make Miloli'i on Hawai'i Island the state's second CBSFA. The state Legislature had designated 18 miles of coastal water on either side of the rural fishing community as a CBSFA back in 1994. The Miloli'i Marine Management Plan will help to restore fish abundance, promote lawai'a pono (proper fishing practices) and serve as a model subsistence-based fishing community.

The process to start a CBSFA is complicated and community activists are burdened to comply with government mandates on consulting, planning and promulgating administrative rules. In response to the community's request, OHA stepped in to help complete DLNR's requirements.

Working with nonprofit Kalanihale, a series of articles were strategically published in OHA's *Ka Wai Ola* newspaper.

"From September through November 2021, OHA provided Miloli'i a platform to tell its narrative in *Ka Wai Ola* with a reach even farther than just the shores of our pae 'āina. This was very important as we began the Hawai'i island scoping and then statewide scoping," said U'ilani Naipo, a lineal descendant of Miloli'i.

OHA public policy and advocacy staff worked with the community to develop a Board resolution approved in Feb. 2022 to ensure that international, federal and state policies (i.e., the United Nations Declaration on the Rights of Indigenous Peoples and Paoakalani Declaration) and that traditional spiritual practices and rights were appropriately applied in the state's process. In March 2022 the Board approved a resolution supporting CBSFA designation and rules in Kīpahulu, Maui.

“

The resolution reconfirmed OHA's commitment to supporting Miloli'i's Community-Based Subsistence Fishing Area designations and rules. It spoke of our traditional natural resource management and fishing practices that have historically proven to sustain abundance of our marine resources. For Miloli'i, this reflects our traditional practices today, and OHA provided indelible references to these practices.

”

*U'ilani Naipo*

Photo: Kai'mi Kaupiko



## Native Hawaiian Organizations Share Their Stories in Ka Wai Ola

With a goal of providing a one-stop shop of information important to beneficiaries, the Office of Hawaiian Affairs provided dedicated space in its monthly *Ka Wai Ola News* publication for news from nearly a dozen Native Hawaiian-serving organizations.

By providing a platform for these like-minded groups, which share similar overall missions as OHA, our combined voices provide a unity of purpose and reflect the important Hawaiian value of lōkahi.

*Ka Wai Ola News* has a large following, counting 51,000 print subscribers, 20,000 digital subscribers worldwide and an average 16,000 monthly readers visiting <https://kawaiola.news>.

The print edition of *Ka Wai Ola News* has been providing news for the lāhui since 1980, covering the people, issues and events important to the Native Hawaiian community.

Contributing columnists and other freelance writers from the community helped earn the news site three overall excellence awards from the Native American Journalist Association Media Awards for work done in 2021.

It is noteworthy that year after year, *Ka Wai Ola News* is consistently acknowledged for its excellence as an Indigenous print and digital publication by the NAJA Native Media Awards. Over the last three years, *Ka Wai Ola News* has scooped up a total of 14 NAJA Media Awards.

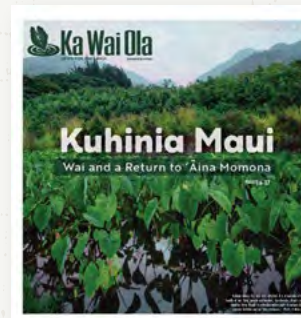
“

*Ka Wai Ola* is a tremendous resource for the public to get more informed and educated about matters of interest in the Hawaiian community. DHHL's partnership with *Ka Wai Ola* allows the Department a consistent portal to share our updates to Hawaiian Homes Commission Act beneficiaries and the greater community.

”

Cedric Duarte

Information and Community Relations Officer for the Department of Hawaiian Home Lands and pens a monthly column in *Ka Wai Ola News*.



## Collectively Addressing COVID-19

As the COVID-19 pandemic continued to disproportionately affect Native Hawaiians and Pacific Islanders, the Office of Hawaiian Affairs supported a pair of initiatives intended to help protect the health and wellbeing of the lāhui.

Participating in both the 60-member strong Native Hawaiian & Pacific Islander Hawai'i COVID-19 Response, Recovery & Resilience Team (NHPI 3R) and the Native Hawaiian Pacific Islander COVID-19 Collective Awareness and Prevention Campaign, the Office of Hawaiian Affairs executed a number of tactics working with partners to provide beneficiaries with reliable information on protecting their 'ohana from COVID-19.

Articles and ads ran in *Ka Wai Ola* throughout the fiscal year including stories penned by trusted Native Hawaiian physicians. Respected kūpuna from across the pae āina participated in an "I'm Vaccinated" campaign to encourage vaccinations and a "Mythbusters" information campaign proved popular among readers.

OHA also assisted by promoting vaccination and testing clinics and "Ask a Kauka" webinars through social media and direct e-mail announcements. When vaccinations became available to keiki, a television commercial featuring Punihei Lipe was produced highlighting her decision to vaccinate her keiki.

Recognizing the strain put on health workers, OHA developed a "Meals & Mahalo" program for frontline emergency medical workers at more than a dozen hospitals and clinics on Hawai'i Island, Kaua'i, Lāna'i, Maui, Moloka'i and O'ahu.

NHPI 3R was established in May 2020 with Papa Ola Lōkahi serving as the backbone of the response team, which functions under a collective impact model.

“

We were drawn to one another to uncover the impact of COVID-19 on our communities. We looked to data sources and scanned the environment for programs and services in place. This helped us to identify gaps and fill them by brokering partnerships and innovating new solutions...As a hui with common goals, we can address other areas of inequity with strategic policy, stronger data sovereignty and shared Pacific values. We are stronger and better together.

”

Sheri Daniels  
CEO of Papa Ola Lōkahi



Snapshot of Dr. Kaiwipunikauikawēkiu Punihei Lipe and her children in a television commercial highlighting her decision to have them vaccinated.



Tammy Smith of Lili'uokalani Trust in Honolulu (top photo) and Ola and Puna Tripp of Liquid Life in Hilo (bottom photo, left and center) are two of the vendors that OHA partnered with to deliver Meals & Mahalo across the pae āina. Center photo: frontline health workers at Hilo Medical Center (left) and Queen's Medical Center West O'ahu (right) appreciated the expression of gratitude for their efforts to provide quality health care to our community during the COVID-19 crisis.

## OHA Research Collaborations

July 1, 2021 to June 30, 2022

Major external collaborations of the Office of Hawaiian Affairs (OHA) Research Department (RD) and Office of Strategy Management (OSM) with other Native Hawaiian-serving organizations.

Agencies & Organizations	Purpose
<b>21st Century Data Governance for Fact-based Policymaking</b>	Facilitate and participate on the SCR5 Task Force whose purpose is to understand the methods by which state entities collect, process, and report disaggregated Native Hawaiian data and how these data are made available (RD and OSM).
<b>Bishop Museum &amp; Awaiaulu</b>	Collaborate to rescan Hawaiian Language newspapers to either accompany or replace the collection currently within OHA's Papakilo Database (RD).
<b>Hawai'i Board of Geographic Names</b>	Represent OHA on the Hawai'i Board of Geographic Names (HBGN) to maintain and updating Geographic Names in Hawai'i by providing research support in the areas of Hawaiian culture, land tenure, and ethnohistory (RD).
<b>Hawai'i State Legislature Burial Sites Working Group</b>	Provide administrative support to supplement OHA's participation on the Burial Sites Working Group (RD).
<b>Kamehameha Schools, Lili'uokalani Trust, Papa Ola Lōkahi, Marzano Research</b>	Collaborate with these agencies to continue the development, implementation, analysis, and reporting of the 'Imi Pono Survey (RD and OSM).
<b>Kūkulu Kumuhana</b>	Collaboration with Lili'uokalani Trust, Kamehameha Schools, Papa Ola Lōkahi, and Consuelo Foundation in an effort to change how wellbeing of Native Hawaiians is defined, measured, and ultimately reported. The Kūkulu Kumuhana framework is championed as a model for research and evaluation (RD).
<b>Murdered and Missing Native Hawaiian Women and Girls (MMNHWG) Task Force</b>	OHA co-leads the MMNHWG Task Force with the Hawai'i State Commission on the Status of Women (RD).
<b>Nā Kama a Hāloa</b>	Participating member of Nā Kama a Hāloa, a network of state and community partners seeking to improve outcomes for keiki in the foster care system (RD).
<b>Native Hawaiian Research Hui</b>	The Native Hawaiian Research Hui (NHRH) is a collaboration between OHA, Lili'uokalani Trust, Kamehameha Schools, and Papa Ola Lōkahi. NHRH produced several publications and continues to support other research initiatives that impact NH wellbeing including data vetting for the Department of Human Services collaborative, and gathering, analysis, and reporting of qualitative data for Native Hawaiian-focused charter schools (RD and OSM).
<b>Native Hawaiian Revolving Loan Fund (NHRLF) Board of Directors</b>	Represent OHA on the Native Hawaiian Revolving Loan Fund (NHRLF) Board of Directors which includes reviewing, processing, and approving loan applications and monitoring program activities (RD).
<b>NHPI COVID-19 Response, Recovery, and Resilience (3R) Team Data &amp; Research Committee</b>	Participate on the Data & Research Committee to ensure the timely, accurate, and appropriate disaggregation of Native Hawaiian and Pacific Islander COVID-19 data (testing, cases, vaccinations, hospitalizations, deaths). The group is a network of some 60 agencies, health organizations, non-profits, and others (RD and OSM).
<b>Partners in Care</b>	Provide research support in the form of committee participation, report review, and editing of PIC's Native Hawaiian sub-report (RD and OSM).
<b>State of Hawai'i Department of Health State of Hawai'i Department of Education</b>	Participate in the coordination and reporting of the Youth Risk Behavioral Survey (YRBS) regarding the health and wellbeing of Native Hawaiian middle and high school public school students. Through its participation on the Behavioral Risk Factor Surveillance System (BRFSS) Committee, OHA provides suggestions for the survey questions (RD).
<b>State of Hawai'i Department of Human Services. In partnership with Lili'uokalani Trust, Kamehameha Schools, and Papa Ola Lōkahi</b>	OHA and DHS entered into a Memorandum of Agreement (MOA) to share data on Native Hawaiians in Adult Protective Services, Childcare, Child Protective Services, Foster Care, MedQUEST, TANF, and SNAP programs to determine if there are COVID-19 impacts on these services and will result in a series of research briefs (RD and OSM).

**PAPAKILO**  
DATABASE

120,934  
Sessions / Visits

51,031  
New Visitors

51,774

Users / Unique visitors

[www.papakilodatabase.com](http://www.papakilodatabase.com)

**KIPUKA**  
DATABASE

33,398  
Sessions/Visits

15,751  
New Visitors

16,042

Users/Unique visitors

[kipukadatabase.com](http://kipukadatabase.com)

**NATIVE HAWAIIAN  
DATA BOOK**

5,845  
Sessions / Visits

4,497  
New Visitors

4,606

Users / Unique visitors

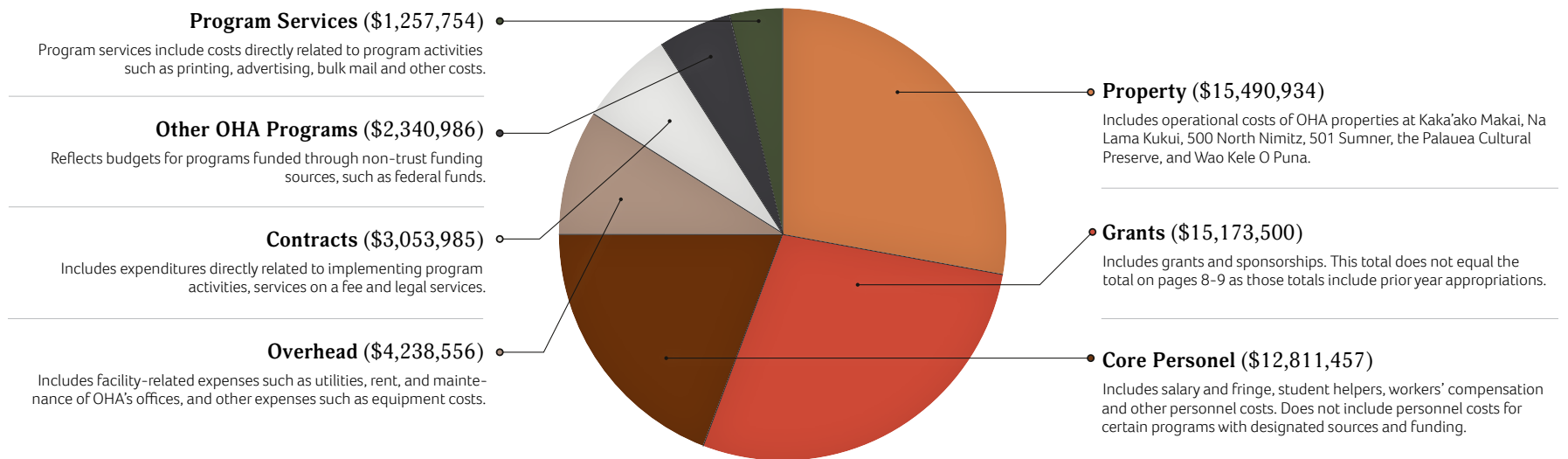
[www.ohadatabook.com](http://www.ohadatabook.com)

# FY 2022 Budget Summary

The Approved Budget and Spending Limit for the fiscal year are shared below and are based on a biennium cycle of budgeting. To prudently manage its budget over a biennium period, the Office of Hawaiian Affairs executes budget realignments as needed. The figures below reflect the budget realignment approved September 29, 2022.

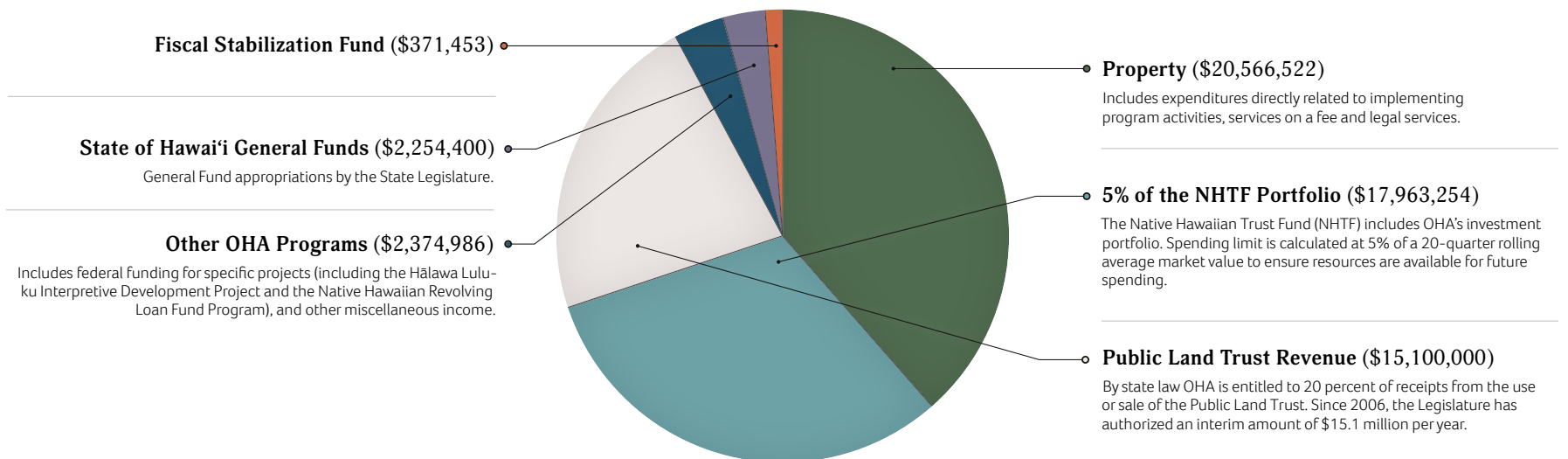
## Approved Budget

Total: \$54,367,172



## Spending Limit

Total: \$58,630,615



# 2022 Unaudited Financial Statements

The following financial statements for the fiscal year beginning July 1, 2021 and ending June 30, 2022 were prepared internally by the Office of Hawaiian Affairs and were not reviewed by any external auditor. OHA has made every effort to ensure the accuracy of these financial statements. When audited financial statements become available, they will be available online at [www.oha.org](http://www.oha.org).

Office of Hawaiian Affairs | State of Hawai'i  
**Statement of Net Position**  
 June 30, 2022 (Dollars in Thousands)

<b>Assets:</b>	<b>Governmental Activities</b>
Petty cash	\$ 1
<b>Cash:</b>	
Held in State Treasury	129
Held in bank	24,746
Held by investment managers	6,295
<b>Restricted cash</b>	<b>264</b>
<b>Accounts receivable, net</b>	<b>2,370</b>
<b>Due from other fund</b>	<b>3,009</b>
<b>Interest and dividends receivable</b>	<b>68,740</b>
<b>Inventory, prepaid items and other assets</b>	<b>873</b>
<b>Notes receivable, net:</b>	
Due within one year	960
Due after one year	5,552
<b>Investments</b>	<b>429,560</b>
<b>Capital assets - net</b>	<b>279,015</b>
<b>Total Assets</b>	<b>821,514</b>
<b>Deferred outflows of resources related to pensions</b>	<b>(80)</b>
<b>Deferred outflows of resources related to OPEB</b>	<b>1,304</b>
<b>Total Assets and Deferred Outflows of Resources</b>	<b>\$ 822,738</b>
<b>Liabilities:</b>	
Accounts payable and accrued liabilities	\$ 6,336
Due to State of Hawai'i	300
<b>Long-term liabilities:</b>	
Due within one year	3
Due after one year	59,750
<b>Other liabilities due in more than one year:</b>	
Net Pension liability	31,909
Net OPEB liability	31,145
<b>Total Liabilities</b>	<b>129,443</b>
<b>Deferred inflows of resources related to pensions</b>	<b>212</b>
<b>Deferred inflows of resources related to OPEB</b>	<b>2,271</b>
<b>Total Liabilities and Deferred Inflows of Resources</b>	<b>131,926</b>
<b>Commitments and Contingencies</b>	
<b>Net Position:</b>	
Invested in capital assets, net of related debt	219,265
Restricted	24,595
Unrestricted	446,952
<b>Total Net Position</b>	<b>690,812</b>
<b>Total Liabilities, Deferred Inflows of Resources and Net Position</b>	<b>\$ 822,738</b>

Office of Hawaiian Affairs | State of Hawai'i

**Statement of Activities**

Year Ended June 30, 2022 (Dollars in Thousands)

Functions/Programs	Program Revenues			Net (expenses) Revenue & Changes in Net Positions
	Expenses	Charges for Services	Operating Grants & Contributions	
<b>Governmental Activities:</b>				
Board of Trustees	\$ 2,639	\$ -	\$ -	\$ (2,639)
Support services	17,959	9,489	-	(8,470)
Beneficiary advocacy	12,417	-	(66)	(12,483)
Unallocated depreciation	1,282	-	-	(1,282)
<b>Total Governmental Activities</b>	<b>\$ 34,297</b>	<b>\$ 9,489</b>	<b>\$ (66)</b>	<b>\$ (24,874)</b>
<b>General Revenues:</b>				
State allotments, net of lapsed appropriations				\$ 2,289
Public land trust revenue				79,100
Unrestricted contributions				866
Interest and investment earnings				(36,422)
<b>Total General Revenues</b>				<b>45,833</b>
<b>Change in Net Position</b>				<b>20,959</b>
<b>Net Position:</b>				
Beginning of year				669,853
<b>Net Position at June 30, 2022</b>				<b>\$ 690,812</b>

Office of Hawaiian Affairs | State of Hawai'i

**Governmental Funds - Balance Sheet**

June 30, 2022 (Dollars in Thousands)

	General Fund	Public Land Trust	Federal Grants	Other	Total
<b>Assets:</b>					
Petty cash	\$ -	\$ 1	\$ -	\$ -	\$ 1
<b>Cash:</b>					
Held in State Treasury	-	129	-	-	129
Held in bank	(372)	18,391	6,296	431	24,746
Held by investment managers	-	6,172	123	-	6,295
<b>Restricted cash</b>	-	-	264	-	264
Accounts receivable	2,283	-	30	57	2,370
Due from other fund	-	3,097	(88)	-	3,009
Interest and dividends receivable	-	68,695	45	-	68,740
Inventory, prepaid items and other assets	-	867	6	-	873
<b>Notes receivable:</b>					
Due within one year	-	49	911	-	960
Due after one year	-	55	5,497	-	5,552
Investments	-	417,633	11,927	-	429,560
<b>Total Assets</b>	<b>\$ 1,911</b>	<b>\$ 515,089</b>	<b>\$ 25,011</b>	<b>\$ 488</b>	<b>\$ 542,499</b>
<b>Liabilities:</b>					
Accounts payable and accrued liabilities	\$ -	\$ 5,403	\$ 116	\$ 817	\$ 6,336
Due to State of Hawai'i	-	-	300	-	300
<b>Total Liabilities</b>	<b>-</b>	<b>5,403</b>	<b>416</b>	<b>817</b>	<b>6,636</b>
<b>Commitments and Contingencies</b>					
<b>Fund balances:</b>					
Nonspendable -					
Inventory, prepaid items & security deposits	-	867	-	-	867
<b>Restricted for:</b>					
Beneficiary advocacy	-	-	1,557	-	1,557
Native Hawaiian loan programs	-	-	17,541	-	17,541
Long-term portion of notes receivable	-	-	5,497	-	5,497
<b>Committed to -</b>					
DHHL-issued revenue bonds	-	90,261	-	-	90,261
<b>Assigned to:</b>					
Board of Trustees	-	98	-	-	98
Support services	-	6,902	-	(329)	6,573
Beneficiary advocacy	284	6,521	-	-	6,805
Long-term portion of notes receivable	-	55	-	-	55
Public Land Trust	-	404,982	-	-	404,982
Unassigned	1,627	-	-	-	1,627
<b>Total Fund Balances</b>	<b>1,911</b>	<b>509,686</b>	<b>24,595</b>	<b>(329)</b>	<b>535,863</b>
<b>Total Liabilities and Fund Balances</b>	<b>\$ 1,911</b>	<b>\$ 515,089</b>	<b>\$ 25,011</b>	<b>\$ 488</b>	<b>\$ 542,499</b>

Office of Hawaiian Affairs | State of Hawai'i

## Governmental Funds - Statement of Revenues, Expenditures, and Changes in Fund Balances

Year Ended June 30, 2022 (Dollars in Thousands)

	General Fund	Public Land Trust	Federal Grants	Other	Total
<b>Revenues:</b>					
Public Land Trust revenue	\$ -	\$ 79,100	\$ -	\$ -	\$ 79,100
Intergovernmental revenue	-	-	150	-	150
Appropriations, net of lapses	2,254	-	-	35	2,289
Charges for services	-	9,422	-	67	9,489
Interest and investment gains (losses)	-	(36,422)	(216)	-	(36,638)
Donations and other	-	688	4	174	866
<b>Total Revenues</b>	<b>2,254</b>	<b>52,788</b>	<b>(62)</b>	<b>276</b>	<b>55,256</b>
<b>Expenditures:</b>					
Board of Trustees	-	2,639	-	-	2,639
Support services	524	68,108	-	48	68,680
Beneficiary advocacy	16	11,314	1,010	77	12,417
<b>Total Expenditures</b>	<b>540</b>	<b>82,061</b>	<b>1,010</b>	<b>125</b>	<b>83,736</b>
<b>Other Financing (Uses) Sources:</b>					
Proceeds from debt	-	59,750	-	-	59,750
Proceeds to debt	-	(21,388)	-	-	(21,388)
<b>Net Change in Fund Balance</b>	<b>1,714</b>	<b>9,089</b>	<b>(1,072)</b>	<b>151</b>	<b>9,882</b>
<b>Fund Balances:</b>					
Beginning of year	197	500,597	25,667	(480)	525,981
Fund Adjustment	-	-	-	-	-
<b>End of Year</b>	<b>\$ 1,911</b>	<b>\$ 509,686</b>	<b>\$ 24,595</b>	<b>\$ (329)</b>	<b>\$ 535,863</b>





### About the Mana i Maui Ola Artwork

Upland rain provides life-giving water that sustains the 'āina, mauka to makai. Captured in the watershed of mauka rainforests, the wai flows down into lush valleys and onto vast agricultural plains, touching and nourishing all within the ahupua'a as it journeys to the sea. The artwork for OHA's Strategic Plan, Mana i Maui Ola, reflects this journey with each element representing a foundational or directional aspect of the plan as we move collectively toward a more vibrant future.

*Artwork by Nelson Makua*

## 2022 OHA Annual Report

Produced by OHA's Communications Team

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*Empowering Hawaiians,  
Strengthening Hawai'i*

# Appendix D

## Additional Information Tables 1 to 19

Office of Hawaiian Affairs  
Functions

<u>Division</u>	<u>Description of Function</u>	<u>Activities</u>	<u>Prog ID(s)</u>	<u>Dept-Wide</u>	<u>Statutory Reference</u>
				<u>Priority</u>	
OHA150	1. Personnel and administrative costs	Services and assistance to Native Hawaiians	OHA150		HRS10-3(3)
OHA160	1. Personnel and administrative costs	Services and assistance to Native Hawaiians	OHA160		HRS10-3(3)
OHA175	1. Personnel and administrative costs	Services and assistance to Native Hawaiians	OHA175		HRS10-3(3)
	2. Social services, legal services and legal representation educational enrichment, health improvement programs and leverage opportunities	Services and assistance to Native Hawaiians	OHA175		HRS10-3(3)

Office of Hawaiian Affairs  
Department-Wide Totals

Fiscal Year 2024					
Budget Acts (2021) Act 029 Appropriation	Reductions	Additions	Emergency Appropriations	Total FY24	MOF
\$ 2,254,400	\$ 200,000	\$ 945,600	\$ -	\$ 3,000,000	A
\$ 6,429,704	\$ 4,375,304	\$ 945,600	\$ -	\$ 3,000,000	T
\$ 8,684,104	\$ 4,575,304	\$ 1,891,200	\$ -	\$ 6,000,000	Total
Fiscal Year 2025					
Budget Acts (2021) Act 029 Appropriation	Reductions	Additions		Total FY25	MOF
\$ 2,254,400	\$ 200,000	\$ 945,600	\$ -	\$ 3,000,000	A
\$ 6,429,704	\$ 4,375,304	\$ 945,600	\$ -	\$ 3,000,000	T
\$ 8,684,104	\$ 4,575,304	\$ 1,891,200	\$ -	\$ 6,000,000	Total

Office of Hawaiian Affairs  
Program ID Totals

APPENDIX D

Prog ID	Program Title	MOF	As Budgeted in Act 29/21 (FY23)			Governor's Submittal (FY24)				Governor's Submittal (FY25)			
			Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Percent Change of \$\$\$\$	Pos (P)	Pos (T)	\$\$\$	Percent Change of \$\$\$\$
OHA150	OFFICE OF THE TRUSTEES	A	0.47	-	\$ -	-	-	\$ 0	na	-	-	\$ 0	na
OHA150	OFFICE OF THE TRUSTEES	T	4.53	-	\$ 275,687	-	-	\$ 0	-100%	-	-	\$ 0	-100%
		TOTAL	5.00	-	\$ 275,687	-	-	\$ 0	-100%	-	-	\$ 0	-100%
OHA160	ADMINISTRATION	A	5.03	-	\$ -	-	-	\$ 0	na	-	-	\$ 0	na
OHA160	ADMINISTRATION	T	31.97	-	\$ 2,861,727	-	-	\$ 0	-100%	-	-	\$ 0	-100%
		TOTAL	37.00	-	\$ 2,861,727	-	-	\$ 0	-100%	-	-	\$ 0	-100%
OHA175	BENEFICIARY ADVOCACY	A	1.47	-	\$ 2,254,400	-	-	\$ 3,000,000	33%	-	-	\$ 3,000,000	33%
OHA175	BENEFICIARY ADVOCACY	T	18.53	-	\$ 3,292,290	-	-	\$ 3,000,000	-9%	-	-	\$ 3,000,000	-9%
		TOTAL	20.00	-	\$ 5,546,690	-	-	\$ 6,000,000	-8%	-	-	\$ 6,000,000	8%
	TOTAL	A	6.97	-	\$ 2,254,400	-	-	\$ 3,000,000	33%	-	-	\$ 3,000,000	33%
	TOTAL	T	55.03	-	\$ 6,429,704	-	-	\$ 3,000,000	-53%	-	-	\$ 3,000,000	-53%
	TOTAL	TOTAL	62.00	-	\$ 8,684,104	-	-	\$ 6,000,000	31%	-	-	\$ 6,000,000	-31%

Prog ID	Sub-Org	Description of Request	Executive Team Recommendations								CEO Approval & Recommendations						Board of Trustee's Decisions					
			FY24				FY25				FY24			FY25			FY24			FY25		
			MOF	Pos (P)	Pos (T)	\$\$\$	MOF	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$
OHA150	N/A	OFFICE OF THE TRUSTEES	A	-	-	\$ -	A	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -
OHA150	N/A	OFFICE OF THE TRUSTEES	T	-	-	\$ -	T	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -
		TOTAL		-	-	\$ -	TOTAL	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -
OHA160	N/A	ADMINISTRATION	A	-	-	\$ -	A	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -
OHA160	N/A	ADMINISTRATION	T	-	-	\$ -	T	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -
		TOTAL		-	-	\$ -	TOTAL	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -	-	-	\$ -
OHA175	N/A	BENEFICIARY ADVOCACY	A	-	-	\$ 3,000,000	A	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000
OHA175	N/A	BENEFICIARY ADVOCACY	T	-	-	\$ 3,000,000	T	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000
		TOTAL		-	-	\$ 6,000,000	TOTAL	-	-	\$ 6,000,000	-	-	\$ 6,000,000	-	-	\$ 6,000,000	-	-	\$ 6,000,000	-	-	\$ 6,000,000
		A		-	-	\$ 3,000,000	A	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000
		T		-	-	\$ 3,000,000	T	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000	-	-	\$ 3,000,000
		TOTAL		-	-	\$ 6,000,000	TOTAL	-	-	\$ 6,000,000	-	-	\$ 6,000,000	-	-	\$ 6,000,000	-	-	\$ 6,000,000	-	-	\$ 6,000,000

Office of Hawaiian Affairs  
Proposed Budget Reductions

Prog ID	Sub-Org	Description of Reduction	Impact of Reduction	MOF	FY24			FY25			FY23 Restriction (Y/N)
					Pos (P)	Pos (T)	\$\$\$\$	Pos (P)	Pos (T)	\$\$\$\$	
OHA150	N/A	1. PERSONNEL	Previously not appropriated	A	0.47	-	\$ -	0.47	-	\$ -	
OHA150	N/A	2. PERSONNEL	Funded by the OHA Trust Fund	T	4.53	-	\$ (275,687)	4.53	-	\$ (275,687)	
OHA160	N/A	1. PERSONNEL	Previously not appropriated	A	5.03	-	\$ -	5.03	-	\$ -	
OHA160	N/A	2. PERSONNEL	Funded by the OHA Trust Fund	T	31.97	-	\$ (2,564,853)	31.97	-	\$ (2,564,853)	
OHA160	N/A	3. OPERATING - Office Rent	Funded by the OHA Trust Fund	T	-	-	\$ (296,874)	-	-	\$ (296,874)	
OHA175	N/A	1. PERSONNEL	Previously not appropriated	A	1.47	-	\$ -	1.47	-	\$ -	
OHA175	N/A	2. PERSONNEL	Funded by the OHA Trust Fund	T	18.53	-	\$ (1,037,890)	18.53	-	\$ (1,037,890)	
OHA175	N/A	3. OPERATING - Other Uses	FY22: Follow-up of CLA-OHA & LLCs Contract; FY23 Legal Services for OHA beneficiaries	A	-	-	\$ (200,000)	-	-	\$ (200,000)	
OHA175	N/A	4. OPERATING - Other Uses	FY22: Legal Services for OHA beneficiaries; FY23 Legal Services for OHA beneficiaries	T	-	-	\$ (200,000)	-	-	\$ (200,000)	
		<b>TOTAL REDUCTIONS</b>			<b>62.00</b>		<b>\$ (4,575,304)</b>	<b>62.00</b>		<b>\$ (4,575,304)</b>	
		<b>TOTAL (A)</b>		<b>A</b>	<b>6.97</b>		<b>\$ (200,000)</b>	<b>6.97</b>		<b>\$ (200,000)</b>	
		<b>TOTAL (T)</b>		<b>T</b>	<b>55.03</b>		<b>\$ (4,375,304)</b>	<b>55.03</b>		<b>\$ (4,375,304)</b>	
		<b>GRAND TOTAL</b>			<b>62.00</b>		<b>\$ (4,575,304)</b>	<b>62.00</b>		<b>\$ (4,575,304)</b>	



Office of Hawaiian Affairs  
Proposed Budget Additions

Prog ID	Sub-Org	Addition Type	Prog ID Priority	Dept-Wide Priority	Description of Addition	Justification	MOF	FY24			FY25		
								Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$
OHA175	N/A	AR	1	1	1. Professional Services	Increase will be for grants related to Legal Services for OHA Beneficiaries	A	-	-	\$ 75,600	-	-	\$ 75,600
OHA175	N/A	AR	1	1	2. Professional Services	Increase will be for grants related to Legal Services for OHA Beneficiaries	T	-	-	\$ 75,600	-	-	\$ 75,600
OHA175	N/A	AR	1	1	3. Grant	Increase will be for grants related to 'Aina, Addressing impacts of Climate Change	A	-	-	\$ 500,000	-	-	\$ 500,000
OHA175	N/A	AR	1	1	4. Grant	Increase will be for grants related to 'Aina, Addressing impacts of Climate Change	T	-	-	\$ 500,000	-	-	\$ 500,000
OHA175	N/A	AR	1	1	5. Grant	Increase will be for grants related to 'Ohana Economic Stability	A	-	-	\$ 370,000	-	-	\$ 370,000
OHA175	N/A	AR	1	1	6. Grant	Increase will be for grants related to 'Ohana Economic Stability	T	-	-	\$ 370,000	-	-	\$ 370,000
TOTAL BUDGET ADDITIONS										\$ 1,891,200			\$ 1,891,200
TOTAL (A)							A			\$ 945,600			\$ 945,600
TOTAL (T)							T			\$ 945,600			\$ 945,600
GRAND TOTAL										\$ 1,891,200			\$ 1,891,200

<u>Fiscal Year</u>	<u>Prog ID</u>	<u>Sub-Org</u>	<u>MOF</u>	<u>Budgeted by Dept</u>	<u>Restriction</u>	<u>Difference Between Budgeted &amp; Restricted</u>	<u>Percent Difference</u>	<u>Impact</u>
	NONE							

Office of Hawaiian Affairs  
Emergency Appropriation Requests

<u>Prog ID</u>	<u>Description of Request</u>	<u>Explanation of Request</u>	<u>MOF</u>	<u>Pos (P)</u>	<u>Pos (T)</u>	<u>\$\$\$</u>
NONE						

Office of Hawaiian Affairs  
Expenditures Exceeding Appropriation Ceilings in FY22 and FY23

<u>Prog ID</u>	<u>MOF</u>	<u>Date</u>	<u>Appropriation</u>	<u>Amount Exceeding Appropriation</u>	<u>Percent Exceeded</u>	<u>Reason for Exceeding Ceiling</u>	<u>Legal Authority</u>	<u>Recurring (Y/N)</u>	<u>GF Impact (Y/N)</u>
NONE									

Office of Hawaiian Affairs  
 Intradepartmental Transfers in FY22 and FY23

<u>Actual or Anticipated Date of Transfer</u>	<u>MOF</u>	<u>Pos (P)</u>	<u>Pos (T)</u>	<u>\$\$\$</u>	<u>From Prog ID</u>	<u>Percent of Program ID Appropriation Transferred From</u>	<u>To Prog ID</u>	<u>Percent of Receiving Program ID Appropriation</u>	<u>Reason for Transfer</u>	<u>Recurring (Y/N)</u>
NONE										

Office of Hawaiian Affairs  
 Vacancy Report as of November 30, 2022

<u>Prog ID</u>	<u>Sub-Org</u>	<u>Date of Vacancy</u>	<u>Expected Fill Date</u>	<u>Position Number</u>	<u>Position Title</u>	<u>Exempt (Y/N)</u>	<u>SR Level</u>	<u>BU Code</u>	<u>Perm Temp (P/T)</u>	<u>FTE</u>	<u>MOF</u>	<u>Budgeted Amount</u>	<u>Actual Salary Last Paid</u>	<u>Authority to Hire (Y/N)</u>	<u>Occupied by 89 Day Hire (Y/N)</u>	<u># of 89 Hire Appts</u>	<u>Describe if Filled by other Means</u>	<u>Priority # to Retain</u>
NONE																		

Positions Filled and/or Established by Acts other than the State Budget as of November 30, 2022

<u>Prog ID</u>	<u>Sub-Org</u>	<u>Date Established</u>	<u>Legal Authority</u>	<u>Position Number</u>	<u>Position Title</u>	<u>Exempt (Y/N)</u>	<u>SR Level</u>	<u>BU Code</u>	<u>T/P</u>	<u>MOF</u>	<u>FTE</u>	<u>Annual Salary</u>	<u>Filled (Y/N)</u>	<u>Occupied by 89 Day Hire (Y/N)</u>
***OHA - NONE TO REPORT***														

Office of Hawaiian Affairs  
Overtime Expenditure Summary

<u>Prog ID</u>	<u>Sub-Org</u>	<u>Program Title</u>	<u>MOF</u>	<u>FY22 (actual)</u>			<u>FY23 (estimated)</u>			<u>FY24 (budgeted)</u>		
				<u>Base Salary</u> \$\$\$\$	<u>Overtime</u> \$\$\$\$	<u>Overtime</u> Percent	<u>Base Salary</u> \$\$\$\$	<u>Overtime</u> \$\$\$\$	<u>Overtime</u> Percent	<u>Base Salary</u> \$\$\$\$	<u>Overtime</u> \$\$\$\$	<u>Overtime</u> Percent
N/A												



Office of Hawaiian Affairs  
Active Contracts as of December 1, 2022

Prog ID	MOF	Amount	Frequency (M/A/O)	Max Value	Outstanding Balance	Term of Contract			Entity	Contract Description	Explanation of How Contract is Monitored	POS Y/N	Category E/L/P/C/G/S/*
						Date Executed	From	To					
OHA 175	A	\$ -	OTHER - QTRLY PMTS	\$54,412	\$2,908	9/18/2019	10/1/2019	9/30/2021	MOLOKAI COMMUNITY SERVICE COUNCIL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	T	\$ -	OTHER - QTRLY PMTS	\$54,412	\$2,908	9/18/2019	10/1/2019	9/30/2021	MOLOKAI COMMUNITY SERVICE COUNCIL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	A	\$ -	OTHER - QTRLY PMTS	\$263,284	\$16,649	9/12/2019	10/1/2019	12/31/2021	KA'ALA FARM, INC.	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	T	\$ -	OTHER - QTRLY PMTS	\$263,284	\$16,649	9/12/2019	10/1/2019	12/31/2021	KA'ALA FARM, INC.	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	A	\$ -	OTHER - QTRLY PMTS	\$101,870	\$666	9/12/2019	10/1/2019	9/30/2021	BOYS & GIRLS CLUBS OF MAUI, INC.	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	T	\$ -	OTHER - QTRLY PMTS	\$101,870	\$666	9/12/2019	10/1/2019	9/30/2021	BOYS & GIRLS CLUBS OF MAUI, INC.	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	A	\$ -	OTHER - QTRLY PMTS	\$80,434	\$1,145	9/12/2019	10/1/2019	9/30/2021	EDUCATIONAL SERVICES HAWAII FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	T	\$ -	OTHER - QTRLY PMTS	\$80,434	\$1,145	9/12/2019	10/1/2019	9/30/2021	EDUCATIONAL SERVICES HAWAII FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	A	\$ -	OTHER - COST REIMBURSEMENT	\$57,096	\$27,826	6/15/2007	6/15/2007	SV CS NOT REQ	DBRODER, SHERRY ESQ	OPERATIONS - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA 175	T	\$ -	OTHER - COST REIMBURSEMENT	\$57,096	\$27,826	6/15/2007	6/15/2007	SV CS NOT REQ	DBRODER, SHERRY ESQ	OPERATIONS - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA 175	A	\$ -	OTHER - QTRLY PMTS	\$1,048,800	\$174,800	10/1/2021	10/1/2021	6/30/2023	NATIVE HAWAIIAN LEGAL CORPORATION	STATE PROVISO - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA 175	T	\$ -	OTHER - QTRLY PMTS	\$1,048,800	\$174,800	10/1/2021	10/1/2021	6/30/2023	NATIVE HAWAIIAN LEGAL CORPORATION	STATE PROVISO - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA 175	A	\$ -	OTHER - SEMI ANN PMT	\$615,000	\$615,000	12/19/2019	12/16/2019	6/30/2023	KANU O KA 'AINA LEARNING OHANA	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	T	\$ -	OTHER - SEMI ANN PMT	\$615,000	\$615,000	12/19/2019	12/16/2019	6/30/2023	KANU O KA 'AINA LEARNING OHANA	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA 175	A	\$ -	OTHER - COST REIMBURSEMENT	\$415,000	\$212,000	8/15/2022	8/15/2022	8/14/2024	ALU LIKE, INC.	STATE PROVISO - SOCIAL SERVICES	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S

Office of Hawaiian Affairs  
 Capital Improvements Program (CIP) Requests

<u>Prog ID</u>	<u>Priority</u>	<u>Dept- Wide Priority</u>	<u>Senate District</u>	<u>Rep. District</u>	<u>Project Title</u>	<u>MOF</u>	<u>FY22 \$\$\$</u>	<u>FY23 \$\$\$</u>
NONE								

Office of Hawaiian Affairs  
CIP Lapses

<u>Prog ID</u>	<u>Act/Year of Appropriation</u>	<u>Project Title</u>	<u>MOF</u>	<u>Lapse Amount</u> <u>\$\$\$\$</u>	<u>Reason</u>
NONE					

Office of Hawaiian Affairs  
Program ID Sub-Organizations

<u>Program ID</u>	<u>Sub-Org Code</u>	<u>Name</u>	<u>Objective</u>
N/A			

Office of Hawaiian Affairs  
Organization Changes

<u>Year of Change</u> FY24/FY25	<u>Description of Change</u>
	OHA Organization Chart at Appendix E.
	PROGRAM Changes:
FY24/FY25	None.

Office of Hawaiian Affairs  
American Rescue Plan Act Fund Initiatives

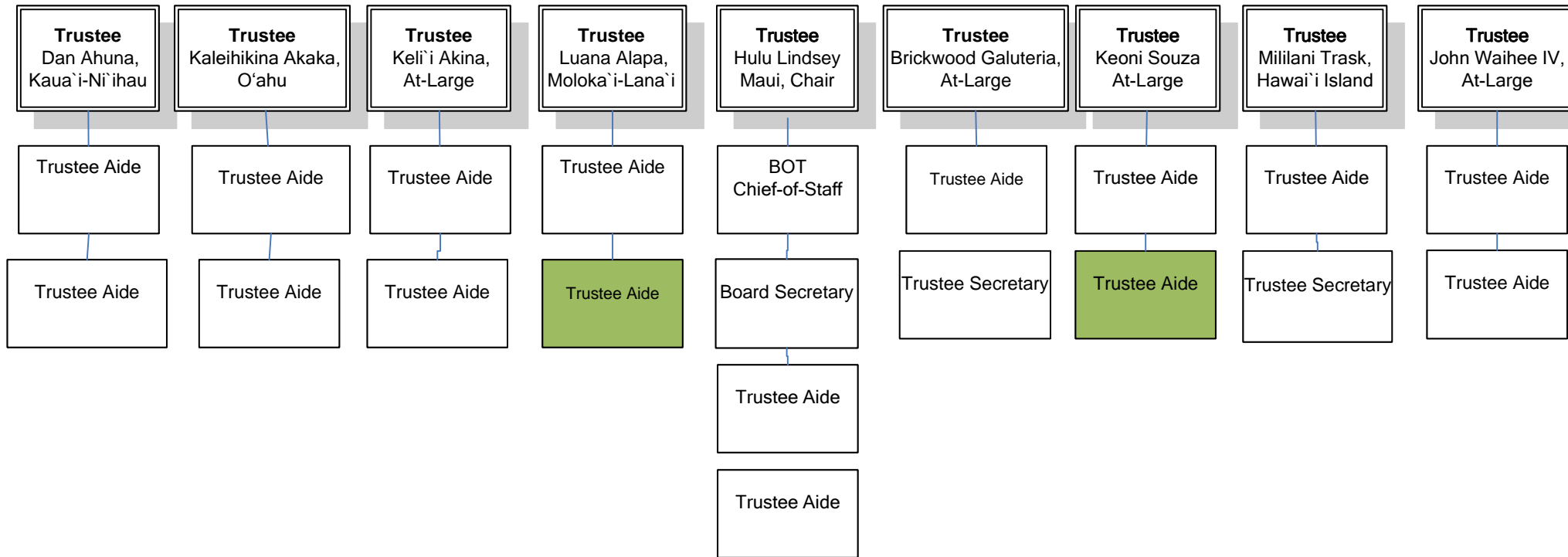
<u>Prog ID</u>	<u>Amount Allotted</u>	<u>Budget for Personnel</u>	<u>Budget for OCE (Other Than Contracts)</u>	<u>Budget for Contracts</u>	<u>Dates of Initiative</u>		<u>Initiative Description</u>	<u>Appropriating Act or GOV</u>	<u>Is This A New Initiative Or An Enhancement To An Existing Initiative/Program</u>
					<u>From</u>	<u>To</u>			
NONE									

# Appendix E

## Additional Information

### Table 18: Organization Changes, Organization Charts (14)

# BOARD OF TRUSTEES

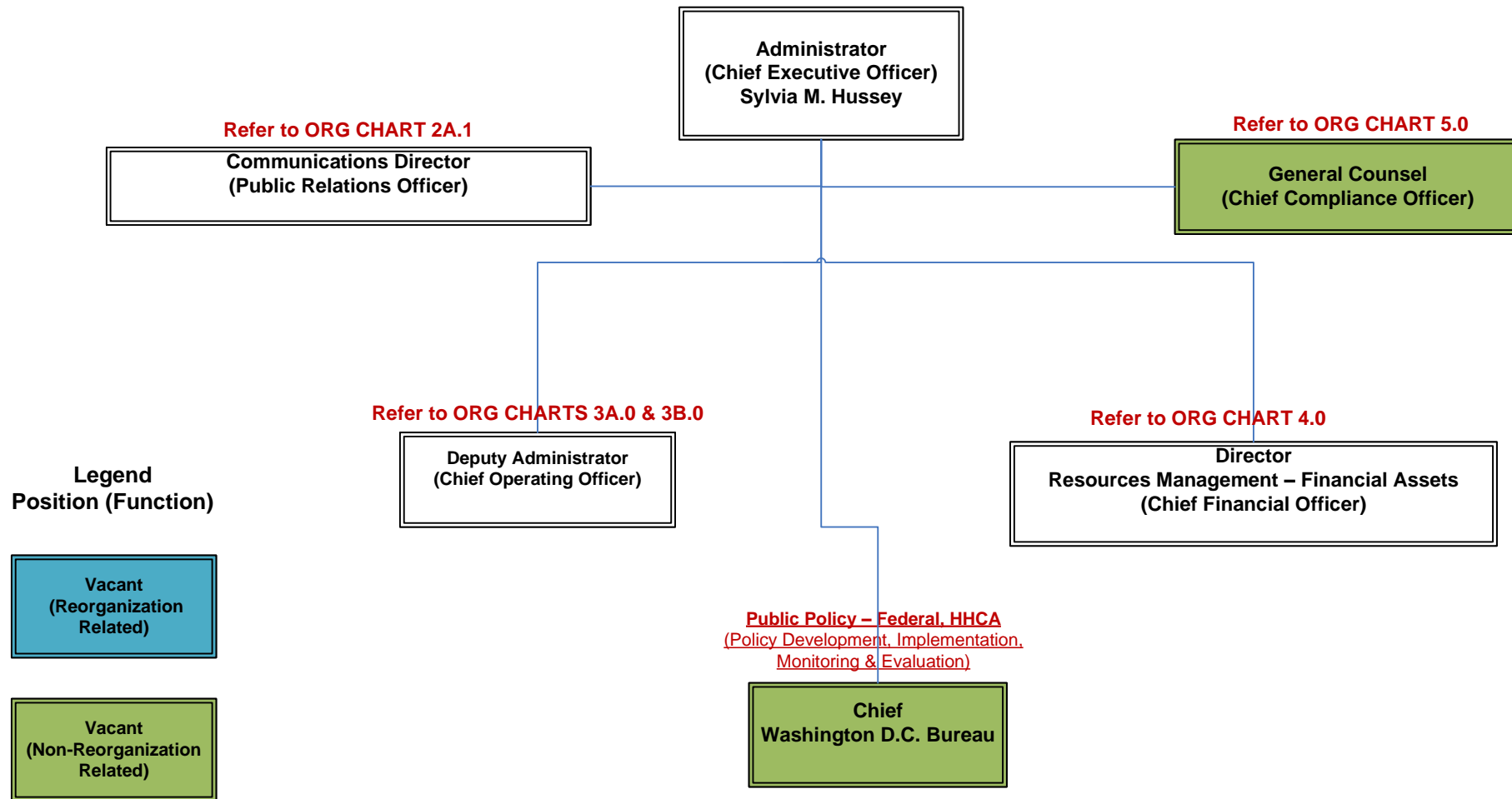


**Legend**

**Vacant  
(Non-Reorganization  
Related)**

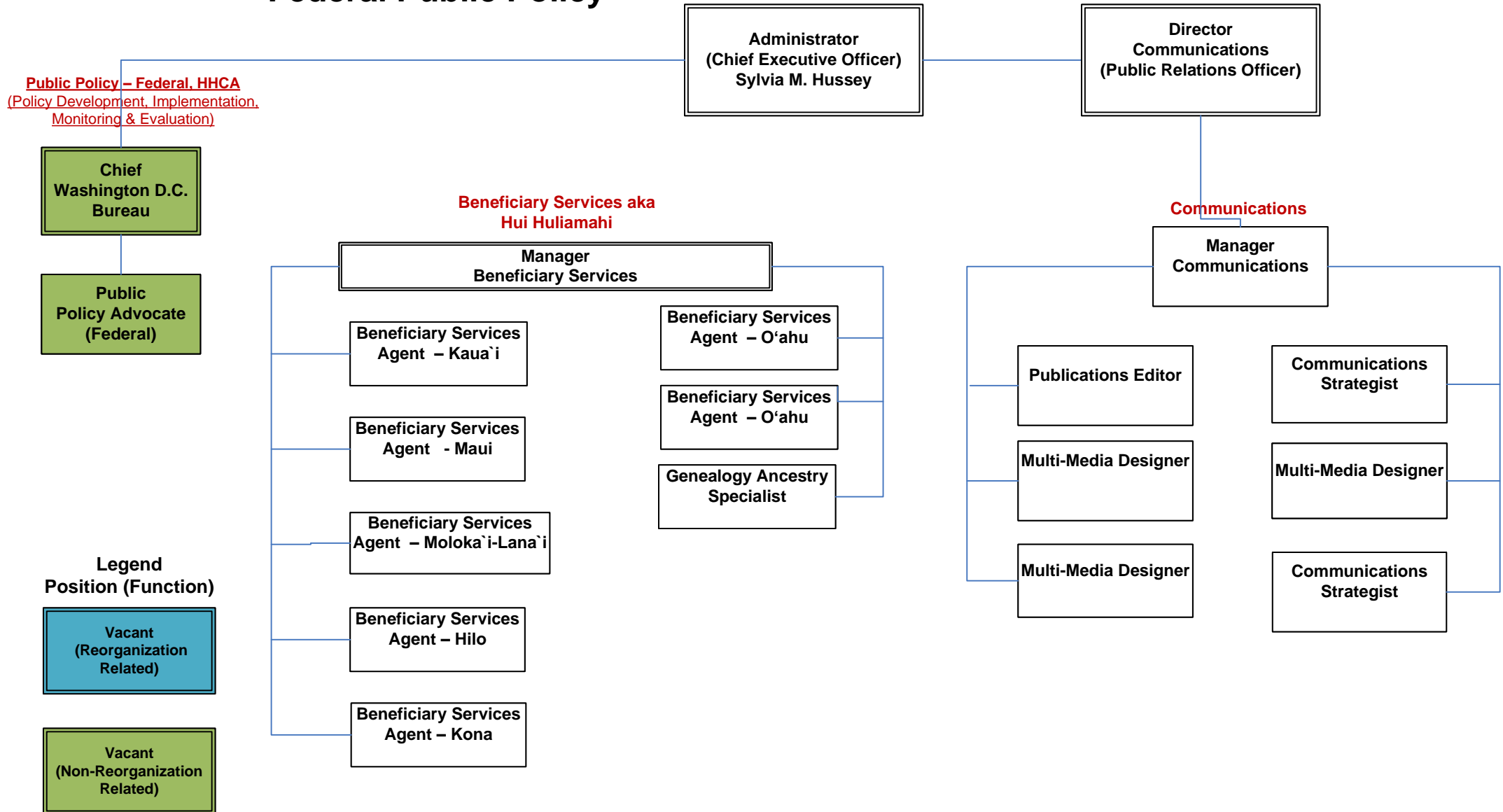


# Administrator, CEO



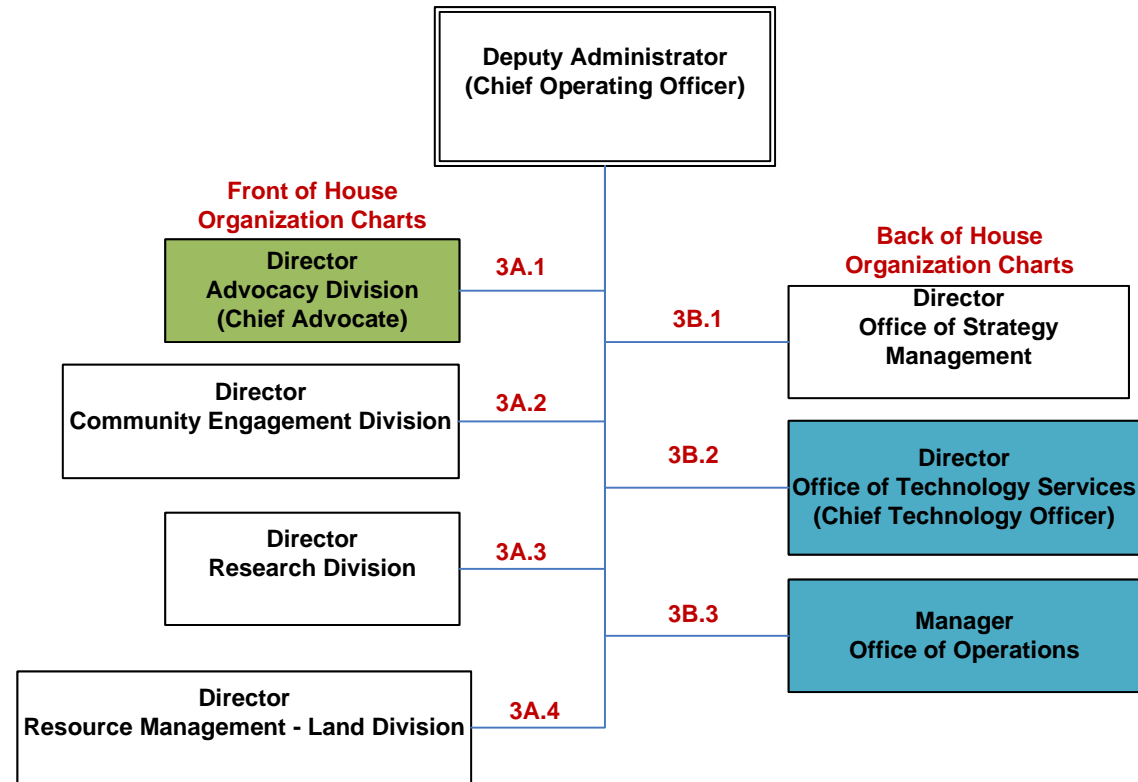
# Administrator, CEO

Functions: Beneficiary Services, Communications,  
Federal Public Policy



# Deputy Administrator, COO

## Functions: Front of House, Back of House

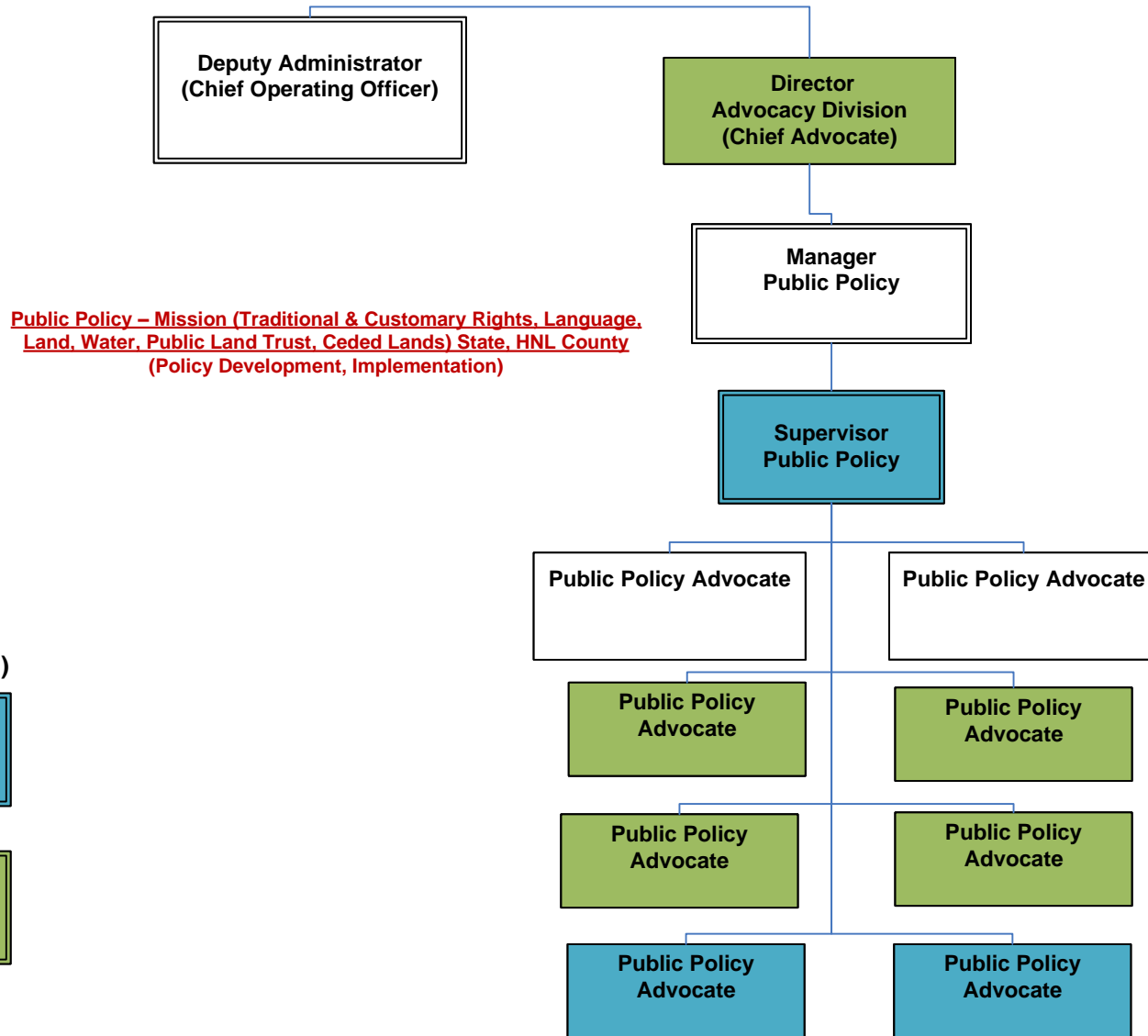


### Legend Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# Advocacy Division

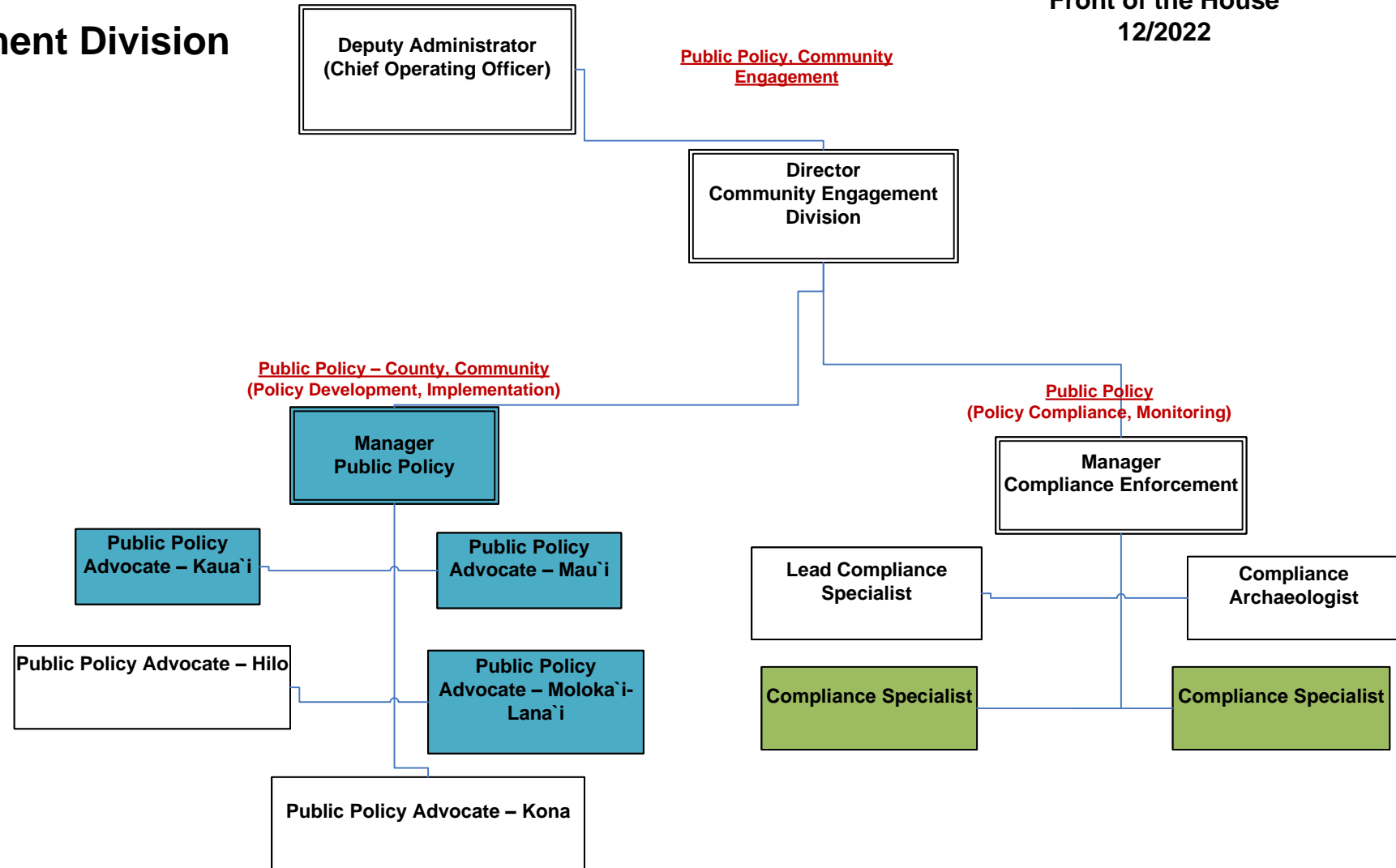


**Legend  
Position (Function)**

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# Community Engagement Division



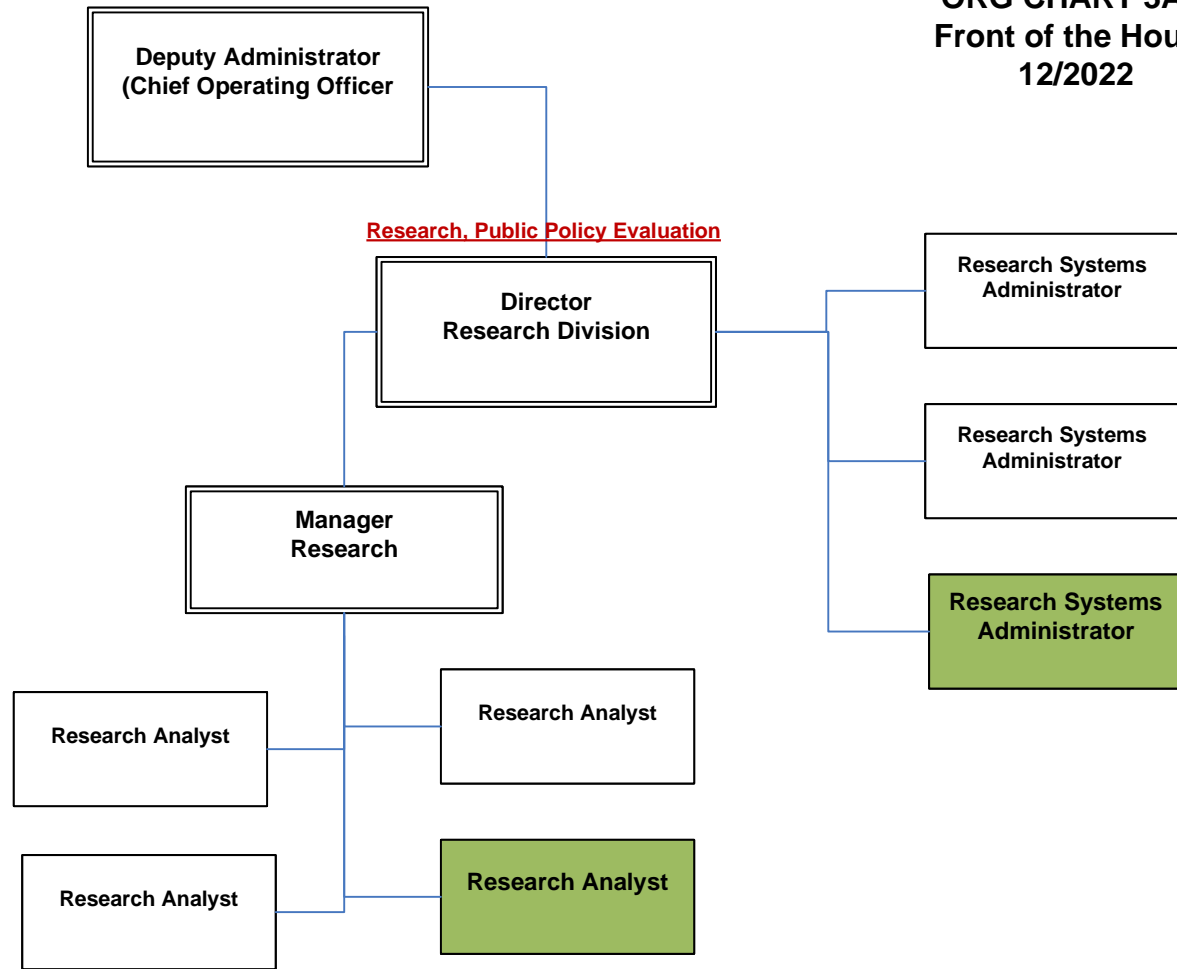
### Legend Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# Research Division

ORG CHART 3A.3  
Front of the House  
12/2022

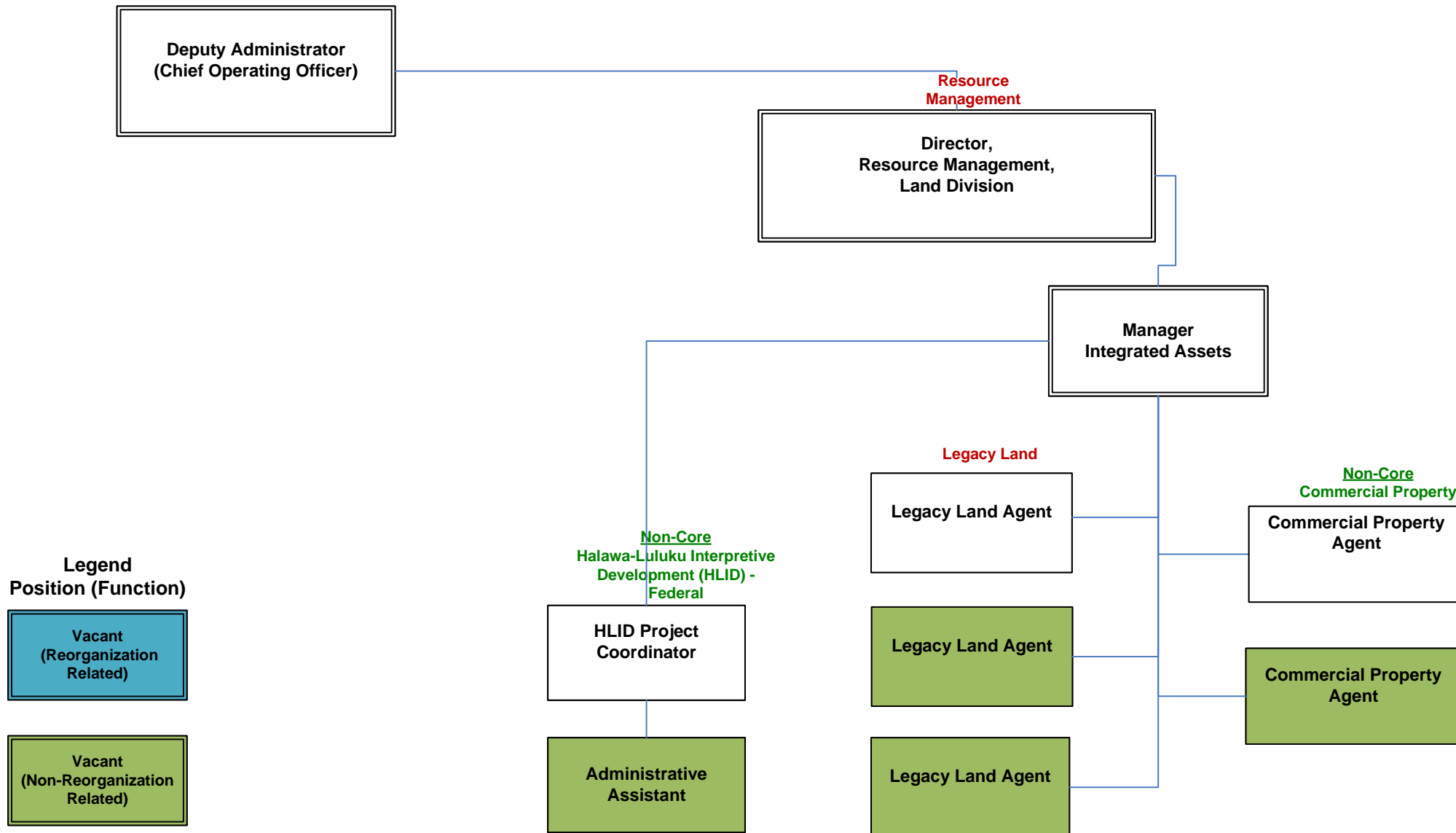


**Legend**  
Position (Function)

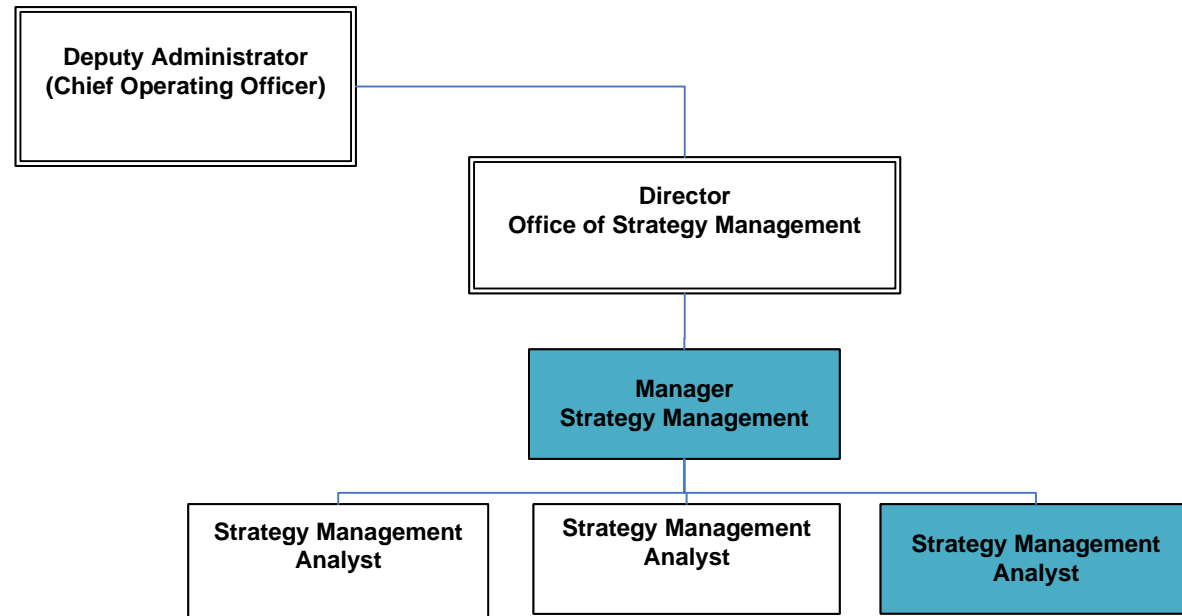
Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# Resource Management – Land Division



# Office of Strategy Management



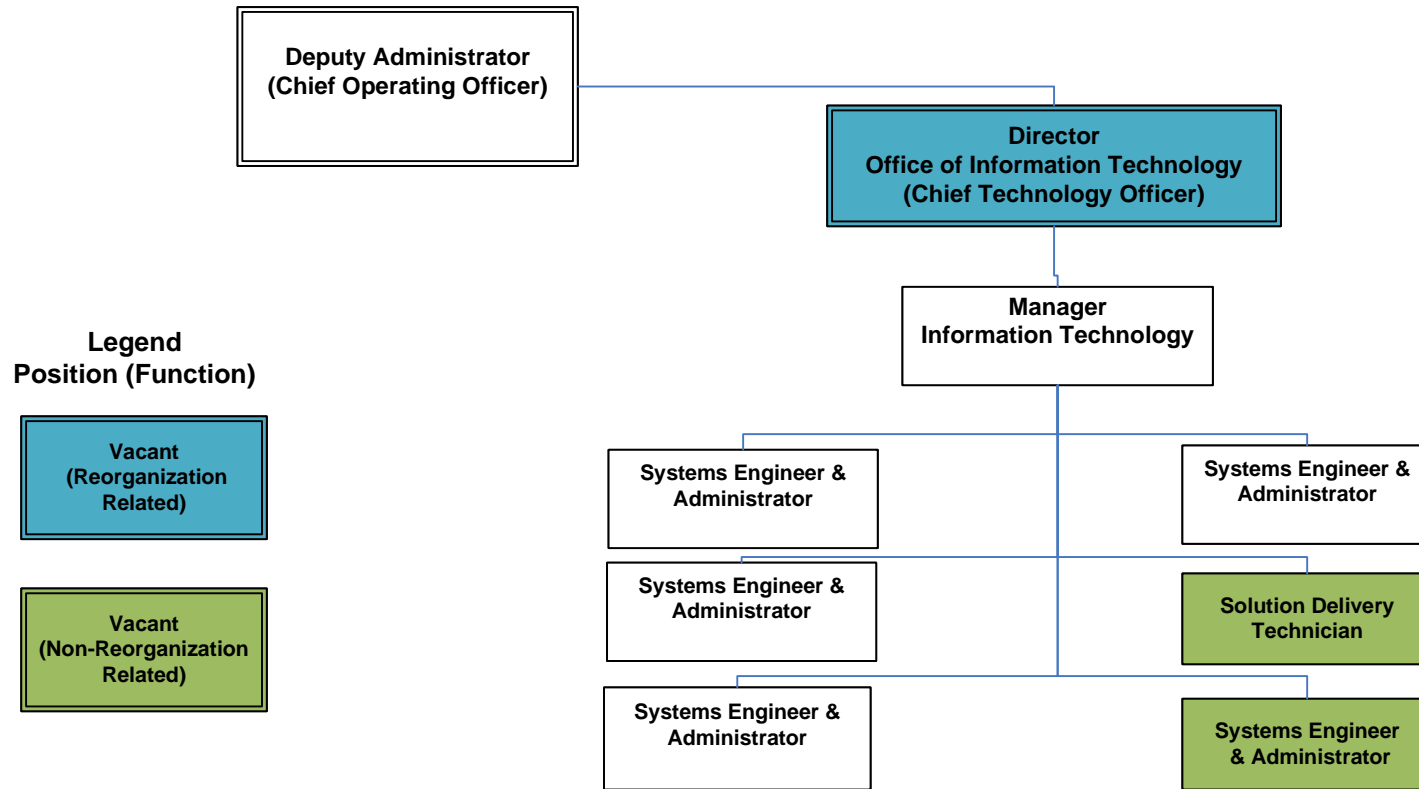
### Legend Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)



# Office of Information Technology

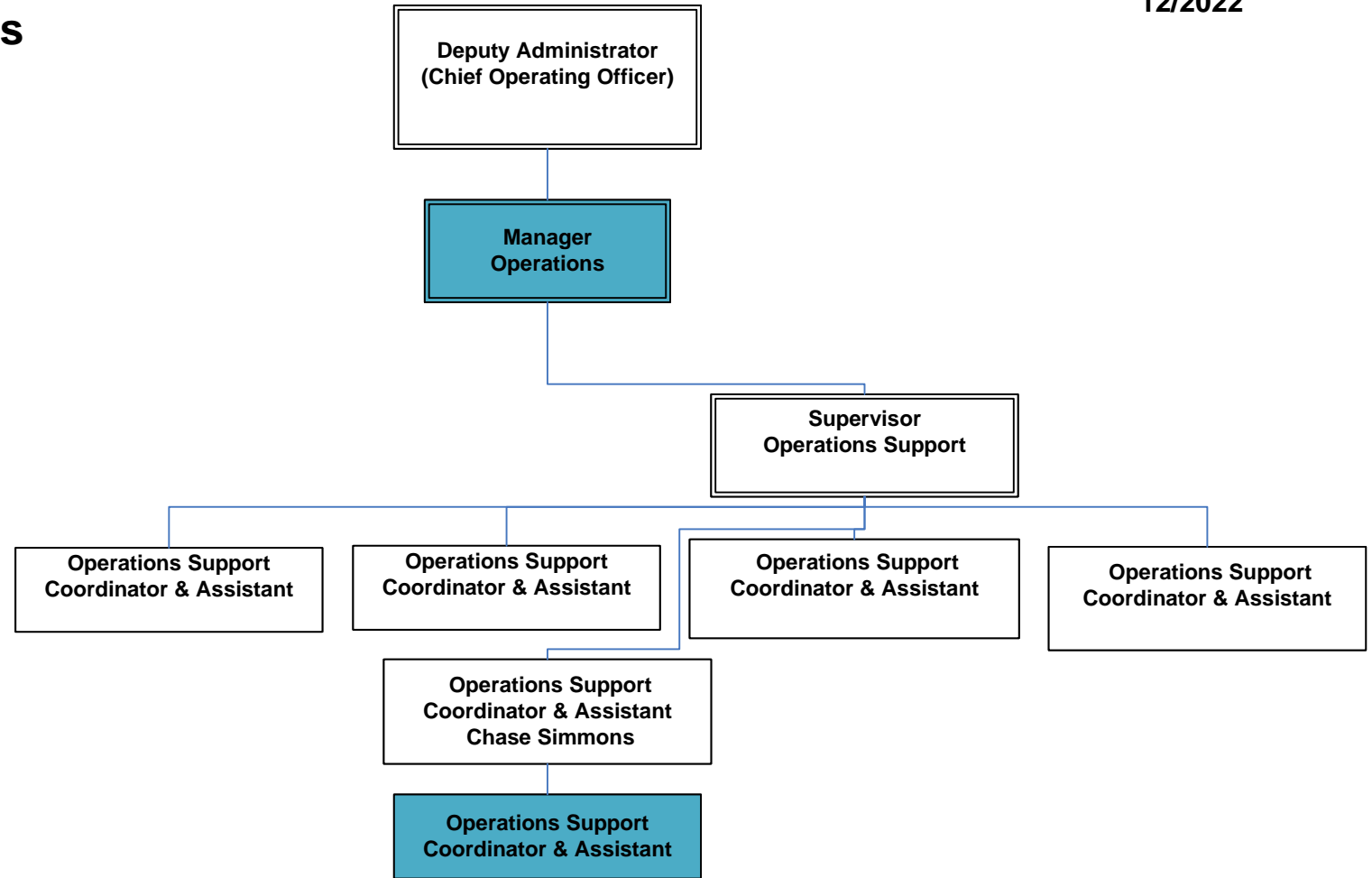


# Office of Operations

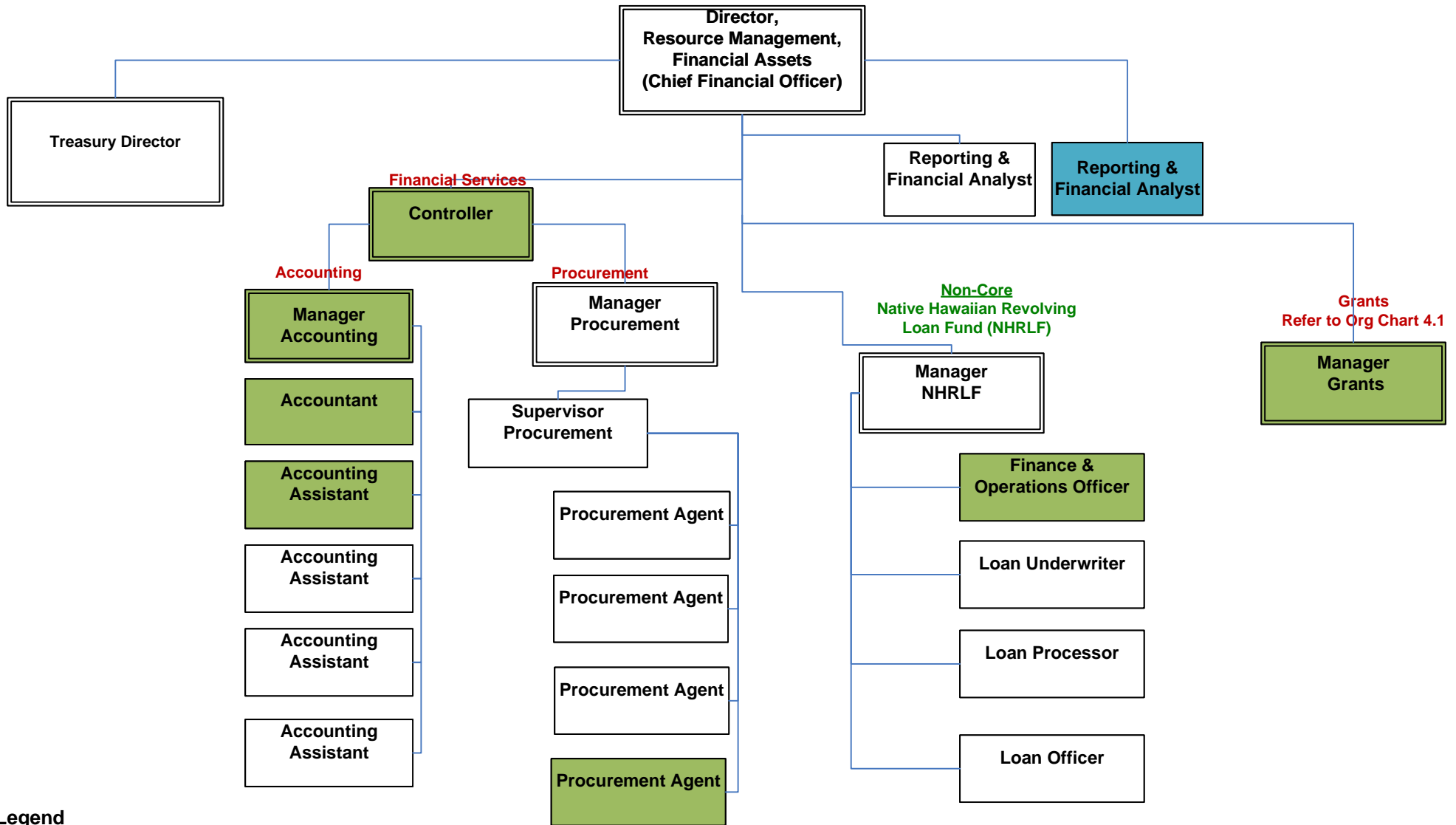
### Legend Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)



# RESOURCE MANAGEMENT-FINANCIAL ASSETS DIVISION



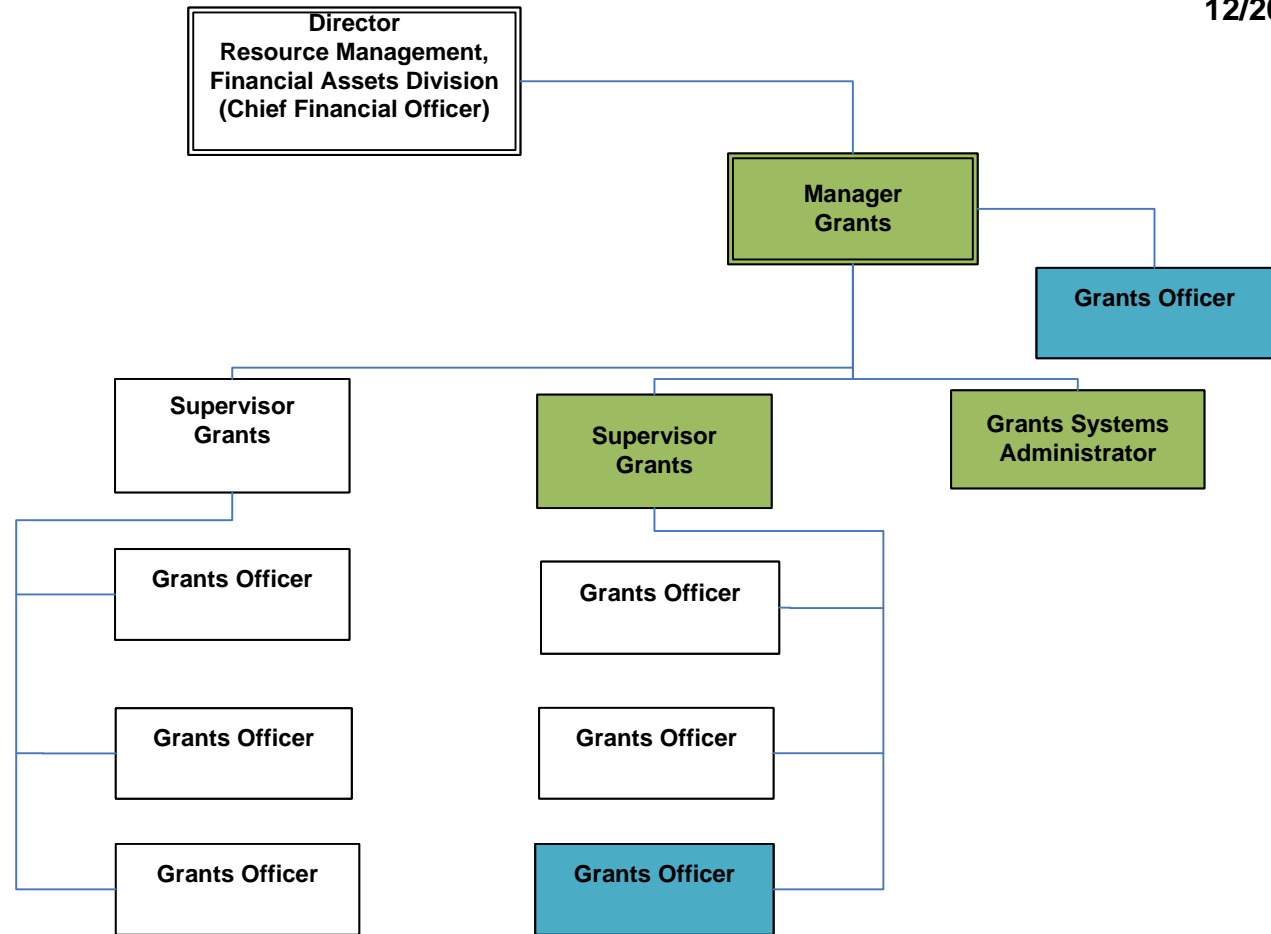
**Legend**  
Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# RESOURCE MANAGEMENT- FINANCIAL ASSETS DIVISION

ORG CHART 4.1  
Resource Management –  
Financial Assets  
Grants  
12/2022

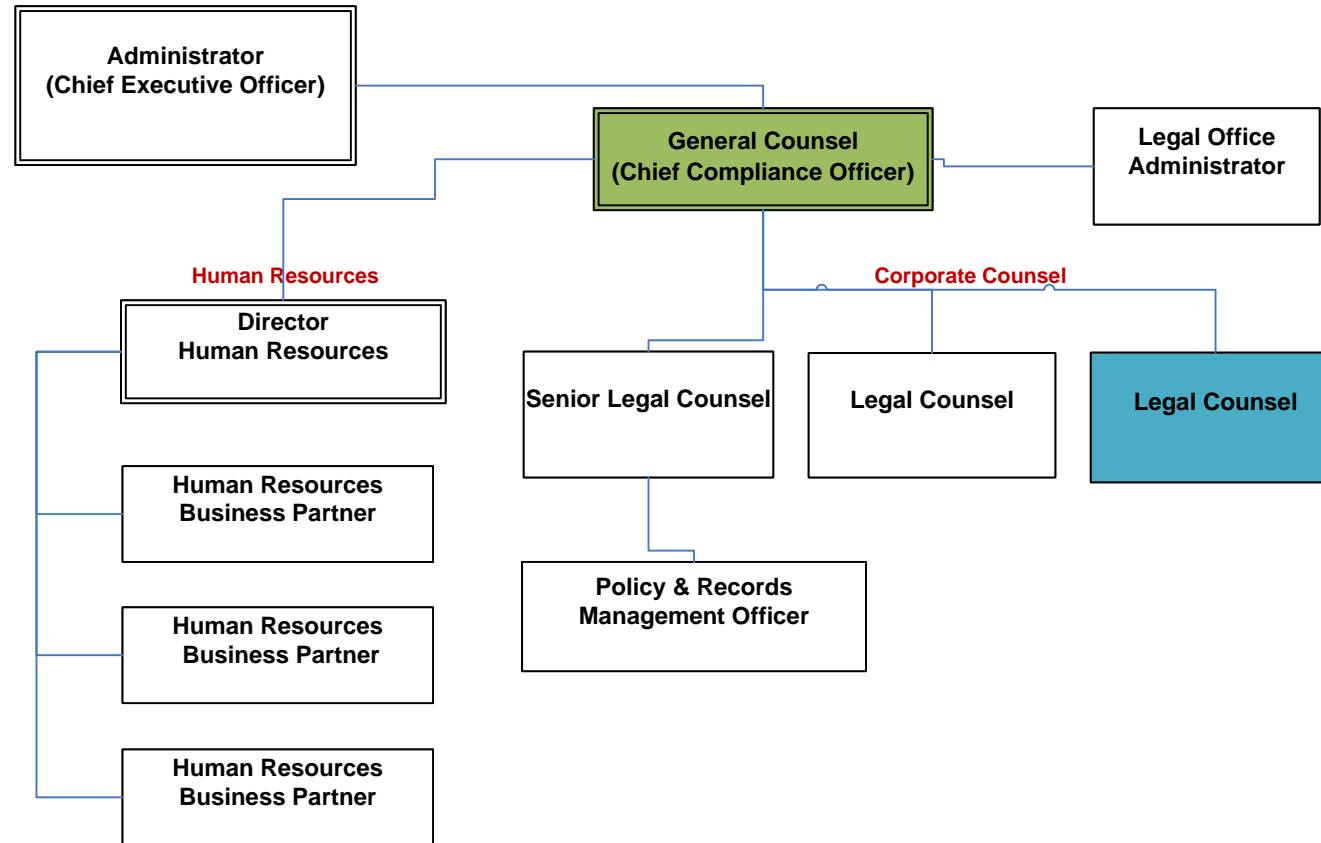


**Legend**  
Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# Corporate Counsel



### Legend Position (Function)

Vacant  
(Reorganization  
Related)

Vacant  
(Non-Reorganization  
Related)

# Appendix F

## Reporting Obligations

Pursuant to HRS 10-  
14.5(a), HRS 37-47,  
and Act 037 (19)  
HB172 relating to  
the Office of  
Hawaiian Affairs



**STATE OF HAWAII**  
**OFFICE OF HAWAIIAN AFFAIRS**  
560 N. NIMITZ HWY., SUITE 200  
HONOLULU, HAWAII 96817

December 22, 2022

Representative Scott Saiki  
House Speaker  
Hawaii State Capitol  
Room 431  
415 South Beretania Street  
Honolulu, Hawaii 96813

Senator Ronald Kouchi  
Senate President  
Hawaii State Capitol  
Room 409  
415 South Beretania Street  
Honolulu, Hawaii 96813

**RE: Reporting obligations pursuant to HRS 37-47 relating to the Office of Hawaiian Affairs**

**VIA: Reports to the Legislature Web Portal**

Aloha'olua mai,

On behalf of the Board of Trustees of the Office of Hawaiian Affairs (OHA), please accept the Reporting of Non-General Fund Information (Attachment A) to follow through with our reporting obligations as described under HRS 37-47.

Please do not hesitate to contact me at 808-594-1973 or [sylviah@oha.org](mailto:sylviah@oha.org) or have your staff contact Chief Financial Officer, Ramona Hinck, at 808-265-5628 or [ramonah@oha.org](mailto:ramonah@oha.org) should there be any questions regarding this statutory reporting requirement or its attachments.

Mahalo again and we look forward to working with you and your staff during the upcoming legislative session.

'O wau iho nō me ka 'oia'i'o,

Sylvia M. Hussey, Ed.D.  
Ka Pouhana, Chief Executive Officer

Attachments

SH:gc

cc: OHA Board of Trustees

**Report on Non-General Fund Information  
for Submittal to the 2023 Legislature**

Department: Office of Hawaiian Affairs  
 Prog ID(s): OHA 150, 160, 175  
 Name of Fund: Public Land Trust

Contact Name: Ramona Hinck  
 Phone: (808) 594-1999  
 Fund type (MOF) Trust and Special (see Purpose)

T-901, T-902, T-910, T-930,  
 T-938, T-939, T-950, T951,  
 S-310, S-315, S-320

Legal Authority Hawaii State Constitution, Article XII, Section 4

Appropriation Acct. No. \_\_\_\_\_

**Intended Purpose:**

To account for OHA's portion of revenues derived from the public land trust as defined in Section 10-2, HRS. To provide budget for continuous management, maintenance and repair of the Palauea Cultural Preserve of culturally and achaelologically significant sites. To account for the activities related to OHA's management and stewardship of the Forest Reserve, and to receive revenues from the sales of advertising space on OHA's monthly newspaper, Ka Wai Ola. All the appropriation account numbers identified above are Trust assets and during a recent State Review of OHA's funds (Special, Revolving, and Trust Funds), it was determined that these 'Special' funds will be characterized as Trust Funds going forward.

**Source of Revenues:**

- a. Ceded land revenue at \$15,100,000 per annum, as of FY 2023 increased to \$21,500,000
- b. Dividend and Interest income from investments
- c. Realized gains from sales of investments
- d. Interest earned from Consumer Micro Loan Program
- e. Revenues generated from OHA's commercial properties operations Kaka'ako Makai parcels, Na Lama Kukui and Iwilei.
- f. The Declaration of Covenants, Conditions, and Restrictions of the One Palau'ea Bay Community Association require payment of a Historical Archeological Enhancement Fee equivalent to 0.5% of gross selling price each time a lot within One Palau'ea Bay is transferred to a new owner.
- g. Sales of advertising space on OHA's monthly newspaper, Ka Wai Ola.
- h. OHA's trust fund as a funding source, when necessary.

**Current Program Activities/Allowable Expenses:**

OHA's ongoing operating and program costs in addition to grants and scholarships funding. Program, grants and scholarship costs are for the betterment of native Hawaiian conditions.

**Purpose of Proposed Ceiling Adjustment (if applicable):**

N/A

Variances:

<b>Financial Data (\$1,000)</b>			
	FY 2022 (actual-not final)	FY 2023 (estimated)	FY 2024 (estimated)
Appropriation Ceiling	N/A	N/A	N/A
Beginning Cash Balance	28,091	37,331	49,578
Revenues	53,064	62,804	64,123
Expenditures	43,824	50,557	53,085
<b>Transfers</b>			
List each net transfer in/out/ or projection in/out; list each account number			
Transfer in			
Transfer out	0	0	0
Net Total Transfers	0	0	0
Ending Cash Balance	37,331	49,578	60,615
Encumbrances	15,337	16,000	16,000
Unencumbered Cash Balance	21,994	33,578	44,615

**Additional Information:**

Amount Req. by Bond Covenants	N/A	N/A	N/A
Amount from Bond Proceeds	N/A	N/A	N/A
Amount Held in CODs, Escrow Accounts, or Other Investments	N/A	N/A	N/A



**Report on Non-General Fund Information  
for Submittal to the 2023 Legislature**

Department: Office of Hawaiian Affairs  
 Prog ID(s): \_\_\_\_\_  
 Name of Fund: Federal Fund  
 Legal Authority: HRS 10-13

Contact Name: Ramona Hinck  
 Phone: (808) 594-1999  
 Fund type (MOF): Special  
 Appropriation Acct. No. S-200, S-202

**Intended Purpose:**

S-200 - Hālawā Luluku Interpretive Development (HLID) was created largely to mitigate any adverse impact resulting from the construction of the Interstate H-3 Highway.

S-202 - To provide Native Hawaiians individuals and Native Hawaiian-owned businesses better access to financial capital and financial services

**Source of Revenues:**

S-200 - Federal Highways Administration - 90% funding; Hawai'i Department of Transportation - 10% funding

S-202 - Principal repayments, Interest earned from loans, Interest earned from investments, Miscellaneous revenue derived from loan fees, Recovery of loans written-off.

**Current Program Activities/Allowable Expenses:**

S-200 - Salaries and CIP to maintain the H-3 Highway

S-202 - Expenditures consisted of loan disbursements, loan application fees, legal services, technical assistance, investment management, bad debt,

**Purpose of Proposed Ceiling Adjustment (if applicable):**

N/A

Variances:

<b>Financial Data (\$1,000)</b>			
	FY 2022	FY 2023	FY 2024
	(actual-not final)	(estimated)	(estimated)
Appropriation Ceiling			
Beginning Cash Balance	7,627	6,555	4,838
Revenues	(62)	123	123
Expenditures	1,010	1,840	1,697
<b>Transfers</b>			
List each net transfer in/out/ or projection in/out; list each account number			
Transfer in	0	0	0
Transfer out			
Net Total Transfers	0	0	0
Ending Cash Balance	6,555	4,838	3,264
Encumbrances	865	900	900
Unencumbered Cash Balance	5,690	3,938	2,364
<b>Additional Information:</b>			
Amount Req. by Bond Covenants	N/A	N/A	N/A
Amount from Bond Proceeds	N/A	N/A	N/A
Amount Held in CODs, Escrow Accounts, or Other Investments	N/A	N/A	N/A

# Appendix G

## Plante Moran 38 Transactions Analysis October 31, 2022

Cut and paste this url to receive  
the 239 page secured report

<https://www.oha.org/wp-content/uploads/Plante-Moran-OHA-Transactions-Report-October-2022-WEB.pdf>

The Office of Hawaiian Affairs | October 31, 2022

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Contract #4262

38 Transactions Analysis



plante moran | Audit. Tax. Consulting.  
Wealth Management.

# Appendix H

Act 226 (2022)

RELATING TO  
INCREASING THE  
PAYMENT AMOUNT  
FOR THE OFFICE OF  
HAWAIIAN AFFAIRS'  
PRO RATA SHARE OF  
THE PUBLIC LAND  
TRUST



GOV. MSG. NO. 1327

EXECUTIVE CHAMBERS  
HONOLULU

DAVID Y. IGE  
GOVERNOR

June 27, 2022

The Honorable Ronald D. Kouchi,  
President  
and Members of the Senate  
Thirty-First State Legislature  
State Capitol, Room 409  
Honolulu, Hawai'i 96813

The Honorable Scott K. Saiki,  
Speaker and Members of the  
House of Representatives  
Thirty-First State Legislature  
State Capitol, Room 431  
Honolulu, Hawai'i 96813

Dear President Kouchi, Speaker Saiki, and Members of the Legislature:

This is to inform you that on June 27, 2022, the following bill was signed into law:

SB2021 SD1 HD2 CD1

RELATING TO INCREASING THE PAYMENT  
AMOUNT FOR THE OFFICE OF HAWAIIAN  
AFFAIRS' PRO RATA SHARE OF THE PUBLIC  
LAND TRUST.

**ACT 226**

Sincerely,

DAVID Y. IGE  
Governor, State of Hawai'i

THE SENATE  
THIRTY-FIRST LEGISLATURE, 2022  
STATE OF HAWAII

S.B. NO. 2021  
S.D. 1  
H.D. 2  
C.D. 1

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# A BILL FOR AN ACT

RELATING TO INCREASING THE PAYMENT AMOUNT FOR THE OFFICE OF  
HAWAIIAN AFFAIRS' PRO RATA SHARE OF THE PUBLIC LAND TRUST.

**BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF HAWAII:**

1           SECTION 1. The legislature finds that it must set right  
2 and fulfill its trust responsibilities to native Hawaiians,  
3 consistent with governmental action across America to address  
4 injustices against Indigenous Peoples. It is incumbent upon the  
5 legislature to enact legislation that upholds its trust  
6 responsibilities and duty of care to native Hawaiians to:

7           (1) Account for all ceded lands in the public lands trust  
8           inventory;

9           (2) Account for all income and proceeds derived from the  
10          public land trust; and

11          (3) Transfer the full twenty per cent pro rata share of  
12          income and proceeds from the public land trust  
13          annually to the office of Hawaiian affairs (OHA) for  
14          the betterment of the conditions of native Hawaiians.

15          The genesis and source of the State's public land trust  
16          responsibility to native Hawaiians are the historical events  
17          that led to the illegal overthrow of the Kingdom of Hawaii; the



S.B. NO. 2021  
S.D. 1  
H.D. 2  
C.D. 1

1 transfer of approximately 1,800,000 acres of crown, government,  
2 and public lands to the United States under the 1898 Joint  
3 Resolution of Annexation without the consent of and without  
4 compensation to the native Hawaiian people or their sovereign  
5 government; the admission of Hawaii as a state of the Union in  
6 1959, with the explicit trust responsibility and requirement in  
7 section 5(f) of the 1959 Admission Act that one of the five  
8 purposes of the public land trust is that the income and  
9 proceeds from the public land trust are to be used "for the  
10 betterment of the conditions of native Hawaiians"; and the 1978  
11 Constitutional Convention's recognition that native Hawaiians  
12 are one of the beneficiaries of the public land trust and the  
13 creation of OHA to manage and administer the specific allocation  
14 of "all income and proceeds from that pro rata portion of the  
15 [public land] trust . . . for native Hawaiians" (Article XII,  
16 section 6, of the Hawaii State Constitution). The United States  
17 and the courts have consistently affirmed the trust nature of  
18 the government and crown lands, including large tracts of ceded  
19 lands used for military or other purposes under federal control.

20 In 1959, as a condition of its admission into the Union,  
21 the State of Hawaii agreed to hold certain lands granted to the



S.B. NO. 2021  
S.D. 1  
H.D. 2  
C.D. 1

1 State by the United States in a public trust for five purposes  
2 delineated in section 5(f) of the Admission Act, which provides  
3 in relevant part:

4           The lands granted to the State of Hawaii by subsection  
5           (b) of this section and public lands retained by the United  
6           States under subsections (c) and (d) and later conveyed to  
7           the State under subsection (e), together with the proceeds  
8           from the sale or other disposition of any such lands and  
9           the income therefrom, shall be held by said State as a  
10          public trust [(1)] for the support of the public schools  
11          and other public educational institutions, [(2)] *for the*  
12          *betterment of the conditions of native Hawaiians, as*  
13          *defined in the Hawaiian Homes Commission Act, 1920, as*  
14          *amended, [(3)] for the development of farm and home*  
15          ownership on as widespread a basis as possible [(4)] for  
16          the making of public improvements, and [(5)] for the  
17          provision of lands for public use. Such lands, proceeds,  
18          and income shall be managed and disposed of for one or more  
19          of the foregoing purposes in such manner as the  
20          constitution and laws of said State may provide, and their





S.B. NO. 2021  
S.D. 1  
H.D. 2  
C.D. 1

1 use for any other object shall constitute a breach of trust  
2 for which suit may be brought by the United States.

3 (*Emphasis added.*)

4 In 1978, the people of Hawaii affirmed the State's trust  
5 obligation to native Hawaiians by ratifying constitutional  
6 amendments from the Constitutional Convention, including  
7 article XII, sections 4, 5, and 6, of the Hawaii State  
8 Constitution, which established OHA and charged it with managing  
9 income and proceeds from the public land trust for the benefit  
10 of native Hawaiians. Article XVI, section 7, of the Hawaii  
11 State Constitution required the State to enact legislation to  
12 comply with its trust obligations. Thus, in 1979, legislation,  
13 codified as chapter 10, Hawaii Revised Statutes, set forth the  
14 purposes of OHA and described the duties of its trustees.

15 In September 1981, an initial land inventory by the  
16 department of land and natural resources listed approximately  
17 1,271,652 acres, falling woefully short of its duty to provide a  
18 complete inventory of the public land trust lands.  
19 Additionally, the state land information management system does  
20 not include all lands held by all state entities.



S.B. NO. 2021  
S.D. 1  
H.D. 2  
C.D. 1

1 Act 273, Session Laws of Hawaii 1980, enacted section  
2 10-13.5, Hawaii Revised Statutes, to implement OHA's pro rata  
3 share and required that OHA receive "[t]wenty per cent of all  
4 funds derived from the public land trust[.]" This legislative  
5 directive addressing the constitutional mandate has led to a  
6 series of lawsuits and legislative enactments concerning OHA's  
7 constitutional pro rata share of the public land trust. The  
8 State and OHA have labored to resolve the political question of  
9 the statutory pro rata share of income and proceeds derived from  
10 the public land trust, and payment to OHA.

11 Act 178, Session Laws of Hawaii 2006, affirmed the State's  
12 trust obligation to native Hawaiians by requiring that the  
13 department of land and natural resources provide an annual  
14 accounting of revenue-generating public trust lands and the  
15 amounts derived from those lands to the legislature. The  
16 measure also set a fixed amount of \$15,100,000 from the pro rata  
17 share of the public land trust income and proceeds due to OHA  
18 for the betterment of the conditions of native Hawaiians until  
19 further action is taken by the legislature for this purpose.

20 Act 15, Session Laws of Hawaii 2012, (Act 15) was enacted  
21 to address past-due amounts, which accumulated during the period



S.B. NO. 2021  
S.D. 1  
H.D. 2  
C.D. 1

1 between November 7, 1978, up to and including June 30, 2012, of  
2 income and proceeds from the public land trust owed to OHA by  
3 implementing an agreement between the State and OHA for the  
4 State to convey certain lands in Kakaako, Oahu, to OHA valued at  
5 approximately \$200,000,000. Act 15 did not, however, address  
6 the State's constitutional obligations relating to OHA's twenty  
7 per cent pro rata share of the income and proceeds from the  
8 public land trust generated after June 30, 2012. Notably, a  
9 2015-2016 financial review initiated by OHA found that the  
10 minimum amount of total gross receipts from sources that OHA has  
11 historically claimed was approximately \$394,322,163 in the  
12 fiscal year 2015-2016. Twenty per cent of this gross amount is  
13 approximately \$78,900,000.

14 The legislature finds that to uphold its constitutional  
15 trust obligation and duty to native Hawaiians, it must enact  
16 another legislative measure in light of the information, data,  
17 and facts provided to the legislature by state agencies since  
18 the enactment of Act 178, Session Laws of Hawaii 2006, more than  
19 a decade ago.

20 The purpose of this Act is to:



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C.D. 1

1 (1) Establish \$21,500,000 as the office of Hawaiian  
2 affairs' interim annual share of the income and  
3 proceeds of the public land trust beginning in fiscal  
4 year 2022-2023;

5 (2) Appropriate \$64,000,000 to the office of Hawaiian  
6 affairs; and

7 (3) Establish a working group to determine the pro rata  
8 share of income and proceeds from the public land  
9 trust due annually to the office of Hawaiian affairs.

10 SECTION 2. Act 178, Session Laws of Hawaii 2006, is  
11 amended by amending sections 2 and 3 to read:

12 "SECTION 2. Notwithstanding the provisions of chapter 10,  
13 Hawaii Revised Statutes, including section 10-13.5, Hawaii  
14 Revised Statutes, and until further action is taken by the  
15 legislature for this purpose, the income and proceeds from the  
16 pro rata portion of the public land trust under article XII,  
17 section 6, of the state constitution for expenditure by the  
18 office of Hawaiian affairs for the betterment of the conditions  
19 of native Hawaiians for each fiscal year beginning with fiscal  
20 year [~~2005-2006~~] 2022-2023 shall be [~~\$15,100,000.~~] \$21,500,000.



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H.D. 2  
C.D. 1

1 SECTION 3. Notwithstanding the provisions of chapter 10,  
2 Hawaii Revised Statutes, or the requirements of Executive Order  
3 No. [~~03-03,~~] 06-06, beginning in fiscal year [~~2005-2006,~~] 2022-  
4 2023, the departments of agriculture, accounting and general  
5 services, business, economic development, and tourism,  
6 education, land and natural resources, and transportation (for  
7 its harbors division), and any other department or agency that  
8 collects receipts from the lands within the public land trust,  
9 shall determine and transfer to the office of Hawaiian affairs  
10 that portion of their receipts from the use of lands within the  
11 public land trust collected during each fiscal quarter,  
12 necessary to ensure that a total of [~~\$3,775,000~~] \$5,375,000 of  
13 revenues generated by the public land trust is transferred to  
14 the office of Hawaiian affairs, within thirty days of the close  
15 of each fiscal quarter; provided that for fiscal year [~~2005-~~  
16 ~~2006,~~] 2022-2023, the departments shall have until thirty days  
17 after the close of the fiscal year to transfer a total of  
18 [~~\$15,100,000~~] \$21,500,000 from their receipts from the use of  
19 lands within the public land trust collected during fiscal year  
20 [~~2005-2006,~~] 2022-2023, to the office of Hawaiian affairs



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C.D. 1

1 whether by the procedures set out in Executive Order No. [~~03-03~~]  
2 06-06 or this Act.

3 The governor is expressly authorized to fix the amounts  
4 each agency shall transfer to the office of Hawaiian affairs in  
5 each quarter by executive order to implement the provisions of  
6 this section[-]; provided that a total of not less than  
7 \$5,375,000 each quarter shall be transferred to the office of  
8 Hawaiian affairs, as provided in this section."

9 SECTION 3. (a) There is established a working group to:

10 (1) Account for all ceded lands in the public land trust  
11 inventory;

12 (2) Account for all income and proceeds from the public  
13 land trust; and

14 (3) Subsequently determine the twenty per cent pro rata  
15 share of income and proceeds from the public land  
16 trust due annually to the office of Hawaiian affairs  
17 for the betterment of the conditions of Native  
18 Hawaiians.

19 (b) The working group shall be comprised of six members,  
20 three of whom three shall be appointed by the governor and three



1 of whom shall be appointed by the office of Hawaiian affairs  
2 board of trustees.

3 (c) The working group, with the cooperation of any  
4 department or agency that uses, manages, or receives income,  
5 proceeds, or any other funds derived from the public land trust,  
6 shall prepare and submit a report of its findings and  
7 recommendations, including any proposed legislation and the  
8 amount it determines for the annual amount of the twenty per  
9 cent pro rata share of income and proceeds from the public land  
10 trust, to the legislature.

11 (d) The office of Hawaiian affairs shall provide any  
12 necessary administrative support, including preparation of the  
13 report required by subsection (c), to the working group.

14 SECTION 4. There is appropriated out of the general  
15 revenues of the State of Hawaii the sum of \$64,000,000 or so  
16 much as may be necessary for fiscal year 2021-2022 to pay to the  
17 office of Hawaiian affairs for a portion of the income and  
18 proceeds from the public land trust. The sum appropriated shall  
19 be deposited into the native Hawaiian trust fund and expended by  
20 the office of Hawaiian affairs.



1 SECTION 5. The general revenue appropriated by this Act  
2 shall be deemed income and proceeds from the public land trust  
3 as if the sum had been paid out of income and proceeds from the  
4 public land trust pursuant to article XII, section 6, of the  
5 Hawaii State Constitution.

6 SECTION 6. Statutory material to be repealed is bracketed  
7 and stricken. New statutory material is underscored.

8 SECTION 7. This Act shall take effect upon its approval.





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S.D. 1  
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C.D. 1

APPROVED this 27th day of June, 2022



GOVERNOR OF THE STATE OF HAWAII


S.B. No. 2021; S.D. 1, H.D. 2, C.D. 1

**THE SENATE OF THE STATE OF HAWAI'I**

Date: May 3, 2022  
Honolulu, Hawaii 96813

We hereby certify that the foregoing Bill this day passed Final Reading in the Senate of the Thirty-First Legislature of the State of Hawai'i, Regular Session of 2022.

  
President of the Senate

  
Clerk of the Senate

SB No. 2021, SD 1, HD 2, CD 1

THE HOUSE OF REPRESENTATIVES OF THE STATE OF HAWAII

Date: May 3, 2022  
Honolulu, Hawaii

We hereby certify that the above-referenced Bill on this day passed Final Reading in the House of Representatives of the Thirty-First Legislature of the State of Hawaii, Regular Session of 2022.



Scott K. Saiki  
Speaker  
House of Representatives



Brian L. Takeshita  
Chief Clerk  
House of Representatives

# Appendix I

Office of  
Hawaiian Affairs  
Kaka'ako Makai  
Lands  
Presentation  
November 2022

# Office of Hawaiian Affairs Kaka'ako Makai Lands

Kuilei Consulting, Inc.

*Kaka'ako Makai Maa*



The Kuilei Consulting collaborative was formed with the purpose of integrating kanaka maoli 'ike (wisdom) with industry-leading developer talent offering innovative, multidisciplinary skills to create synergistic solutions to accomplish exceptional developments.



**A.** \$34,980,000 – 1011 Ala Moana Blvd. and Keolu Bldg. (MAFES) TMC 2-1-58-95 & 2-1-58-125 (221,372 sq. ft.)  
**B.** \$17,750,000 – 123 Alua St. and 113 Alua St. TMC 2-1-58-2 & 2-1-58-35 (137,218 sq. ft.)  
**C.** \$13,820,000 – 59 Alua St. TMC 2-1-58-124 & 2-1-58-126 (88,996 sq. ft.)  
**D.** \$7,400,000 – 45 Alua St. and 53 Alua St. TMC 2-1-58-48 & 2-1-60-18 (40,841 sq. ft.)  
**E.** \$17,140,000 – 919 Ala Moana Blvd. (MAFES) TMC 2-1-58-6 (195,832 sq. ft.)



**F.** \$30,660,000 – 160 Alua St. TMC 2-1-60-5 (200,742 sq. ft.)  
**G.** \$18,470,000 – 160 Keolu St. TMC 2-1-60-6 (110,904 sq. ft.)  
**H.** \$25,540,000 – Ala Moana Blvd. TMC 2-1-58-3 (145,316 sq. ft.)  
**I.** \$11,420,000 – Point Panic 40 Alua St., TMC 2-1-60-1 (69,000 sq. ft.)  
**J.** \$21,930,000 – End of Keolu St. TMC 2-1-15-6 (227,645 sq. ft.)  
**K.** [Caption partially obscured]  
**L.** [Caption partially obscured]

This map is provided solely to give the reader a general sense as to the location and configuration of each of the respective settlement parcels. It is not a survey map, and does not necessarily show the legal boundary lines of such parcels. For more information: Visit [www.oha.org/kakaako](http://www.oha.org/kakaako)

# 2012 Settlement

The 2012 Settlement to OHA was in lieu of **\$200MM** cash payment for Ceded Lands Revenue

If OHA had invested that money in **2012** at a return rate of **7%**, OHA would now have:

**\$400MM**

Current  
Potential  
Value  
**\$200MM**

# Residential Repeal

If OHA is allowed to develop this property with the **REPEAL** of the residential restriction it will realize about **\$200MM** in value.

2012 Reinvested Value at 7%	<b>\$400MM</b>
- Less: Value w/ Repeal (including Lot L):	<b>\$200MM</b>
- Less: State Contribution to Bulkhead:	<b>\$ 50MM</b>
<hr/>	
Equity Gap	<b>\$150MM</b>



The 2012 Settlement was in lieu of \$200MM cash owed to Hawaiians.

OHA needs to be “made whole” as the settlement was not an equal trade and presented as a “take it or leave it” ultimatum.

Seeking Residential Repeal & Remuneration for OHA.

The only way to achieve \$400MM in Value today, is to secure Residential Repeal and Remuneration.

What does this mean?



View from Ala Moana Boulevard looking towards the horizon. Fisherman's Wharf site is to the right and Kewalo Basin Park is to the left. Local retail shops and cultural uses line the board walk where residents can come to dine, enjoy the outdoors, and engage with culture.



View from Kewalo Harbor looking Ewa towards West Oahu. To the right is Kamehameha Schools' Our Kaka'ako with 400 ft. residential towers. On OHA's property is 4 towers at 200 ft. Retail and commercial uses are spread through out the district on the ground floor.

## Bottom Line

Native Hawaiians are entitled, by law, to determine how best to shape our cultural, social and economic well-being and to ensure the health and prosperity of our people through optimum use of the lands that belong to us.

# Legislative Ask

## Residential Repeal for Entitlements

- ❖ Project is non-feasible without Residential Repeal
- ❖ There will be no project without Residential Entitlements

## Remuneration

- ❖ Estimated \$50MM Bulk Head and Infrastructure Repairs

# Comprehensive Community Outreach

## We Need Your Support

Our goal is to bring our communities as beneficiaries of OHA together with its leadership to achieve our rights to self-determination as guaranteed under the law.

*OHA's Kakaako Makai Lands are a significant land asset that can be developed as an economic engine.*

- **Active Participation in mobilizing the community** *Make your Voices Heard*
- **Reach out to Legislators**
- **Reach out to Community Leaders**
- **Testimony**
- **Rally our supporters**

# Initial Outreach Strategy

<b>November 21 - December 5</b>	<b>Key Partners Small Group Meetings</b>
<b>Week of December 12</b>	<b>Public Town Hall 1</b>
<b>Week of January 9</b>	<b>Public Town Hall 2</b>



The Kuilei Consulting collaborative was formed with the purpose of integrating kanaka maoli 'ike (wisdom) with industry-leading developer talent offering innovative, multidisciplinary skills to create synergistic solutions to accomplish exceptional developments.

## Mahalo Nui

Karl Veto Baker, CEO

808-286-2754

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