



Senate Committee on Ways and Means
2013 Legislative Budget Briefing
January 3, 2013

FY 2013 and Biennium FY 2014 and FY 2015

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OVERVIEW

A. Office of Hawaiian Affairs' (OHA) Mission

OHA's mission is to mālama (protect) 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 nation, 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:

- the betterment of conditions of Native Hawaiians
- the 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.

B. Current Economic Conditions & Notable Performance

Notable Performance Example

Since 2010, OHA Administration has continued to define its performance measures and outcomes relating to its six (6) Strategic Priorities and ten (10) Strategic Results. These refined measures and outcomes are reflected in our current grant solicitations. Highlights of the ***OHA 14-04: Improving Middle and High School Testing Scores of Native Hawaiians*** Grants Solicitation are summarized below:

Strategic Priority:

Ho'ona'auao (Education)

To maximize choices of life and work, Native Hawaiians will gain knowledge and excel in educational opportunities at all levels.

Service Activities: Include but not limited to:

- Develop/implement initiatives that help increase proficiency in reading and math
- Service planning
- Counseling, guidance, tutoring and mentoring
- Incorporate culture-based education
- Test preparation activities
- Measurement and evaluation

Strategic Result:

Increase the percent of Native Hawaiian students who meet or exceed educational standards. By 2018 increase the number of Native Hawaiian students:

- Exceeding READING standards from 55% to 65%
- Exceeding MATH standards from 32% to 45%

Service Goals: To improve Native Hawaiian student proficiency in reading and math so that they can increase standardized test scores.

Target Population: Native Hawaiian middle and high school students attending Hawai'i Department of Education (HIDOE) schools.

Highlights ~ Continued:

Outcomes:

Total # of:

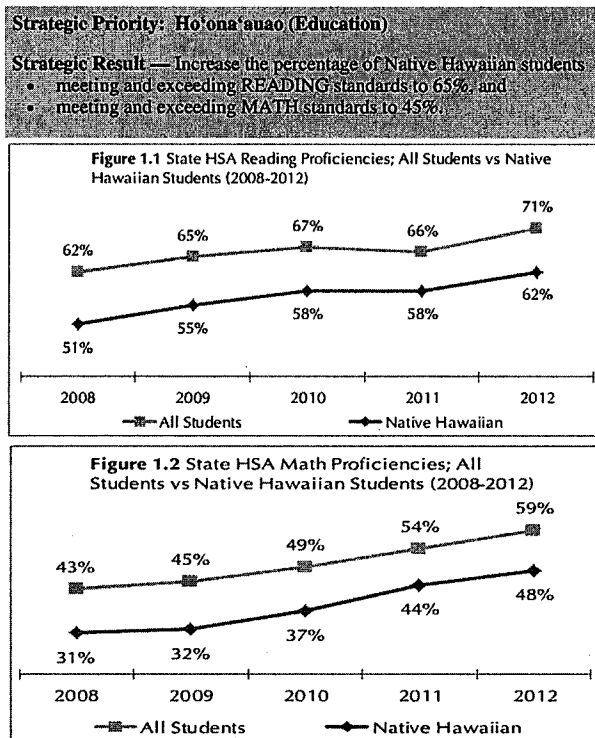
- students who met or exceeded standards-based Reading testing
- Native Hawaiian students who met or exceeded standards-based Reading testing
- students who met or exceeded standards-based Math testing
- Native Hawaiian students who met or exceeded standards-based Math testing
- students who performed below proficiency in standards-based Reading testing
- Native Hawaiian students who performed below proficiency in standards-based Reading testing
- students who performed below proficiency in standards-based Math testing
- Native Hawaiian students who performed below proficiency in standards-based Math testing

Outputs:

Total # of:

- students enrolled
- Native Hawaiian students enrolled
- standards-based testing readiness activities facilitated
- students who completed standards-based Reading testing
- Native Hawaiian students who completed standards-based Reading testing
- students who completed standards-based Math testing
- Native Hawaiian students who completed standards-based Math testing

Despite improvement in proficiency scores among all students across the years, there is still a distinct gap, reflected in Figure 1.1 & Figure 1.2 below, between Native Hawaiian students and their counterparts in Reading and Math proficiency scores which OHA will continue to address.



Note: All Students data includes Native Hawaiian student data.

Current Economic Conditions

Budget cuts on the state and federal levels, combined with a volatile stock market, significantly impact OHA's operations and the needs of OHA's beneficiaries.

In general terms, the current economic and fiscal conditions affect OHA's operations in a number of ways including:

- Budget cuts have reduced services and programs that support low to moderate income individuals, including OHA beneficiaries. As a result, these beneficiaries, or the organizations that serve them, often turn to OHA to fill the gap. Since the start of the economic downturn, the number of inquiries from beneficiaries has increased by almost 50%.
- Trust funds available to OHA decreased due to under-performance of its investment portfolio as a result of the volatile stock market.
- Continued legal challenges that could seriously impact Native Hawaiians have and will continue to require financial resources that could otherwise be used to address the increased demand for Native Hawaiian services and assistance.

In general terms, the current economic and fiscal conditions have affected OHA beneficiaries in a number of ways including:

- Reduced State appropriations have negatively impacted a vast majority of programs and services in the highest need areas, including but not limited to: 1) homelessness, 2) medically uninsured/underinsured, 3) mental health, 4) substance abuse, 5) domestic violence, and 6) chronic disease.
- Reduced State appropriations have created a reduction in services and beneficiary assistance, including but not limited to: 1) reduction in funding to emergency financial assistance programs, 2) reduction of case management services which assist beneficiaries to access community resources, 3) reduction of clinicians providing mental health and substance abuse counseling and support, and 4) reduction of health monitoring/navigation programs that assist those with chronic disease to get needed medical care.
- The looming "fiscal cliff" threatens to increase taxes, decrease spending, and ultimately increase the demand for gap services provided through OHA funding to support a greater number of beneficiaries.

FEDERAL FUNDS

C. Impending Loss of Federal Funds for OHA Programs

OHA currently administers two separate federally-funded programs: (1) 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 and skills so as to create jobs, wealth, and economic and social well-being for all the people of Hawai'i; and (2) the Hālawā Luluku Interpretive Development (HLID) Project, whose three basic goals are compliance, mitigation and community support relating to the adverse impacts as a result of construction of Interstate Highway H-3.

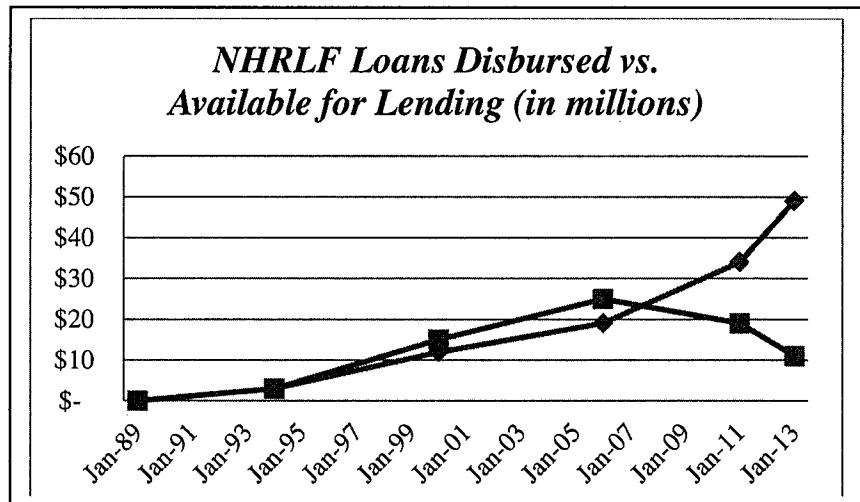
Native Hawaiian Revolving Loan Fund Program

OHA became the NHRLF Loan Administrator, as defined in 45 Code of Federal Regulations (CFR) 1336.62 in 1998. A summary of FY 2012 activity is provided in Figure 2 and a summary of historical NHRLF loan disbursements as well as funds available for lending is provided in Figure 3 below:

Figure 2: FY 2012 Summary

\$8,698,264
<small>Bill Consolidation</small>
\$3,071,800
<small>Home Improvement</small>
\$1,841,227
<small>Business</small>
\$816,391
<small>Education</small>
<hr style="border-top: 3px double #000;"/>
\$14,427,682
<small>TOTAL AMOUNT IN FY12</small>

Figure 3: Loans Disbursed vs. Available for Lending (Sep 1989 – Jun 2012)



The success of the NHRLF Program in recent years has caused available funding levels to drop to an all-time low. Although the remaining NHRLF funds are not considered to be subject to the Federal Budget Control Act sequester, OHA's ability to seek out additional federal resources to allow the fund continued success is drastically diminishing.

The Hālawā Luluku Interpretive Development Project

The HLID Project (sub-recipient) is currently reimbursed pursuant to a Cooperative Agreement with the Hawai'i State Department of Transportation (prime recipient) which carries out the conditions of the related Memorandum of Agreement (MOA). According to the Federal Highway Administration, federal funds associated with the MOA are indeed subject to the

Federal Budget Control Act sequester. If federal funds in support of the HLID Project are lost, it is OHA's expectation that the Hawai'i State Department of Transportation request for additional funding (approximately \$7 million as of 10/31/2012) to fulfill the terms of the agreement.

***Impending Loss of Federal Funds for OHA Beneficiaries and
Beneficiary Serving Organizations***

As explained above, the looming "fiscal cliff" is likely to decrease the amount of federal funding available to our individual beneficiaries and the organizations that serve them. This will cause an increased demand for supplemental funding from OHA to ensure that the health, education and other daily needs of our beneficiaries are met.

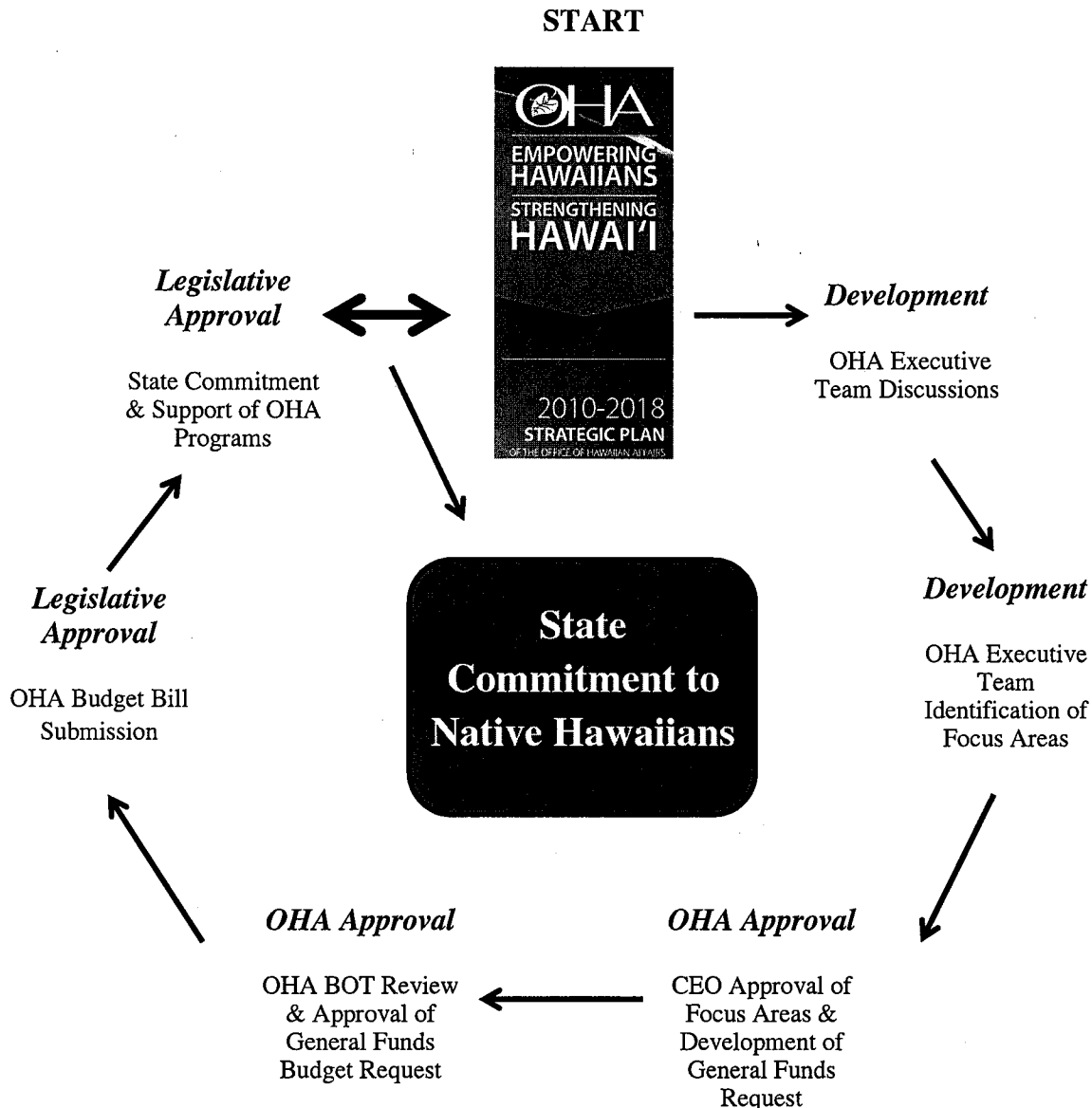
BUDGET REQUEST

D. Budget Development Process and Priority Requests

General Fund appropriations are determined by the State Legislature during each Biennium. As part of its annual budget, the Office of Hawaiian Affairs (OHA) receives general funds from the State of Hawai'i, which are appropriated through the State Legislature. OHA has received state general funds since 1981 for a portion of its personnel and operating cost and to provide services to beneficiaries in the three major areas of multi-services assistance, legal assistance, and educational enrichment.


The OHA Biennium budget is prepared every two years, for the ensuing two years. OHA's general funds budget development process is documented in Figure 4 below:

Figure 4: OHA's General Funds Biennium Budget Development Process



Biennium Budget Focus Areas

The primary (#1) purpose of OHA's general funds request to the State of Hawai'i is to provide services and assistance to Native Hawaiians in the areas of:

- 
- ***Social services*** to OHA beneficiaries to include information and referral services, case management and counseling, establishment of individual development accounts, financial literacy, and financial assistance. Referral services include those relating to education assistance, employment and income security, individual and family care, health needs, housing, legal services, genealogy research, business assistance, and general information.
 - ***Legal services and legal representation*** to OHA beneficiaries for the assertion and defense of quiet title actions; assistance with ahupua'a and kuleana tenant rights, including rights of access and rights to water, land title assistance, including review of title and genealogy, preservation of traditional and customary practices, protection of culturally significant places, and preservation of Native Hawaiian land trust entitlements.
 - ***Educational enrichment programs*** for Native Hawaiian children in grades K through 12 to optimize learning for Hawaiian students, develop a stronger interest in learning, connect learning and education to one's Hawaiian identity, and explore possible educational, career and academic goals the students may not have considered.
 - ***Health improvement program services*** to OHA beneficiaries to include, but not necessarily limited to, information and referral services, case management and counseling, and establishment of prevention programs. Direct services and prevention programs include those designed to have the greatest statewide impact on the overall wellness of Native Hawaiians.
 - ***Leverage Opportunities*** on behalf of OHA beneficiaries to maximize the impact of OHA's limited financial resources by partnering with other funders to increase available funding for projects in support of all OHA Strategic Priorities and Results.

The secondary (#2), but equally important, purpose of OHA's general funds request to the State of Hawai'i is to provide services and assistance to Native Hawaiians through its commitment to OHA through its funding of personnel and operating costs.

E. Significant Budget Adjustments and Related Outcomes

Significant Budget Adjustments

Beginning with this current FY 2014/FY 2015 Biennium Budget, OHA is requesting consideration and approval in two new areas of focus including (a) Health Improvement Program Services and (b) Leverage Opportunities. The budget request and comparative adjustments are summarized in Table 1 below:

Table 1 – Comparative Adjustments in Budget Requests to the Legislature

Purpose	2011/2012 and 2012/2013 Biennium (per year)		2013/2014 and 2014/2015 Biennium (per year)		Adjustments	
	General Funds Request	Trust Fund Match	General Funds Request	Trust Fund Match	General Funds Request	Trust Fund Match
<i>Social services</i>	\$ 415,000	\$ 415,000	\$ 400,000	\$ 400,000	-15,000	-15,000
<i>Legal services and legal representation</i>	524,400	524,400	524,400	524,400	0	0
<i>Educational enrichment programs</i>	615,570	615,570	750,000	750,000	134,430	134,430
<i>Health improvement programs</i>	0	0	750,000	750,000	750,000	750,000
<i>Leverage opportunities</i>	0	0	250,000	250,000	250,000	250,000
<i>Personnel</i>	519,028	3,959,003	520,300	3,959,000	1,272	-3
<i>Operations</i>	296,874	296,874	305,300	305,300	8,426	8,426
Total:	\$2,370,872	\$ 5,810,847	\$ 3,500,000	\$ 6,938,700	\$1,129,128	\$1,127,853

OHA Support Provided to Other State Agencies and University of Hawai‘i

In pursuit of its mission, OHA partners with a number of state agencies and the University of Hawai‘i. During the fiscal years FY 2007 through FY 2012, OHA expended \$28,953,169, and projects to expend an additional \$5,517,470 in FY 2013, for a total of \$34,470,639 in Trust funds in support of State programs and services* as reflected in Table 2 below:

Table 2 – OHA Support of State Agencies and its University of Hawai‘i ~ FY 2007-FY 2013

Fiscal Year	University of Hawai‘i	Other State Agencies	Total
FY 2007	\$ 1,264,579	\$ 4,473,903	\$ 5,738,482
FY 2008	1,651,580	799,535	2,451,115
FY 2009	2,158,398	3,343,216	5,501,614
FY 2010	1,325,887	3,034,260	4,360,147
FY 2011	1,948,268	3,455,000	5,403,268
FY 2012	2,428,644	3,228,000	5,656,644
Sub-total:	\$ 10,777,356	\$ 18,333,914	\$ 29,111,270
Projected FY 2013	2,286,470	3,231,000	5,517,470
Total:	\$ 13,063,826	\$ 21,564,914	\$ 34,628,740

*A listing of current and past State programs funded can be found in Attachment #1.

Educational Enrichment Programs

Native Hawaiians account for nearly 28% of students in the Hawai‘i Department of Education (HIDOE). As previously discussed on pages 3 and 4 of this testimony document, despite improvement in proficiency scores among all students across the years, current data indicates a continued academic achievement gap between Native Hawaiian students and those of other ethnicities with regard to the State of Hawai‘i’s education standards in reading and mathematics.

Health Improvement Program Services for all Native Hawaiians – Chronic Diseases

Research indicates that there exists a contemporary Native Hawaiian public health crisis, particularly when considering chronic disease rates for cardiovascular disease, obesity, diabetes, asthma, and cancer. In particular, statistics show that Native Hawaiians are among the highest ranking ethnic groups with cardiovascular disease (4.6%), obesity (44%), and diabetes (13%).

Demographics show a need to support OHA's Strategic Result to Decrease Chronic Disease Rates and Improve Family Lifestyle Choices by providing family centered and community-based services that 1) decrease the incidence and severity of obesity and other chronic diseases in Native Hawaiians so that they can sufficiently improve their physiology health and 2) increase Native Hawaiian families actively improving lifestyle choices by engaging in health programs and supportive family development practices.

Current data exhibits that contemporary care practices do not adequately address the health concerns of all populations, as indicated by rising chronic disease rates and poor health maintenance among Native Hawaiians. The current condition of Native Hawaiian wellness with respect to chronic disease prevalence suggests a need for greater availability of programs, as well as culturally appropriate program content regarding prevention and maintenance oriented program content.

Data supports traditional methods of health and wellness, particularly as related to the *kahuna* system and the various healing arts and orders. Traditional methods include *hāhā*, *ho'oponopono*, *lā'au lapa'au*, *lomilomi*, and *lā'au kāhea*. To enhance the health and well-being of Native Hawaiians, integrating health services that incorporate Western and traditional healing practices should be considered (OHA Research Personal Communication, 2011).

Minority health advocates have increasingly focused on chronic disease indicators as an important measure of overall health. The federal Centers for Disease Control and Prevention (CDC) define chronic diseases as those that are prolonged and do not resolve spontaneously, and for which a complete cure is rarely achieved (Huang, Li, & Parrish, 2008). Chronic disease is the leading cause of mortality, disability, and illness in the United States, as well as in the state of Hawai'i. Chronic diseases, including cancer, cardiovascular disease, obesity, asthma, and diabetes, are among the major causes of disability and death for Native Hawaiians (OHA Research Personal Communication, 2011). Refined measures and outcomes are reflected in our current grant solicitations.

Highlights of the *OHA 14-03: Obesity and Physical Health Improvements in Native Hawaiians* Grants Solicitation are summarized below:

Strategic Priority:

Mauli Ola (Health)

To improve the quality and longevity of life, Native Hawaiians will enjoy healthy lifestyles and experience reduced onset of chronic diseases.

Strategic Result:

Native Hawaiians reduce the rate of obesity from 49.3% to 35% by 2018

Highlights ~ *Continued*:

Service Activities: Include but not limited to:

- Outreach, screening, intake and assessment
- Service planning
- Case management including the development of an Individual Service Plan and monitoring and follow-up
- Counseling and referral
- Providing educational nutrition and promotion of physical activity
- Measurement and evaluation
- Develop and disseminate literature and other materials addressing Native Hawaiian obesity
- Incorporate traditional Hawaiian practices and concepts supporting cultural strategies as related to health and wellness

Outputs:

Total # of:

- participants enrolled in program
- Native Hawaiians enrolled in program
- Native Hawaiians who completed an Individual Treatment Plan
- Native Hawaiians identified as overweight
- Native Hawaiians identified as obese

Participant:

- weight at intake
- BMI at intake
- body fat at intake
- blood pressure at intake
- physical activity status at intake
- dietary and nutrition status at intake

Service Goals: Reduce the rate of obesity among Native Hawaiians by implementing a culturally sensitive approach that focuses on:

- *Direct Services:* Clinical assessment, diagnosis, treatment, and specialist referrals
- *Prevention Services:* Prevention and advocacy, research, educational and administration services to the community.

Target Population: Persons of Native Hawaiian ancestry who are identified as overweight/obese and/or at-risk of obesity.

Outcomes:

Total # of Native Hawaiians who:

- achieved reduction in weight
- achieved reduction in BMI
- decreased body fat
- improved dietary/eating habits
- improved physical activity
- received patient education
- completed the program

Optional Total # of Native Hawaiians:

- screened for diabetes
- identified with diabetes
- identified with asthma
- who improved blood pressure control
- who improved self-management of diabetes
- who improved self-management of asthma
- who achieved reduced obesity-related medical complications

Health Improvement Program Services for all Native Hawaiians – Prenatal Care

Under OHA's Health Strategic Priority, strategic results target decreasing chronic disease rates and improving family lifestyle choices. The focus is on Hawaiian families becoming actively engaged in health programs and supportive family development practices. Childbirth brings together Hawaiian and modern medical practices for many ethnic minorities. The purpose of this solicitation is to support a culture of integrated treatment programs that promote prenatal care, primarily during a woman's first trimester of pregnancy. Studies show that prenatal care within the first trimester of pregnancy significantly increases fetus survival rates and gestational and post-natal development. The current condition of Native Hawaiian women's wellness with respect to pregnancy suggests a need for greater availability of and access to prenatal programs, as well as culturally appropriate program content. Prenatal care in the first trimester allows

health care providers to identify and manage a woman's risk factors and health conditions, to provide education and referral to social and nutritional services which help promote positive birth outcomes, and to provide the expectant parents and extended family with supportive services. Highlights of the *OHA 14-07: Prenatal Services for Native Hawaiians* Grants Solicitation are summarized below:

Strategic Priority:

Mauli Ola (Health)

To improve the quality and longevity of life, Native Hawaiians will enjoy healthy lifestyles and experience reduced onset of chronic diseases.

Strategic Result:

Increasing the percent of Native Hawaiian families actively improving lifestyle choices by engaging in health programs and supportive family development practices by increasing the number of Native Hawaiian mothers receiving prenatal care in the first trimester from 81.4% to 83.6% by 2018

Service Activities: Including maternal and/or infant care programs that support one or more of the following:

- Provide regular prenatal check-ups to treat and prevent potential health problems through the course of the pregnancy
- Promote healthy lifestyle to benefit both mother and child
- Reduce maternal death rate, miscarriages, birth defects, low birth weights, and/or other preventable health problems
- Provide prenatal screenings to monitor prenatal development and test for diseases or conditions in fetus
- Address socio-economic factors that promote access to or availability of prenatal services
- Or other culturally appropriate prevention and intervention program services that may increase prenatal care services and the health of the mother and child such as nutrition, exercise, stress reduction,

Outcomes:

Total # of Hawaiian women who improved:

- level of care
- frequency of prenatal visits; and
- Increased family involvement before and after childbirth

Target Population: Women of Native Hawaiian ancestry who are pregnant.

Service Goals: Increase the number of Native Hawaiian women receiving prenatal care in the first trimester by providing services that support development and expansion of:

- culturally appropriate prevention and intervention programs that address such indicators as substance use, nutrition, vitamin use, exercise, managing healthy behaviors, stress reduction, emotional wellness, and breastfeeding
- programs and services geared towards family inclusive care and structural well-being. This may include female-centered and/or male-centered programs that provide educational and health support to become contributing members of the family.

Outputs:

Total # of:

- Hawaiian women enrolled in the program
- prenatal visits per client (including month/trimester of first prenatal visit)
- screened for pregnancy-related health conditions to include gestational diabetes, hypertension, and preconception obesity

Assessment of:

- risk factors (health conditions, family history, substance abuse, age, etc.)
- barriers to care (insurance coverage, availability of service providers, transportation issues, child care needs, etc.)
- preconception obesity, to include pregnancy weight gain and education on diet and exercise

Leverage Opportunities for OHA and for all State Agencies

To “leverage” means the ability to influence a system, or an environment, in a way that multiplies the outcomes of one’s efforts without a corresponding increase in the consumption of resources. In other words, leverage is the advantageous condition of having a relatively small amount of cost yield a relatively high level of returns.

Leveraging consists of mutually beneficial partnerships, agreements or any similar collaborative arrangements entered into by OHA and/or public/private agencies in advancing OHA’s mission. Collaborative leveraging ventures provide a means to maximize intellect, time, money and resources.

Leveraging Sources include:

1. ***Private Sector Capital*** – Developer contributions, venture capitalists, philanthropic foundations and non-profit donations
2. ***Tax Credits*** – Developers can receive historic, low-income and other tax credits to help make projects more affordable in the long run
3. ***State Programs***
4. ***Other Federal Programs***

No one agency, not even OHA, possesses all the resources necessary to fulfill its mission and its Strategic Plan. Leveraged grant funds can provide maximum impact with limited resources. Leveraging opportunities provide one means by which OHA can meet its obligation of serving the Hawaiian people. Additionally, leveraging opportunities forge partnerships that deliver greater outcomes more economically that contribute to making Hawai‘i a better place for all. To that end, OHA’s Administration has begun to explore external opportunities to use its limited resources as levers and to catalyze much larger streams of funding from alternative sources. Through leveraging, OHA is able to enter into partnerships that will allow it to obtain a significant match to its own contribution of funds. In this regard, OHA is seeking consideration by the State Legislature for matching general funds of OHA’s commitment to Leverage Opportunities beginning with the upcoming FY 2014/FY 2015 Biennium.

Outcomes Relating to Biennium Budget Request

The development of OHA’s 2010-2018 Strategic Plan recognized the need to change from serving on an individual level to applying our resources to programs and activities that would lead to systemic change and would maximize the impact to all Hawaiians. The development of a more proactive strategy to advocate on behalf of Hawaiians by turning OHA into a more streamlined, performance-based organization, has allowed us to focus on a few key areas, rather than dispersing our strength, so that we can maximize the impact we have for all Hawaiians.

OHA’s current FY 2014/FY 2015 Biennium Budget request seeks support from the State of Hawai‘i in pursuit of all ten (10) Strategic Results as follows:

STRATEGIC RESULTS

1. Native Hawaiian median family income will equal 100% or greater than the Statewide median family income:
 - 92% or greater than the Statewide median family income by 2018
2. Increase the percent of Native Hawaiian Students who meet or exceed educational standards and who graduate from post-secondary institutions. By 2018 increase the number of Native Hawaiian students:
 - exceeding READING standards from 55% to 65%
 - exceeding MATH standards from 32% to 45%
 - who earn post-secondary degrees or certificates in the UH-system by 12%
3. Increasing the percent of Native Hawaiian families actively improving lifestyle choices by engaging in health programs and supportive family development practices by:
 - Decreasing the number of Native Hawaiians in State DOH substance abuse treatment from 45.9% to 39% by 2018
 - Increasing the number of Native Hawaiian mothers receiving prenatal care in the first trimester from 81.4% to 83.6% by 2018
4. 70% of all Hawai'i residents understand and agree that a viable land base is necessary for the new Native Hawaiian governing entity.
5. Increasing the percent of Ka Pae 'Āina O Hawaii managed to create economic value, preserve cultural and natural resources and historic properties, and/or provide cultural and social opportunities for Native Hawaiians in a sustainable and balanced manner:
 - By 2018, increasing from 12% to 15% the percent of ahupua'a that are managed sustainably
6. Adoption by the Board of Trustees of a Transition Plan that includes the legal transfer of assets and other resources to the new Native Hawaiian governing entity.
7. 85% of Hawai'i residents appreciate and value Native Hawaiian history and culture.
8. 51% of Native Hawaiians living in the State of Hawai'i participating in cultural activities, including language, and who interact with the 'āina for cultural, spiritual, religious and subsistence.
9. Native Hawaiians reduce the rate of obesity from 49.3% to 35% by 2018.
10. Increase the percent of Native Hawaiians who improve their capacity to own or rent a home by focusing on:
 - By 2018, decreasing from 55% to 50% the percent of Native Hawaiian renters who are paying more than the HUD standard housing cost (no more than 30% of household income)
 - By 2018, increasing Native Hawaiian owner-occupied housing from 56.62% to 58%

Complete details of OHA's 2010-2018 Strategic Plan are provided in Attachment #2.

Table 1: Prioritized List of Functions

Attached. Commentary also provided below:

Statutory Reference: HRS10-3(3) Purpose of the office includes: Serving as the principal public agency in this State responsible for the performance, development and coordination of programs and activities relating to Native Hawaiians and Hawaiians.

Priority #1: To provide services for the betterment of conditions for Native Hawaiians in support of OHA's 2010-2018 Strategic Plan (see Attachment #2 for complete details). This will be achieved through the following proposed programs and services:

Social services (OHA175) to OHA beneficiaries: to include information and referral services, case management and counseling, establishment of individual development accounts, financial literacy, and financial assistance. Referral services include those relating to education assistance, employment and income security, individual and family care, health needs, housing, legal services, genealogy research, business assistance, and general information.

Legal services and legal representation (OHA175) to OHA beneficiaries for the assertion and defense of quiet title actions; assistance with ahupua'a and kuleana tenant rights, including rights of access and rights to water, land title assistance, including review of title and genealogy, preservation of traditional and customary practices, protection of culturally significant places, and preservation of Native Hawaiian land trust entitlements.

Educational enrichment programs (OHA175) for Native Hawaiian children in grades K through 12 to optimize learning for Hawaiian students, develop a stronger interest in learning, connect learning and education to one's Hawaiian identity, and explore possible educational, career and academic goals the students may not have considered.

Health improvement programs (OHA 175) to OHA beneficiaries to include, but not necessarily limited to, information and referral services, case management and counseling, and establishment of prevention programs. Direct services and prevention programs include those designed to have the greatest statewide impact on the overall wellness of Native Hawaiians.

Leverage Opportunities (OHA 175) on behalf of OHA beneficiaries to maximize the impact of OHA's limited financial resources by partnering with other funders to increase available funding for projects in support of all OHA Strategic Priorities and Results.

The following is a brief update on the status of the three programs currently being implemented:

Social services – Summary of Program Deliverables for the period from July 1, 2011 to June 30, 2012:

Service	Impact
Information and Referral	8,940 total client contacts 2,661 unduplicated contacts
Case management	497 unduplicated clients
Individual Development Accounts	63 beneficiaries receiving matching funds \$59,942 matching funds disbursed
Financial Literacy Education	761 total participant attendance 211 unduplicated participant attendance
Emergency Financial Assistance	<ul style="list-style-type: none"> • 100 beneficiaries received emergency financial assistance • \$111,947 disbursed <p>Emergency Fund</p> <ul style="list-style-type: none"> ➤ 85 (Beneficiaries Assisted) ➤ \$95,645 (Total Assistance Disbursed) <p>Disability Emergency Fund</p> <ul style="list-style-type: none"> ○ 15 (Beneficiaries Assisted) ○ \$16,302 (Total Assistance Disbursed)

Legal services and legal representation – During FY 2012, NHLC's active caseload totaled 225 clients in 85 cases. During the same time period, NHLC completed its representation of 112 clients in 47 cases. Another 570 individuals were provided some level of service short of full representation.

Educational enrichment programs – During FY 2012, the Nā Pua No‘eau program provided a total of 103 events at various sites statewide. A total of 4,004 students attended events and 3,087 (77%) had Hawaiian ancestry. Hawaiian students (less the duplicates) totaled 2,066.

The following summarizes our request relating to *social services, legal services and legal representation, educational enrichment and health improvement programs and leverage opportunities*.

OHAI75 – Beneficiary Advocacy (Operating Budget)	FY 2013-2014			FY 2014-2015			Total Biennium Request
	General Funds	Matching Funds	Total	General Funds	Matching Funds	Total	
<i>Social services</i>	\$ 400,000	\$ 400,000	\$ 800,000	\$ 400,000	\$ 400,000	\$ 800,000	\$ 1,600,000
<i>Legal services and legal representation</i>	524,400	524,400	1,048,800	524,400	524,400	1,048,800	2,097,600
<i>Educational enrichment programs</i>	750,000	750,000	1,500,000	750,000	750,000	1,500,000	3,000,000
<i>Health improvement programs</i>	750,000	750,000	1,500,000	750,000	750,000	1,500,000	3,000,000
<i>Leverage opportunities</i>	250,000	250,000	500,000	250,000	250,000	500,000	1,000,000
Total:	\$ 2,674,400	\$ 2,674,400	\$ 5,348,800	\$ 2,674,400	\$ 2,674,400	\$ 5,348,800	\$ 10,697,600

Priority #2: To support OHA personnel and administrative costs to implement the five beneficiary services programs and a number of other services and programs that allow OHA to advocate for and provide services to Hawaiians:

Program ID & Program Title	FY 2013-2014			FY 2014-2015			Total Biennium Request
	General Funds	Matching Funds	Total	General Funds	Matching Funds	Total	
OHA150 – Office of the Trustees	\$ 28,435	\$ 275,687	\$ 304,122	\$ 28,435	\$ 275,687	\$ 304,122	\$ 608,244
Personnel Budget	28,435	275,687	304,122	28,435	275,687	304,122	608,244
Operating Budget	0	0	0	0	0	0	0
OHA160 – Support Services	708,585	2,870,150	3,578,735	708,585	2,870,150	3,578,735	7,157,470
Personnel Budget	403,285	2,564,850	2,968,135	403,285	2,564,850	2,968,135	5,936,270
Operating Budget	305,300	305,300	610,600	305,300	305,300	610,600	1,221,200
OHA175 – Beneficiary Advocacy	2,762,980	3,792,863	6,555,843	2,762,980	3,792,863	6,555,843	13,111,686
Personnel Budget	88,580	1,118,463	1,207,043	88,580	1,118,463	1,207,043	2,414,086
Operating Budget	2,674,400	2,674,400	5,348,800	2,674,400	2,674,400	5,348,800	10,697,600
Total All Programs:	\$ 3,500,000	\$ 6,938,700	\$ 10,438,700	\$ 3,500,000	\$ 6,938,700	\$ 10,438,700	\$ 20,877,400

Table 2: Department-Wide Totals

Attached

Table 3: Program ID Totals

Attached

Table 4: Budget Discussions

Attached

Table 5: Proposed Budget Reductions

Attached

Table 6: Proposed Budget Additions

Attached

Table 7: Current Year (FY13) Restrictions

None

Table 8: Emergency Appropriation Requests

None

Table 9: Expenditures Exceeding Appropriation Ceilings

None

Table 10: Intradepartmental Transfers

None

Table 11: Active Federal Awards

Attached

Table 12: Non-general Funds

Attached

Table 13: Vacancy Report

Attached

Table 14: Overtime Expenditures

None

Table 15: Overpayments

None

Table 16: Contract Costs

Attached

Table 17: Capital Improvement Program (CIP) Requests

None

Table 18: CIP Lapses

None

Table 19: Division Resources

Attached

Table 20: Organizational Charts

Attached

Office of Hawaiian Affairs
 Priority List of Functions

Table 1

<u>Priority</u>	<u>Description of Function</u>	<u>Activities</u>	<u>Prog ID(s)</u>	<u>Statutory Reference</u>
	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)
2	Personnel and administrative costs	Services and assistance to Native Hawaiians	OHA150, OHA160 & OHA175	HRS10-3(3)

Office of Hawaiian Affairs
Department-Wide Totals

Table 2

Fiscal Year 2013				
Act 095/11 Appropriation	Restriction	Emergency Appropriation	Total FY13	MOF
\$ 2,370,872.00			\$ 2,370,872.00	A
\$ 5,810,847.00			\$ 5,810,847.00	T
			\$ -	
\$ 8,181,719.00	\$ -	\$ -	\$ 8,181,719.00	Total
Fiscal Year 2014				
Appropriation	Reductions	Additions	Total FY14	MOF
\$ 3,500,000.00			\$ 3,500,000.00	A
\$ 6,938,700.00			\$ 6,938,700.00	T
			\$ -	
\$ 10,438,700.00	\$ -	\$ -	\$ 10,438,700.00	Total
Fiscal Year 2015				
Appropriation	Reductions	Additions	Total FY15	MOF
\$ 3,500,000.00			\$ 3,500,000.00	A
\$ 6,938,700.00			\$ 6,938,700.00	T
			\$ -	
\$ 10,438,700.00	\$ -	\$ -	\$ 10,438,700.00	Total

Office of Hawaiian Affairs
Program ID Totals

Table 3

Prog ID	Program Title	MOF	As budgeted in Act 095/11 (FY13)			Governor's Submittal (FY14)				Governor's Submittal (FY15)			
			Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Percent Change of \$\$\$\$	Pos (P)	Pos (T)	\$\$\$	Percent Change of \$\$\$\$
OHA150	OFFICE OF THE TRUSTEES	A	0.63	0	28,435	0.63	0	28,435	0.000000%	0.63	0	28,435	0.000000%
OHA150	OFFICE OF THE TRUSTEES	T	4.37	0	275,687	4.37	0	275,687	0.000000%	4.37	0	275,687	0.000000%
		TOTAL	5.00	0	304,122	5.00	0	304,122		5.00	0	304,122	0.000000%
OHA160	ADMINISTRATION	A	7.60	0	700,159	7.60	0	708,585	1.203441%	7.60	0	708,585	1.203441%
OHA160	ADMINISTRATION	T	32.40	0	2,861,727	32.40	0	2,870,150	0.294333%	32.40	0	2,870,150	0.294333%
		TOTAL	40.00	0	3,561,886	40.00	0	3,578,735	0.473036%	40.00	0	3,578,735	0.473036%
OHA175	BENEFICIARY ADVOCACY	A	2.86	0	1,642,278	2.86	0	2,762,980	68.240700%	2.86	0	2,762,980	68.240700%
OHA175	BENEFICIARY ADVOCACY	T	14.14	0	2,673,433	14.14	0	3,792,863	41.872379%	14.14	0	3,792,863	41.872379%
		TOTAL	17.00	0	4,315,711	17.00	0	6,555,843		17.00	0	6,555,843	51.906441%
	TOTAL	A	11.09	0	2,370,872	11.09	0	3,500,000	47.625009%	11.09	0	3,500,000	47.625009%
	TOTAL	T	50.91	0	5,810,847	50.91	0	6,938,700	19.409442%	50.91	0	6,938,700	19.409442%
	TOTAL	TOTAL	62.00	0	8,181,719	62.00	0	10,438,700	27.585658%	62.00	0	10,438,700	27.585658%

Office of Hawaiian Affairs
Budget Decisions

Prog ID	Description	MOF	Executive Team Recommendations						CEO Approval and Recommendations						Board of Trustee's Decisions					
			FY14			FY15			FY14			FY15			FY14			FY15		
			Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$
OHA 150	OHA150	A	0.63	0	28,435	0.63	0	28,435	0.63	0	28,435	0.63	0	28,435	0.63	0	28,435	0.63	0	28,435
OHA 150	OHA150	T	4.37	0	275,687	4.37	0	275,687	4.37	0	275,687	4.37	0	275,687	4.37	0	275,687	4.37	0	275,687
		TOTAL	5.00	0	304,122	5.00	0	304,122	5.00	0	304,122	5.00	0	304,122	5.00	0	304,122	5.00	0	304,122
OHA 160	OHA160	A	7.60	0	708,585	7.60	0	708,585	7.60	0	708,585	7.60	0	708,585	7.60	0	708,585	7.60	0	708,585
OHA 160	OHA160	T	32.40	0	2,870,150	32.40	0	2,870,150	32.40	0	2,870,150	32.40	0	2,870,150	32.40	0	2,870,150	32.40	0	2,870,150
		TOTAL	40.00	0	3,578,735	40.00	0	3,578,735	40.00	0	3,578,735	40.00	0	3,578,735	40.00	0	3,578,735	40.00	0	3,578,735
OHA 175	OHA175	A	2.86	0	2,762,980	2.86	0	2,762,980	2.86	0	2,762,980	2.86	0	2,762,980	2.86	0	2,762,980	2.86	0	2,762,980
OHA 175	OHA175	T	14.14	0	3,792,863	14.14	0	3,792,863	14.14	0	3,792,863	14.14	0	3,792,863	14.14	0	3,792,863	14.14	0	3,792,863
		TOTAL	17.00	0	6,555,843	17.00	0	6,555,843	17.00	0	6,555,843	17.00	0	6,555,843	17.00	0	6,555,843	17.00	0	6,555,843
		A	11.09	0	3,500,000	11.09	0	3,500,000	11.09	0	3,500,000	11.09	0	3,500,000	11.09	0	3,500,000	11.09	0	3,500,000
		T	50.91	0	6,938,700	50.91	0	6,938,700	50.91	0	6,938,700	50.91	0	6,938,700	50.91	0	6,938,700	50.91	0	6,938,700
		TOTAL	62.00	0	10,438,700	62.00	0	10,438,700	62.00	0	10,438,700	62.00	0	10,438,700	62.00	0	10,438,700	62.00	0	10,438,700

Office of Hawaiian Affairs
Proposed Budget Reductions

Table 5

<u>Prog ID</u>	<u>Description of Reduction</u>	<u>Impact of Reduction</u>	<u>MOF</u>	<u>FY14</u>			<u>FY15</u>			<u>Carry-over?</u> <u>(Y/N)</u>
				<u>Pos (P)</u>	<u>Pos (T)</u>	<u>\$\$\$\$</u>	<u>Pos (P)</u>	<u>Pos (T)</u>	<u>\$\$\$\$</u>	
OHA 175	Social Services	Expected decrease in Administrative Costs	A	-	-	\$ (15,000)	-	-	\$ (15,000)	N
OHA 175	Social Services	Expected decrease in Administrative Costs	T	-	-	\$ (15,000)	-	-	\$ (15,000)	N

Office of Hawaiian Affairs
Proposed Budget Additions

Prog ID	Request Category	Prog ID Priority	Dept- Wide Priority	Description of Addition	Explanation	MOF	FY14			FY15		
							Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$
OHA 160	N/A	1	1	Rent	Land was given; however administrative expenses were not factored in	A	-	-	\$ 8,426	-	-	\$ 8,426
OHA 160	N/A	1	1	Rent	Land was given; however administrative expenses were not factored in	T	-	-	\$ 8,426	-	-	\$ 8,426
OHA 175	N/A	1	1	Salary	Funds to support positions which will have an increased work load	A	17.00	-	\$ 1,272	17.00	-	\$ 1,272
OHA 175	N/A	1	1	Grant	Educational Enrichment Programs	A	-	-	\$ 134,430	-	-	\$ 134,430
OHA 175	N/A	1	1	Grant	Health Improvement Programs	A	-	-	\$ 750,000	-	-	\$ 750,000
OHA 175	N/A	1	1	Grant	Leverage Opportunities	A	-	-	\$ 250,000	-	-	\$ 250,000
OHA 175	N/A	1	1	Grant	Educational Enrichment Programs	T	-	-	\$ 134,430	-	-	\$ 134,430
OHA 175	N/A	1	1	Grant	Health Improvement Programs	T	-	-	\$ 750,000	-	-	\$ 750,000
OHA 175	N/A	1	1	Grant	Leverage Opportunities	T	-	-	\$ 250,000	-	-	\$ 250,000

Office of Hawaiian Affairs
Current Year (FY13) Restrictions

Table 7

<u>Prog ID</u>	<u>MOF</u>	<u>Restriction \$\$\$</u>	<u>Percent of Act 106/12 Appropriation</u>	<u>Impact</u>
NONE				

Office of Hawaiian Affairs
Emergency Appropriation Requests

Table 8

<u>Prog ID</u>	<u>Description of Request</u>	<u>Explanation of Request</u>	<u>MOF</u>	<u>Pos (P) FY13</u>	<u>Pos (T) FY13</u>	<u>\$\$\$ FY13</u>
NONE						

Expenditures Exceeding Appropriation Ceilings

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

Office of Hawaiian Affairs
Intradepartmental Transfers

Table 10

<u>Anticipated or Actual Date of Transfer</u>	<u>MOF</u>	<u>Amount of Transfer</u>	<u>From Prog ID</u>	<u>Percent of Imparting Program ID Appropriation</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
Non-general Funds

Name of Fund	Purpose	Statutory Reference	MOF	Beginning FY13	Estimated FY13	Estimated FY13	Estimated FY13	Estimated FY13	Balance in Excess of
				Unencumbered Cash Balance	Revenues	Expenditures and Encumbrances	Net Transfers	Ending Unencumbered Cash Balance	Program Needs
OHA MATCHING TRUST FUNDS (FY12)	Additional Funds for OHA 150, OHA 160 and OHA 175	HRS10-3(3)	T	5,810,847	\$ -	\$ 5,810,847	\$ -	\$ -	
OHA MATCHING TRUST FUNDS (FY13)	Additional Funds for OHA 150, OHA 160 and OHA 175	HRS10-3(3)	T	5,810,847	\$ -	\$ 5,810,847	\$ -	\$ -	

Office of Hawaiian Affairs
Vacancy Report

Table 13

<u>Prog ID</u>	<u>Date of Vacancy</u>	<u>Position Number</u>	<u>Position Title</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>Exempt (Y/N)</u>	<u>Authority to Hire (Y/N)</u>	<u>Occupied by 89 Day Hire (Y/N)</u>	<u># of 89 Hire Appointments</u>
OHA160	1/5/2012	16212	COUNSEL FOR EMPLOYMENT PRACTICES, COMPLIANCE & LEGAL SERVICES	SR28	00	P	1.00	A&T	\$ 76,680.00	\$ 76,080.00	Y	Y	N	0
OHA160	10/25/2012	16322	LAND MANAGEMENT SPECIALIST	SR26	00	P	1.00	A&T	\$ 60,000.00	\$ 60,000.00	N	Y	N	0
OHA160	6/6/2012	16330	INFORMATION SYSTEMS MANAGER	SR30	00	P	1.00	A&T	\$ 81,120.00	\$ 81,120.00	Y	Y	N	0

Office of Hawaiian Affairs
Overtime Expenditures

Table 14

<u>Prog ID</u>	<u>Program Title</u>	<u>MOF</u>	<u>FY12 (actual)</u>			<u>FY13 (estimated)</u>			<u>FY14 (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
	NONE										

Office of Hawaiian Affairs
Overpayments

Table 15

<u>Name</u>	<u>Date of Overpayment</u>	<u>Gross Amount Overpaid</u>	<u>Amount Recovered</u>	<u>Balance</u>	<u>Category</u>				<u>Reason for Overpayment</u>	<u>Referred to Attorney General</u>
					<u>Employed Occurred > 2 Years</u>	<u>Employed Occurred < 2 Years</u>	<u>Not Employed Occurred > 2 Years</u>	<u>Not Employed Occurred < 2 Years</u>		
NONE										

Office of Hawaiian Affairs
Contract Costs

Prog ID	MOF	Frequency		Max Value	Outstanding Balance	Term of Contract			Organization	Category E/L/P/C/ G/S	Description	Explanation of How Contract is Monitored	POS Y/N
		Amount	(M/A/O)			Date Executed	From	To					
OHA 175	A	\$ 24,740	MONTHLY	\$ 296,874.00	\$ 148,437.00	8/1/2012	8/1/2012	6/30/2013	PACIFIC PARK PLAZA OWNER, LLC	S	OHA HEADQUARTER RENT AND CAM	Presentment of monthly statements	N
OHA 175	T	\$ 24,740	MONTHLY	\$ 296,874.00	\$ 148,437.00	8/1/2012	8/1/2012	6/30/2013	PACIFIC PARK PLAZA OWNER, LLC	S	OHA HEADQUARTER RENT AND CAM	Presentment of monthly statements	N
OHA 175	A	\$ 131,100	QUARTERLY	\$ 524,400.00	\$ 262,200.00	8/9/2011	7/1/2011	6/30/2013	NATIVE HAWAIIAN LEGAL CORPORATION	C	STATE PROVISO - LEGAL SERVICES	Presentment of a disbursement schedule and request	N
OHA 175	T	\$ 131,100	QUARTERLY	\$ 524,400.00	\$ 262,200.00	8/9/2011	7/1/2011	6/30/2013	NATIVE HAWAIIAN LEGAL CORPORATION	C	STATE PROVISO - LEGAL SERVICES	Presentment of a disbursement schedule and request	N
OHA 175	A	\$ 103,750	QUARTERLY	\$ 415,000.00	\$ 185,000.00	7/16/2012	7/1/2012	6/30/2013	ALU LIKE, INC.	S	STATE PROVISO - SOCIAL SERVICES	Presentment of quarterly reports	N
OHA 175	T	\$ 103,750	QUARTERLY	\$ 415,000.00	\$ 185,000.00	7/16/2012	7/1/2012	6/30/2013	ALU LIKE, INC.	S	STATE PROVISO - SOCIAL SERVICES	Presentment of quarterly reports	N

Office of Hawaiian Affairs
Capital Improvement Program (CIP) Requests

Table 17

<u>Prog ID</u>	<u>Prog ID</u> <u>Priority</u>	<u>Dept- Wide</u> <u>Priority</u>	<u>Project Title</u>	<u>MOF</u>	<u>FY14 \$\$\$</u>	<u>FY15 \$\$\$</u>
NONE						

Office of Hawaiian Affairs
CIP Lapses

Table 18

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

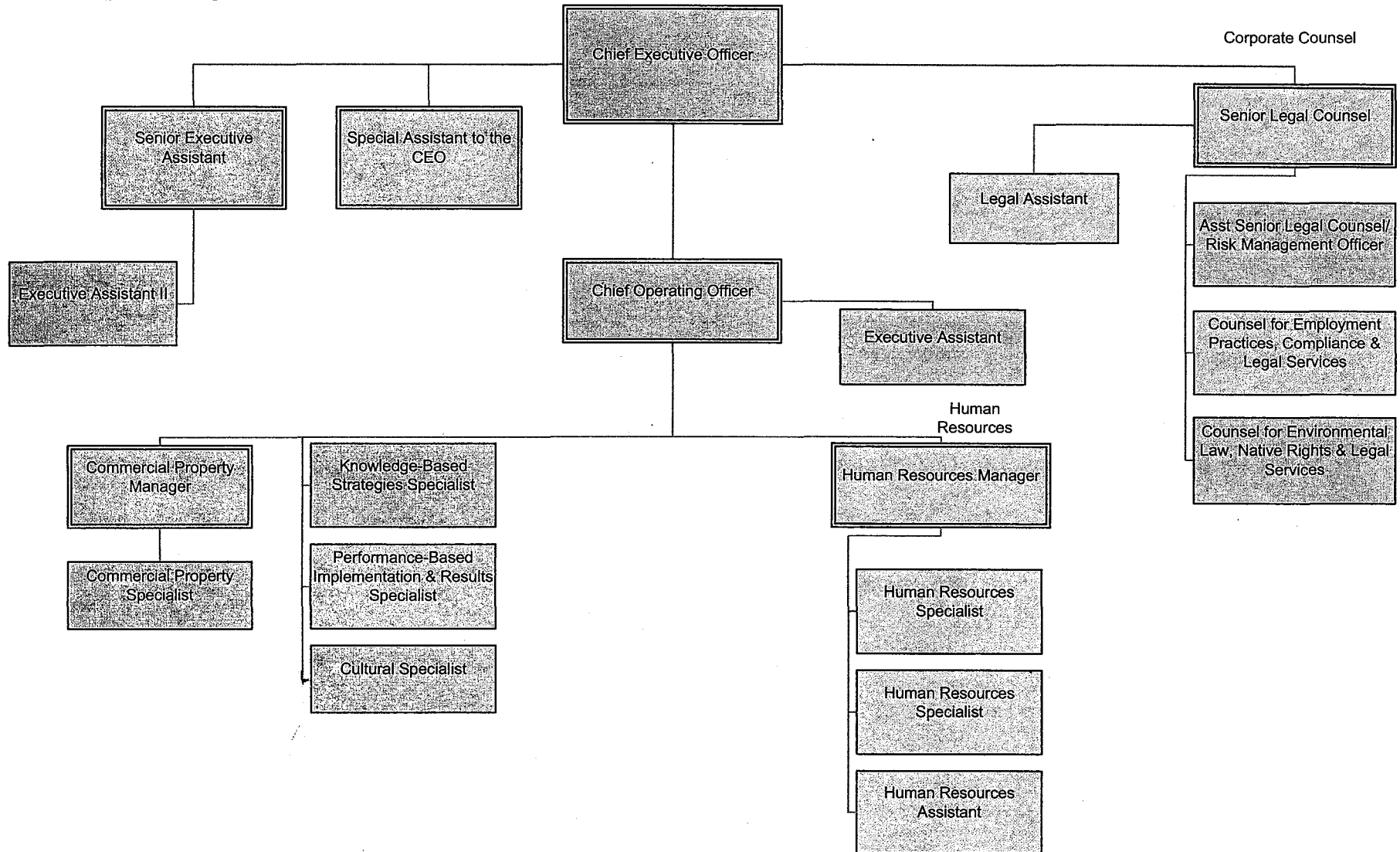
Division Resource

<u>Division</u>	<u>Associated Program IDs</u>						
BOARD OF TRUSTEES	OHA 150						
ADMINISTRATION	OHA 160						
BENEFICIARY ADVOCACY	OHA 175						

Office of Hawaiian Affairs
Organizational Charts

<u>Year of Change</u> FY13/FY14	<u>Page</u> Number	<u>Description of Change</u>
Note: Organizational Chart Attached		
FY13	Page 1	Revision of Executive Office org chart (includes the addition of commercial property positions)
N/A	Page 2	No Changes to Resource Management LOB
FY12/FY13	Page 3	Creation of Community Engagement LOB org chart (includes a Community Engagement Director, Communications, Digital Media, and Community Outreach staff)
FY12	Page 4	Revision of Research org chart (includes the Program Improvement staff)
FY12	Page 5	Revision of Advocacy org chart (removes the Community Outreach staff due to the creation of the Community Engagement LOB)

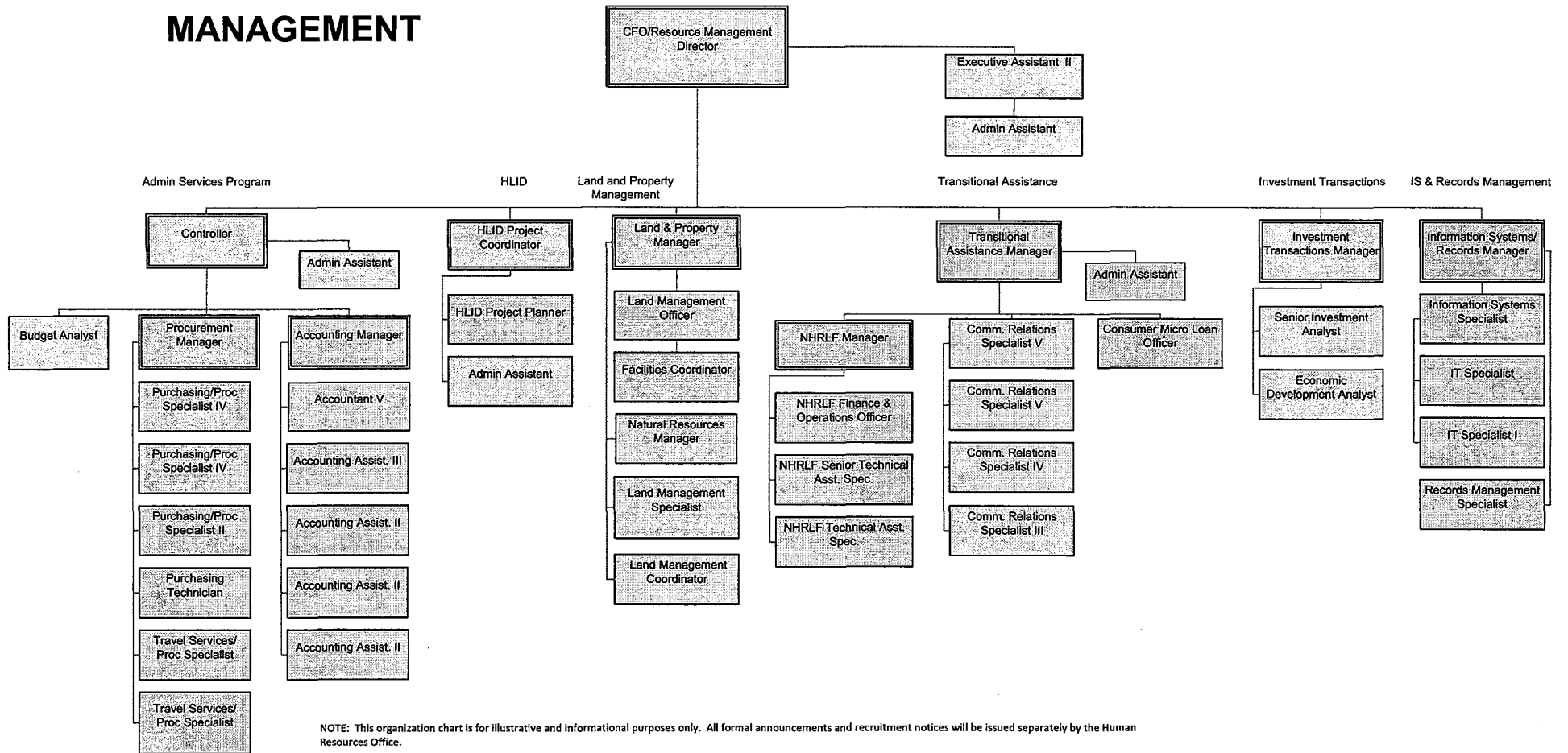
EXECUTIVE OFFICE



NOTE: This organization chart is for illustrative and informational purposes only. All formal announcements and recruitment notices will be issued separately by the Human Resources Office.

CONFIDENTIAL

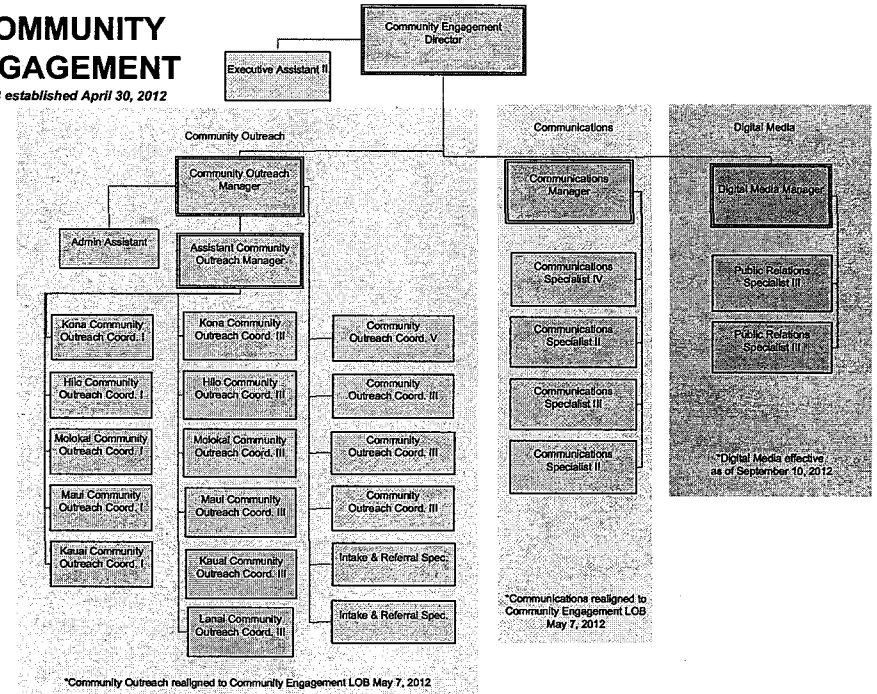
RESOURCE MANAGEMENT



CONFIDENTIAL

COMMUNITY ENGAGEMENT

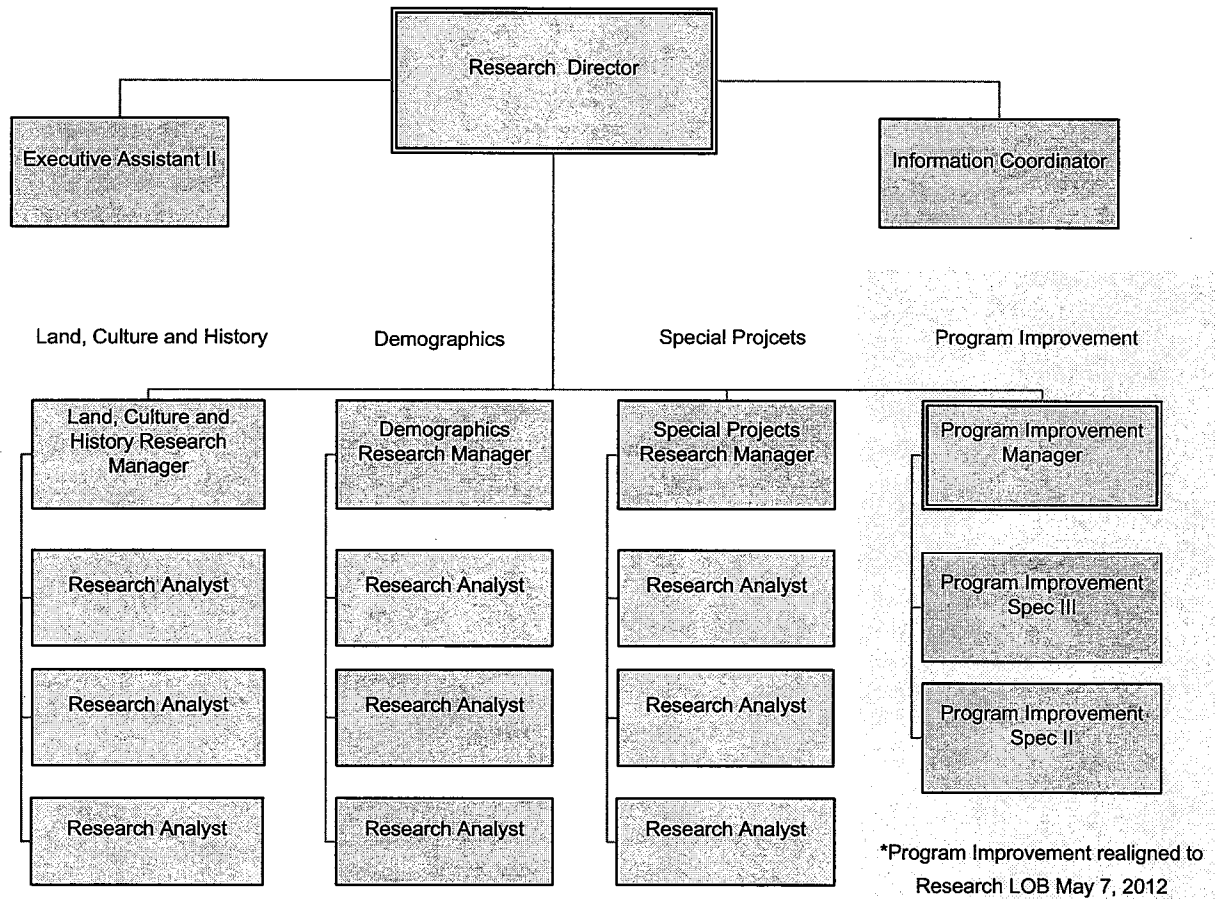
*LOB established April 30, 2012



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CONFIDENTIAL

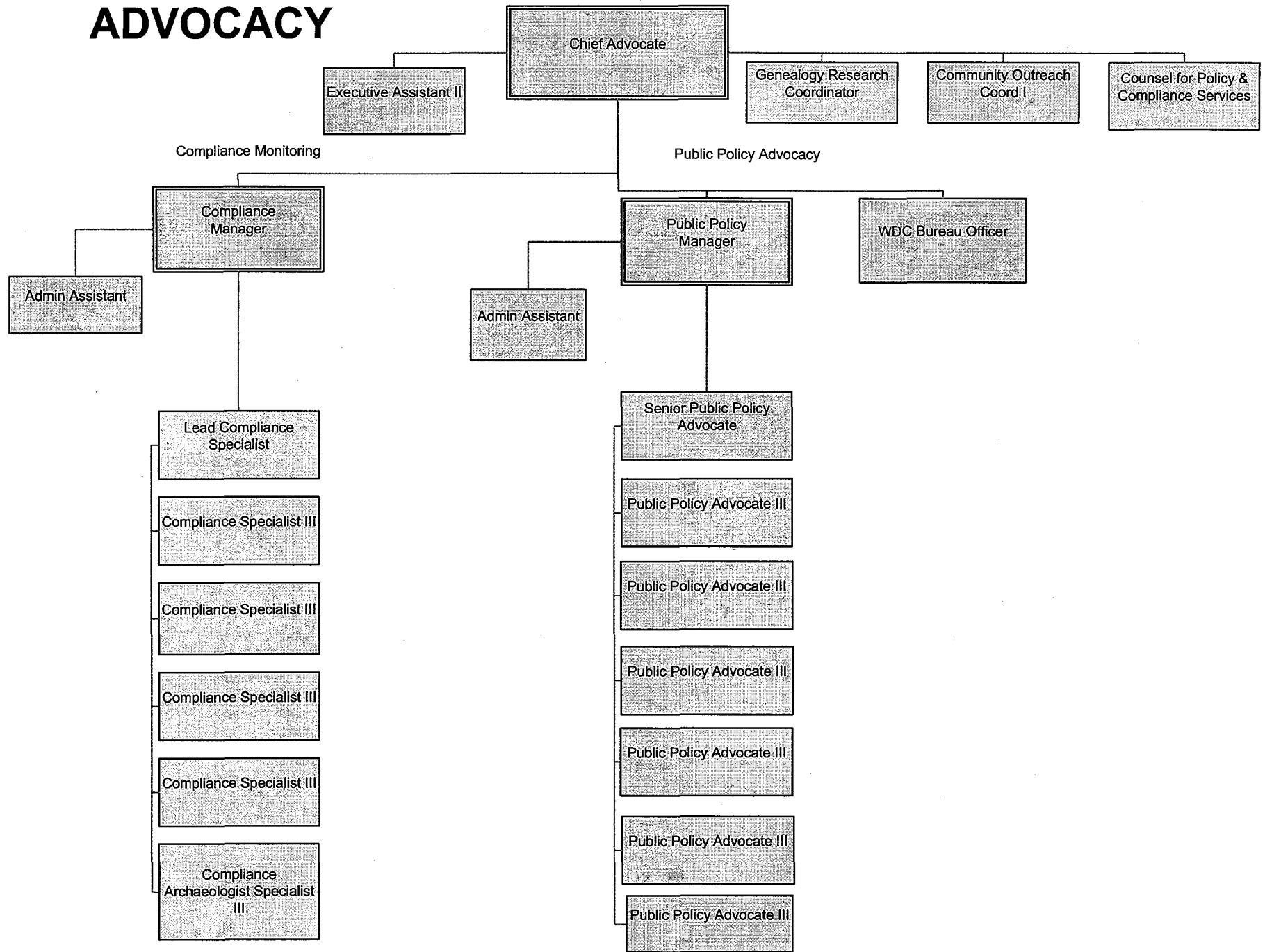
RESEARCH



NOTE: This organization chart is for illustrative and informational purposes only. All formal announcements and recruitment notices will be issued separately by the Human Resources Office.

CONFIDENTIAL

ADVOCACY



NOTE: This organization chart is for illustrative and informational purposes only. All formal announcements and recruitment notices will be issued separately by the Human Resources Office.

CONFIDENTIAL

Attachment #1

State Agencies

- DAGS for emergency & transitional housing for homeless
- DHHL for debt service on bonds
- DHHL for Infrastructure support for Nānakuli Village and Maku‘u Farmers Association
- DHHL for home ownership assistance to lessees and first time buyers
- DHS for Maui Adult Protection and Community Services – ‘Aha Kupuna
- DLNR for planning and management of Wao kele O Puna
- Hawaiian-focused public Charter schools funding
- DOE for various grants & programs, including Hawaiian Language School Immersion program
- DOE for various grants and programs
- DOH for Moloka‘i General Hospital construction
- DOH grant for the Caregiver Training & Apprenticeship program
- DOH for Kūkala Aloha Holistic Mental Illness Treatment program
- HTA grant to support Museum of Hawaiian Dance & Music
- HTA grant to support the Asia-Pacific Economic Cooperation (APEC) meetings

University of Hawai‘i System

- University of Hawai‘i:
 - Achieving the Dream legislative proviso (budgeted trust fund portion)
 - Ho‘okulāiwi: ‘Aha Ho‘ona‘auao ‘Ōiwi: Center for Hawaiian and Indigenous Education
 - Department of Native Hawaiian Health
 - Department of Political Science
 - Department of Public Policy
 - Foundation
 - Hawaii Innocence Project
 - Hawai‘inuiākea School of Hawaiian Knowledge
 - Kamakakūokalani Center of Hawaiian Studies program student sponsorship to the United Nations
 - Kua‘ana Native Hawaiian student development services to train UHM students to be tutors and mentors
 - Liko A‘e Native Hawaiian Scholarship Program
 - Native Hawaiian Student Services – Aka Lehulehu
 - Native Hawaiian Student Services – Pa‘ahao Awareness and Advocacy
 - ‘Ōiwi Ake Akamai Fellowship Program
 - School of Social Work Master’s program
 - Support for UH School of Social Work master’s candidates
 - Study on the criminal justice system & Native Hawaiians, Richardson School of Law
 - TEDx Manoa
 - William S. Richardson School of Law Center for Excellence in Native Hawaiian Law
 - JABSOM, School of Medicine, PILI 'Ohana Project: A Community Academic Partnership to Eliminate Obesity in Native Hawaiians (Dr. Keawe Kaholokula)

Attachment #1 (continued)

- University of Hawai‘i at Hilo:
 - Geomorphological study of Papohaku dune preservation plan
 - Hawaiian language and literature master’s and bachelor’s degree program
 - Ho‘omau ‘Aha ‘Ōpio Alaka‘i design program
 - ‘Imiloa Astronomy Center Pocket Theatre
 - Ka Haka ‘Ula O Ke‘elikōlani Hawaiian Language College
 - Kū Kilakila writing anthology
 - Nā Pua No‘eau (budgeted trust fund portion)
 - ‘Ohana strengthening education programs and other programs
 - Running Start program
 - Youth leadership program

- Honolulu Community College:
 - Build and establish a Native Hawaiian Māla and Lo‘i

- Kaua‘i Community College:
 - Tuition for students from Ni‘ihau
 - Youth and family educational support program
 - Wai‘ale‘ale First Year Experience Program

- Leeward Community College:
 - Hālau ‘Ike o Pu‘uloa first Birthday Pā‘ina and Blessing

- Windward Community College:
 - Economic Summit: \$87,940
 - Employment Training Center certified nurse aid program
 - Technical assistance for Native Hawaiian Revolving Loan program

OFFICE OF HAWAIIAN AFFAIRS STRATEGIC PLAN 2010-2018

VISION STATEMENT

"Ho'oulu Lāhui Aloha" - To Raise a Beloved Nation. OHA's vision statement 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.

MISSION STATEMENT

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 nation, recognized nationally and internationally.

CORE VALUES & GUIDING PRINCIPLES

Kākou: E alu like mai kākou i ka ho'okō 'ana i ko kākou mikiona.
We work together, unified to accomplish our mission.

Aloha Kekahi i Kekahi: 'Olu'olu a maika'i kākou i nā kānaka a pau.
We are kind and compassionate to all whose lives we touch.

Pono Pau'ole: E hana kūpono kākou i me ka 'oia'i'o.
We act with integrity and truthfulness.

Mālama Kekahi i Kehahi: E hō 'ihi a mālama kākou i nā po'e a pau a me nā mea 'ē a'e a pau.
We respect and care for others and all that surrounds us.

Kuleana: E ho'okō kākou i ko kākou kuleana hana.
We carry out our individual and collective responsibilities.

Kūlia: E ho'okumu kākou i ka hana e pili ana i nā kuleana Hawai'i me ka ho'ohulu.
We take initiative and are resilient in advocating for Hawaiian rights.

Po'okela: E hana kākou me ka 'oi a e ho'omaika'i iā kākou iho.
We do our absolute best and continuously seek improvement.

Ho'omau: E ho'omau kākou i ke ea o ka 'āina, na mea e ho'opuni ana, ka mo'omeheu a me ka po'e Hawai'i.
Together, steadfast we preserve and perpetuate our culture, people, land and environment.

OHA ROLES

In order to achieve our Priorities and Strategic Results, we are focused on the roles of advocate, researcher, and asset manager to improve conditions for all Native Hawaiians through systemic change.

Advocacy means making changes to laws, policies, and practices which broadly impact the Priorities the BOT has approved in the OHA Strategic Plan. This includes community outreach to mobilize the community, monitoring activities to identify harmful policies and laws, and advocacy initiatives to change laws, policies and practices in ways that improve conditions for Native Hawaiians as outlined in the Priorities.

Research means to compile and gather data to identify gaps and important issues, inform our advocacy efforts and ensure our actions and initiatives are based on the best information available.

Asset manager means to fulfill our sacred trust by analyzing opportunities, making critical decisions, and maximizing the value of our portfolio and other investments.

STRATEGIC PRIORITIES

HO‘OKAHUA WAIWAI

Economic Self-Sufficiency

To have choices and a sustainable future, Native Hawaiians will progress towards greater economic self-sufficiency.

‘ĀINA

Land & Water

To maintain the connection to the past and a viable land base, Native Hawaiians will participate in and benefit from responsible stewardship of Ka Pae ‘Āina O Hawai‘i.

MO‘OMEHEU

Culture

To strengthen identity, Native Hawaiians will preserve, practice and perpetuate their culture.

MAULI OLA

Health

To improve the quality and longevity of life, Native Hawaiians will enjoy healthy lifestyles and experience reduced onset of chronic diseases.

KE EA

Governance

To restore pono and ea, Native Hawaiians will achieve self-governance; after which, the assets of OHA will be transferred to the new governing entity.

HO‘ONA‘AUAO

Education

To maximize choices of life and work, Native Hawaiians will gain knowledge and excel in educational opportunities at all levels.

STRATEGIC RESULTS

1. Native Hawaiian median family income will equal 100% or greater than the Statewide median family income:
 - 92% or greater than the Statewide median family income by 2018
2. Increase the percent of Native Hawaiian Students who meet or exceed educational standards and who graduate from post-secondary institutions. By 2018 increase the number of Native Hawaiian students:
 - exceeding READING standards from 55% to 65%
 - exceeding MATH standards from 32% to 45%
 - who earn post-secondary degrees or certificates in the UH-system by 12%
3. Increasing the percent of Native Hawaiian families actively improving lifestyle choices by engaging in health programs and supportive family development practices by:
 - Decreasing the number of Native Hawaiians in State DOH substance abuse treatment from 45.9% to 39% by 2018
 - Increasing the number of Native Hawaiian mothers receiving prenatal care in the first trimester from 81.4% to 83.6% by 2018
4. 70% of all Hawai'i residents understand and agree that a viable land base is necessary for the new Native Hawaiian governing entity.
5. Increasing the percent of Ka Pae 'Āina O Hawaii managed to create economic value, preserve cultural and natural resources and historic properties, and/or provide cultural and social opportunities for Native Hawaiians in a sustainable and balanced manner:
 - By 2018, increasing from 12% to 15% the percent of ahupua'a that are managed sustainably
6. Adoption by the Board of Trustees of a Transition Plan that includes the legal transfer of assets and other resources to the new Native Hawaiian governing entity.
7. 85% of Hawai'i residents appreciate and value Native Hawaiian history and culture.
8. 51% of Native Hawaiians living in the State of Hawai'i participating in cultural activities, including language, and who interact with the 'āina for cultural, spiritual, religious and subsistence.
9. Native Hawaiians reduce the rate of obesity from 49.3% to 35% by 2018.
10. Increase the percent of Native Hawaiians who improve their capacity to own or rent a home by focusing on:
 - By 2018, decreasing from 55% to 50% the percent of Native Hawaiian renters who are paying more than the HUD standard housing cost (no more than 30% of household income)
 - By 2018, increasing Native Hawaiian owner-occupied housing from 56.62% to 58%