



**Senate Committee on Ways and Means**

**Budget Briefing**

**January 9, 2019, 9:00am**

**FY 19 and Biennium FY 20 and FY 21**

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## OVERVIEW

### A. 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 Constitution 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 Native Hawaiian community in general. In 1979, the legislature enacted Chapter 10 of the Hawai‘i Revised Statutes (HRS) which created OHA as a semi-autonomous self-governing body. Subsequent legislation has defined the amount of the revenue streams accruing to OHA. OHA’s Board of Trustees is composed of nine trustees, five of whom represent specific island districts. OHA’s key administrators include a Chief Executive Officer, Chief Operating Officer and five Departmental Directors ([www.oha.org](http://www.oha.org)).

Hawai‘i is an ethnically-diverse state. Currently, one in five (21.67%) of our island population 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.

#### 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 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:

- 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.

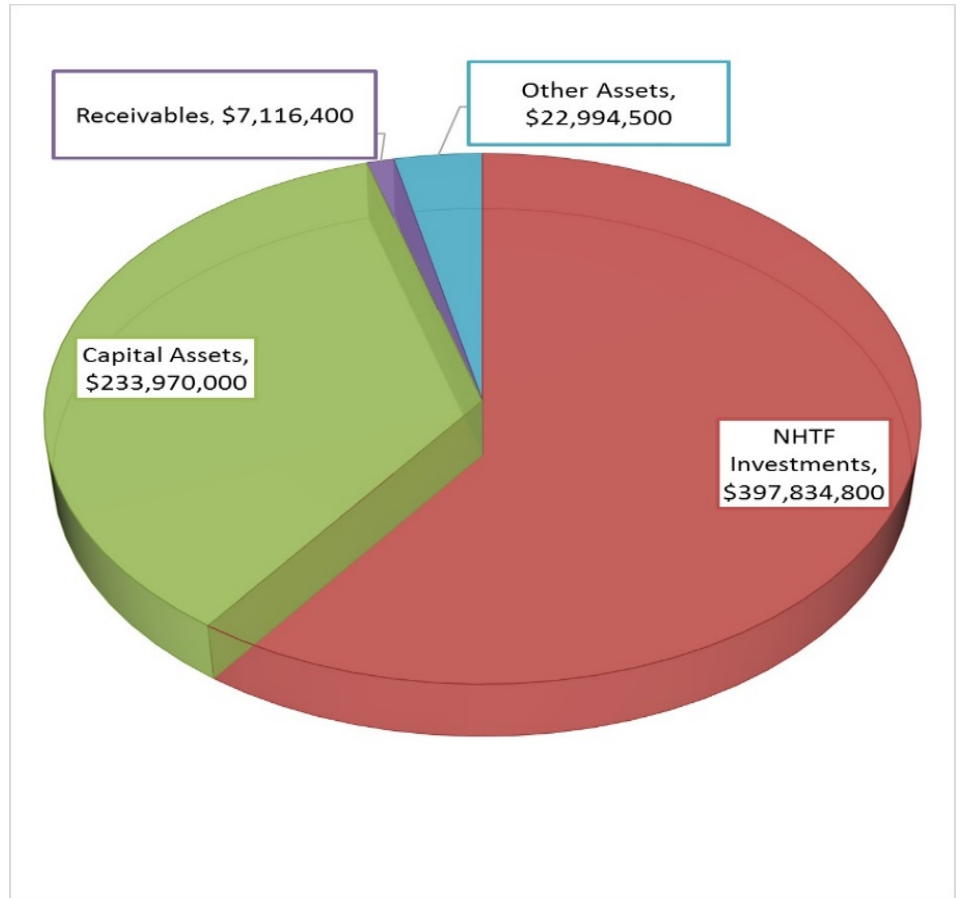
OHA carries out its mission through the strategic allocation of its limited resources. Consistent with best practices among foundations and endowments, and with the purpose of ensuring the continued viability of its Native Hawaiian Trust Fund (NHTF), OHA’s Board of Trustees adopted its first Spending Policy in 2003. This Policy limits its annual spending to 5% of the rolling 20

quarter average of the NHTF to help ensure sufficient resources are available for future generations. FY 2018 is used as an example to depict OHA's net assets and core operating budget.

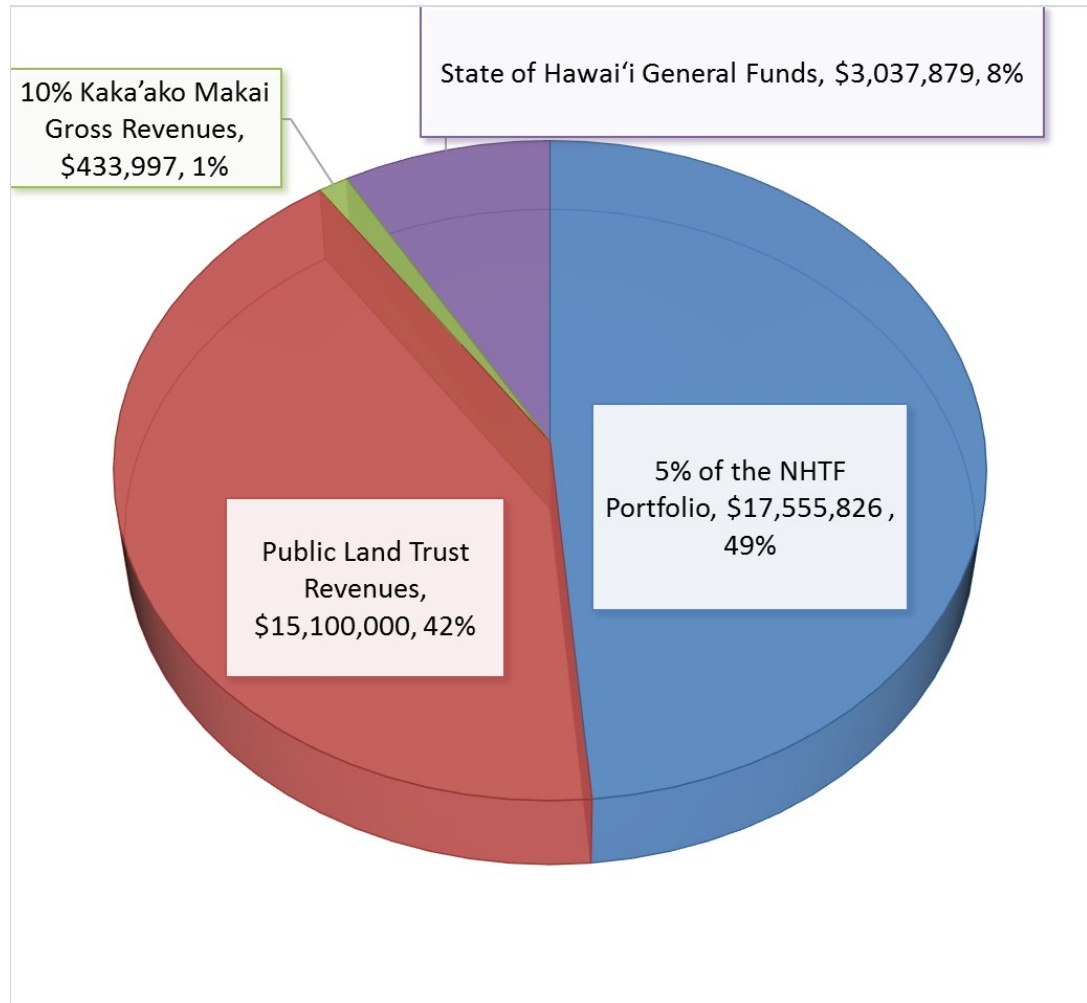
**Figure 1. OHA's FY 2018 Net Assets (unaudited) = \$662,915,500**

**OHA's Spending Policy limits the amount of annual withdrawals from its investment portfolio for operations.**

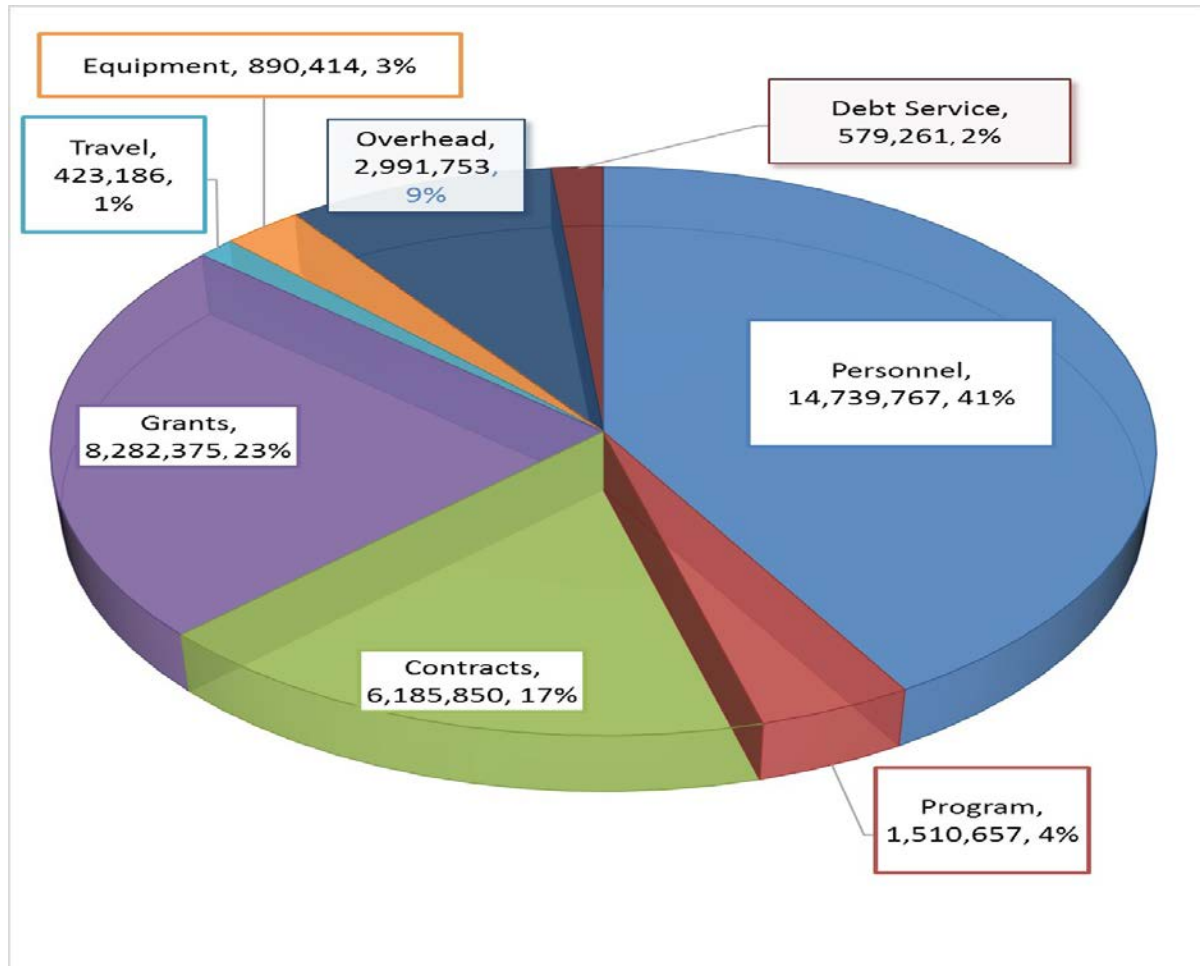
**For FY 2018 the spending limit was \$17,555,826, which was an increase of \$256,762 from FY 2016 of \$17,299,064.**



**Figure 2. OHA's FY 2018 Funding Sources for Core Operations = \$36,127,702**



**Figure 3. OHA's FY 2018 Core Operating Budget = \$35,603,263**



Each year, OHA publishes its activities and financial performance in its Annual Report. This year's report illustrates how the organization continues to make inroads on our three main goals: providing resources, advocating for Native Hawaiians on a range of issues, and facilitating collaboration among key stakeholders.

We encourage you to review the 2018 Office of Hawaiian Affairs Annual Report. The complete report can be downloaded from [www.oaha.org/about/annual-reports/](http://www.oaha.org/about/annual-reports/).

OHA's 2010-2018 Strategic Plan guides the achievement of its vision and mission. **Table 1** outlines the progress made on key strategic indicators related to the priorities and expected future outcomes outlined in this request. OHA has begun the challenging process of updating the Strategic Plan. Administrative staff has presented the Board of Trustees with the key steps and timetable for the update process. Developing the content of the plan will require interaction between the Board and staff, with final approval of the plan resting with the Board.

**Table 1. Key Education, Economic, Health and Legal Indicators**

Target Area	➤ Strategic Indicator ○ Related Measure/Evidence from OHA funding	Progress FY 17 - FY18	Future Progress	\$ Requested from State	
<b>EDUCATION</b>	<b>Adults</b>	➤ Increase number of <b>degrees or certificates</b> earned by Native Hawaiians from the UH System by 12%	97.8% FY2018	Maintain	\$ 0
		○ Number of OHA scholarships provided	384 awarded / yr	Maintain	
	<b>K-12</b>	➤ Increase the percentage of Native Hawaiian student that meet or exceed <b>math standards*</b>	26% SY2018*	Increase	\$ 615,000
		➤ Increase the percentage of Native Hawaiian student that meet or exceed <b>reading standards*</b>	38% SY2018*	Increase	
		○ Number of Native Hawaiian students OHA assisted	3,428 students / yr	Maintain**	
<b>ECONOMIC</b>	<b>Income</b>	➤ Increase Native Hawaiian <b>median family income</b> to 92% or greater of the total State median family income	87.7% FY2016	Increase	\$ 0
		○ Number of Native Hawaiians assisted	170 families / yr	Maintain**	
	<b>Housing</b>	➤ Increase Native Hawaiian <b>homeownership</b> rate to 58%	50.3% FY2016	Increase	\$ 500,000
		➤ Decrease the percent of Native Hawaiians who pay more than 30% of Income on <b>rental housing cost</b> to 55%	51% FY2016	Decrease	
		○ Number of Native Hawaiians assisted	894 families / yr	Maintain**	
	<b>Social Services</b>	○ Number of Native Hawaiians assisted	924 individuals / yr	Maintain**	\$ 415,000
	<b>Income/Housing/Social Services</b>	○ Number who completed Financial Literacy Training to secure OHA economic assistance	757 individuals / yr	Maintain**	\$ 0
<b>HEALTH</b>	➤ Reduce the rate of <b>obesity</b> among Native Hawaiians to 35%	45.6% FY2016	Decrease	\$ 0	
	○ Number of Native Hawaiians who lost weight	535 individuals / yr	Maintain**		
<b>LEGAL</b>	○ Number of Native Hawaiians who received legal services including representation	580 individuals / yr	Maintain**	\$ 524,400	
<b>TOTAL ANNUAL PROGRAMMATIC REQUEST:</b>				<b>\$2,054,400</b>	

**Note.** \* = Due to changes in the Department of Education’s state standards and related assessments, these results are incomparable with previous years and with OHA’s strategic target developed in 2009. In alignment with the DOE’s updated targets, an update to OHA’s strategic target is currently under consideration.

\*\* = Future progress expected to be consistent with the ratio of funding provided to meet each strategic indicator.



## B. Current Economic Conditions & Notable Performance

### 1. Impact of Current Economic Conditions

Budget cuts on the State and Federal levels, combined with a volatile stock market have significant indirect impact to OHA's operational funds, programs and/or needs of OHA's beneficiaries in a number of ways.

- **Reductions.** In general, any loss of government funding to beneficiary programs and the organizations that serve them will cause an increased demand for supplemental funding from OHA to ensure that the health, education, legal, housing, and other daily needs of our beneficiaries are met. Reduced State appropriations have created a reduction in beneficiary assistance, from non-OHA programs, including but not limited to reductions in: 1) emergency financial assistance programs, 2) case management services which assist beneficiaries to access community resources, 3) clinicians providing mental health and substance abuse counseling and support, and 4) health monitoring/navigation programs that assist those with chronic disease to get needed medical care.
- **Reduced Program Funds.** Trust funds available to OHA increased in FY2018 but OHA notes a decrease in the first half of FY2019 due to the current volatile stock market.
- **Beneficiaries.** 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).
- **Bottom Line.** State and federal budget cuts may have reduced services and programs that previously serviced OHA beneficiaries. When there are cuts beneficiaries often turn to OHA to fill the gap. Also, increasingly non-profits and other social services organizations have looked to other avenues to support their work and have turned to OHA for support.

### 2. Notable Performance, Results and Expected Outcomes

**Enhanced performance measures.** In the quest to improve conditions for Native Hawaiians, OHA continues to work closely with many community-based partners who continue to play a critical role in the successes presented in Table 1. OHA remains encouraged by visible signs of progress in helping Hawai'i's citizens improve their health; improve their economic self-sufficiency; secure stable housing; improve skills in reading and math; and protect legal rights. Within the last year OHA has continued to align its funded projects with its strategic priorities, increased its grants monitoring, strengthened its grants performance measures, and

streamlined its grant processes with input from past and current providers. Additionally, trustees have adopted new guidelines for its Kulia grants program and are in the process of amending trustee allowance policies and its fiscal reserve policy. Currently, all OHA community grant applications, from each county and for every grant type, are submitted online at OHA's updated website - [www.oha.org](http://www.oha.org). Finally, OHA's Board approved a policy amendment that requires Board approval for all grants and sponsorships and therefore these decisions will be made in open public meetings.

**Significant Return on Investment via OHA and Community Commitment.** For FY18 and FY19 OHA successfully leveraged \$3,347,660 of general funds into \$14,160,959 in the areas of social services, legal services, education, and income, a 4.23 : 1 total impact.

Strong demand continues for OHA grant money to help tackle priority issues. Community partners increasingly tailor marketable services to OHA priorities to meet critical needs across the State. Organizations contribute a minimum 20% cash match in each grant request. In turn, OHA anticipates that it will be as successful as it was in this past fiscal biennium, and through continued partnerships with the State and many well-connected organizations, we will leverage OHA funds as much as 8.4 : 1 (in the area of housing).

**Bottom Line.** State General Funds are highly leveraged through its partnership with OHA, as evidenced by an impressive overall **4.23 : 1 total impact** as depicted in Table 2.

In other words, OHA will turn **\$4.1 million** into **\$17.4 million** to strengthen Hawai'i families and communities

**Table 2.** Summary of FB 20/21 Projected State Leveraged Impact by Priority Area: State Funds Leveraged 4.23:1

Priority Area	Requested State General Funds	Projected OHA Matching Funds	Projected Minimum 20% Community Match	Other OHA Trust Funds [A]	Total Investment [B]	Leveraged Impact [C]	Estimated # of Individuals to be Served	Estimated # of Native Hawaiians to be Served
Social Services	830,000	830,000	332,000	0	1,992,000	2.40	1,847	1,847
Legal Services	1,048,800	1,048,800	676,218	0	2,773,818	2.64	1,160	1,160
Education	1,230,000	1,230,000	200,000	1,540,000	4,200,000	3.41	9,687	6,856
Housing (inc \$6M DHHL)	1,000,000	1,000,000	400,000	6,000,000	8,400,000	8.40	4,432	3,576
TOTAL:	4,108,800	4,108,800	1,608,218	7,540,000	17,365,818	4.23	17,126	13,439

Notes:

[A] Housing includes \$3M/year to DHHL.

[B] Additional Funds through OHA Partnership \$13,257,018 [ = \$17,365,818 (Total Investment) - 4,108,800 (State General Funds) ]

[C] Leveraged Impact = Total Investment / State General Funds; Projected State General Funds leveraged through OHA Partnerships: 4.23 : 1

*Above does not include OHA in-kind salary & administrative support*

## FEDERAL FUNDS

### C. Impending Loss of Direct Federal Funds

OHA currently administers one (1) Federally-funded pass-through program and one (1) Federally-funded direct program. As of this time, these awards have not lost, or are not 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 Hälawa Luluku Interpretive Development (HLID) Project is a pass-through from the State’s 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 for all the people of Hawai ` i, issued its first loan in 1989.

The Native American Programs Act (NAPA) of 1974, as amended, requires the Administration for Native Americans to submit an Annual Report to the Congress on the NHRLF. The most recent report, submitted in March 2016, noted that through FY 2015 (June 30, 2015), “OHA has successfully revolved the Fund twice by lending a cumulative \$57 million to more than 2,000 Native Hawaiians. More importantly, the Fund has contributed to the economic self-sufficiency of Native Hawaiians.” The report continues by informing the Congress of joint efforts to develop a Three-Year Business Plan that “will demonstrate that the \$26 million Fund can be self-sustaining and continue to advance the economic and social self-sufficiency of Native Hawaiians.”

## NON-GENERAL FUNDS

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

Please see Appendix C.

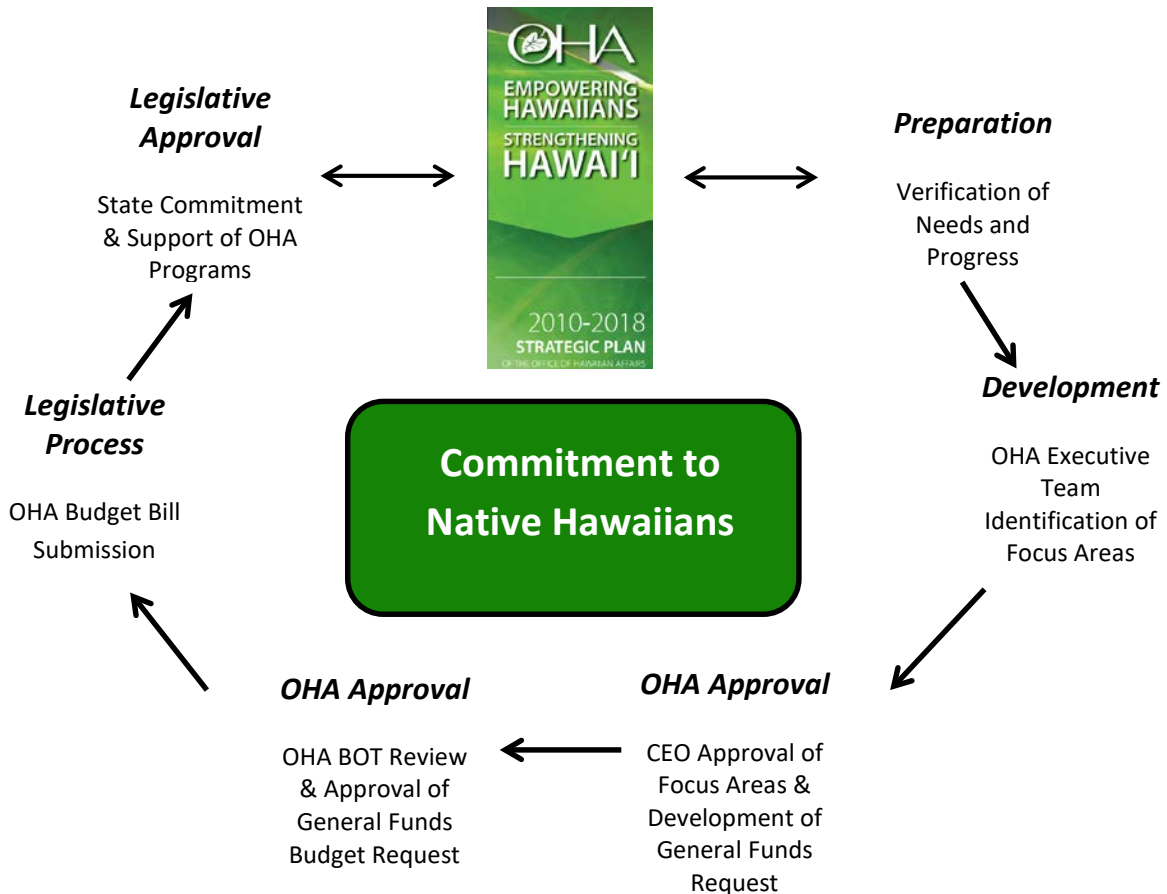
## BUDGET REQUEST

### E. Budget Development Process and Priority Requests

#### 1. Budget Development

As documented in Figure 4, OHA's request centers on both the State and OHA's commitment to Native Hawaiians. The process involves an assessment of priorities, previous progress and needs by OHA's Executive Team prior to Board Approval and eventual Legislative Submission.

**Figure 4.** OHA's General Funds Biennial Budget Development Process



## 2. Summary of Priority Requests

**Historical Funding.** OHA has received State General Funds since 1981 for a portion of its personnel and operating cost and to provide services. Through its FY 2018 - FY 2019 appropriations, OHA currently supports services to beneficiaries in the priority areas of **Social Services, Legal Services, Education, and Income**. OHA considers all of its programmatic request (Social Services, Legal Services, Education, and Housing) as well as support provided for personnel and operations as priorities.

**Budget Changes.** OHA is requesting an increase in programmatic support totaling \$500,000/year in the areas of Housing, as well as an increase in personnel support totaling \$562,130/year as explained in Section E. Significant Adjustments and Related Outcomes below.

In summary, OHA requests **\$7,921,158** including **\$4,108,800** for **programmatic support** plus **\$3,852,358** for **personnel and operations** during the next biennium. OHA hopes to leverage State's General Funds provided for programmatic support of **\$4,108,800** to a projected **\$17,365,818** or **4.23:1**, as summarized in Table 2.

As of this time, OHA considers all budget requests, including changes, as a priority since these funds will be used as leverage to heavily invest over the next two years in addressing four specific priority areas that are ultimately about helping statewide efforts to strengthen families and communities.

### F. Significant Budget Adjustments and Related Outcomes

OHA's FB 20/21 State General Funds request includes the following significant adjustments:

#### Budget Adjustments/Changes

##### HOUSING:

- **Increase** request for the combined areas of \$500,000/year.

##### INCOME:

- **Decrease** request of \$119,430/year.

##### PERSONNEL:

- **Increase** request totaling \$562,130/year and \$1,124,260/FB 20/21.

OHA is one of few State agencies whose primary source of funding is non-State-General Funds. Therefore, OHA has and will continue to be severely impacted by the large and unexpected increase in the State's fringe rate. Increased General Funds would allow OHA to more easily absorb the impact of the fringe rate increase and continue to service. As stated previously in this testimony, State and federal budget cuts have reduced services and programs that previously serviced OHA beneficiaries. As a result, these beneficiaries often turn to OHA to fill the gap. Also, increasingly non-profit and other social services organizations have looked to other avenues to support their work and have turned to OHA for support. Strong demand continues for OHA grant money to help tackle priority issues.

Community partners increasingly tailor marketable services to OHA priorities to help them stay afloat and meet critical needs across the State. Organizations contribute a 20% cash match in each grant request. In turn, OHA funding will allow many well-connected organizations to leverage OHA funds as much as 8.4 : 1 (see Table 2. Leveraged Impact, under “Housing”).

Changes for the upcoming FB 20/21 biennium are summarized in **Table 3** below:

**Table 3.** Overview of OHA’s Budget Request by Priority Area (per year)

Purpose	FB 18/19 (per year)		FB 20/21 (per year)		Adjustments	
	General Funds	Trust Fund Match	General Funds	Trust Fund Match	General Funds	Trust Fund Match
1. Social Services	\$ 415,000	\$ 415,000	\$ 415,000	\$ 415,000	\$ 0	\$ 0
2. Legal	524,400	524,400	524,400	524,400	0	0
3. Education	615,000	615,000	615,000	615,000	0	0
4. Housing	0	0	500,000	500,000	500,000	500,000
5. Income	119,430	619,430	0	0	-119,430	-619,430
<b>Sub-Total Programs:</b>	<b>\$ 1,673,830</b>	<b>\$ 2,173,830</b>	<b>\$ 2,054,400</b>	<b>\$ 2,054,400</b>	<b>\$ 380,570</b>	<b>\$ -119,430</b>
A. Personnel	1,067,175	3,959,000	1,629,305	3,959,000	562,130	0
B. Operations	296,874	296,874	296,874	296,874	0	0
<b>Sub-Total Non Programs:</b>	<b>\$ 1,364,049</b>	<b>\$ 4,255,874</b>	<b>\$ 1,926,179</b>	<b>\$ 4,255,874</b>	<b>\$ 562,130</b>	<b>\$ 0</b>
<b>Totals:</b>	<b>\$ 3,037,879</b>	<b>\$ 6,429,704</b>	<b>\$ 3,980,579</b>	<b>\$ 6,310,274</b>	<b>\$ 942,700</b>	<b>\$ -119,430</b>
<b>FB 20/21 (2-year) Programs Total:</b>			<b>\$ 4,108,800</b>	<b>\$ 4,108,800</b>	<b>*Same as Table 2, 1:1 match</b>	
<b>FB 20/21 (2-year) Overall Total:</b>			<b>\$ 7,921,158</b>	<b>\$12,620,548</b>	<b>*Overall 1.6:1 match</b>	

Although OHA requests State General Funds each year, OHA’s support to the State and its programs far exceeds its ask. During the same period of time (FY 11-FY 19) in which OHA committed over **\$54 million in support of State agencies and its University**, it received less than half that amount, or **\$25 million** in State General Funds, as summarized in **Table 4** to the right.

The infographics on the pages following summarize OHA’s overall budget request as well as its projected leveraged impact as it relates to the four priority areas.

**Table 4.** State General Funds to OHA FY 11-FY 19

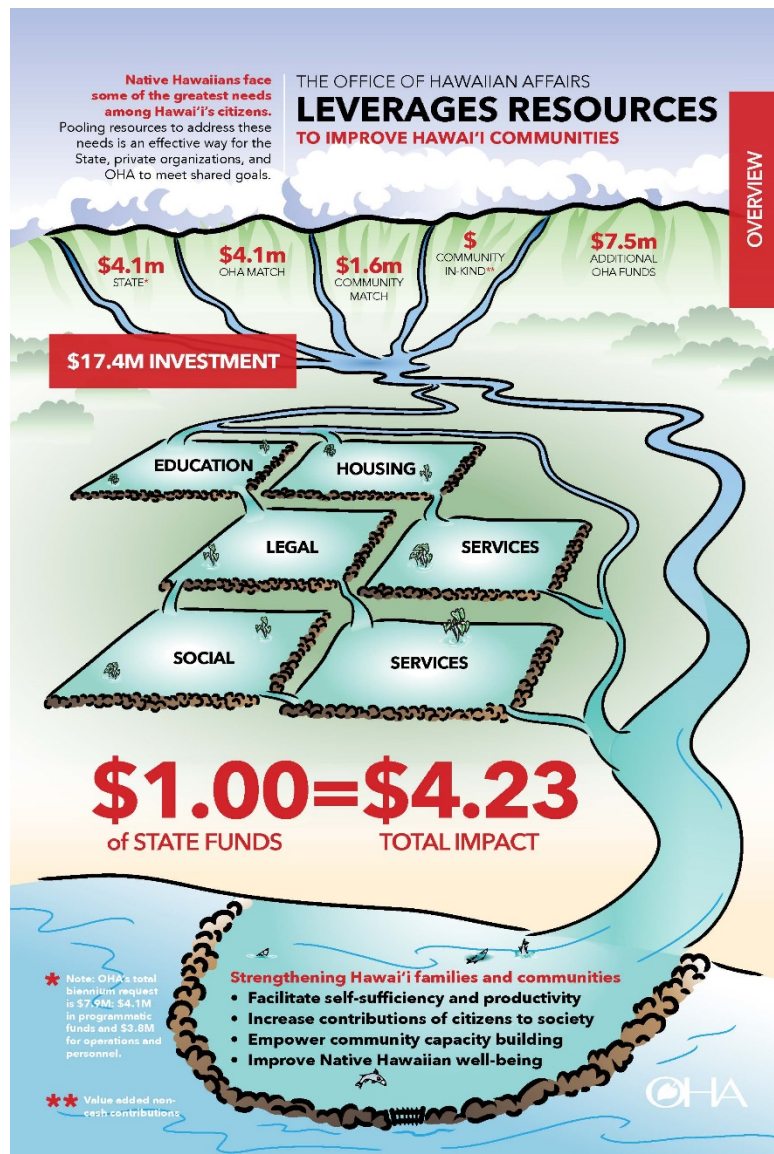
Fiscal Year	General Funds Amount
FY 2011	2,469,659
FY 2012	2,370,872
FY 2013	2,370,872
FY 2014	3,141,574
FY 2015	2,741,574
FY 2016	2,991,004
FY 2017	2,991,004
FY 2018	3,037,879
FY 2019	3,037,879
<b>Total:</b>	<b>\$ 25,152,317</b>

## Summary of OHA’s Budget Request and Projected State Leveraged Impact

In its quest to improve the conditions of Native Hawaiians, OHA has worked closely with a number of community-based partners to bring attention, needed resources, and advocacy to address the many urgent issues facing the Native Hawaiian community and the State as a whole. OHA remains encouraged by signs of progress in Native Hawaiians’ ability to secure stable housing, improved socioeconomic conditions, increased financial stability, and greater awareness of and ability to protect their legal rights. In the months and years ahead, the immediate challenge will be maintaining and building upon this progress.

Strong demand remains for OHA grant money to help tackle these issues and OHA has seen community partners increasingly tailor their services to align with OHA’s priorities. Many of these community partners have already proved their value in enhancing OHA’s efforts to help create a solid future for Native Hawaiians and Hawai’i residents.

Figure 5. Summary Infographic (See Appendix A-1 for larger image)



OHA’s grants program has substantially enhanced its community impact by requiring projects to align with OHA’s strategic priorities, and by closely monitoring grant projects to ensure adequate progress toward specific, measurable outcomes. Therefore, it is with optimistic enthusiasm that OHA is now requesting \$4.1 million (over half of OHA’s \$7.9 million total budget request) in programmatic state funds for the 2020-2021 fiscal biennium. OHA hopes to leverage \$4.1 million in State funds into a \$17.4 million investment in four specific areas that further existing State efforts to strengthen Hawai’i’s families and communities.

OHA is committed to further leveraging the requested state funds by requiring a 20% cash match by all providers awarded funds under OHA’s community grants program.



## 1. Social Services

In partnership with the State, OHA hopes to continue to provide support and funding for social services to at-risk Native Hawaiians. Through its grants program, OHA works with and funds organizations that serve Native Hawaiians who may be struggling financially or facing unexpected crises.

Unfortunately, the need for social services support within the Native Hawaiian community remains high. The most recent data from 2017 reveals that 12% of Native Hawaiian individuals and 10% of Native Hawaiian families live in poverty (U.S. Census Bureau, 2018). These rates are nearly 2.4% points higher than that of the total state population (U.S. Census Bureau, 2018). In fact, 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 only 71% of that of the total state population, \$24,188 compared to \$33,882 (U.S. Census Bureau, 2018; U.S. Census Bureau, 2018).

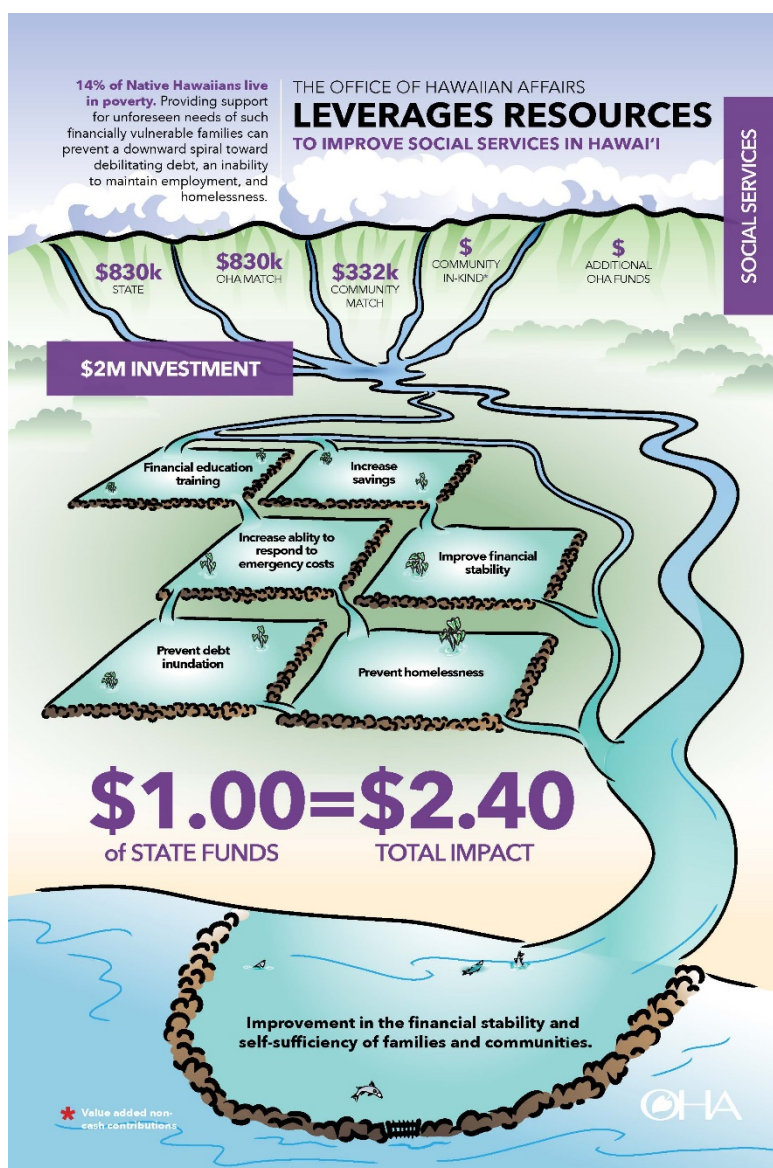
For many in our communities who are already living paycheck-to-paycheck and struggling to survive financially, emergency situations such as natural disasters, sudden unemployment, medical issues, or family

crises, exacerbate their already dire financial situation. In 2018, we saw many Native Hawaiian families affected by extreme flooding in Wainiha and Hā'ena, and by lava flows in Kalapana-Kapoho and Pāhoā.

OHA's emergency assistance program, funded through our social services proviso, collaborates with community partners to provide relief to struggling Native Hawaiians faced with unforeseen circumstances by providing funds to pay for necessities like rent and utilities, helping to ensure that they do not fall deeper into poverty, lose employment, or become homeless. Financial literacy training remains a condition for this emergency assistance, which is part of a larger effort to encourage financial self-sufficiency.

Figure 6. Social Services Infographic (See Appendix A-2 for larger image)

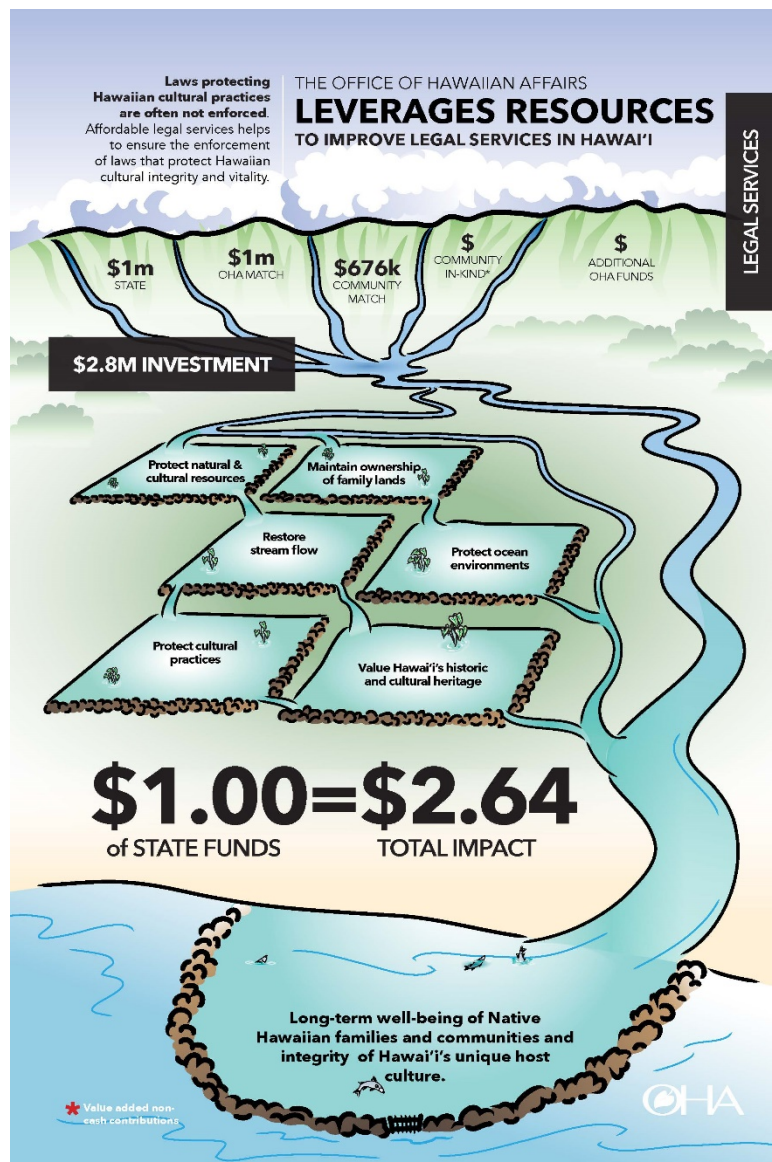
OHA is committed to matching \$830,000 from the State over the next two years, and leveraging these funds with contributions from community partners to help more at-risk Native Hawaiians and their families address unexpected crises, and make smart-money-management decisions meant to improve their economic well-being and self-sufficiency.



## 2. Legal Services

Over the next two years, OHA will continue to support access to justice for Native Hawaiians seeking to perpetuate their culture, and maintain a connection to their ‘āina, their communities, and their ‘ohana. The Legislature has found that the “historic and cultural heritage of the State is among its important assets” and has declared that it is the policy of the State to “provide leadership in preserving, restoring, and maintaining historic and cultural property . . . in a spirit of stewardship and trusteeship for future generations.” However, Native Hawaiians continue to have unique legal needs relating to issues such as quiet title, land title, traditional and customary practices, protection of significant places, and protection of natural and cultural resources. Accordingly, OHA’s legal services program provides funding that ensure state laws passed by the Legislature are upheld and Native Hawaiians have access to affordable legal services.

**Figure 7.** Legal Services Infographic (See Appendix A-3 for larger image)



OHA hopes to leverage \$1,040,800 in state funds over the next two years for a total investment of \$2.77 million in legal services that can improve and consistently uphold state laws that are meant to protect Native Hawaiians’ rights and interests.

### 3. Education

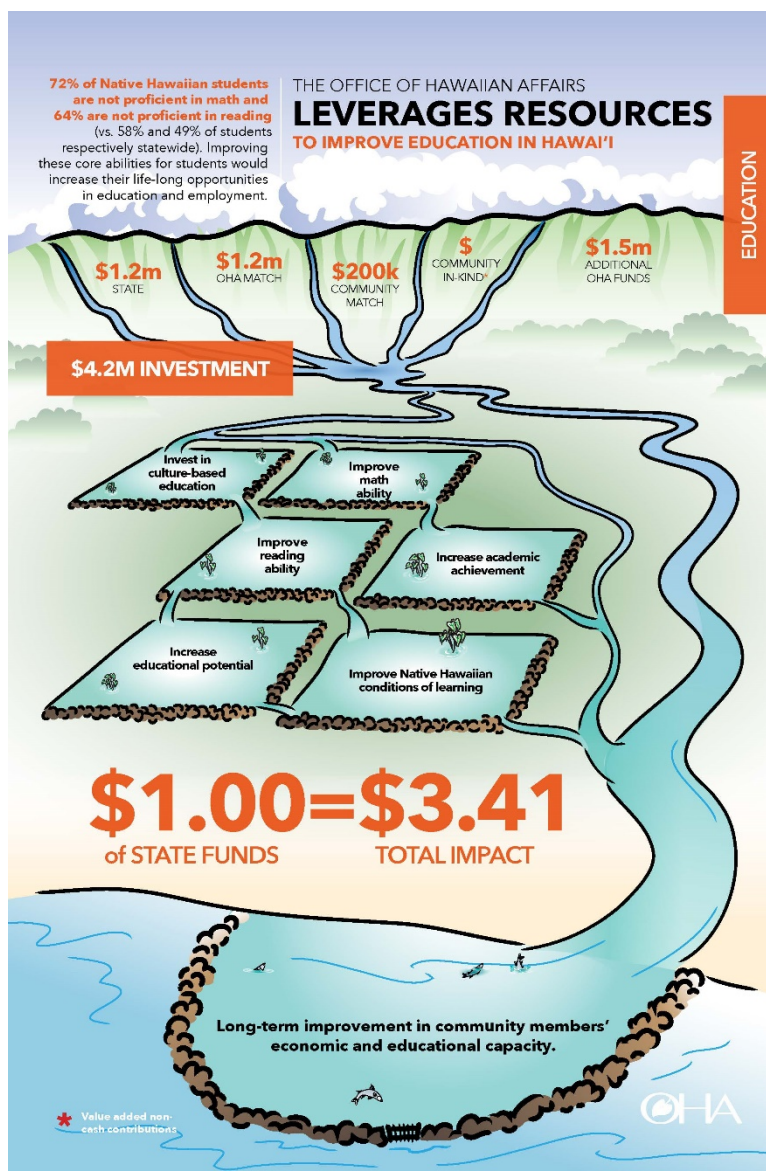
In the year ahead, OHA will continue to focus on closing the persistent achievement gap between Native Hawaiian students and their peers across the State, particularly in math and reading. OHA recognizes the need to reverse this trend, which threatens to undermine the future success of Native Hawaiian students. Last school year, 2017-18, 74% of Native Hawaiian students were not proficient in math and 62% were not proficient in reading (vs 58% and 46% of all students respectively) (DOE, 2018).

In order to close this gap, OHA seeks to support programs that provide Native Hawaiian students with learning opportunities that are culturally-based, that strengthened students' sense of well-being, and that provide specific strategies to help them understand the math and reading concepts with which they are struggling. Research shows that teaching environments using a culture-based education approach positively influence

key student outcomes, including improved community connections and cultural relationships, increased self-efficacy and a sense of belonging, and increased college aspirations. (Kanaiaupuni et al., 2017).

In addition, OHA believes that successful educational outcomes for all students, are critical to supporting the State's economy, overcoming our present and future social and environmental challenges, and maintaining a culturally enriched and socially conscious island society.

**Figure 8.** Education Infographic (See Appendix A-4 for larger image)



OHA is hoping to continue to partner with the state and other organizations to leverage an anticipated \$1,230,000 from the State, to invest in closing educational achievement gaps and ensuring a brighter future for Native Hawaiian students. With the requested state funding, OHA and its partners will be able to invest an additional \$2.97 million into educational programs designed to help Native Hawaiian students succeed academically. These students will also graduate with the skills needed to obtain well-paying jobs and/or pursue a college education.

#### 4. Housing

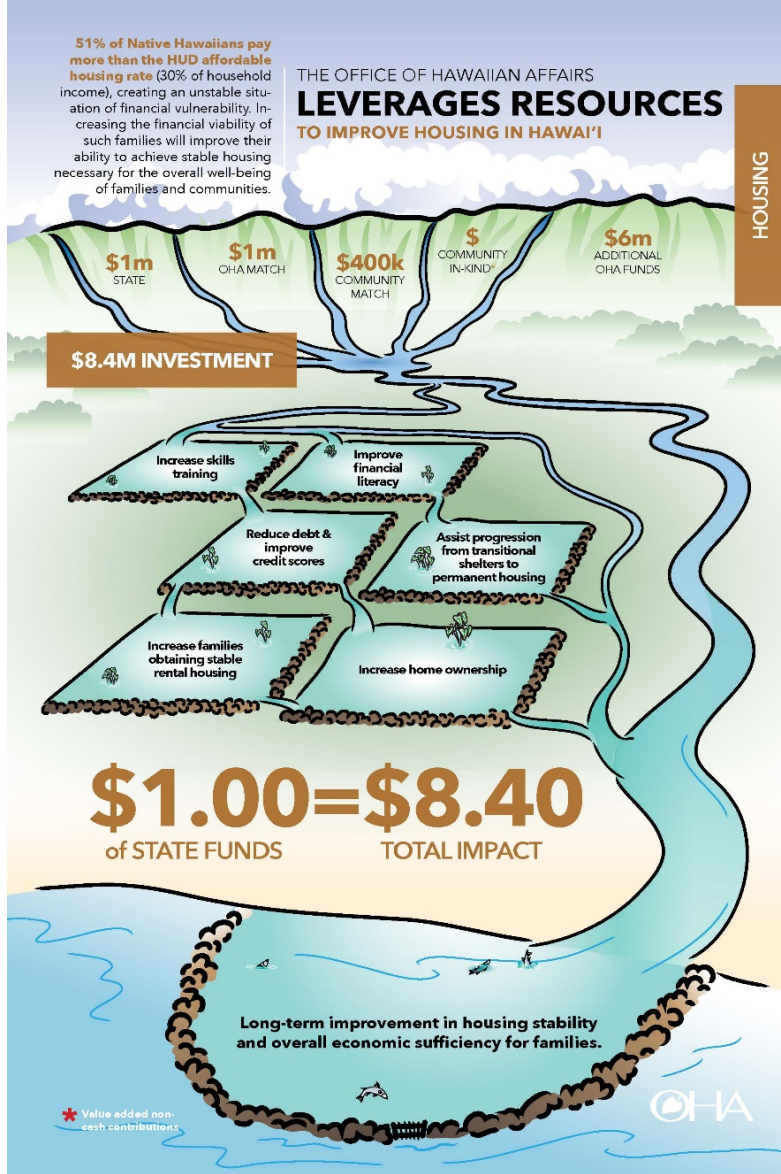
OHA continues to focus on helping more Native Hawaiians achieve housing stability, as many continue to struggle to achieve homeownership, afford adequate rental housing, and avoid homelessness. According to the latest available figures from 2017, only 54% of Native Hawaiians reside in owner-occupied housing, compared to 58.5% of residents of the state/State (U.S. Census Bureau, 2018). Of Native Hawaiian households planning to buy a home, the average amount available for a down payment was half that of non-Hawaiian households, \$24,440 compared to \$59,225; Native Hawaiians' median affordable monthly mortgage payment was \$1,000 less (HHFDC, 2016).

Meanwhile, more than half of Native Hawaiian renters live in homes they are struggling to afford, and many may also live in overcrowded situations to reduce rental payments (U.S. Census Bureau, 2018). In fact, one in four Native Hawaiian homes are occupied by two or more families in order to share housing costs and 14% include "hidden homeless" persons. These rates are more than two times that of non-Hawaiian households (10% doubled-up and 4% with hidden homeless). (HHFDC, 2016). In addition to being burdened by the same unaffordable housing costs as the rest of Hawai'i, Native Hawaiians also earn substantially less—nearly \$10,000 less—than that of the per capita income of the State (U.S. Census Bureau, 2018).

Among the State's homeless populations, Native Hawaiians represent the largest ethnic group, comprising 27% of all clients receiving homeless services statewide (Yuan & Cauci, 2018) and 32% of surveyed homeless on O'ahu (PIC, 2017). In fact, 25% of emergency shelter clients and 32% of transitional housing clients are Native Hawaiian (Yuan, 2017). Additionally, 22% of Native Hawaiian households are at-risk of becoming homeless (HHFDC, 2016).

In response to this data, OHA is advocating for appropriate affordable housing policies, and hoping to leverage \$500,000 from the State over the next two years to improve housing stability. OHA is accepting grants to assist Native Hawaiians improve housing stability, including Native Hawaiians that are currently homeless, at risk of homelessness, in transitional housing, in unstable or unaffordable rentals, and/or those pursuing homeownership.

Figure 9. Housing Infographic (See Appendix A-5 for larger image)



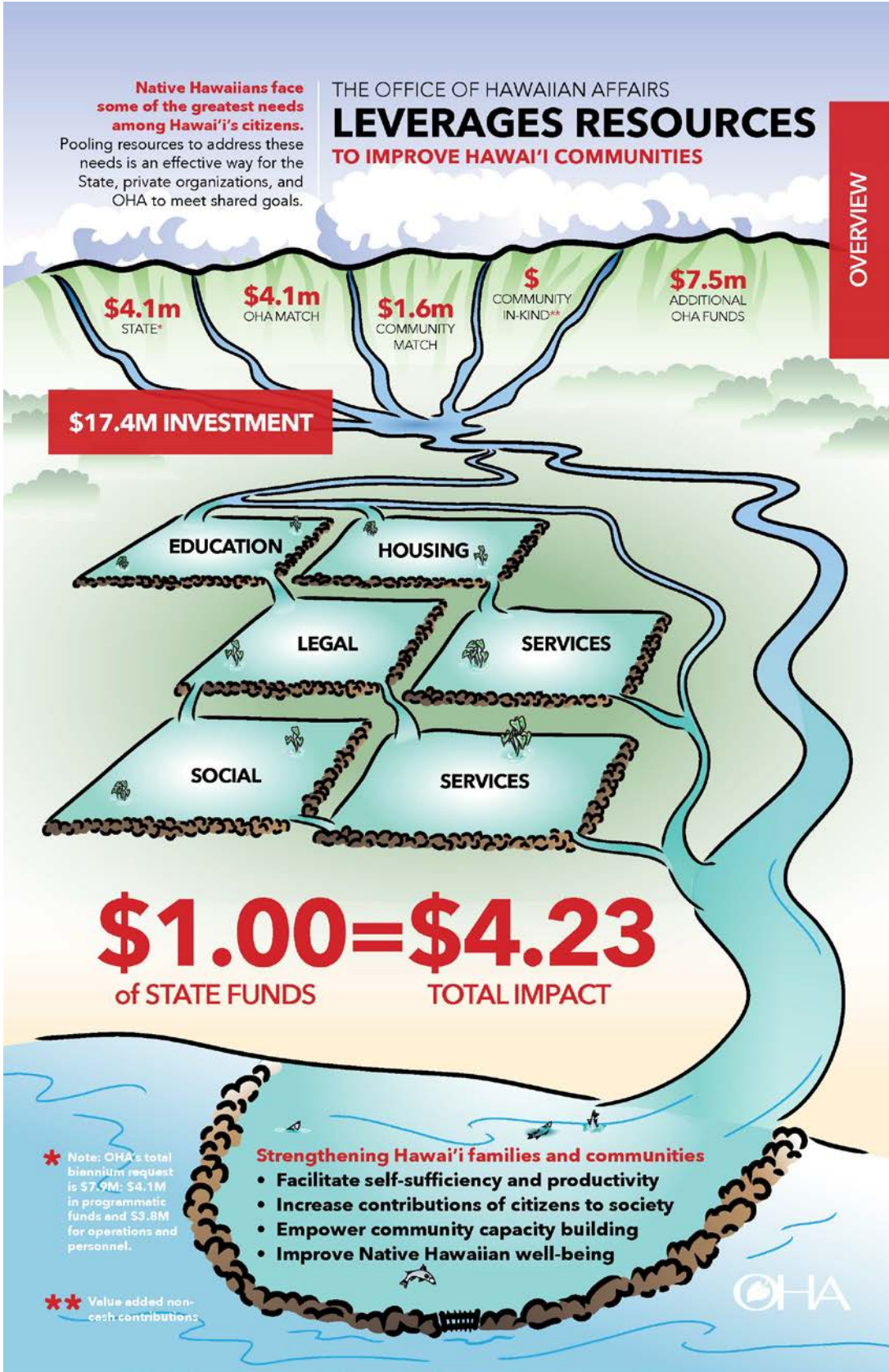
OHA and community partners expect to invest \$8.4 million into helping Native Hawaiians achieve housing stability, become more creditworthy, improve financial management, and increase their home ownership rate.

OHA has already seen real results through past grantees that have successfully helped Native Hawaiians, including homeless families and renters, become more economically self-sufficient and housing secure across the State.

# Appendix A

## OHA's Full Size Infographics

Figures A-1 Overview



Figures A-2 Social Services

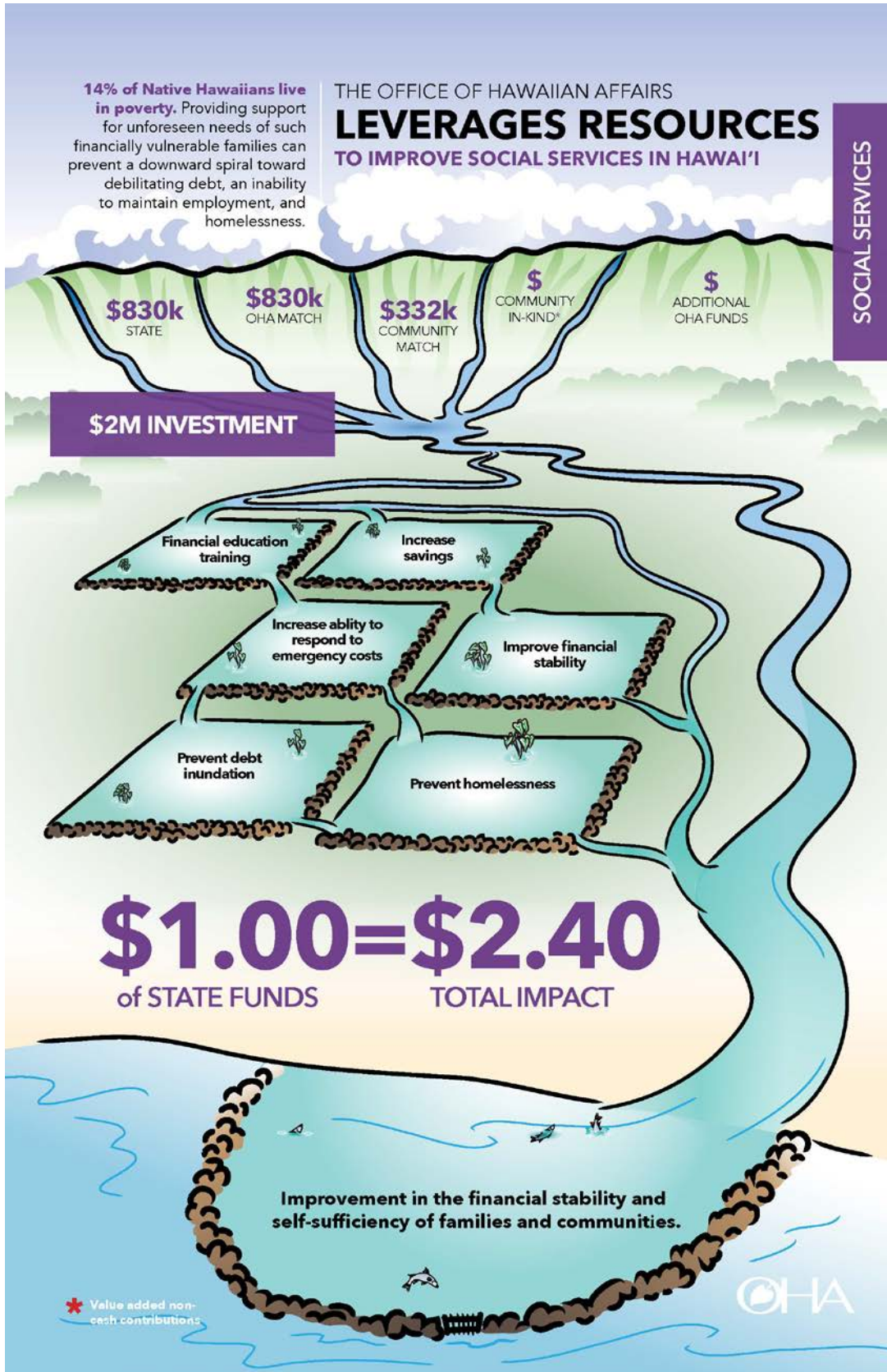




Figure A-3 Legal Services

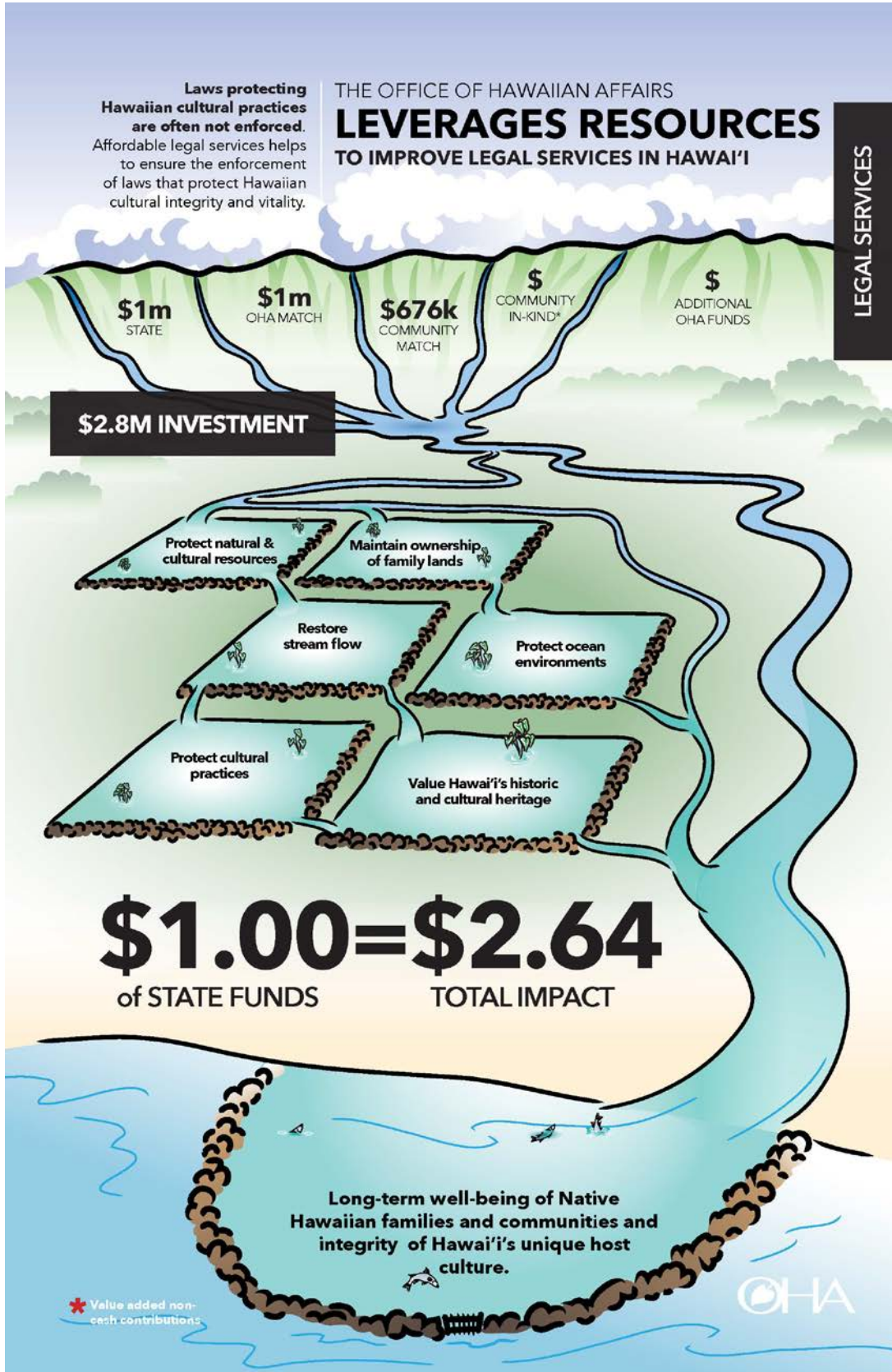


Figure A-4 Education

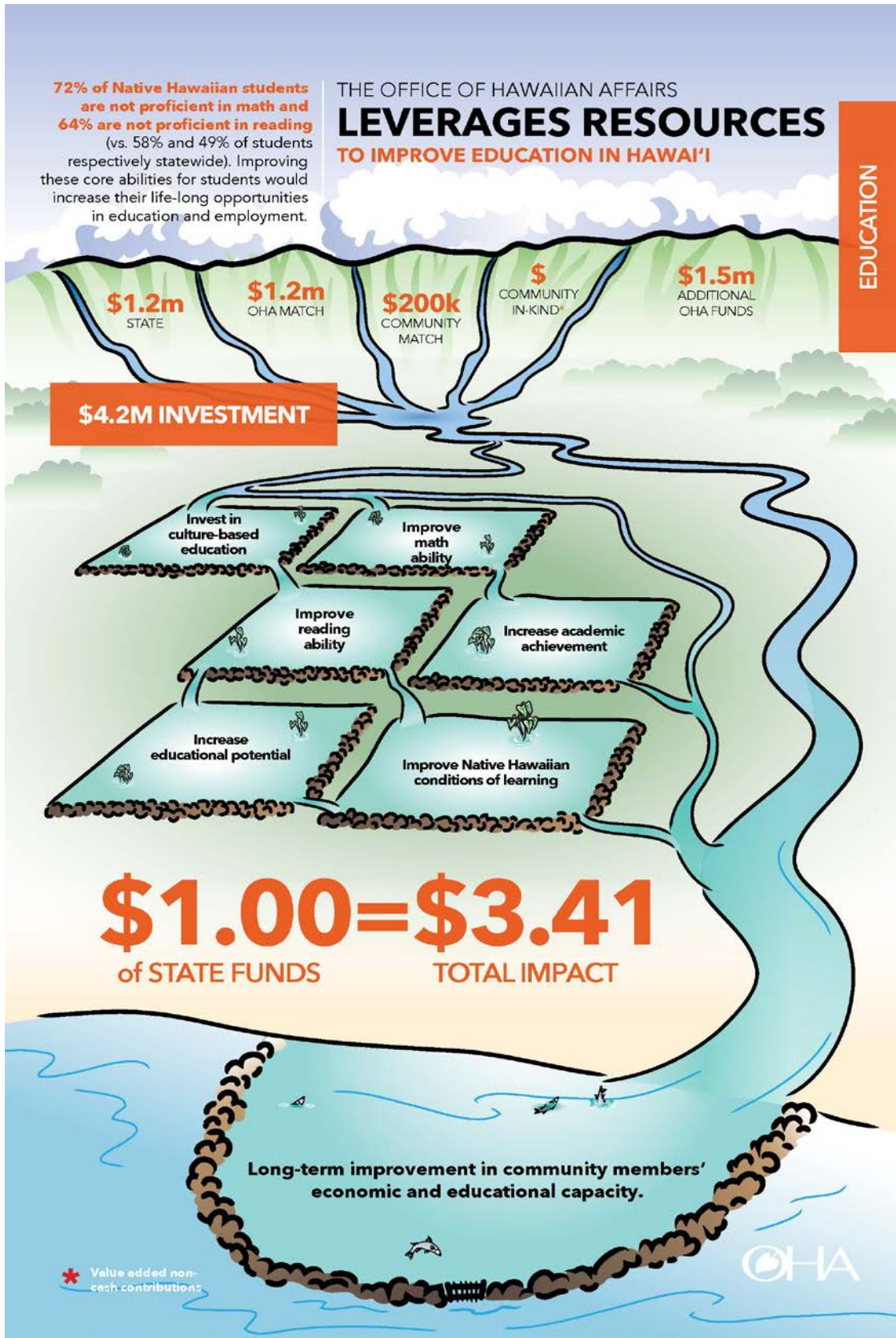
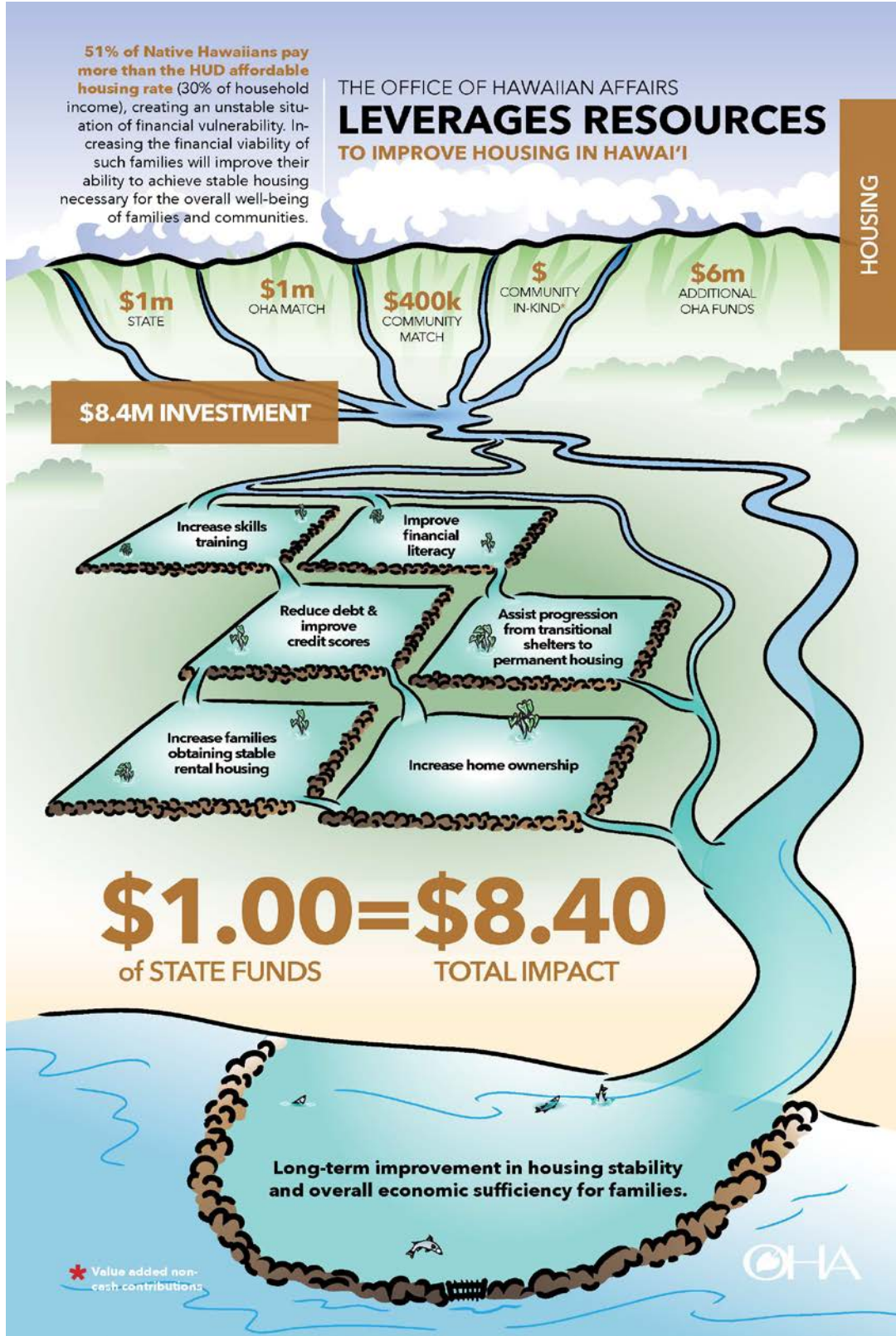


Figure A-5 Housing



# Appendix B

## Additional Information: Excel Tables 1-18 and Organization Charts

Office of Hawaiian Affairs  
Functions

Table 1

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

Office of Hawaiian Affairs  
Department-Wide Totals

Table 2

Fiscal Year 2019				
Act 131/17 Appropriation	Restriction	Emergency Appropriations	Total FY19	MOF
\$ 3,037,879.00			\$ 3,037,879.00	A
\$ 6,429,704.00			\$ 6,429,704.00	T
			\$ -	
			\$ -	
			\$ -	
			\$ -	
\$ 9,467,583.00	\$ -	\$ -	\$ 9,467,583.00	Total
Fiscal Year 2020				
Appropriation	Reductions	Additions	Total FY20	MOF
\$ 3,980,579.00			\$ 3,980,579.00	A
\$ 6,310,277.00			\$ 6,310,277.00	T
			\$ -	
\$ 10,290,856.00	\$ -	\$ -	\$ 10,290,856.00	Total
Fiscal Year 2021				
Appropriation	Reductions	Additions	Total FY21	MOF
\$ 3,980,579.00			\$ 3,980,579.00	A
\$ 6,310,277.00			\$ 6,310,277.00	T
			\$ -	
			\$ -	
			\$ -	
			\$ -	
\$ 10,290,856.00	\$ -	\$ -	\$ 10,290,856.00	Total

Office of Hawaiian Affairs  
Program ID Totals

Table 3

Prog ID	Program Title	As Budgeted in Act 131/17 (FY19)				Governor's Submittal (FY20)				Governor's Submittal (FY21)			
		MOF	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	-	\$ 58,323	A	0.47	\$ 89,045	52.68%	A	0.47	\$ 89,045	52.68%
OHA150	OFFICE OF THE TRUSTEES	T	4.53	-	\$ 275,687	T	4.53	\$ 275,687	0.00%	T	4.53	\$ 275,687	0.00%
		TOTAL	5.00	-	\$ 334,010	TOTAL	5.00	\$ 364,732	9.20%	TOTAL	5.00	\$ 364,732	9.20%
OHA160	ADMINISTRATION	A	5.03	-	\$ 1,124,042	A	5.03	\$ 1,559,749	38.76%	A	5.03	\$ 1,559,749	38.76%
OHA160	ADMINISTRATION	T	31.97	-	\$ 2,861,727	T	31.97	\$ 2,861,727	0.00%	T	31.97	\$ 2,861,727	0.00%
		TOTAL	37.00	-	\$ 3,985,769	TOTAL	37.00	\$ 4,421,476	10.93%	TOTAL	37.00	\$ 4,421,476	10.93%
OHA175	BENEFICIARY ADVOCACY	A	1.47	-	\$ 1,855,514	A	1.47	\$ 2,331,785	25.67%	A	1.47	\$ 2,331,785	25.67%
OHA175	BENEFICIARY ADVOCACY	T	18.53	-	\$ 3,292,290	T	18.53	\$ 3,172,863	-3.63%	T	18.53	\$ 3,172,863	-3.63%
		TOTAL	20.00	-	\$ 5,147,804	TOTAL	20.00	\$ 5,504,648	6.93%	TOTAL	20.00	\$ 5,504,648	6.93%
	TOTAL	A	6.97	-	\$ 3,037,879	A	6.97	\$ 3,980,579	31.03%	A	6.97	\$ 3,980,579	31.03%
	TOTAL	T	55.03	-	\$ 6,429,704	T	55.03	\$ 6,310,277	-1.86%	T	55.03	\$ 6,310,277	-1.86%
	TOTAL	TOTAL	62.00	-	\$ 9,467,583	TOTAL	62.00	\$ 10,290,856	8.70%	TOTAL	62.00	\$ 10,290,856	8.70%

Office of Hawaiian Affairs  
Budget Decisions

Table 4

Prog ID	Sub-Org	Description of Request	Executive Team Recommendations FY20				Executive Team Recommendations FY21				EO Approval & Recommendations FY20			EO Approval & Recommendations FY21			Board of Trustee's Decisions FY20			Board of Trustee's Decisions FY21		
			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	0.47	-	\$ 89,045	A	0.47	-	\$ 89,045	0.47	-	\$ 89,045	0.47	-	\$ 89,045	0.47	-	\$ 89,045	0.47	-	\$ 89,045
OHA150	N/A	OFFICE OF THE TRUSTEES	T	4.53	-	\$ 275,687	T	4.53	-	\$ 275,687	4.53	-	\$ 275,687	4.53	-	\$ 275,687	4.53	-	\$ 275,687	4.53	-	\$ 275,687
			TOTAL	5.00	-	\$ 364,732	TOTAL	5.00	-	\$ 364,732	5.00	-	\$ 364,732	5.00	-	\$ 364,732	5.00	-	\$ 364,732	5.00	-	\$ 364,732
OHA160	N/A	ADMINISTRATION	A	5.03	-	\$ 1,559,749	A	5.03	-	\$ 1,559,749	5.03	-	\$ 1,559,749	5.03	-	\$ 1,559,749	5.03	-	\$ 1,559,749	5.03	-	\$ 1,559,749
OHA160	N/A	ADMINISTRATION	T	31.97	-	\$ 2,861,727	T	31.97	-	\$ 2,861,727	31.97	-	\$ 2,861,727	31.97	-	\$ 2,861,727	31.97	-	\$ 2,861,727	31.97	-	\$ 2,861,727
			TOTAL	37.00	-	\$ 4,421,476	TOTAL	37.00	-	\$ 4,421,476	37.00	-	\$ 4,421,476	37.00	-	\$ 4,421,476	37.00	-	\$ 4,421,476	37.00	-	\$ 4,421,476
OHA175	N/A	BENEFICIARY ADVOCACY	A	1.47	-	\$ 2,331,785	A	1.47	-	\$ 2,331,785	1.47	-	\$ 2,331,785	1.47	-	\$ 2,331,785	1.47	-	\$ 2,331,785	1.47	-	\$ 2,331,785
OHA175	N/A	BENEFICIARY ADVOCACY	T	18.53	-	\$ 3,172,863	T	18.53	-	\$ 3,172,863	18.53	-	\$ 3,172,863	18.53	-	\$ 3,172,863	18.53	-	\$ 3,172,863	18.53	-	\$ 3,172,863
			TOTAL	20.00	-	\$ 5,504,648	TOTAL	20.00	-	\$ 5,504,648	20.00	-	\$ 5,504,648	20.00	-	\$ 5,504,648	20.00	-	\$ 5,504,648	20.00	-	\$ 5,504,648
			A	6.97	-	\$ 3,980,579	A	6.97	-	\$ 3,980,579	6.97	-	\$ 3,980,579	6.97	-	\$ 3,980,579	6.97	-	\$ 3,980,579	6.97	-	\$ 3,980,579
			T	55.03	-	\$ 6,310,277	T	55.03	-	\$ 6,310,277	55.03	-	\$ 6,310,277	55.03	-	\$ 6,310,277	55.03	-	\$ 6,310,277	55.03	-	\$ 6,310,277
			TOTAL	62.00	-	\$ 10,290,856	TOTAL	62.00	-	\$ 10,290,856	62.00	-	\$ 10,290,856	62.00	-	\$ 10,290,856	62.00	-	\$ 10,290,856	62.00	-	\$ 10,290,856



Office of Hawaiian Affairs  
Proposed Budget Reductions

Table 5

<u>Prog ID</u>	<u>Sub-Org</u>	<u>Description of Reduction</u>	<u>Impact of Reduction</u>	<u>MOF</u>	<u>FY20</u>			<u>FY21</u>			<u>FY19 Restriction</u>
					<u>Pos (P)</u>	<u>Pos (T)</u>	<u>\$\$\$\$</u>	<u>Pos (P)</u>	<u>Pos (T)</u>	<u>\$\$\$\$</u>	
OHA175	N/A	Grants - Education Program	None - trade off in Grants programmatic funding	T	-	-	\$ (500,000)	-	-	\$ (500,000)	N
OHA175	N/A	Grants - Income Program	None - trade off in Grants programmatic funding	A	-	-	\$ (119,430)	-	-	\$ (119,430)	N
OHA175	N/A	Grants - Income Program	None - trade off in Grants programmatic funding	T	-	-	\$ (119,430)	-	-	\$ (119,430)	N

Office of Hawaiian Affairs  
Proposed Budget Additions

Table 6

Prog ID	Sub-Org	Addition Type	Prog ID Priority	Dept-Wide Priority	Description of Addition	Justification	MOF	FY20			FY21		
								Pos (P)	Pos (T)	\$\$\$	Pos (P)	Pos (T)	\$\$\$
OHA175	N/A	AR	1	1	Grant	Increase will be used for grants related to Housing Programs	A	-	-	\$ 500,000.00	-	-	\$ 500,000.00
OHA175	N/A	AR	1	1	Grant	Increase will be used for grants related to Housing Programs	T	-	-	\$ 500,000.00	-	-	\$ 500,000.00
OHA150	N/A	AR	1	1	Fringe	Increase will be used to offset the increase in fringe	A	-	-	\$ 30,721	-	-	\$ 30,721
OHA160	N/A	AR	1	1	Fringe	Increase will be used to offset the increase in fringe	A	-	-	\$ 435,707	-	-	\$ 435,707
OHA175	N/A	AR	1	1	Fringe	Increase will be used to offset the increase in fringe	A	-	-	\$ 95,701	-	-	\$ 95,701

Office of Hawaiian Affairs  
 FY19 Restrictions

<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

Table 8

<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  
 Intradepartmental Transfers in FY18 and FY19

Table 10

<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>
6/30/2018	T	-	-	\$ 10,306	OHA175	6.03%	OHA160	1.28%	REALLOCATION TO FULLY UTILIZE AVAILABLE PERSONNEL FUNDING	N

Office of Hawaiian Affairs  
Vacancy Report as of November 30, 2018

Table 11

<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>
OHA150	-	11/22/18	12/24/18	15122	Trustee Aide	Y	SR24	00	P	1.00	A&T	\$ 63,168	\$ 63,168	Y	N	N/A	N/A	1
OHA160	-	02/08/16	TBD	16208	Knowledge-Based Strategies Specialist	Y	SR26	00	P	1.00	A&T	\$ 84,660	\$ 83,688	N	N	N/A	N/A	1
OHA160	-	09/29/18	12/12/18	16331	Information Systems Specialist	Y	SR26	00	P	1.00	A&T	\$ 67,668	\$ 35,712	Y	N	N/A	N/A	1
OHA175	-	06/01/18	TBD	17601	Community Outreach Advocate	N	SR24	00	P	1.00	A&T	\$ 47,892	\$ 46,956	Y	N	N/A	N/A	1
OHA175	-	10/13/17	TBD	16418	Community Outreach Coord III	N	SR20	00	P	1.00	A&T	\$ 48,492	\$ 47,544	N	N	N/A	N/A	1
OHA175	-	11/02/18	TBD	17615	Lead Compliance Specialist	Y	SR28	00	P	1.00	A&T	\$ 75,972	\$ 75,972	Y	N	N/A	N/A	1

## Positions Established by Acts other than the State Budget as of November 30, 2018

<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>
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\*\*\*OHA - NONE TO REPORT\*\*\*





Office of Hawaiian Affairs  
Active Contracts as of December 1, 2018

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					
OHA175	A	\$ -	OTHER - QTRLY REIMB BASIS	\$ 129,276	\$ 10,451.10	9/6/2017	8/1/17	7/31/19	EPIC FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY REIMB BASIS	\$ 129,276	\$ 10,451.09	9/6/2017	8/1/17	7/31/19	EPIC FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 55,000	\$ 16,500.00	6/6/2018	8/1/17	7/31/19	KE KULA NIIHAU O KEKAHA LEARNING CENTER	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 60,066	\$ 6,007.00	8/13/2018	8/1/17	7/31/19	KUA O KA LA NEW CENTURY PUBLIC CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 143,587	\$ 71,793.00	9/6/2018	8/1/17	7/31/19	KANU O KA AINA NEW CENTURY PUBLIC CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - SEMI ANN PMT	\$ 134,072	\$ 33,518.00	8/6/2018	8/1/17	7/31/19	KA UMEKE KAEO	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 134,072	\$ 33,518.00	8/6/2018	8/1/17	7/31/19	KA UMEKE KAEO	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY PMTS	\$ 245,405	\$ 82,952.00	8/29/2018	8/1/17	7/31/19	AFTER-SCHOOL ALL-STARS HAWAII	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - RETAINER	\$ 245,405	\$ 12,270.00	8/29/2018	8/1/17	7/31/19	AFTER-SCHOOL ALL-STARS HAWAII	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - RETAINER	\$ 245,405	\$ 12,270.00	8/29/2018	8/1/17	7/31/19	AFTER-SCHOOL ALL-STARS HAWAII	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY PMTS	\$ 245,405	\$ 82,953.00	8/29/2018	8/1/17	7/31/19	AFTER-SCHOOL ALL-STARS HAWAII	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - RETAINER	\$ 129,276	\$ 6,463.00	9/6/2017	8/1/17	7/31/19	EPIC FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - RETAINER	\$ 129,276	\$ 6,464.00	9/6/2017	8/1/17	7/31/19	EPIC FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY PMTS	\$ 129,276	\$ 58,174.00	9/6/2017	8/1/17	7/31/19	EPIC FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 99,632	\$ 24,908.00	6/12/2018	8/1/17	7/31/19	KUALAPU'U PUBLIC CONVERSION CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - FINAL PMT	\$ 144,608	\$ 57,842.00	7/13/2018	8/1/17	7/31/19	KE KULA 'O NAWAHIOKALANIOPUU IKI LPCS	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 144,608	\$ 14,461.00	7/13/2018	8/1/17	7/31/19	KE KULA 'O NAWAHIOKALANIOPUU IKI LPCS	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 144,608	\$ 20,486.00	6/14/2018	8/1/17	7/31/19	KAWAIKINI NEW CENTURY CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 144,608	\$ 16,500.00	6/5/2018	8/1/17	7/31/19	KULA AUPUNI NIIHAU A KAHELELANI ALOHA PCS	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 144,608	\$ 16,500.00	6/7/2018	8/1/17	7/31/19	HAKIPUU LEARNING CENTER, A PUBLIC CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 144,608	\$ 17,000.00	6/19/2018	8/1/17	7/31/19	KE ANA LAAHANA PUBLIC CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - FINAL PMT	\$ 156,599	\$ 62,639.00	6/6/2018	8/1/17	7/31/19	KA WAIHONA O KA NAAUAO PCS	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 156,599	\$ 15,660.00	6/6/2018	8/1/17	7/31/19	KA WAIHONA O KA NAAUAO PCS	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 156,599	\$ 19,795.00	6/12/2018	8/1/17	7/31/19	KANUIKAPONO PUBLIC CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 57,000	\$ 17,100.00	6/6/2018	8/1/17	7/31/19	WAIMEA MIDDLE PUBLIC CONVERSION CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 57,000	\$ 18,980.00	6/5/2018	8/1/17	7/31/19	KE KULA O SAMUEL M KAMAKAU, LPCS	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 57,000	\$ 28,124.00	6/14/2018	8/1/17	7/31/19	KAMAILE ACADEMY PUBLIC CHARTER SCHOOL	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S

Office of Hawaiian Affairs  
Active Contracts as of December 1, 2018

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					
OHA175	T	\$ -	OTHER - SEMI ANN PMT	\$ 55,000	\$ 16,500.00	6/13/2018	8/1/17	7/31/19	MALAMA HONUA PUBLIC CHARTER SCHOOL FOUNDATION	STATE PROVISO - EDUCATION	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - RETAINER	\$ 125,319	\$ 6,266.00	9/20/2017	8/1/17	7/31/19	BOYS AND GIRLS CLUB OF THE BIG ISLAND	STATE PROVISO - HEALTH	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY PMTS	\$ 125,319	\$ 40,393.00	9/20/2017	8/1/17	7/31/19	BOYS AND GIRLS CLUB OF THE BIG ISLAND	STATE PROVISO - HEALTH	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - RETAINER	\$ 125,319	\$ 6,266.00	9/20/2017	8/1/17	7/31/19	BOYS AND GIRLS CLUB OF THE BIG ISLAND	STATE PROVISO - HEALTH	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY PMTS	\$ 125,319	\$ 40,394.00	9/20/2017	8/1/17	7/31/19	BOYS AND GIRLS CLUB OF THE BIG ISLAND	STATE PROVISO - HEALTH	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - RETAINER	\$ 175,000	\$ 8,750.00	6/29/2018	9/1/15	6/30/18	UNIVERSITY OF HAWAII	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - RETAINER	\$ 175,000	\$ 8,750.00	6/29/2018	9/1/15	6/30/18	UNIVERSITY OF HAWAII	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY PMTS	\$ 175,000	\$ 8,705.00	6/29/2018	9/1/15	6/30/18	UNIVERSITY OF HAWAII	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY PMTS	\$ 175,000	\$ 8,705.00	6/29/2018	9/1/15	6/30/18	UNIVERSITY OF HAWAII	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY REIMB BASIS	\$ 129,276	\$ 29,414.00	9/6/2017	8/1/17	7/31/19	GOODWILL INDUSTRIES OF HAWAII, INC	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY REIMB BASIS	\$ 129,276	\$ 29,414.00	9/6/2017	8/1/17	7/31/19	GOODWILL INDUSTRIES OF HAWAII, INC	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY PMTS	\$ 360,000	\$ 110,000.00	9/6/2017	8/1/17	7/31/19	GOODWILL INDUSTRIES OF HAWAII, INC	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY PMTS	\$ 360,000	\$ 110,000.00	9/6/2017	8/1/17	7/31/19	GOODWILL INDUSTRIES OF HAWAII, INC	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - RETAINER	\$ 360,000	\$ 9,428.00	9/6/2017	8/1/17	7/31/19	GOODWILL INDUSTRIES OF HAWAII, INC	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - RETAINER	\$ 360,000	\$ 9,432.00	9/6/2017	8/1/17	7/31/19	GOODWILL INDUSTRIES OF HAWAII, INC	STATE PROVISO - INCOME	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY REIMB BASIS	\$ 830,000	\$ 49,225.47	8/1/2017	8/1/17	7/31/19	HELPING HANDS HAWAII	TATE PROVISO - SOCIAL SERVICE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY REIMB BASIS	\$ 830,000	\$ 49,225.48	8/1/2017	8/1/17	7/31/19	HELPING HANDS HAWAII	TATE PROVISO - SOCIAL SERVICE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY REIMB BASIS	\$ 830,000	\$ 332,000.00	8/1/2017	8/1/17	7/31/19	HELPING HANDS HAWAII	TATE PROVISO - SOCIAL SERVICE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - FINAL PMT	\$ 830,000	\$ 83,000.00	8/1/2017	8/1/17	7/31/19	HELPING HANDS HAWAII	TATE PROVISO - SOCIAL SERVICE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	A	\$ -	OTHER - QTRLY REIMB BASIS	\$ 830,000	\$ 332,000.00	8/1/2017	8/1/17	7/31/19	HELPING HANDS HAWAII	TATE PROVISO - SOCIAL SERVICE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - FINAL PMT	\$ 830,000	\$ 83,000.00	8/1/2017	8/1/17	7/31/19	HELPING HANDS HAWAII	TATE PROVISO - SOCIAL SERVICE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	S
OHA175	T	\$ -	OTHER - QTRLY PMTS	\$ 1,048,800	\$ 262,200.00	9/15/2017	7/1/17	6/30/19	NATIVE HAWAIIAN LEGAL CORPORATION	STATE PROVISO - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA175	A	\$ -	OTHER - QTRLY PMTS	\$ 1,048,800	\$ 262,200.00	9/15/2017	7/1/17	6/30/19	NATIVE HAWAIIAN LEGAL CORPORATION	STATE PROVISO - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA160	T	\$ -	OTHER - COST REIMBURSEMENT	\$ 102,941	\$ 30,071.80	2/15/2012	6/15/07	SVCS NOT REQD	BRODER, SHERRY ESQ	OPERATIONS - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA160	A	\$ -	OTHER - COST REIMBURSEMENT	\$ 102,941	\$ 30,071.78	6/22/2007	6/15/07	SVCS NOT REQD	BRODER, SHERRY ESQ	OPERATIONS - LEGAL	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	C
OHA175	T	\$ -	OTHER - COST REIMBURSEMENT	\$ 1,655,771	\$ 134,142.80	8/1/2017	8/1/17	7/31/19	OFFICE OF HAWAIIAN AFFAIRS	OPERATIONS - LEASE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	L
OHA175	A	\$ -	OTHER - COST REIMBURSEMENT	\$ 1,655,771	\$ 134,142.80	8/1/2017	8/1/17	7/31/19	OFFICE OF HAWAIIAN AFFAIRS	OPERATIONS - LEASE	Periodic reporting pursuant to contract terms monitored by OHA personnel	N	L



Office of Hawaiian Affairs  
CIP Lapses

Table 16

<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

Table 17

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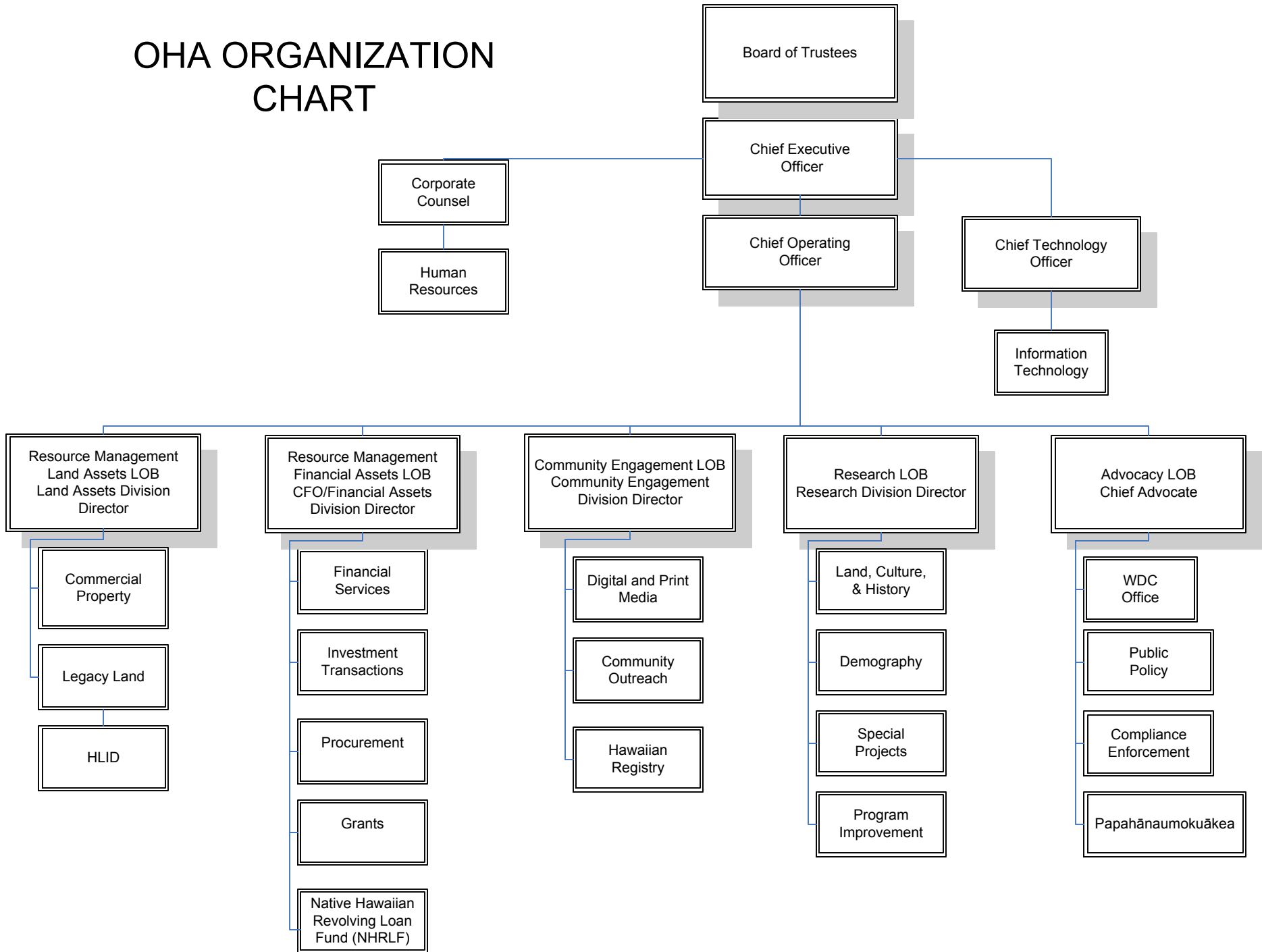
N/A

Office of Hawaiian Affairs  
 Organization Changes

Table 18

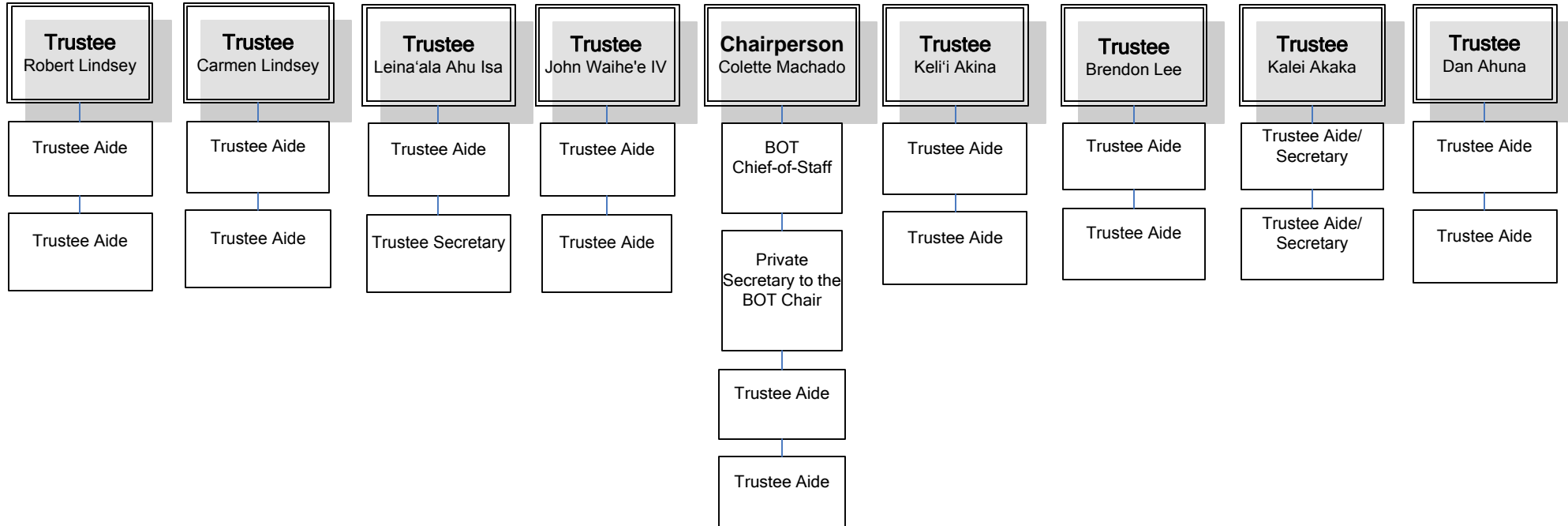
<u>Year of Change</u> FY18/FY19	<u>Description of Change</u>
	<b>PROGRAM Changes:</b>
FY 18	1. In FY18, Human Resources reports to Corporate Counsel.
FY 19	2. In FY19, position #16212 was re-described from Legal Counsel, SR28 to Chief Technology Officer (CTO). The Information Technology (IT) program transferred from Resource Management - Financial and reports to the CTO effective December 2018.
FY 18	3. In FY18, position #36338, Records Management Specialist, SR22, program code 3600 (IT) transferred to program code 2300 (Corporate Counsel).
FY 18 / FY 19	4. In FY18, the Procurement program was included in Financial Services, program code 3200. In FY19, Procurement was assigned its own program code 3900, reporting directly to the CFO/Financial Assets Division Director.
FY 18	5. In FY18, position #37624, Hawaiian Registry Program Specialist, SR18, program code 6120 (Governance) transferred to program code 4100 (Community Engagement Director).
FY 18	6. In FY18, position #37509, Demography Research Analyst, SR24, program code 5300 was re-described/transferred to Special Projects Research Analyst, SR24, program code 5400.
	<b>ORGANIZATION-WIDE Changes:</b>
	No organizational-wide changes in Fiscal Year 2018. Currently, no proposed organizational changes in Fiscal Year 2019.

# OHA ORGANIZATION CHART

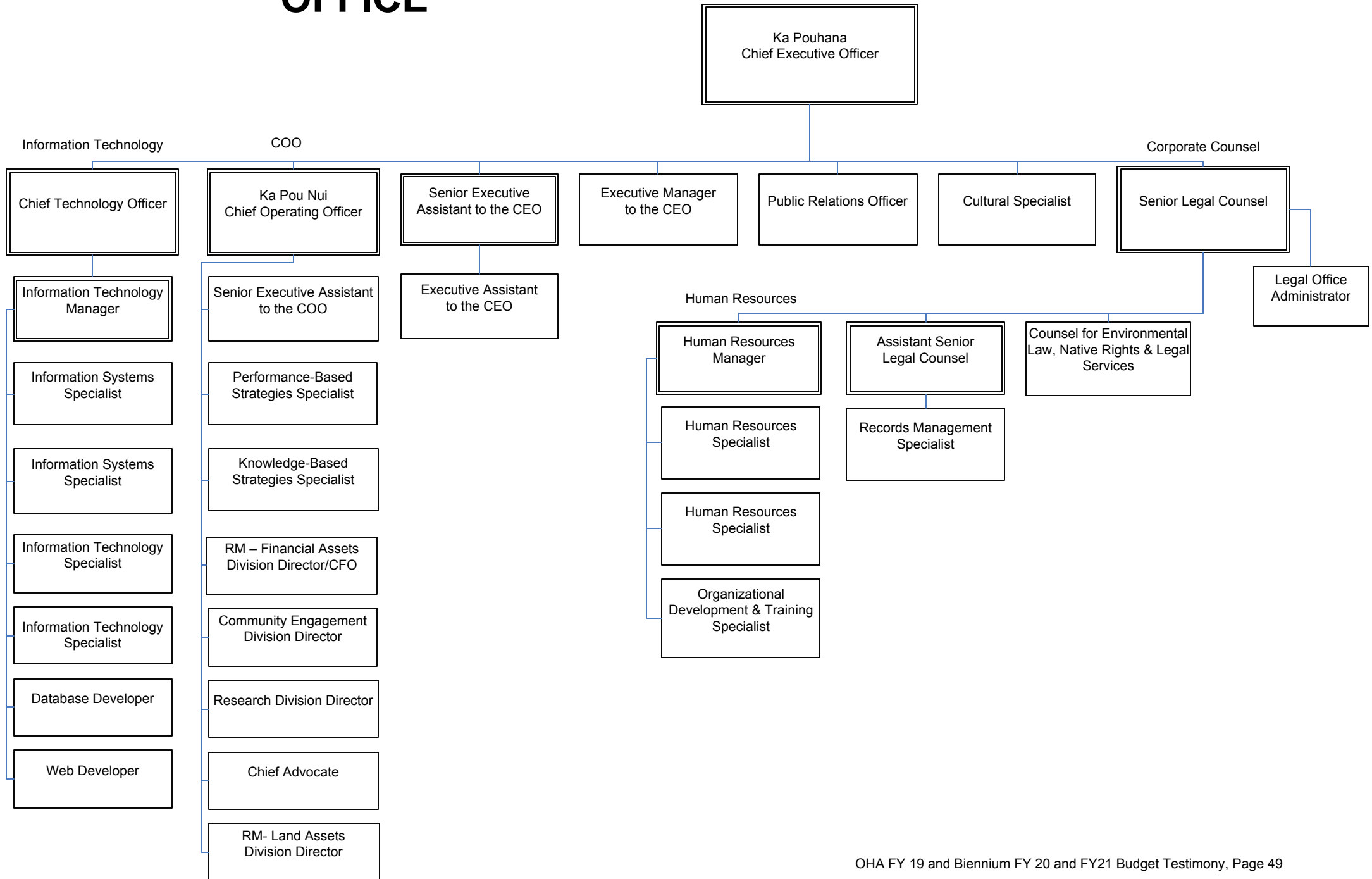




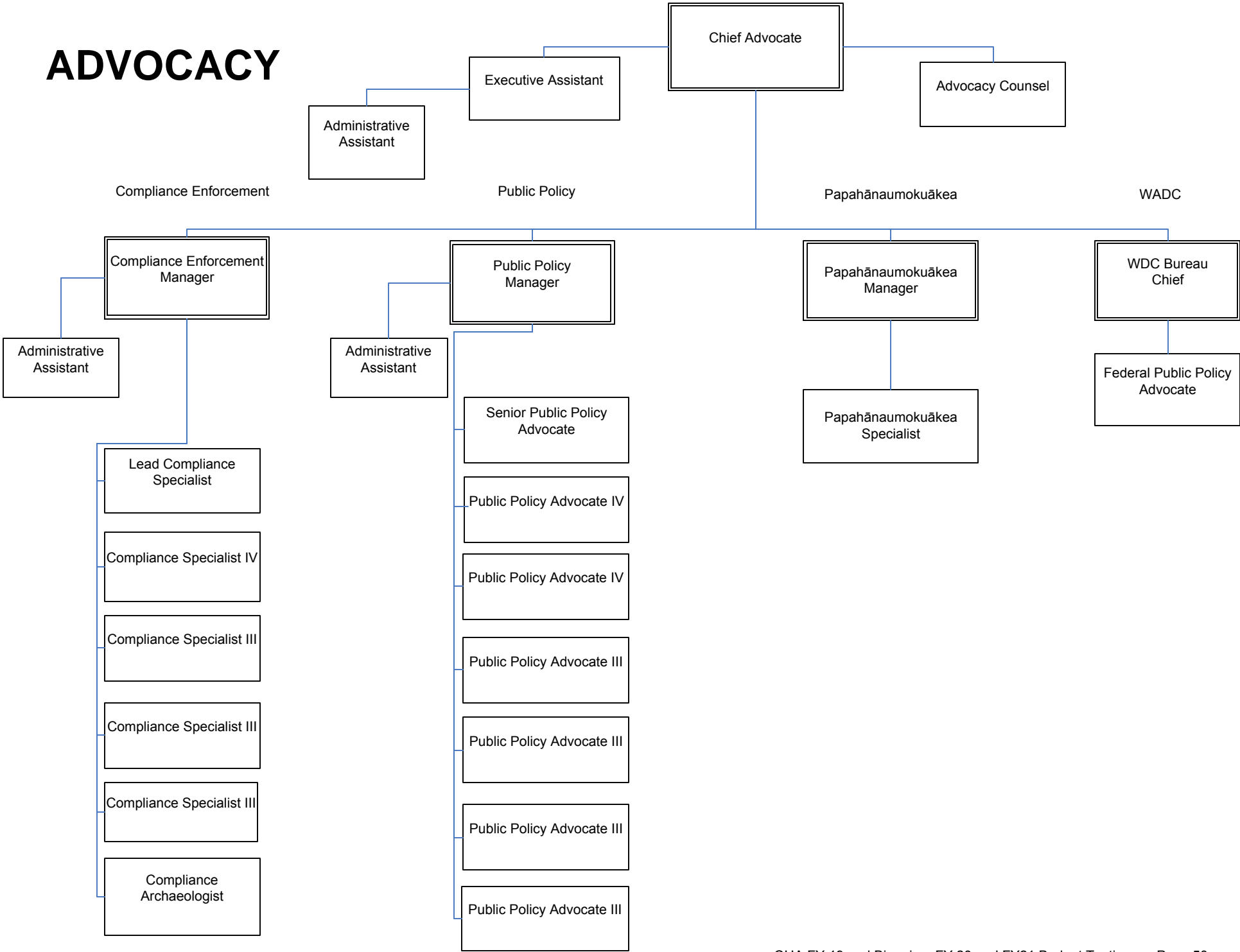
# BOARD OF TRUSTEES



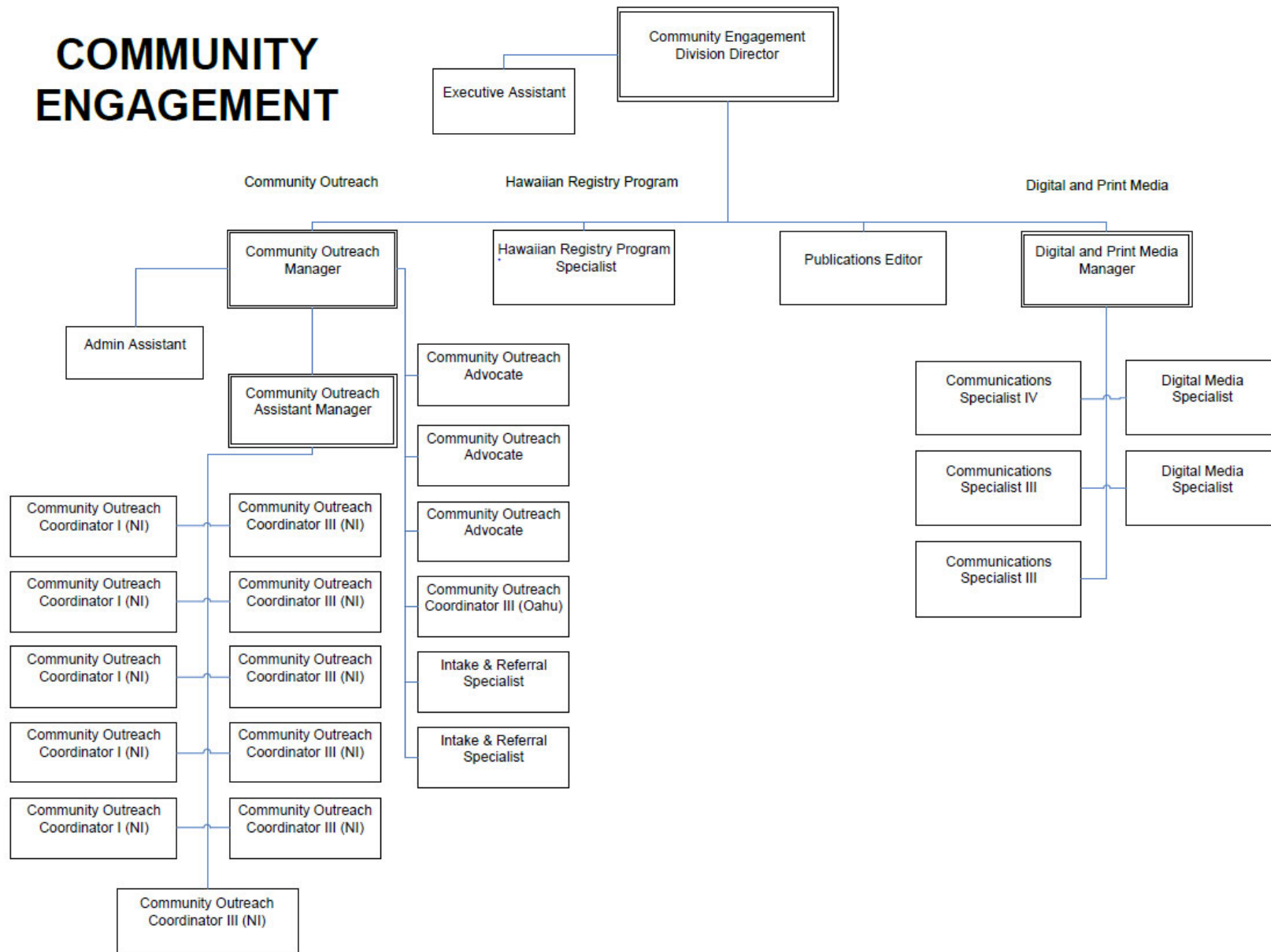
# EXECUTIVE OFFICE



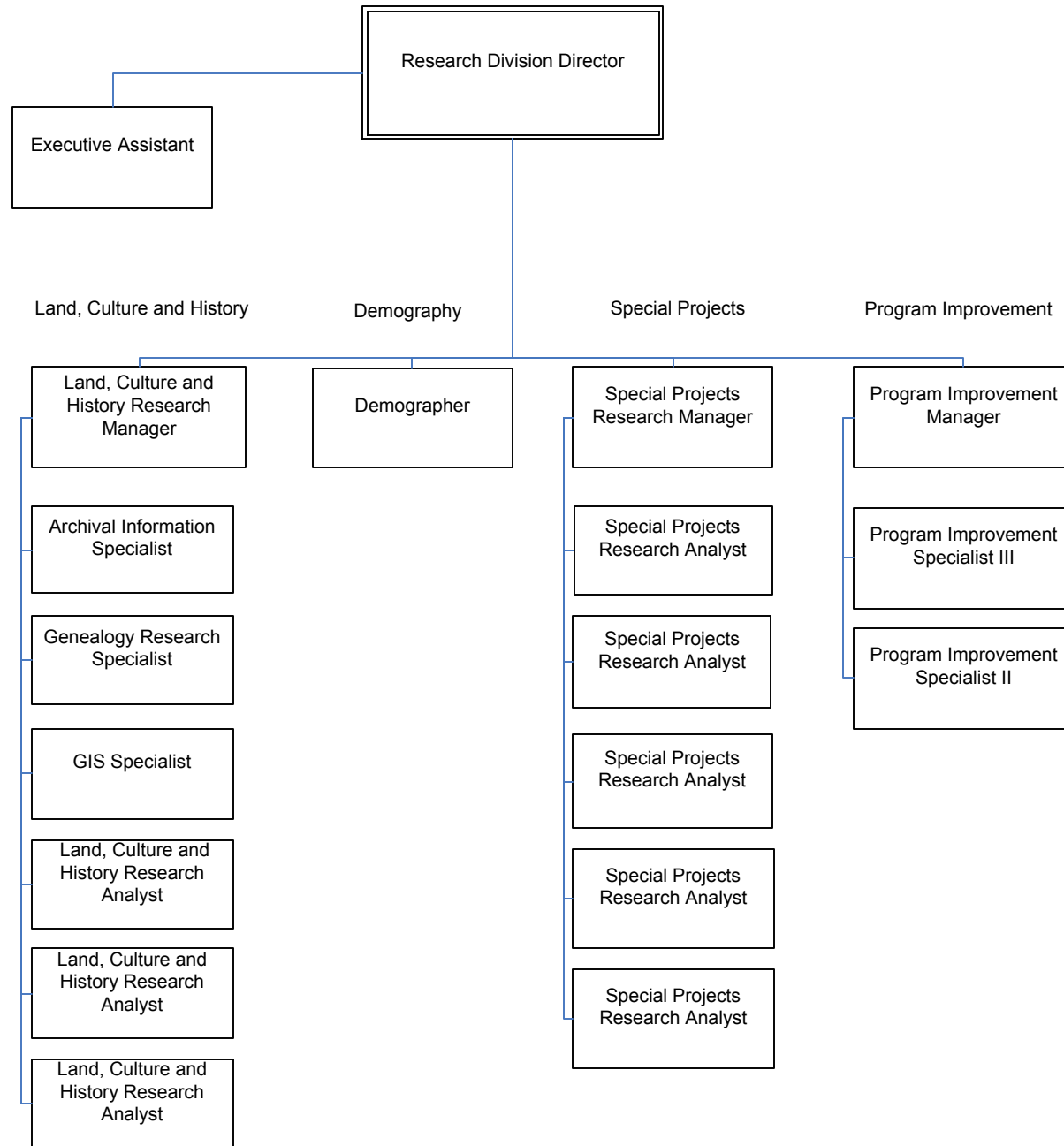
# ADVOCACY



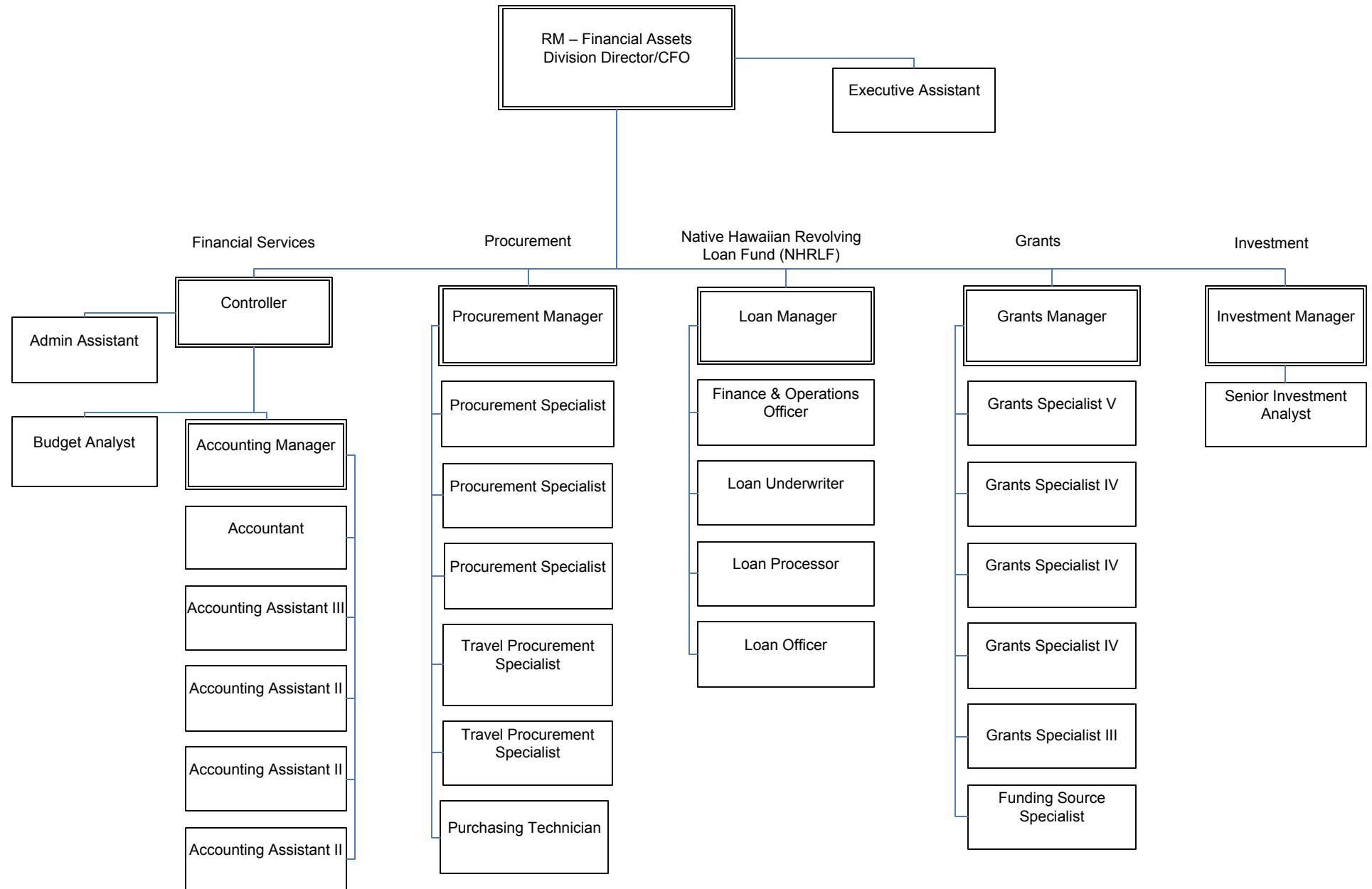
# COMMUNITY ENGAGEMENT



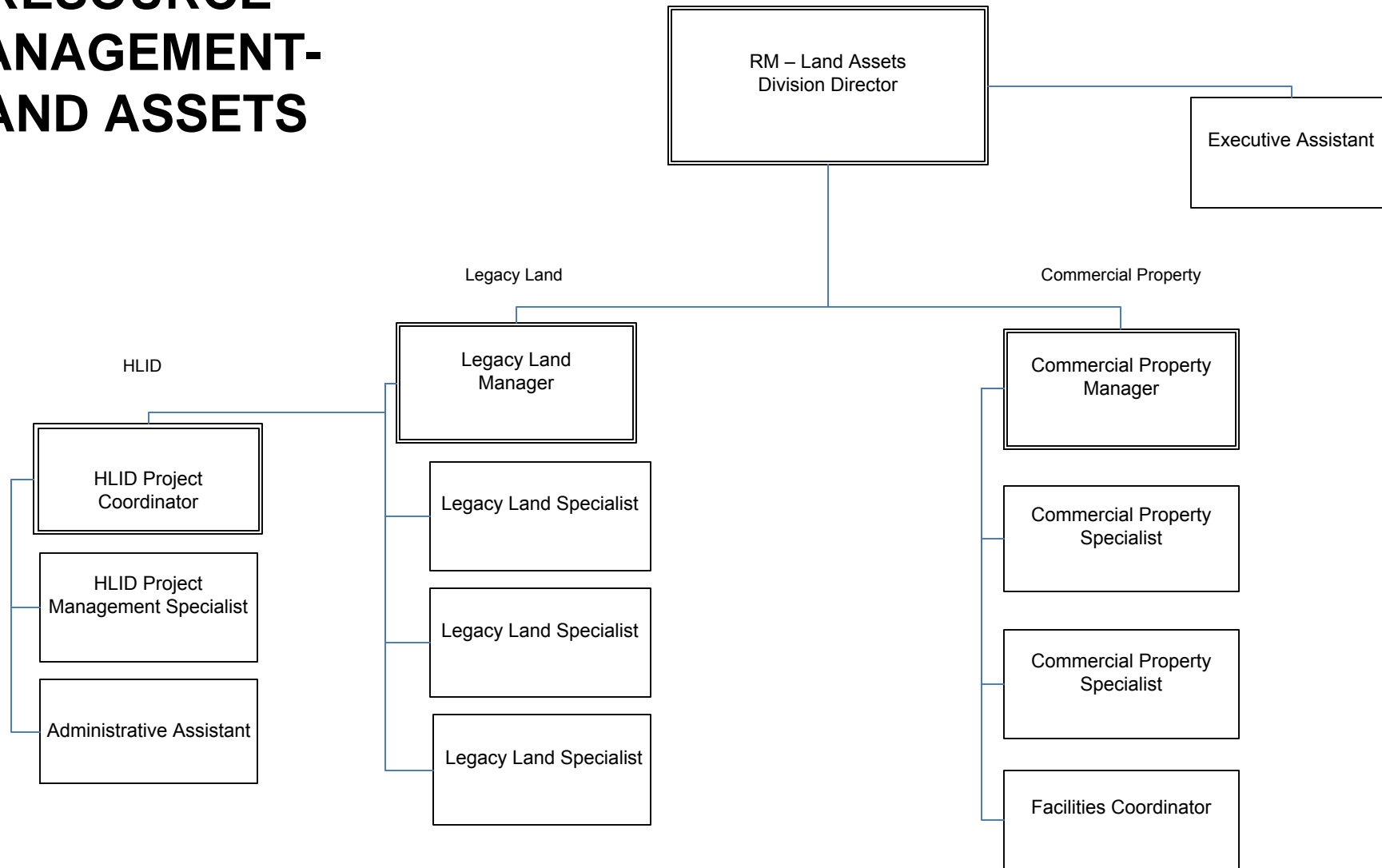
# RESEARCH



# RESOURCE MANAGEMENT- FINANCIAL ASSETS



# RESOURCE MANAGEMENT- LAND ASSETS



Reports on Non-General Fund Information

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

Contact Name: Gloria Li  
 Phone: (808) 594-1955  
 Fund type (MOF) Trust

Legal Authority Hawaii State Constitution, Article XII, Section 4

Appropriation Acct. No. T-901, T-902, T-910, T-915, T-930, T-936, T-937, T-938, T-939, T-940

Intended Purpose:

To account for OHA's portion of revenues derived from the public land trust as defined in Section 10-2, HRS

Source of Revenues:

- a. *Ceded land revenue at \$15,100,000 per annum*
- a. *Dividend and Interest income from investments*
- b. *Realized gains from sales of investments*
- c. *Interest earned from Consumer Micro Loan Program*
- d. *Revenues generated from OHA's commercial properties operations Kaka'ako Makai parcels & Na Lama Kukui*

Current Program Activities/Allowable Expenses:

OHA's ongoing operational expenses; Programs for the betterment of native Hawaiian conditions

Purpose of Proposed Ceiling Adjustment (if applicable):

N/A

Variances:

Financial Data (Figures in \$000s)							
	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021
	(actual)	(actual)	(actual)	(actual)	(estimated)	(estimated)	(estimated)
Beginning Cash Balance	395,501	390,164	362,693	393,639	405,632	391,366	374,185
Revenues	50,338	32,514	76,080	77,341	42,466	42,745	44,889
Expenditures	40,310	44,776	32,443	38,001	40,232	41,594	43,719
Transfers							
List each net transfer in/out; list each account number							
Net Total Transfers	(15,365)	(15,209)	(12,691)	(27,347)	(16,500)	(18,332)	(18,250)
Ending Cash Balance	390,164	362,693	393,639	405,632	391,366	374,185	357,105
Encumbrances	20,336	16,914	14,108	12,883	14,000	14,000	14,000
Unencumbered Cash Balance	369,828	345,779	379,531	392,749	377,366	360,185	343,105

Additional Information:

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



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

Contact Name: Gloria Li  
 Phone: (808) 594-1955  
 Fund type (MOF) Special  
 Appropriation Acct. No. S-200, S-201, S-202

**Intended Purpose:**

S-200 - Hälawa Luluku Interpretive Development (HLID) was created largely to mitigate any adverse impact resulting from the construction of the Interstate H-3  
 S-201 - Funds provided by US EPA to inventory, characterize, assess, and conduct planning and community involvement related to brownfields sites.  
 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-201- US Environmental Protection Agency  
 S-202 - Federal Grant Award; OHA's dollar for dollar match on Federal Grant Award; 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-201 - Contracted services to do sampling on soil and other testing to create a Phase II environmental assessment report for the impact in Kaka'ako Makai  
 S-202 - Expenditures consisted of loan disbursements, loan application fees, legal services, technical assistance, investment management, bad debt, personnel and various overhead cost

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

N/A  
 Variances:

Financial Data (Figures in \$000s)							
	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021
	(actual)	(actual)	(actual)	(actual)	(estimated)	(estimated)	(estimated)
Beginning Cash Balance	15,765	18,586	20,759	23,960	24,299	24,599	24,899
Revenues	4,827	3,858	4,353	3,356	2,237	2,218	2,262
Expenditures	2,042	2,033	2,128	3,050	2,237	2,218	2,262
Transfers							
List each net transfer in/out; list each account number							
Net Total Transfers	36	348	976	33	300	300	300
Ending Cash Balance	18,586	20,759	23,960	24,299	24,599	24,899	25,199
Encumbrances	796	596	1,630	105	500	500	500
Unencumbered Cash Balance	17,790	20,163	22,330	24,194	24,099	24,399	24,699

**Additional Information:**

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

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

Contact Name: Gloria Li  
 Phone: (808) 594-1955  
 Fund type (MOF) Special  
 Appropriation Acct. No. S-310, S-315, S-320, S-331

**Intended Purpose:**

S-310 - To provide budget for continuous management, maintenance, and repair of the Palauea Cultural Preserve for the preservation of culturally and archaeologically significant sites.  
 S-315 - To account for the activities related to OHA's management and stewardship of the Forest Reserve,  
 S-320 - This trust fund was established in 1987 to receive revenues from the sale of advertising space on OHA's monthly newspaper, Ka Wai Ola  
 S-331 - This trust fund was established in 1987 to receive OHA's portion of legal fees recovered through settlements of Native Hawaiian Legal Corporation (NHLC) land title cases. The corporation provides legal services to Native Hawaiians defending their property interests in quiet title actions

**Source of Revenues:**

S-310 - 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.  
 S-315 - OHA's trust fund is the main funding source.  
 S-320 - Major revenue sources for this fund include sales of advertising space on OHA's monthly newspaper, Ka Wai Ola; OHA's portion of proceeds from the sale of publications or books; federal and other grants; and private donations designated for OHA's programs  
 S-331 - OHA receives 50% of the amounts recovered by NHLC from clients in land-related cases.

**Current Program Activities/Allowable Expenses:**

S-310 - Costs related to this program has been primarily related to basic management property, such as utilities, bank fees, and repair and maintenance  
 S-315 - OHA's trust fund is the main funding source.  
 S-320 - Purchasing printing software and equipment for Kai Wai Ola publication, public information products such as books and video  
 S-331 - Interest expense was the only cost incurred by the program.

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

N/A

Variances:

Financial Data (Figures in \$000s)							
	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021
	(actual)	(actual)	(actual)	(actual)	(estimated)	(estimated)	(estimated)
Beginning Cash Balance	346	364	322	512	494	561	471
Revenues	76	443	84	58	60	60	60
Expenditures	86	485	40	397	693	1,682	1,600
Transfers							
List each net transfer in/out; list each account number							
Net Total Transfers	28	0	146	321	700	1,532	1,450
Ending Cash Balance	364	322	512	494	561	471	381
Encumbrances	11	44	199	233	200	200	200
Unencumbered Cash Balance	353	278	313	261	361	271	181

**Additional Information:**

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