



1 "Elder adult" or "elderly" means a person who is a resident  
2 of the State and has attained the age of sixty-two years.

3 "Elder or elderly housing" means:

4 (1) A housing project intended for and occupied by elders  
5 or elderly households; or

6 (2) Housing provided under any state or federal program  
7 that the Secretary of the United States Department of  
8 Housing and Urban Development determines is  
9 specifically designed and operated to assist elder or  
10 elderly persons, or if the Secretary makes a  
11 determination, the project may also be occupied by  
12 persons with disabilities who have reached eighteen  
13 years of age.

14 "Trust fund" or "fund" means the Hawaii kupuna trust fund.

15 "Vulnerable adult" shall have the same meaning as in  
16 section 346-222.

17 **§ -2 Creation of the Hawaii kupuna trust fund. (a)**  
18 There is established the Hawaii kupuna trust fund as a separate  
19 fund of a nonprofit entity having a board of directors and  
20 qualifying under section 501(c)(3) of the Internal Revenue Code  
21 of 1986, as amended, into which shall be deposited moneys



1 received as provided under subsection (c). The director, with  
2 the concurrence of the governor, shall select, in accordance  
3 with chapter 103F, the entity based upon the proven record of  
4 accomplishment of the entity in administering a similar trust  
5 fund.

6 (b) Notwithstanding that the trust fund is established  
7 within a private entity, the department of health shall have  
8 oversight authority over the fund and may make periodic  
9 financial audits of the fund; provided that the director of  
10 health may contract with a certified public accountancy firm for  
11 this purpose. The director, with the concurrence of the  
12 governor in their sole discretion, may rescind the selection of  
13 the entity. If the selection of the entity is rescinded, moneys  
14 in the trust fund shall revert back to the State and shall be  
15 deemed to be trust moneys.

16 (c) The assets of the trust fund shall consist of:

- 17 (1) Moneys appropriated to the trust fund by the state,  
18 county, or federal government;
- 19 (2) Private contributions of cash or property from  
20 corporations, businesses, foundations, grants,



1           endowments, individuals, and other interested parties;

2           and

3           (3) Income and capital gains earned by the trust fund.

4 Any appropriations made by the State shall not supplant or  
5 diminish the funding of existing elderly and vulnerable adult  
6 programs or any health-related programs funded in whole or in  
7 part by the State.

8           (d) The purpose of the trust fund is to strengthen elderly  
9 and vulnerable adult care by the award of grants for purposes  
10 that may include but are not limited to the following:

11           (1) The prevention of elder and vulnerable adult abuse and  
12           neglect;

13           (2) The prevention of financial exploitation of the  
14           elderly and vulnerable adults;

15           (3) The prevention of injuries to the elderly and  
16           vulnerable adults that are caused by falling;

17           (4) The assistance of residents of elderly housing;

18           (5) The assistance of the elderly and vulnerable adults  
19           with transportation and mobility needs;

20           (6) The promotion of aging and disability resource  
21           centers; and



1           (7) The meeting of future needs of the elderly and  
2           vulnerable adults, as determined by the board in  
3           accordance with this chapter.

4           (e) There shall be an endowment component of the trust  
5 fund.

6           (f) The aggregate principal sum deposited in the trust  
7 fund, and any income and capital gains earned by the trust fund  
8 but not expended for grantmaking or administration, shall be  
9 invested by the entity selected under subsection (a) in a manner  
10 intended to maximize the rate of return on investment of the  
11 trust fund consistent with the objective of preserving the trust  
12 fund's principal.

13           (g) If the entity selected under subsection (a) is  
14 dissolved, the director, with the concurrence of the governor,  
15 shall select a successor entity. If the trust fund is  
16 terminated, the moneys remaining in the trust fund shall revert  
17 back to the State and shall be deemed to be trust moneys.

18           (h) The administration of the trust fund shall be advised  
19 by the board created under section -3.

20           (i) The department of human services and the executive  
21 office on aging shall serve as co-lead agencies for the public



1 sector and, in conjunction with the entity selected under  
2 subsection (a) to administer the trust fund, may provide  
3 staffing for the board.

4 (j) Results of the annual audit of the nonprofit entity  
5 selected under subsection (a) shall be submitted to the  
6 department of health not later than thirty days from the date  
7 the nonprofit entity receives the audit results. The nonprofit  
8 entity selected under subsection (a) shall retain for three  
9 years all documents, papers, books, records, and other material  
10 pertinent to the fund and audit. The nonprofit entity selected  
11 under subsection (a) shall permit the department of health, the  
12 department of accounting and general services, the legislature,  
13 and the auditor, or their authorized representatives, to inspect  
14 and have access to any of these materials.

15 **§ -3 Hawaii kupuna trust fund advisory board. (a)**

16 There is established the Hawaii kupuna trust fund advisory board  
17 under the department for administrative purposes.

18 (b) The board shall consist of seven members to be  
19 appointed as follows:

20 (1) One member shall be selected by the entity selected  
21 under section -2(a) to serve for a term of three



- 1           years. This member may not serve more than two  
2           consecutive terms;
- 3           (2) Two members shall be appointed by the governor from a  
4           list of names of seven persons submitted by the entity  
5           selected under section -2(a). Each of these  
6           members shall serve for a term of three years, except  
7           that the terms of the initial board members shall be  
8           staggered as follows: one member shall be appointed  
9           to a two-year term and one member shall be appointed  
10          to a three-year term. None of these members shall  
11          serve for more than two consecutive terms;
- 12          (3) One member shall be appointed from among the members  
13          of the senate by the president of the senate to serve  
14          until the expiration of the member's term in the  
15          senate during which the member is appointed;
- 16          (4) One member shall be appointed from among the members  
17          of the house of representatives by the speaker of the  
18          house of representatives to serve until the expiration  
19          of the member's term in the house of representatives  
20          during which the member is appointed;



1 (5) One member shall be the director of human services or  
2 the director's designee; and

3 (6) One member shall be the director of the executive  
4 office on aging or the director's designee.

5 (c) The board, in collaboration with the department, shall  
6 make the final recommendations to the entity selected under  
7 section -2(a) for the following activities:

8 (1) Grantmaking with private nonprofit organizations,  
9 public agencies, or qualified individuals to provide  
10 services and education designed to meet the  
11 outstanding needs of the State's elderly;

12 (2) Grantmaking to raise community awareness of the trust  
13 fund; and

14 (3) Administration of the trust fund.

15 (d) The board, in collaboration with the department, shall  
16 develop a strategic plan for strengthening elderly and  
17 vulnerable adult care in the State. The strategic plan shall be  
18 in writing and shall be a public document. The board shall also  
19 be responsible for the following:



- 1 (1) Assessing and determining the needs of the elderly and  
2 vulnerable adults unmet by current trust fund grants  
3 and fund expenditures;
- 4 (2) Developing policy, strategies, and plans for the fund;
- 5 (3) Soliciting public and private moneys for the fund;
- 6 (4) Promoting statewide planning for the prevention of  
7 elder abuse and neglect and promoting quality care;
- 8 (5) Developing adequate standards and benchmarks by which  
9 measures of program success may be appropriately  
10 evaluated;
- 11 (6) Establishing criteria and guidelines for grantmaking;
- 12 (7) Advising the executive office on aging on matters  
13 involving elderly and vulnerable adult care and  
14 issues; and
- 15 (8) Facilitating the exchange of information between  
16 groups concerned with elderly and vulnerable adult  
17 issues.
- 18 § -4 **Grants.** Grants provided for elder assistance may  
19 include but are not limited to the following:
- 20 (1) Programs for the prevention of elder and vulnerable  
21 adult abuse, and promotion of quality care;



- 1           (2) Programs for the prevention of financial exploitation
- 2           of the elderly and vulnerable adults, and promotion of
- 3           quality care;
- 4           (3) Programs for the prevention of injuries sustained by
- 5           the elderly and vulnerable adults from falling;
- 6           (4) Programs for the assistance of the elderly and
- 7           vulnerable adults in meeting transportation and
- 8           mobility needs;
- 9           (5) Promotion of aging and disability resource centers;
- 10          (6) Training and education for professionals, informal
- 11          caregivers, and caregiver advocates, including making
- 12          information about the problems of elder abuse and
- 13          neglect and the promotion of quality care available to
- 14          agencies dealing with these problems;
- 15          (7) General community education to increase the
- 16          community's awareness of the needs of the elderly and
- 17          vulnerable adults, of the issues of elder and
- 18          vulnerable adult abuse and neglect and its prevention,
- 19          and of how to provide quality care to elder and
- 20          vulnerable adults;



- 1 (8) Research, evaluation, and advocacy activities related  
2 to the prevention of elder and vulnerable adult abuse  
3 and neglect and promotion of quality care; and  
4 (9) The meeting of future needs of the elderly and  
5 vulnerable adults, as determined by the board in  
6 accordance with this chapter."

7 SECTION 2. This Act shall take effect on July 1, 2050.



**Report Title:**

Hawaii Kupuna Trust Fund

**Description:**

Creates the Hawaii kupuna trust fund, which comprises public and private funding for meeting the outstanding and future needs of the elder and vulnerable adult population. Effective 7/1/2050.  
(SD2)

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

