



DEPT. COMM. NO. 441

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

January 9, 2024

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

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

RE: Reporting obligations pursuant to HRS 37-69(a), HRS 10-14.5(a), HRS 37-75, HRS 37-47, Report to Legislature of Uses of Authority, and HRS 10-15

VIA: Reports to the Legislature Web Portal

Aloha 'olua mai,

We appreciate your continuing support and guidance as we prepare for the 2024 Legislature session that will convene on Wednesday, January 17, 2024. Please accept the report to follow through with our reporting obligations pertaining to the following statutory requirements:

- A. HRS 37-69(a): Six-Year Program and Financial Plan
- B. HRS 10-14.5(a): FY 2023 Actual Expenditures
- C. HRS 37-75: FY 2023 FY 2024 Variance Report
- D. HRS 37-47: Reporting of Non-General Fund Information
- E. Report to Legislature of Uses of Authority in Act 29 (21) HB204 SD2 CD1 & in Act 71 (23) HB 133 HD1 SD2 CD1
- F. HRS 10-15: FY2023 Office of Hawaiian Affairs Annual Report

Please do not hesitate to contact me at 808-582-0508 or stacyf@oha.org or have your staff contact Chief Financial Officer, Ramona Hinck, at 808-265-5628 or ramonah@oha.org should there be any questions regarding this statutory reporting requirement or its attachments. Mahalo again and we look forward to working with you and your staff during the upcoming legislative session.

‘O wau iho nō me ka ‘oia‘i‘o,

Stacy Kealohalani Ferreira
Ka Pouhana, Chief Executive Officer

Attachments

SKF:gc

Cc: Trustee Carmen "Hulu" Lindsey, Chair, OHA Board of Trustees

OFFICE OF HAWAIIAN AFFAIRS
SIX YEAR PROGRAM AND FINANCIAL PLAN, REPORT DATE 12/15/2023

	Actual FY 2023*					Projected FY 2024				
	General Fund	Trust Funds	Other	Federal Grants	Total Funds	General Fund	Trust Funds	Other	Federal Grants	Total Funds
REVENUES										
1. General Fund Appropriations	\$2,254,400				\$2,254,400	\$3,000,000				\$3,000,000
2. Public Land Trust		21,500,000			21,500,000		21,500,000			21,500,000
3. Charges for Services		10,870,525			10,870,525		11,110,000			11,110,000
4. Dividend & Interest Income		36,907,823	3,282	410,186	37,321,291		35,347,000	3,000	504,000	35,854,000
5. Federal and Other Grants		0	0	421,680	421,680		0	0	347,000	347,000
6. Newspaper Ads		0	46,590	0	46,590		0	47,000	0	47,000
7. Donations and Other		275,746	207,150	15,440	498,336		276,000	0	16,000	292,000
Total Revenues Estimates	\$2,254,400	\$69,554,095	\$257,022	\$847,306	\$72,912,822	\$3,000,000	\$68,233,000	\$50,000	\$867,000	\$72,150,000
EXPENDITURES										
8. Board of Trustees	53,650	2,690,780	0	0	2,744,430	0	3,814,606	0	0	3,814,606
9. Support Services	634,400	24,867,101	12,907	143,001	25,657,409	600,000	26,739,648	128,600	0	27,468,248
10. Beneficiary Advocacy	1,970,278	10,923,594	0	995,367	13,889,238	2,400,000	20,741,016	0	1,196,073	24,337,089
Total Expenditures Estimates	\$2,658,328	\$38,481,474	\$12,907	\$1,138,367	\$42,291,076	\$3,000,000	\$51,295,270	\$128,600	\$1,196,073	\$55,619,943

*Unaudited figures for YE 6/30/2023

NOTES and ASSUMPTIONS

1. (a) General Fund FY23 figures reflect HB204 SD2 CD1, Relating to the Budget of the Office of Hawaiian Affairs, Act 29(21), signed into law on 5/28/2021.
- (b) General Fund FY24 and FY25 figures reflect HB133 HD1 SD2 CD1, Relating to the Budget of the Office of Hawaiian Affairs, Act 071 (Gov. Msg. No. 1171), signed into law on 6/7/2023.
- (c) General Funds FY26-FY30 reflect estimate OHA general fund appropriation request and subject to Hawaii State Legislatures and Governor approval.
2. On June 27, 2022, SB 2021 SD1 HD2 CD1 was signed into law "Relating to Increasing the Payment Amount for the Office of Hawaiian Affairs' Pro Rata Share of the Public Land Trust", Act 226. It established \$21,500,000 as the Office of Hawaiian Affairs' interim annual share of income and proceeds of public land trust beginning in fiscal year 2022-2023.
3. Charges for Services are generated from the commercial properties and are comprised of Nā Lama Kukui (OHA headquarters at 560 N. Nimitz Highway), the 30-acres Hakuone, and the two acquired properties in 2021: 500 N. Nimitz Highway and 501 Sumner Street, both adjacent to Nā Lama Kukui. Unaudited amounts are reported for FY23. For FY24 to FY30 revenue estimates calculated at +3% year-over-year.
4. Dividend & Interest Income are comprised of interest income, dividend income and realized and unrealized gains/losses on investments. Unaudited amounts reported for FY23, totaling \$36.9M. Estimates for FY24 - FY30 are based on the Native Hawaiian Trust Fund's long-term return assumption of a 6.8% annual return.
5. Federal and other grants revenues are based on anticipated expenditures as payments are on a reimbursement basis. The federal-funded Hālawā Lūluku Interpretive Development Project is expected to wind-down in FY24.
6. Other OHA Funds revenue classification includes OHA newspaper ads sales and other miscellaneous funding sources. Newspapers ad sales are the unaudited FY23 amounts and also used for FY24 - FY30 revenue. Other miscellaneous sources are minimal and fluctuate between years and therefore are not considered for projection purposes.
7. Donations, unused grant refunds, and other income fluctuate between years and are therefore not being considered for purposes of this analysis.
- 8, 9, 10. Unaudited amounts are reported for FY23. Expenditure estimates for FY24 and FY25 based on OHA's approved biennium budget for the fiscal biennium periods 2023-2024 (FY24) and 2024-2025 (FY25). Expenditure estimates for FY26 to FY30 calculated at conservative 3% year-over-year using FY25 projections.

OFFICE OF HAWAIIAN AFFAIRS
SIX YEAR PROGRAM AND FINANCIAL PLAN, REPORT DATE 12/15/2023

	Projected FY 2025					Projected FY 2026				
	General Fund	Trust Funds	Other	Federal Grants	Total Funds	General Fund	Trust Funds	Other	Federal Grants	Total Funds
REVENUES										
1. General Fund Appropriations	\$3,000,000				\$3,000,000	\$3,000,000				\$3,000,000
2. Public Land Trust		21,500,000			21,500,000		21,500,000			21,500,000
3. Charges for Services		11,496,250			11,496,250		11,894,088			11,894,088
4. Dividend & Interest Income		35,726,000	3,000	504,000	36,233,000		36,816,000	3,000	504,000	37,323,000
5. Federal and Other Grants		0	0	100,000	100,000		0	0	0	0
6. Newspaper Ads		0	47,000	0	47,000		0	47,000	0	47,000
7. Donations and Other		276,000	0	16,000	292,000		276,000	0	16,000	292,000
Total Revenues Estimates	\$3,000,000	\$68,998,250	\$50,000	\$620,000	\$72,668,250	\$3,000,000	\$70,486,088	\$50,000	\$520,000	\$74,056,088
EXPENDITURES										
8. Board of Trustees	0	3,711,516	0	0	3,711,516	0	3,823,000	0	0	3,823,000
9. Support Services	600,000	25,227,708	126,600	0	25,954,308	600,000	26,001,000	131,000	0	26,732,000
10. Beneficiary Advocacy	2,400,000	21,099,326	0	1,073,138	24,572,464	2,400,000	21,805,000	0	1,105,000	25,310,000
Total Expenditures Estimates	\$3,000,000	\$50,038,549	\$126,600	\$1,073,138	\$54,238,287	\$3,000,000	\$51,629,000	\$131,000	\$1,105,000	\$55,865,000

OFFICE OF HAWAIIAN AFFAIRS
SIX YEAR PROGRAM AND FINANCIAL PLAN, REPORT DATE 12/15/2023

	Projected FY 2027					Projected FY 2028				
	General Fund	Trust Funds	Other	Federal Grants	Total Funds	General Fund	Trust Funds	Other	Federal Grants	Total Funds
REVENUES										
1. General Fund Appropriations	\$3,000,000				\$3,000,000	\$3,000,000				\$3,000,000
2. Public Land Trust		21,500,000			21,500,000		21,500,000			21,500,000
3. Charges for Services		12,303,860			12,303,860		12,725,926			12,725,926
4. Dividend & Interest Income		37,894,000	3,000	504,000	38,401,000		38,945,000	3,000	504,000	39,452,000
5. Federal and Other Grants		0	0	0	0		0	0	0	0
6. Newspaper Ads		0	47,000	0	47,000		0	47,000	0	47,000
7. Donations and Other		276,000	0	16,000	292,000		276,000	0	16,000	292,000
Total Revenues Estimates	\$3,000,000	\$71,973,860	\$50,000	\$520,000	\$75,543,860	\$3,000,000	\$73,446,926	\$50,000	\$520,000	\$77,016,926
EXPENDITURES										
8. Board of Trustees	0	3,938,000	0	0	3,938,000		4,056,000	0	0	4,056,000
9. Support Services	600,000	26,799,000	135,000	0	27,534,000	600,000	27,621,000	139,000	0	28,360,000
10. Beneficiary Advocacy	2,400,000	22,531,000	0	1,138,000	26,069,000	2,400,000	23,279,000	0	1,172,000	26,851,000
Total Expenditures Estimates	\$3,000,000	\$53,268,000	\$135,000	\$1,138,000	\$57,541,000	\$3,000,000	\$54,956,000	\$139,000	\$1,172,000	\$59,267,000

OFFICE OF HAWAIIAN AFFAIRS
SIX YEAR PROGRAM AND FINANCIAL PLAN, REPORT DATE 12/15/2023

	Projected FY 2029				
	General Fund	Trust Funds	Other	Federal Grants	Total Funds
REVENUES					
1. General Fund Appropriations	\$3,000,000				\$3,000,000
2. Public Land Trust		21,500,000			21,500,000
3. Charges for Services		13,160,654			13,160,654
4. Dividend & Interest Income		39,966,000	3,000	504,000	40,473,000
5. Federal and Other Grants		0	0	0	0
6. Newspaper Ads		0	47,000	0	47,000
7. Donations and Other		276,000	0	16,000	292,000
Total Revenues Estimates	\$3,000,000	\$74,902,654	\$50,000	\$520,000	\$78,472,654
EXPENDITURES					
8. Board of Trustees		4,178,000	0	0	4,178,000
9. Support Services	600,000	28,466,000	144,000	0	29,210,000
10. Beneficiary Advocacy	2,400,000	24,050,000	0	1,207,000	27,657,000
Total Expenditures Estimates	\$3,000,000	\$56,694,000	\$144,000	\$1,207,000	\$61,045,000

OFFICE OF HAWAIIAN AFFAIRS
FISCAL YEAR 2023 ACTUAL EXPENDITURES, REPORT DATE 12/15/2023

GOVERNMENTAL ACTIVITIES [FN 1]	FY2023				
	GENERAL FUNDS	TRUST FUNDS	OTHER OHA FUNDS	FEDERAL FUNDS	TOTAL
BOARD OF TRUSTEES					
Personnel	-	2,529,735	-	-	2,529,735
Operating	53,650	161,045	-	-	214,695
Subtotal - Board of Trustees	53,650	2,690,780	-	-	2,744,430
SUPPORT SERVICES					
Personnel	-	6,203,194	-	-	6,203,194
Operating	634,400	18,663,907	12,907	143,001	19,454,215
Subtotal - Support Services	634,400	24,867,101	12,907	143,001	25,657,409
BENEFICIARY ADVOCACY					
Personnel	-	3,415,544	-	511,625	3,927,169
Operating	1,970,278	7,508,050	-	483,742	9,962,069
Subtotal - Beneficiary Advocacy	1,970,278	10,923,594	-	995,367	13,889,238
GOVERNMENTAL ACTIVITIES TOTAL	2,658,328	38,481,474	12,907	1,138,367	42,291,076

FOOTNOTES>

[1] FY2023 actuals figures from OHA's unaudited financial statements.

OFFICE OF HAWAIIAN AFFAIRS
FISCAL YEARS 2023, 2024 VARIANCE REPORT, REPORT DATE 12/15/2023

GOVERNMENTAL ACTIVITIES	FY 2023 [FN 2] [FN 3]				FY2024 ACTUAL THREE MONTHS ENDING 9-30-23				FY2024 ESTIMATE NINE MONTHS ENDING 6-30-24			
	Budgeted	Actual Uses	±Change	%	Budgeted	Actual Uses	±Change	%	Budgeted	Estimate Uses	±Change	%
GENERAL FUNDS [FN 1]												
Board of Trustees												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	-	(53,650)	(53,650)	-	-	-	-	-	-	-	-	-
Subtotal - Board of Trustees	-	(53,650)	(53,650)	-	-	-	-	-	-	-	-	-
Support Services												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	724,400	(634,400)	90,000	12	150,000	(90,000)	60,000	40	450,000	(510,000)	(60,000)	(13)
Subtotal - Support Services	724,400	(634,400)	90,000	12	150,000	(90,000)	60,000	40	450,000	(510,000)	(60,000)	(13)
Beneficiary Advocacy												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	1,530,000	(1,970,278)	(440,278)	(29)	600,000	-	600,000	100	1,800,000	(2,400,000)	(600,000)	(33)
Subtotal - Beneficiary Advocacy	1,530,000	(1,970,278)	(440,278)	(29)	600,000	-	600,000	100	1,800,000	(2,400,000)	(600,000)	(33)
TOTAL - GENERAL FUNDS	2,254,400	(2,658,328)	(403,928)	(18)	750,000	(90,000)	660,000	88	2,250,000	(2,910,000)	(660,000)	(29)
TRUST FUNDS												
Board of Trustees												
Personnel	2,565,472	(2,529,735)	35,738	1	705,058	(663,244)	41,813	6	2,115,173	(2,156,986)	(41,813)	(2)
Operating	337,675	(161,045)	176,631	52	248,594	(66,941)	181,653	73	745,782	(927,435)	(181,653)	(24)
Subtotal - Board of Trustees	2,903,148	(2,690,780)	212,368	7	953,652	(730,185)	223,466	23	2,860,955	(3,084,421)	(223,466)	(8)
Support Services												
Personnel	6,406,437	(6,203,194)	203,243	3	1,803,010	(1,603,826)	199,184	11	5,409,030	(5,608,214)	(199,184)	(4)
Operating	22,462,280	(18,663,907)	3,798,373	17	4,881,902	(3,469,954)	1,411,948	29	14,645,706	(16,057,653)	(1,411,948)	(10)
Subtotal - Support Services	28,868,717	(24,867,101)	4,001,616	14	6,684,912	(5,073,780)	1,611,132	24	20,054,736	(21,665,868)	(1,611,132)	(8)
Beneficiary Advocacy												
Personnel	3,447,257	(3,415,544)	31,713	1	965,638	(908,696)	56,941	6	2,896,913	(2,953,854)	(56,941)	(2)
Operating	14,504,502	(7,508,050)	6,996,452	48	4,219,617	(2,491,179)	1,728,437	41	12,658,850	(14,387,287)	(1,728,437)	(14)
Subtotal - Beneficiary Advocacy	17,951,759	(10,923,594)	7,028,165	39	5,185,254	(3,399,875)	1,785,379	34	15,555,762	(17,341,141)	(1,785,379)	(11)
TOTAL - TRUST FUNDS	49,723,624	(38,481,474)	11,242,150	23	12,823,817	(9,203,841)	3,619,977	28	38,471,452	(42,091,429)	(3,619,977)	(9)
OTHER OHA FUNDS												
Board of Trustees												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal - Board of Trustees	-	-	-	-	-	-	-	-	-	-	-	-
Support Services												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	129,462	(12,907)	116,555	90	32,150	(1,672)	30,478	95	96,450	(126,928)	(30,478)	(32)
Subtotal - Support Services	129,462	(12,907)	116,555	90	32,150	(1,672)	30,478	95	96,450	(126,928)	(30,478)	(32)
Beneficiary Advocacy												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal - Beneficiary Advocacy	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL - OTHER OHA FUNDS	129,462	(12,907)	116,555	90	32,150	(1,672)	30,478	95	96,450	(126,928)	(30,478)	(32)

OFFICE OF HAWAIIAN AFFAIRS
FISCAL YEARS 2023, 2024 VARIANCE REPORT, REPORT DATE 12/15/2023

GOVERNMENTAL ACTIVITIES	FY 2023 [FN 2] [FN 3]				FY2024 ACTUAL THREE MONTHS ENDING 9-30-23				FY2024 ESTIMATE NINE MONTHS ENDING 6-30-24			
	Budgeted	Actual Uses	±Change	%	Budgeted	Actual Uses	±Change	%	Budgeted	Estimate Uses	±Change	%
FEDERAL FUNDS												
Board of Trustees												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal - Board of Trustees	-	-	-	-	-	-	-	-	-	-	-	-
Support Services												
Personnel	-	-	-	-	-	-	-	-	-	-	-	-
Operating	231,045	(143,001)	88,044	38	-	(14,400)	(14,400)	-	-	14,400	14,400	-
Subtotal - Support Services	231,045	(143,001)	88,044	38	-	(14,400)	(14,400)	-	-	14,400	14,400	-
Beneficiary Advocacy												
Personnel	560,186	(511,625)	48,561	9	156,425	(138,435)	17,990	12	469,275	(487,265)	(17,990)	(4)
Operating	750,126	(483,742)	266,385	36	142,593	(44,187)	98,407	69	427,780	(526,186)	(98,407)	(23)
Subtotal - Beneficiary Advocacy	1,310,312	(995,367)	314,946	24	299,018	(182,622)	116,397	39	897,055	(1,013,451)	(116,397)	(13)
TOTAL - FEDERAL FUNDS	1,541,358	(1,138,367)	402,990	26	299,018	(197,022)	101,996	34	897,055	(999,051)	(101,996)	(11)
TOTAL - BOARD OF TRUSTEES	2,903,148	(2,744,430)	158,718	5	953,652	(730,185)	223,466	23	2,860,955	(3,084,421)	(223,466)	(8)
TOTAL - SUPPORT SERVICES	29,953,624	(25,657,409)	4,296,215	14	6,867,062	(5,179,853)	1,687,209	25	20,601,186	(22,288,395)	(1,687,209)	(8)
TOTAL - BENEFICIARY ADVOCACY	20,792,072	(13,889,238)	6,902,833	33	6,084,272	(3,582,497)	2,501,775	41	18,252,817	(20,754,592)	(2,501,775)	(14)
GOVERNMENTAL ACTIVITIES TOTAL	53,648,843	(42,291,076)	11,357,767	21	13,904,986	(9,492,535)	4,412,451	32	41,714,957	(46,127,408)	(4,412,451)	(11)

FOOTNOTES->

- [1] FY2023 General Funds figures from Act 29 approved 5/28/2021, 2021 HB204 SD2 CD1, Relating to the Budget of the Office of Hawaiian Affairs.
FY2024 General Funds figures from Act 071 approved 6/7/2023, 2023 HB133 HD1 SD2 CD1, Relating to the Budget of the Office of Hawaiian Affairs.
- [2] FY2023 budget reflect the budget realignment approved June 29, 2023.
FY2024 budget reflect the budget also approved on June 29, 2023.
- [3] FY2023 and FY2024 actuals figures from OHA's unaudited financial statements.

**Report on Non-General Fund Information
for Submittal to the 2024 Legislature**

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

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

T-901, T-902, T-910, T-930,
 T-938, T-939, T-950, T-951,
 S-310, S-315, S-320

Legal Authority Hawaii State Constitution, Article XII, Section 4

Appropriation Acct. No. _____

Intended Purpose:

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

Source of Revenues:

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

Current Program Activities/Allowable Expenses:

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

Purpose of Proposed Ceiling Adjustment (if applicable):

N/A

Variances:

Financial Data (\$1,000)			
	FY 2023 (actual-not final)	FY 2024 (estimated)	FY 2025 (estimated)
Appropriation Ceiling	N/A	N/A	N/A
Beginning Cash Balance	23,960	58,309	75,168
Revenues	70,713	68,283	69,048
Expenditures	36,364	51,424	50,165
Transfers			
List each net transfer in/out/ or projection in/out; list each account number			
Transfer in			
Transfer out	0	0	0
Net Total Transfers	0	0	0
Ending Cash Balance	58,309	75,168	94,051
Encumbrances	21,370	22,000	22,000
Subtotal Cash Balance	36,939	53,168	72,051
Investment: Native Hawaiian Trust Fund	33,939	50,168	69,051
Unencumbered Cash Balance	3,000	3,000	3,000

Additional Information:

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

**Report on Non-General Fund Information
for Submittal to the 2024 Legislature**

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

Contact Name: Ramona Hinck
 Phone: (808) 594-1999
 Fund type (MOF) Special
 S-200, S-202, S-203, S-205,
 Appropriation Acct. No. S-209

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 Highway.
 S-202 - To provide Native Hawaiians individuals and Native Hawaiian-owned businesses better access to financial capital and financial services.
 S-203 - For coordinating and supporting management of Papahānaumokuākea Marine National Monument (PMNM).
 S-205 - To provide federal financial assistance to secure endangered or threatened species information, undertake restoration actions that will lead to delisting of a species; help prevent extinction of a species, or aid in the recovery of species.
 S-209 - To make emergency awards to eligible recipients to ensure the survival and continuing vitality of Native American languages during and after the public health emergency with respect to the COVID-19 pandemic.

Source of Revenues:

S-200 - Federal Highways Administration - 90% funding; Hawai'i Department of Transportation - 10% funding.
 S-202 - Principal repayments, Interest earned from loans, Interest earned from investments, Miscellaneous revenue derived from loan fees, Recovery of loans written-off.
 S-203 - U.S. Department of Commerce, National Oceanic and Atmospheric Administration (NOAA).
 S-205 - U.S. Department of Interior, U.S. Fish and Wildlife Service.
 S-209 - U.S. Department of Health and Human Services, Administration for Children and Families (ACF), Administration for Native Americans (ANA).

Current Program Activities/Allowable Expenses:

S-200 - Salaries and CIP to maintain the H-3 Highway.
 S-202 - Expenditures consisted of loan disbursements, loan application fees, legal services, technical assistance, investment management, bad debt, personnel and various overhead cost.
 S-203 - For coordinating and supporting management of Papahānaumokuākea Marine National Monument (PMNM).
 S-205 - For Wao Kele O Puna (WKOP) Deer Fence Project at Puu Hei.
 S-209 - For the ACF/ANA Project: 'Olelo Hawai'i Community Research Grant.

Purpose of Proposed Ceiling Adjustment (if applicable):

N/A
 Variances:

Financial Data (\$1,000)			
	FY 2023	FY 2024	FY 2025
	(actual-not final)	(estimated)	(estimated)
Appropriation Ceiling			
Beginning Cash Balance	6,682	6,431	6,102
Revenues	847	867	620
Expenditures	1,098	1,196	1,073
Transfers			
List each net transfer in/out/ or projection in/out; list each account number			
Transfer in	0	0	0
Transfer out			
Net Total Transfers	0	0	0
Ending Cash Balance	6,431	6,102	5,649
Encumbrances	1,208	1,000	1,000
Subtotal Cash Balance	5,223	5,102	4,649
Investment: Treasury Securities	4,723	4,602	4,149
Unencumbered Cash Balance	500	500	500
Additional Information:			
Amount Req. by Bond Covenants	N/A	N/A	N/A
Amount from Bond Proceeds	N/A	N/A	N/A
Amount Held in CODs, Escrow Accounts, or Other Investments	N/A	N/A	N/A

Office of Hawaiian Affairs - Report to Legislature of Uses of Authority
State of Hawaii HB204 SD2 CD1 in Act 029 on 5/28/2021
Report Date: 1/9/2024

Description	FY 2023					Notes
	General Fund	OHA Trust Fund	Total	Uses & Encumbrances	Remaining	
A. OHA 150 Office of Trustees						
Personnel		275,687	275,687	(275,687)	-	Uses & Encumbrances from 11/1/2022 to 6/30/2023.
Subtotal OHA 150		275,687	275,687	(275,687)	-	
B. OHA 160 Administration						
Personnel		2,564,853	2,564,853	(2,564,853)	-	Uses & Encumbrances from 11/1/2022 to 6/30/2023.
Operating Rent		296,874	296,874	(296,874)	-	Uses & Encumbrances from 11/1/2022 to 6/30/2023.
Subtotal OHA 160		2,861,727	2,861,727	(2,861,727)	-	
C. OHA 175 Beneficiary						
1 Personnel		1,037,890	1,037,890	(1,037,890)	-	Uses & Encumbrances from 11/1/2022 to 6/30/2023.
2 Occupancy Ready Housing Needs	750,000 [a]	750,000 [b]	1,500,000	(1,500,000)	-	Via Grants Solicitation awarded to [a] Honolulu Habitat for Humanity (\$750,000), [b] Honolulu Habitat for Humanity (\$500,000), Hawaiian Community Assets (\$250,000). Services provided include: providing permanent, affordable, occupancy-ready housing to Native Hawaiians (self-help, owner builder housing units); and, increasing the occupancy readiness of Native Hawaiians by improving their financial capacity to rent or own homes (down payment assistance, credit repair, financial counseling).
3 Social Services (Multi-Services)	415,000 [a]	415,000 [b]	830,000	(415,000)	415,000	[a] Via Grants Solicitation awarded to Alu Like. Services provided include: assistance for utilities; rent; mortgage; car repair; funerary and medical expenses, up to \$2,000 per applicant. [b] Remaining funds was put on pause, and due to change in Administration will not to be distributed.
Native Hawaiian Students:						
4 Education Improvement Programs	615,000	615,000	1,230,000	(1,230,000)	-	Via Grants Solicitation awarded to Kanu O Ka 'Āina Learning 'Ohana. Services provided include: administering funds to the sixteen (16) Native Hawaiian-focused Charter Schools to improve educational outcomes.
5 Legal Representation Services	724,400 [a]	724,400 [b]	1,448,800	(1,270,450)	178,350	Via Purchase of Service (POS) via Professional Services List - Awarded to Native Hawaiian Legal Corporation: [a] \$724,400, [b] \$546,050, leaving \$178,350 unawarded. Services provided include: direct legal services and assistance in protecting the rights and entitlements of Hawaiians, including, matters related to land title; quiet title defense; ahupua'a and kuleana tenant rights; traditional and customary practices; protection of cultural sites; preservation of Native Hawaiian land trust and DHHL home retention strategies, maintaining 'ohana care rights, and limited estate planning related to keiki and kupuna care.
Subtotal OHA 175	2,504,400	3,542,290	6,046,690	(5,453,340)	593,350	

Total \$ 2,504,400 \$ 6,679,704 \$ 9,184,104 \$ (8,590,754) \$ 593,350

NOTES

(1) FY2023 figures from Act 29 approved 5/28/2021, 2021 HB204 SD2 CD1, Relating to the Budget of the Office of Hawaiian Affairs.

(2) This report details the uses of all programmatic and operational awards, as well as expenditures and encumbrances made through November 30, 2023, pursuant to the reporting obligations in Act 029 (21) HB204 [Section

Office of Hawaiian Affairs - Report to Legislature of Uses of Authority
 State of Hawaii HB133 HD1 SD2 CD1 in Act 071 on 06/07/2023
 Report Date: 1/9/2024

Description	FY 2024					Notes
	General Fund	OHA Trust Fund	Total	Uses & Encumbrances	Remaining	
A. OHA 175 Beneficiary						
1 Occupancy Ready Housing Needs	500,000	500,000	1,000,000	(1,000,000)	-	Solicitation to be released 2/1/2024, pending Administration approval. OHA expects to fully expend or encumber FY24 funding no later than 6/30/2024. Examples of services provided under this solicitation include, but are not limited to: providing permanent, affordable, occupancy-ready housing to Native Hawaiians (self-help, owner builder housing units); and, increasing the occupancy readiness of Native Hawaiians by improving their financial capacity to rent or own homes (down payment assistance, credit repair, financial counseling).
2 Social Services (Multi-Services)	415,000	415,000	830,000	(830,000)	-	Solicitation to be released 2/1/2024, pending Administration approval. OHA expects to fully expend or encumber FY24 funding no later than 6/30/2024. Examples of services provided under this solicitation include, but are not limited to: financial assistance for utilities, rent, mortgage, car repair, funerary and medical expenses, up to \$2,000 per applicant.
Native Hawaiian Students: 3 Education Improvement Programs	615,000	615,000	1,230,000	(1,230,000)	-	Solicitation to be released 2/1/2024, pending Administration approval. OHA expects to fully expend or encumber FY24 funding no later than 6/30/2024. Examples of services provided under this solicitation include, but are not limited to: administering funds to the sixteen (16) Native Hawaiian-focused Charter Schools to improve educational outcomes.
4 Legal Representation Services	600,000	600,000	1,200,000	(1,200,000)	-	Purchase of Service (POS) via Professional Services List - Awarded to Native Hawaiian Legal Corporation. direct legal services and assistance in protecting the rights and entitlements of Hawaiians, including, matters related to land title; quiet title defense; ahupua'a and kuleana tenant rights; traditional and customary practices; protection of cultural sites; preservation of Native Hawaiian land trust and DHHL home retention strategies, maintaining 'ohana care rights, and limited estate planning related to keiki and kupuna care.
6 Protection of 'Aina; Climate Change Adaptation and Mitigation Strategies and Practices	500,000	500,000	1,000,000	(1,000,000)		Via Grants Solicitation awarded a sum of \$600,000, to Hui Mālama i ke Ala 'Ūlili (\$100,000), Aloha Kuamoo 'Āina (\$100,000), The Men of PA'A (\$100,000), 'Āina Alliance (\$100,000), Papkōlea Community Development Corporation (\$100,000), and Keaukaha Pana'ewa Community Alliance (\$100,000). Solicitation for remaining funds to be released 2/1/2024, pending Administration approval. OHA expects to fully expend or encumber remaining FY24 funding no later than 6/30/2024. Examples of services provided under this solicitation include, but are not limited to: 'Āina hazard mitigation; 'āina-based stewardship and related educational programming; and workshops and activities related to food sovereignty.

Description	FY 2024					Notes
	General Fund	OHA Trust Fund	Total	Uses & Encumbrances	Remaining	
7 'Ohana Economic Stability	370,000	370,000	740,000	(740,000)	-	Via Grants Solicitation awarded a sum of \$200,000, to Ho'ākeolapono Trades Academy and Institute, and \$250,000 Homestead Community Development Corporation for FY24. Solicitation for remaining funds to be released 2/1/2024, pending Administration approval. OHA expects to fully expend or encumber remaining FY24 funding no later than 6/30/2024. Examples of services provided under this solicitation include, but are not limited to: paid trades and vocational skills training, experiential employment opportunities and training, improving individuals' real-world experience in the trades industry, and preparing individuals for job placement in Hawai'i.
Subtotal OHA 175	3,000,000	3,000,000	6,000,000	(6,000,000)	-	

Total \$ 3,000,000 \$ 3,000,000 \$ 6,000,000 \$ (6,000,000) -

NOTES:

(1) FY2024 figures from Act 071 approved 6/7/2023, 2023 HB133 HD1 SD2 CD1, Relating to the Budget of the Office of Hawaiian Affairs.

(2) This report details the uses of all programmatic and operational awards, as well as expenditures and encumbrances made through November 30, 2023, pursuant to the reporting obligations in Act 071 (23) HB133 [Section 11].

2023

Office of Hawaiian Affairs Annual Report

*“E paepae hou ‘ia ka pōhaku”
“Let the stones of the foundation be rebuilt.”*

- FROM THE SONG "KE AU HAWAII" BY LARRY KIMURA



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About OHA

Our Mission

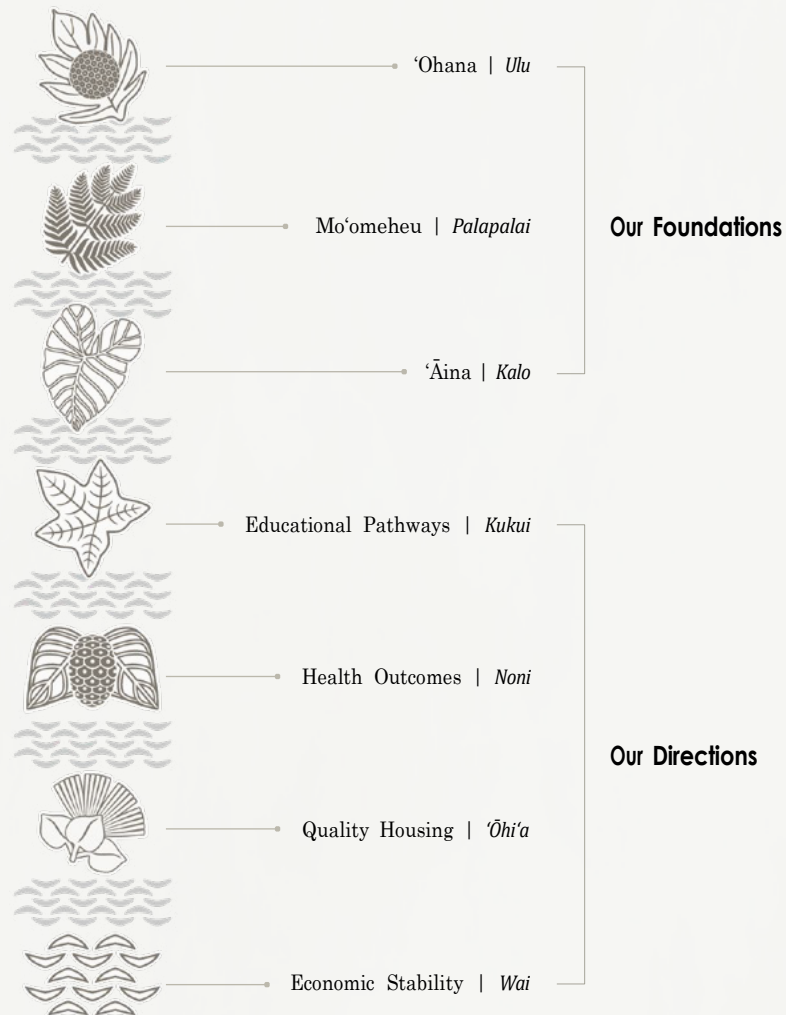
To mālama Hawai‘i’s people and environmental resources, and OHA’s assets, toward ensuring the perpetuation of the culture, the enhancement of lifestyle and the protection of entitlements of Native Hawaiians, while enabling the building of a strong and healthy Hawaiian people and lāhui, recognized nationally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

Our Vision

Ho‘oulu Lāhui Aloha

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

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



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

Messages from the Chair and the CEO



Aloha mai kākou,

On behalf of the Board of Trustees, it is my distinct privilege to present the Annual Report for the Office of Hawaiian Affairs, covering the activities of our organization from July 1, 2022, to June 30, 2023.

As a look back over this period, I am reminded that “O ke kahua ma mua, ma hope ke kūkulu – the foundation comes first, and then the building.”

As we continued our work to better the lives of Native Hawaiians, it was a year of working diligently to set foundations that the organization can build upon for decades to come.

We are justifiably proud that we have ushered in a new era of accountability and financial transparency that has positioned OHA to serve its beneficiaries better than ever before after a thorough overhaul of our policies, procedures and practices.

We have established a governance and policy framework for the Board with updated bylaws, implemented technology upgrades for grants, accounting and contract management, and approved policy amendments to improve fiscal management in budget preparation, format and reporting requirements.

We mahalo and aloha cultural practitioner Kumu Cy Bridges for his thoughtful selection of the name Hakuone to represent our 30-acre property formerly known as Kaka’ako Makai. Hakuone will represent the history and cultural significance of the area for generations to come, and we will persevere in our dream of building residential housing at Hakuone.

Our Native Hawaiian Revolving Loan Fund program introduced a new program during the fiscal year to support Native Hawaiian farmers across the pae ‘āina. The Mahi ‘Ai Agricultural Loan Program is now another way that OHA is meeting the business needs of Native Hawaiians – in this case, those who are starting a farm or expanding an existing one.

I am gratified by the achievements highlighted in this annual report.

Our organization has remained pa’a (firm), guided by the true dedication of our wonderful team members, the support of our community partners, and the trust bestowed upon us by our beneficiaries. We have proved that our greatest strengths are in unity and lōkahi.

Carmen “Hulu” Lindsey

Board of Trustees Chair | Trustee, Maui



Aloha mai kākou,

OHA is unique in the world; an independent branch of the Hawai‘i State government created in 1978 by a constitutional amendment to change the status quo of Hawaiians by “bettering their conditions.” That was, and continues to be, the principle that calls us to service and guides our operations.

OHA’s actions are grounded in our love and connection to our ‘āina, ‘ohana, and culture. We continue to focus our efforts on building and supporting education, health, housing, and economic development programs for Hawaiians that increase our wellbeing and foster a strong sense of Hawaiian identity.

Our trustees recommitted themselves to working together in service to our lāhui as they emerged from the shadow of the COVID-19 pandemic and publicly took their oaths of office together for the first time in many years. Our trustees’ diverse perspectives will guide OHA’s efforts moving forward.

OHA advanced its stewardship of its Kaka’ako Makai lands, now known as Hakuone, with a view towards creating a place where Hawaiians may live, work, play, and celebrate Hawaiian culture together.

In the not-too-distant past, Kaka’ako was disrespected, neglected, and used as a city dump; today these lands are a symbol of hope, wellbeing, and relevance as OHA begins to plan a vibrant one-of-a-kind community in the heart of Honolulu. OHA is now actively engaged in conducting its due diligence and planning how best to use these lands to serve our beneficiaries.

The forced assimilation of Hawaiians by the United States in the aftermath of the armed overthrow of our constitutional monarchy in 1893 has left deep scars on the identity, health, and wellbeing of Hawaiians.

The outlawing of the Hawaiian language as a medium of instruction in the territorial years through the first two decades of statehood has been addressed by tenacious language advocates who have been instrumental in revitalizing our language over the past 40 years.

This year, OHA received its first federal language grant of \$312,000 from the Administration for Native Americans (ANA) and re-distributed these funds to four local nonprofits working to re-establish ‘ōlelo Hawai‘i. This represents progress toward ensuring that our language thrives for generations to come, that the harmful effects of forced assimilation are overcome, and that a strong sense of Hawaiian identity is fostered.

We Hawaiians have a deep connection to our ‘āina, and it is our kuleana to steward and care for these precious resources. Thus, OHA is working with the community to develop comprehensive management plans to mālama ‘āina – heal and sustain our planet – through the development of pono ocean policies.

OHA exists to respond to challenges such as these. We look forward to the day when the conditions of Hawaiians, and our ‘āina, are as they should be, and there is no longer a need for an Office of Hawaiian Affairs to exist.

Until that day, we will stay the course and work together to serve our lāhui. Mālama pono.

Colin Kippen

Interim CEO | Ka Pouhana Kūikawā
(July 1, 2023 - October 31, 2023)

OHA Board of Trustees



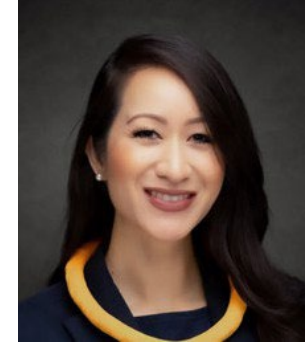
Carmen "Hulu" Lindsey
Chair
Trustee | Maui



Mililani B. Trask
Vice Chair
Trustee | Hawai'i Island



Dan Ahuna
Trustee | Kaua'i & Niihau



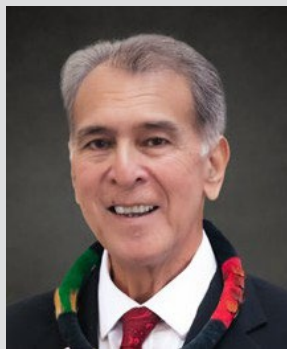
Kaleihikina Akaka
Trustee | O'ahu



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



Luana Alapa
Trustee | Molokai & Lanai



Brickwood Galuteria
Trustee | At-Large



Keoni Souza
Trustee | At-Large



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

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

Executive Team



Sylvia M. Hussey, Ed.D.
Ka Pouhana
Chief Executive Officer
(Till June 30, 2023)



Casey K. Brown
Ka Pou Nui
Chief Operating Officer



Ramona G. Hinck
Chief Financial Officer



Capsun M. Poe
Interim Chief Advocate &
Community Engagement Director
(Till September 30, 2023)



Everett Ohta
Interim General Counsel



Carla Hostetter
Systems Office Director



Kai Mana Perez-David
Human Resources Director
(Till June 30, 2023)



Alice Malepeai Silbanuz
Communications Director



Lisa Watkins-Victorino, Ph.D.
Research Director
(Till May 31, 2023)



Tim Wong
Land Assets Director

A New Era of Accountability

In November of 2022, Office of Hawaiian Affairs Board Chair Carmen “Hulu” Lindsey detailed the steps that the organization has taken over the last three years to improve overall organizational accountability.

“OHA is now positioned to serve its beneficiaries better than ever before after a thorough overhaul of its policies, procedures and practices,” Lindsey said.

In September 2018, OHA engaged a top 10 national accounting firm – Clifton-LarsonAllen LLP (CLA) – to conduct a detailed review of a sample of OHA and limited liability company (LLC) contracts and disbursements from five fiscal years (2012-2016).

While OHA was not required to take this extraordinary step, the Board of Trustees opted to do so despite OHA undergoing regular state audits and receiving clean annual independent financial audits for 14 consecutive years (now 18 years).

CLA presented the results of their engagement in December 2019, including 73 OHA, 30 LLC and six general oversight and governance recommendations.



OHA Trustees shared improvement steps at a press conference on Nov. 10, 2022. (L-R) Trustees Waihe'e, Akaka, Alapa, Lindsey, Akina, Trask, and CEO Sylvia Hussey. Photo: Joshua Koh

Better stewardship through tighter systems and controls

Lindsey highlighted the improvement steps taken by OHA since December 2019 to better align policies, procedures and practices, through Administration’s Recommendations Implementation Plan which addressed CLA recommendations, including but not limited to:

- Implemented three major technology systems for grants management, accounting and contract management.
- Established a governance and policy framework for the BOT with updated bylaws.
- Approved policy amendments to improve fiscal management and transparency in budget preparation, format, and reporting requirements.
- Established contract monitoring as the responsibility of the operating unit with oversight by the business line executive.
- Subjected all grants and sponsorships to approval by the Board of Trustees
- Eliminated CEO-initiated sponsorships and the CEO management override practice.
- Required that employee-related events be compliant with OHA policies.
- Established a financial transparency website that includes 18 years of financial statements and independent auditors’ opinions, Trustee Protocol Allowance and Annual Reports.

A Symbolic Investiture

In December 2022, Office of Hawaiian Affairs’ trustees elected that year were inducted into their terms of office at an investiture ceremony held at Kawaiaha’o Church.

Newly elected At-Large Trustees Brickwood Galuteria and Keoni Souza, At-Large Trustee John Waihe’e, Hawai’i Island Trustee Mililani Trask, Maui Island Trustee Carmen “Hulu” Lindsey and O’ahu Trustee Kalei Akaka won election this year. Kaua’i Island Trustee Dan Ahuna, Moloka’i and Lāna’i Island Trustee Luana Alapa and At-Large Trustee Keli’i Akina won election in 2020, however, due to the Covid-19 pandemic, OHA’s 2020 investiture ceremony was cancelled.

In a symbolic show of unity, the ceremony marked the first investiture where all nine trustees were

inducted together since the first OHA board was established in 1981.

With a theme of “Ho’oulu Lāhui Aloha – To Raise a Beloved Lāhui,” the ceremony was attended by the Royal Benevolent Societies, ali’i trusts, state and county officials, OHA staff, and beneficiaries. Each of the trustees was presented with a lei hulu and received a special blessing from Kahu Ken Makuakāne to prepare for the important work ahead of them.

“As one who has preached the value of working together in a spirit of lōkahi since first being elected as chair of this board two years ago, I see a symbolism in all of us receiving Ke Akua’s blessing together today,” Board Chair Lindsey said. “May we continue to work in unity as one ‘ohana as we move forward with the mission of this institution.”



All nine Office of Hawaiian Affairs trustees were sworn into office on Dec. 8, 2022, at a formal investiture ceremony at Kawaiaha'o Church. (L-R front row): Brickwood Galuteria, Kalei Akaka, Carmen "Hulu" Lindsey, Keli'i Akina and John Waihe'e IV. (L-R back row): Dan Ahuna, Luana Alapa, Mililani Trask and Keoni Souza. Photo: Joshua Koh



HAKUONE

At Hakuone, its 30 acres of land at Kaka'ako Makai, the Office of Hawaiian Affairs hopes to create a gathering place in the center of Honolulu that achieves a Hawaiian sense of place; an area developed to meet the needs of our people, not tourists. Early visualizations of Hakuone include ample open space and greenways featuring native and endemic plants, and a waterfront boardwalk on the Diamond Head side along Kewalo Basin (as shown in this rendering). Planned properly, Hakuone could become an "economic engine" for our lāhui.

Hakuone: Reimagining Kaka'ako Makai

In 2012, the State of Hawai'i transferred approximately 30 acres of land in urban Honolulu to the Office of Hawaiian Affairs in lieu of three decades of unpaid pro-rata shares of income and proceeds from the Public Land Trust (PLT) owed to Native Hawaiians.

The land is comprised of 10 separate parcels and located at Kaka'ako Makai, a man-made peninsula in the heart of Honolulu adjacent to Kewalo Basin.

In November 2022, OHA rebranded its lands as "Hakuone," which refers to a small land division cultivated for a chief – it is a name of cultural significance with layers of meaning that was gifted by respected Kumu Cy Bridges.

To ensure that OHA's vision for Hakuone was pono, a series of eight community meetings and virtual townhalls attended by hundreds of participants were scheduled between November 2022 and January 2023.

OHA's vision for its property is first and foremost to mālama 'āina (care for the land) by cleaning and restoring life to

Hakuone to make it safe and productive once again.

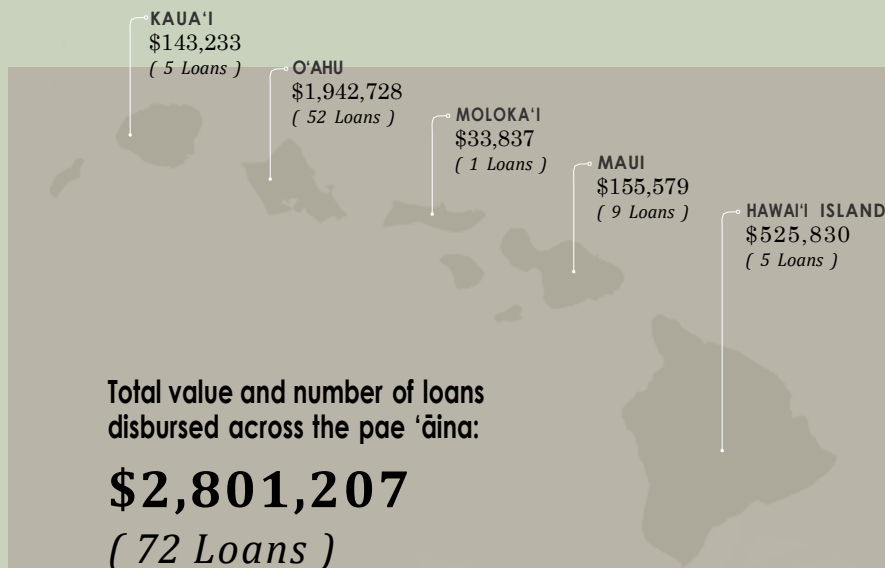
In terms of development, OHA wants to balance commerce and culture; to ensure that the land will be developed in such a way that it not only generates revenue for Native Hawaiians, but also creates a Hawaiian "sense of place." It is a vision of community – a place where people can live, work and play – so housing has always been part of the equation.

Given Hawai'i's affordable housing crisis, and the effect this has had on Native Hawaiians in particular, during the 2023 legislative session OHA again pursued a repeal of the restriction on residential development at Kaka'ako Makai which prevents the organization from developing affordable housing on its property.

It was deeply disappointing that this effort failed – a bitter pill to swallow in light of the preponderance of luxury condominiums being developed just across the street on the ma uka side of Ala Moana Boulevard.

FY2023 Consumer Micro-Loan & Mālama Loan Disbursement

July 1, 2022 to June 30, 2023



HUA KANU & MĀLAMA LOAN DISBURSEMENT BREAKDOWN

Purpose	No. of loans	\$ Amount
Business - Hua Kanu	2	\$700,000
Business - Mālama	13	\$634,240
Debt Consolidation	32	\$534,115
Home Improvement	22	\$919,065
Total	69	\$2,787,420

Other categories of Hua Kanu and Mālama Loans we offer include disaster relief and education.

CONSUMER MICRO-LOAN DISBURSEMENT BREAKDOWN

Purpose	No. of loans	\$ Amount
Auto Repairs	2	\$11,287
Career Advancement	1	\$2,500
Total	3	\$13,787

Other categories of Consumer Micro-Loans we offer include funeral expenses, home repairs and medical expenses.



Introducing the new Mahi 'Ai Loan

The Office of Hawaiian Affairs (OHA) Native Hawaiian Revolving Loan Fund introduced a new program in May 2023 to support Native Hawaiian farmers across the pae 'āina.

The Mahi 'Ai Agricultural Loan Program is another way that OHA is meeting the business needs of Native Hawaiians who are starting a farm or expanding an existing one.

The program has unique features that keep the needs of mahi 'ai in mind. In addition to the low-interest rates, new borrowers have the option of deferring their loan payments for the first six months without incurring additional interest.

"We recognize that it takes time for crops to grow, or livestock to reach a certain stage, before they can generate revenue for farmers, and we've taken that into consideration to help

ensure our loan recipients are off to a good start," said Aikū'e Kalima, OHA's Native Hawaiian Revolving Loan manager.

"These loans will not only help Native Hawaiians build strong businesses working in harmony with the land to support their families and provide jobs for others in the community, but also support food security to help Hawai'i become more resilient."

Creating Positive Change for Native Hawaiians

Desiree Kanae Loperfido and her husband, Chef Donato Loperfido, operate Flavors of Italy LLC, a licensed importer and distributor of alcohol and spirits specializing in a wide range of wines and cheese. In September 2022, they received a \$250,000 Hua Kanu loan through OHA's Mālama Loans Program.



"I spoke with my husband, and we decided to reach out to OHA and see if they could help us because we needed that extra money to expand our business. The interest rates are great, and we are very appreciative of what OHA and its Mālama Loans program does for the Hawaiian community. We're grateful for the help because we really needed it."

- DESIREE LOPERFIDO

2023 Grantees

The Office of Hawaiian Affairs' Grants Program is integral to the agency's efforts to increase wellness for our beneficiaries by supporting nonprofit organizations that are directly serving the Native Hawaiian community. For fiscal year 2023, OHA awarded \$10,413,269 for grants and another \$141,000 in sponsorships (see page 13) for a total of \$10,554,269.

<p>'ĀHAHUI GRANT PROGRAM (\$79,830)</p>	<p>Kualoa-He'eia Ecumenical Youth Project \$10,000 >> O'AHU</p>	<p>Ke Ao Hāli'i \$100,000 >> MAUI</p>	<p>COMMUNITY GRANTS EDUCATION (\$200,000)</p>
<p>Adult Friends for Youth \$10,000 >> KAUAI, O'AHU <i>PEARL Convention (Promoting Peace, Empathy, Acceptance, Respect, and Love)</i> An event to provide knowledge and tools to youth to make schools safer places where learning and growth can thrive by reducing bullying and violence on campuses.</p>	<p><i>Ko'olau 'Ohana Festival</i> A festival to showcase the strength of the Native Hawaiian/Pacific Islander culture and community by providing a wholesome event that caters to diversity and encourages a sense of place and kuleana.</p>	<p><i>E Mālama i Mokae a me Maka'alaie</i> Activate community stewardship to restore native plant and animal habitats, develop traditional agriculture, and manage the shoreline ecosystems of Mokae and Maka'alaie.</p>	<p>Purple Mai'a Foundation \$200,000 >> HAWAII, LĀNA'I, O'AHU <i>Waiwai: Building a Flourishing Future for Kānaka with AI</i> Equip Native Hawaiian students and teachers with the knowledge, skills, and resources necessary to pursue and succeed in Artificial Intelligence (AI) related fields and contribute to the development and innovation of AI in Hawai'i.</p>
<p>Ala Kukui Hāna Retreat \$10,000 >> MAUI <i>Hāna Kū Mele Series</i> The Hāna Kū Mele Series celebrates and inspires academic and place-based knowledge and education through an evening of live music, culture, and food.</p>	<p>Living Life Source Foundation \$9,830 >> O'AHU <i>Waiakeakua Reforestation</i> Restore the native koa and 'ōhi'a forests and the Wao Akua of Mānoa Valley. Replacing invasive species provides healing, perpetuates culture, restores connections and provides habitat for native species.</p>	<p>COMMUNITY GRANTS ECONOMIC STABILITY (\$1,196,660)</p> <p>Hawai'i Community Lending \$398,000 >> MAUI, MOLOKAI <i>Native Hawaiian Owner-Builder Project</i> Increase the economic stability of 58 Native Hawaiians in Nā'iwa via a culturally relevant owner-builder program to access capital, credit, and technical assistance to build/own homes on Hawaiian Home Lands.</p>	<p>COMMUNITY GRANTS HEALTH (\$470,000)</p> <p>Alu Like, Inc. \$250,000 >> KAUAI, MAUI, O'AHU <i>Kohopono</i> Improve the social and emotional health and wellbeing of Native Hawaiian youth living in Hāna, Nānākuli and on Kaula'i by implementing a program utilizing a culturally based/adapted prevention curriculum.</p>
<p>Hāna Arts \$10,000 >> MAUI <i>Hawaiian Music Events in East Maui</i> A program to support local agriculture by creating income-generating opportunities through live music performances at the Hāna Farmers Market.</p>	<p>Native Hawaiian Hospitality Association \$10,000 >> O'AHU <i>Hō'ihi</i> An engagement program to alleviate the impacts of a post-COVID Hawai'i by targeting and energizing cultural practitioners, elevating their knowledge, and re-mapping/re-constituting ancestral places.</p>	<p>Ma Ka Hana Ka 'Ike Building Program \$300,000 >> MAUI <i>I Kū Nā Loea</i> The purpose of I Kū Nā Loea is to empower the community to achieve economic well-being among Native Hawaiians in Hāna through training youth to compete in vocational fields that will raise their household incomes and prepare them to explore entrepreneurial pathways that lead to economic sovereignty.</p>	<p>Ma Ka Hana Ka 'Ike Building Program \$220,000 >> MAUI <i>Mana 'Āina, Mauli Ola</i> Increase access to quality, culturally based and culturally adapted prevention programs in Hāna that help perpetuate Hawaiian language, culture, traditions, identity, skills, readiness and sense of lāhui.</p>
<p>Hāna Arts \$10,000 >> MAUI <i>Uplifting the East Maui Community through Music and Culture</i> A program designed to uplift the 'ohana of East Maui by supporting local traditions and creating income-generating opportunities through live music performances at the Hāna Farmers Market and at Hāna School.</p>	<p>COMMUNITY GRANTS 'ĀINA (\$200,000)</p> <p>'Āina Ho'okupu O Kīlauea \$100,000 >> KAUAI <i>Kaua'i Locally Grown Fresh Produce Boxes for Native Hawaiians</i> Preparing and eating locally grown food is an 'ohana-building activity. This project helps to restore traditional food systems by community feeding community and increase local food sovereignty.</p>	<p>Purple Mai'a Foundation \$498,660 >> STATEWIDE <i>Mālama Design Studio</i> Educate 20 Native Hawaiian businessowners in Hawai'i via a collaborative design research process to implement technology solutions to improve their businesses and cultivate economic development.</p>	<p>COMMUNITY GRANTS HOMESTEAD (\$40,000)</p> <p>Homestead Community Development Corporation \$40,000 >> STATEWIDE <i>Homestead Policy Advocacy for the Waitlist (HPAW)</i> Increase policy advocacy for the waitlist in alignment with the long term goal of "a strong advocacy program serving individuals and their families on the Hawaiian Home Land waitlist for a land award."</p>
<p>Huliauapa'a \$10,000 >> O'AHU <i>Kali'uokapa'akai Collective Wahi Kūpuna Stewardship Conference</i> This conference supports Lā Kūpuna and Lā 'Ehunui events to uplift Kealakekua's K-12 immersion school Ke Kula o 'Ehunuikaimalino.</p>			

<p>COMMUNITY GRANTS <i>HOUSING</i> (\$4,500,000)</p> <p>Department of Hawaiian Home Lands</p> <p>\$3,000,000 >> STATEWIDE</p> <p><i>Infrastructure Support</i></p> <p>Funds to cover debt service on bonds issued by DHHL that will be used to establish infrastructure support for Native Hawaiian affordable housing opportunities.</p> <p>Hawaiian Community Assets</p> <p>\$1,500,000 >> HAWAII, KAUA'I, MOLOKA'I, O'AHU</p> <p><i>Native Hawaiian Occupancy Ready Project</i></p> <p>Increase the occupancy readiness of 500 Native Hawaiians by improving their financial capacity to rent or own homes. This goal will be achieved by establishing the Native Hawaiian occupancy ready database consisting of Native Hawaiians residing in Hawai'i who have enrolled in HUD housing counseling so they can access grants, loans, and referrals to housing opportunities as they become available.</p>	<p>COMMUNITY GRANTS <i>'OHANA</i> (\$265,000)</p> <p>Hāna Arts</p> <p>\$80,000 >> MAUI</p> <p><i>Uniting East Maui 'Ohana through Arts and Culture</i></p> <p>Unite and uplift East Maui youth through arts and culture education and events to strengthen family relationships and cultural connection equipping students to be thriving adults.</p> <p>Ke Kula 'O Pi'ilani</p> <p>\$85,000 >> MAUI</p> <p><i>Hawaiian Heritage Garden Restoration</i></p> <p>Revitalize and steward the Hawaiian Heritage Garden at Kepaniwai Park through the collective efforts of the Maui community to create a space where Hawaiian language, culture, traditions and identity thrive.</p> <p>Papahana Kuaola</p> <p>\$100,000 >> O'AHU</p> <p><i>Nā Kama 'Āina</i></p> <p>Strengthen and foster connections to 'āina, 'ohana and community by providing opportunities for Hawaiian culture-based 'āina activities and access to natural resources.</p>	<p>Kanu o ka 'Āina Learning 'Ohana</p> <p>\$2,850,000 >> HAWAII, KAUA'I, MAUI, MOLOKA'I, O'AHU</p> <p><i>KALO: Hawaiian-Focused Public Charter School Fund Administration - Phase II</i></p> <p>The purpose of this project is to provide support to address unmet facilities-related needs for 16 Hawaiian-Focused Public Charter Schools.</p> <p>IWI KŪPUNA REPATRIATION & REINTERMENT (\$50,000)</p> <p>The Hawaiian Church of Hawai'i Nei</p> <p>\$50,000 >> HAWAII, KAUA'I, MAUI, MOLOKA'I, O'AHU</p> <p><i>E Ho'omau o nā Mālama i nā Iwi Kūpuna</i></p> <p>Provide a full range of experience for participants working with their hands from gathering materials, to traditional preparation/creation of the sacred items needed for the care of our ancestors.</p>	<p>Hui o Hanohano</p> <p>\$69,902 >> HAWAII</p> <p><i>Pilināhāleo</i></p> <p>Determine whether 'ōlelo Hawai'i and 'ike Hawai'i events, workshops and weekly gatherings will increase the reported use of 'ōlelo Hawai'i and mo'omeheu Hawai'i within the homes of 15 participating families.</p> <p>Ke Kula 'O Pi'ilani</p> <p>\$77,766 >> MAUI</p> <p><i>Ka Piko Kaiao</i></p> <p>Determine whether educating students' parents and caregivers in 'ōlelo Hawai'i and cultural practices increases the use of 'ōlelo Hawai'i and Hawaiian cultural practices within these households.</p> <p>Papahana Kuaola</p> <p>\$84,757 >> O'AHU</p> <p><i>Nā Leo Makamae</i></p> <p>Determine whether delivery of a multi-generational 'ohana-based Hawaiian language instruction program increases the use of 'ōlelo Hawai'i and Hawaiian lifestyle traditions and practices within the home.</p>
<p>COMMUNITY GRANTS <i>MO'OMEHEU</i> (\$99,840)</p> <p>Hui Mālama O Ke Kai Foundation</p> <p>\$99,840 >> O'AHU</p> <p><i>Papahana Kālai Papa Me Pōhaku Ku'i 'Ai</i></p> <p>The Papahana Kālai Papa Me Pōhaku Ku'i 'Ai program increases cultural knowledge and self-esteem of Hawaiian youth and 'ohana to increase confidence, academic success, and career- or college-readiness.</p>	<p>HAWAIIAN-FOCUSED PUBLIC CHARTER SCHOOLS (\$3,000,000)</p> <p>Kanu o ka 'Āina Learning 'Ohana</p> <p>\$150,000 >> HAWAII</p> <p><i>KANU: Hawaiian-Focused Public Charter School Fund Administration - Phase II</i></p> <p>The purpose of this project is to provide support addressing unmet facilities related needs for Kanu o ka 'Āina New Century Public Charter School.</p>	<p>PERPETUATION OF 'ŌLELO HAWA'I (\$311,939)</p> <p>'Aha Pūnana Leo, Inc.</p> <p>\$79,514 >> HAWAII, KAUA'I, MAUI, MOLOKA'I, O'AHU</p> <p><i>Noi'i OHA</i></p> <p>Collect data to determine if 'Aha Pūnana Leo's online videos, virtual coursework and gatherings increases the use of and comfort/fluency in Hawaiian language by 'ohana who participate in the program.</p>	<p>Total Grants =</p> <p>\$10,413,269</p> <p>Awarded as of June 30, 2023. Since June 30, 2023, an additional \$9,815,000 has been awarded.</p>



Purple Mai'a Foundation



'Āina Ho'okupu O Kīlauea



Hui Mālama O Ke Kai Foundation

Supporting Language Revitalization

Language is the foundation of any culture. For Indigenous peoples, our languages reflect our unique world-views, our values and even our histories.

Over the past four decades, 'ōlelo Hawai'i advocates have revitalized the Hawaiian language and increased the number of speakers from just a few hundred (mostly kūpuna) to some 20,000 individuals, most of whom are younger than 40.

Nevertheless, the Hawaiian language remains vulnerable and sustained effort is required to perpetuate and transmit 'ōlelo Hawai'i to upcoming generations.

Recognizing that many Indigenous languages spoken in America are endangered, the federal government's Administration for Native Americans (ANA) has established American Rescue Plan (ARP) grant funding to support federally and state-recognized Tribes and Alaska Native, Native Hawaiian and Pacific Islander community organizations that are trying to ensure the survival and continuing vitality of their native languages.

The American Rescue Plan Act of 2021 allocated approximately \$20 million in grant funding to 210 recipients – one of which was OHA. It was the first ANA grant awarded to OHA and the first time that OHA has served as a grant administrator of ANA funds (\$300,000 was awarded) to distribute monies to support programming and lead research in 'ōlelo Hawai'i.

The grant application was a joint effort of OHA's Research Department, Office of Strategy Management, and Grants Program. The grant award enabled OHA in FY2023 to provide funding to four solicited nonprofit organizations from across the State of Hawai'i that are actively perpetuating Hawaiian language revitalization: 'Aha Pūnana Leo, Hui o Hanohano, Ke Kula 'o Pi'ilani, and Papahana Kuaola.

Ideally, this grant administration model – of passing through federal monies directly to smaller nonprofits in Hawai'i – will serve as a foundational model for OHA and other large Native Hawaiian-serving organizations to provide valuable financial resources directly to the communities we collectively serve.

Four solicited nonprofit organizations who received the Perpetuation of 'Ōlelo Hawai'i Grant:



- 'Aha Pūnana Leo
*Hawai'i, Kaua'i, Maui,
Moloka'i, O'ahu*



- Hui o Hanohano
Hawai'i



- Ke Kula 'o Pi'ilani
Maui



- Papahana Kuaola
O'ahu

Major OHA Research Collaborations

July 1, 2022 to June 30, 2023

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

Behavioral Risk Factor Surveillance System (BRFSS) Work Group

BRFSS is the nation's premier system of health-related telephone surveys that collect state data about residents' health-related risk behaviors, chronic health conditions, and use of preventive services. OHA collaborates with the Hawai'i State Department of Health (DOH) and other government agencies to develop community surveys for Hawai'i.

Bishop Museum & Awaiaulu

OHA RD, Bishop Museum, and Awaiaulu are collaborating to plan the intake and complete rescanning of Hawaiian language newspapers to either accompany or replace the collection currently housed in OHA's Papakilo Database.

Census Information Center (CIC)

OHA serves as a U.S. CIC to support local and community access, training and technical assistance on census data for research, planning and decision-making for underserved communities. This was a collaboration with the Hawai'i State Data Center, led by the Department of Business and Economic Development and Tourism's Research & Economic Analysis Division.

Culturally Relevant Assessment (CRA)

OHA is partnering with Hawaiian-focused charter schools and Kamehameha Schools to develop tools and assessments to communicate the breadth of student learning. Existing standardized assessments do not adequately assess student learning that is grounded in Hawaiian language and culture.

Culturally Responsive Evaluation and Assessment-Hawai'i (CREA-HI)

OHA is a participant of CREA-HI, along with numerous other Hawai'i agencies. The group is working on a culturally sustaining evaluation through a Native Hawaiian lens and has developed and disseminated the Evaluation with Aloha Framework.

Hawai'i Board of Geographic Names

OHA's RD sits on the Hawai'i Board of Geographic Names (HBGN) to support the maintenance and updating of Hawai'i Geographic Names by providing research support in the areas of Hawaiian culture, land tenure, and ethnohistory.

Hawai'i Data Exchange

OHA partners with the Hawai'i Department of Education (DOE) to support access, utilization, and dissemination of data related to student performance in the Hawai'i Data Exchange (DXP).

'Imi Pono Survey

An ongoing collaboration between OHA's RD and OSM with Kamehameha Schools, Lili'uokalani Trust, Papa Ola Lōkahi, and Marzano Research to develop, implement, analyze, and report findings of the 'Imi Pono Survey.

Kūkulu Kumuhana

This collaboration includes OHA, Lili'uokalani Trust, Kamehameha Schools, Papa Ola Lōkahi, and Consuelo Foundation and seeks to change how the wellbeing of Native Hawaiians is defined, measured, and ultimately reported. The Kūkulu Kumuhana framework is championed as a model to use in practice, research, and evaluation.

Legislature Burial Sites Working Group

OHA's RD provides administrative support to supplement OHA's participation on the Burial Sites Working Group.

Memorandum of Agreement (MOA) to Share Data

OHA, Lili'uokalani Trust, Kamehameha Schools, Papa Ola Lōkahi and the Hawai'i State Department of Human Services (DHS) entered into an MOA to share data on Native Hawaiians in Adult Protective Services, Childcare, Child Protective Services, Foster Care, MedQUEST, TANF, and SNAP programs to determine if there are COVID-19 impacts on these services. The MOA will result in a series of research briefs to be disseminated publicly.

Murdered and Missing Native Hawaiian

Women and Girls (MMNHWG) Task Force
OHA co-leads the MMNHWG Task Force with the Hawai'i State Commission on the Status of Women. The task force includes service providers, police representatives, survivors, and other agency participants.

Nā Kama a Hāloa

OHA is a member of Nā Kama a Hāloa, a network of state and community partners seeking to improve the outcomes of keiki in the foster care system.

Native Hawaiian Education Council (NHEC)

In 1994, the Native Hawaiian Education Act established the NHEC to coordinate, assess, report, and make recommendations on the effectiveness of existing programs, and the state of Native Hawaiian education. OHA is represented on the NHEC, along with multiple state departments.

Native Hawaiian Research Hui (NHRH)

This is a collaboration between OHA, Lili'uokalani Trust, Kamehameha Schools, and Papa Ola Lōkahi. NHRH has produced several publications using data from the NH Business Survey, Native Hawaiian Wellbeing Survey (now known as 'Imi Pono) and continues to support other research initiatives that impact NH wellbeing.

Native Hawaiian Revolving Loan Fund (NHRLF) Board of Directors

RD serves as a member of the NHRLF Board of Directors with kuleana to review, process, and approve NHRLF loan applications and monitor NHRLF program activities.

NHPI COVID-19 Response, Recovery, and Resilience (NHPI-3R)

OHA's RD and OSM serve on the NHPI-3R's Data & Research Committee that seeks to ensure the timely, accurate, and appropriate disaggregation of Native Hawaiian and Pacific Islander data with regard to testing, cases, vaccinations, hospitalizations, and deaths. The group is a network of agencies, health organizations, nonprofits, and others.

Partners in Care

OHA's RD and OSM provides research support to PIC in the form of committee participation, report review, and editing of the PIC Native Hawaiian Sub-Report.

Senate Concurrent Resolution No. 5 (SCR5) Data Governance Task Force

The task force was focused on understanding how Native Hawaiian and Pacific Islander data is collected, managed, and reported. The task force supported the development and implementation of a survey to gather data. OHA was both a participant and facilitator of the task force. The required report was submitted in January 2023, and the task force was then disbanded.

UH Mānoa Center for Indigenous Innovation and Health Equity (CIHE)

CIHE aims to advance Indigenous innovation (the application of traditional Indigenous knowledge, practices, and methodologies to contemporary problems) as a tool for health equity in NHPI populations. OHA participated in a collaboration with CIHE to disseminate their Health Equity Analysis Survey.

US Office of Management and Budget (OMB) Listening Session

The OMB led a formal review process for national statistical standards for collecting race and ethnicity data. OHA convened local and Native Hawaiian-serving organizations to coordinate a formal response and authored a letter providing recommendations and feedback to the proposed changes to the current guidelines.

Youth Risk Behavioral Survey (YRBS)

OHA collaborates with the state DOH and DOE to coordinate and report on the YRBS which is designed to provide detailed information on the health and wellbeing of Native Hawaiian middle and high school public school students.



* The number of times the site is visited

** Visitor with a unique IP address

Developing OHA's Ocean Policy

OHA's sphere of advocacy includes international, federal, state and county governments as it pertains to Native Hawaiian traditional and customary practices and associated rights from the near shore to the high seas.

This includes everything from protecting traditional aquaculture to advocating for protections against highly extractive activities such as the commercial aquarium fish trade, excessive tourism, industrial commercial fishing, and deep-sea mining.

For these reasons, OHA is in the process of developing innovative and effective ocean policies reflective of Hawaiian and Oceanic cultural values and traditions that meet or exceed global standards of practice.

In October and November 2022, OHA hosted a series of nine in-person Ocean Policy development meetings throughout the islands, as well as an online meeting via Zoom and, in addition, created a web survey to gather mana'o from the community.

Several hundred people participated in the meetings which were intended to enhance, develop and integrate 'ike kūpuna (ancestral knowledge) with western science to inform OHA's Ocean Policy and advocacy and to support sustainable, intergenerational protection and management of our ocean ecosystems.

The meetings were conducted by OHA's "ocean team" comprised of staff from its advocacy, communications, community engagement, research and public policy divisions as well as administrators and trustees.

These gatherings brought together Native Hawaiian cultural practitioners, fishers, divers, and other ocean people, along with Native Hawaiians and others who are already working to steward our marine ecosystems and ocean realms.

By meeting together, we have identified opportunities to build upon our collective strength to address the ongoing challenges to our Moananuiākea (Pacific Ocean) moving forward.



Hilo, Hawai'i Island



He'eia, O'ahu



2023 Sponsorships

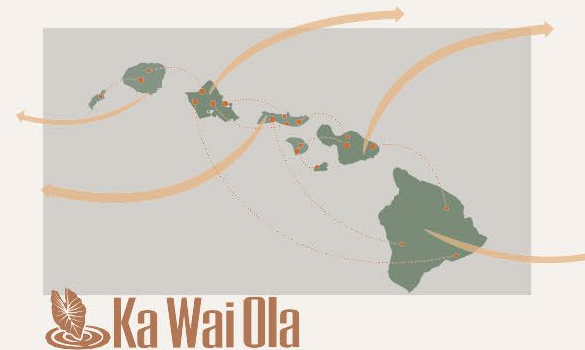
The Office of Hawaiian Affairs provides funding support to eligible organizations that have events, projects or programs that serve our lāhui in alignment with OHA's strategic plan.

Organization	Award
Merrie Monarch Festival <i>60th Anniversary Merrie Monarch Festival</i>	\$25,000
‘Aha Pūnana Leo <i>‘Aha Pūnana Leo Event</i>	\$15,000
Friends of ‘Iolani Palace <i>Queen Kapi‘olani Evening Tours</i>	\$15,000
Kalihi-Pālama Culture & Arts Society <i>Queen Lili‘uokalani Keiki Hula Competition</i>	\$15,000
Moanalua Gardens Foundation <i>Prince Lot Hula Festival</i>	\$15,000
Polynesian Voyaging Society <i>Polynesian Voyaging Society Event</i>	\$15,000
Hawai‘i Academy of Recording Arts <i>46th Annual Nā Hōkū Hanohano Awards</i>	\$10,000
Papa Ola Lōkahi <i>‘Aha Ho‘olōkahi 2023 Native Hawaiian Health and Wellness Summit</i>	\$10,000
Alaska Federation of Natives <i>Alaska Federation of Natives Annual Convention</i>	\$5,000
Nā‘ālehu Theatre <i>Annual Gabby Pahinui Waimānalo Kanikapila 2023</i>	\$5,000
National Indian Education Association <i>National Indian Education Association Conference and Trade Show</i>	\$5,000
Native Hawaiian Chamber of Commerce <i>2023 ‘Ō‘ō Awards</i>	\$5,000
Wai‘ānae Coast Community Foundation <i>Nānākuli Village Center Christmas Lights</i>	\$1,000

Total Sponsorships:
\$141,000

Beneficiary Reach

Throughout the fiscal year, beneficiaries and community members around the world are getting connected with Hawaiian news, events and resources through OHA's *Ka Wai Ola News*, social media and websites.



732,000

Printed *Ka Wai Ola* distributed across the pae ‘āina and continent

WEBSITES

2,528,000

Total webpage views

www.oha.org
2,100,000

loans.oha.org
39,000

kawaiola.news
389,000

SOCIAL MEDIA

82,063

Followers across multiple platforms

f 36,165
Fans

ig 30,717
Followers

tw 15,181
Followers

117,089

Users engaged

f 42,282
Reactions

ig 71,136
Likes

tw 3,671
Likes

173,706

Video views

f 40,289
Views

ig 81,579
Views

tw 905
Views

v 13,950
Views

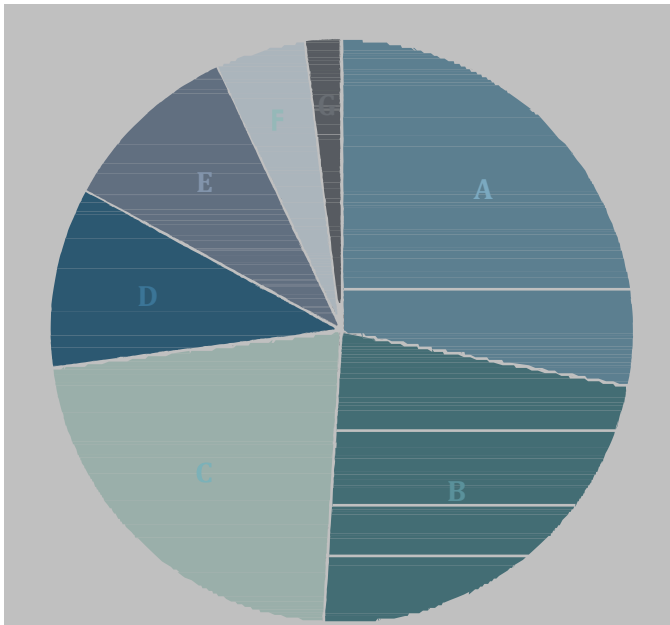
yt 57,185
Views

FY 2023 Budget Summary

The Approved Budget and Spending Limit for the fiscal year are shared below and are based on a biennium cycle of budgeting. To prudently manage its budget over a biennium period, the Office of Hawaiian Affairs executes budget realignments as needed. The figures below reflect the budget realignment approved June 29, 2023.

Approved Budget

Total: \$54,295,646



A - Grants (\$15,203,500)

Includes grants and sponsorships. This total does not equal the total on pages 8-9 as those totals include prior year appropriations.

B - Property (\$12,642,656)

Includes operational costs of OHA properties at Hakuone, Nā Lama Kukui, 500 North Nimitz, 501 Sumner, the Palaula Cultural Preserve, and Wao Kele O Puna.

C - Core Personnel (\$12,198,672)

Includes salary and fringe, student helpers, workers' compensation and other personnel costs. Does not include personnel costs for certain programs with designated sources and funding.

D - Other OHA Programs (\$1,229,419)

Reflects budgets for programs funded through non-trust funding sources, such as federal funds.

E - Program Services (\$2,514,362)

Program services include costs directly related to program activities such as printing, advertising, bulk mail and other costs.

F - Overhead (\$5,001,866)

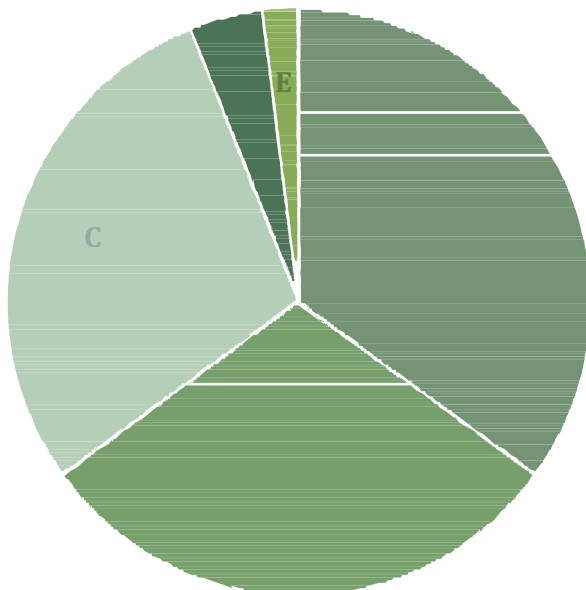
Includes facility-related expenses such as utilities, rent, and maintenance of OHA's offices, and other expenses such as equipment costs.

G - Contracts (\$5,505,171)

Includes expenditures directly related to implementing program activities, services-on-a-fee and legal services.

Spending Limit

Total: \$62,004,435



A - Public Land Trust Revenue (\$21,500,000)

By state law, OHA is entitled to 20% of receipts from the use or sale of the Public Land Trust. In 2006, the legislature authorized an interim amount of \$15.1 million per year. In 2022, that amount was increased to \$21.5 million.

B - 5% of the NHTF Portfolio (\$18,615,394)

The Native Hawaiian Trust Fund (NHTF) includes OHA's investment portfolio. Spending limit is calculated at 5% of a 20-quarter rolling average market value to ensure resources are available for future spending.

C - Property (\$18,277,533)

Includes expenditures directly related to implementing program activities, services-on-a-fee and legal services.

D - State of Hawai'i General Funds (\$2,254,400)

General Fund appropriations by the State Legislature.

E - Other OHA Programs (\$1,357,108)

Includes federal funding for specific projects (including the Hālawā Luluku Interpretive Development Project and the Native Hawaiian Revolving Loan Fund Program), and other miscellaneous income.

OFFICE OF HAWAIIAN AFFAIRS | STATE OF HAWAII

Statement of Net Position

Year Ended June 30, 2023 (dollars in thousands)

2023

Unaudited Financial Statements

The following financial statements for the fiscal year beginning July 1, 2022, and ending June 30, 2023, were prepared internally by the Office of Hawaiian Affairs and were not reviewed by any external auditor. OHA has made every effort to ensure the accuracy of these financial statements. When audited financial statements become available, they will be available online at www.oha.org.

	Governmental Activities	Business-Type Activities	Total
Assets:			
Petty cash	\$ 1	\$ -	\$ 1
Cash:			
Held in bank	21,623	7,384	29,007
Held by investment managers	312	-	312
Restricted cash	272	-	272
Accounts receivable, net	6,602	321	6,923
Interest and dividends receivable	52	-	52
Lease receivable:			
Due within one year	4,299	183	4,482
Due after one year	24,355	358	24,713
Inventory, prepaid items and other assets	883	251	1,134
Notes receivable, net:			
Due within one year	1,027	-	1,027
Due after one year	6,843	-	6,843
Investments	532,538	2,403	534,941
Capital assets:			
Non-depreciable assets	253,381	13,430	266,811
Depreciable assets, net	24,246	2,110	26,356
Right of use lease assets, net	478	-	478
Total Assets	876,912	26,440	903,352
Deferred Outflows of Resources:			
Deferred outflows of resources related to pensions	3,541	-	3,541
Deferred outflows of resources related to OPEB	1,120	-	1,120
Total Deferred Outflows of Resources	4,661	-	4,661
Liabilities:			
Accounts payable and accrued liabilities	3,982	1,105	5,087
Due to State of Hawai'i	300	-	300
Long-term liabilities:			
Due within one year	119	-	119
Due after one year	60,116	-	60,116
Other liabilities due in more than one year:			
Net pension liability	31,909	-	31,909
Net OPEB liability	31,145	-	31,145
Total Liabilities	127,571	1,105	128,676
Deferred Inflows of Resources:			
Deferred inflows of resources related to pension	3,833	-	3,833
Deferred inflows of resources related to OPEB	2,087	-	2,087
Deferred inflow of resources related to leases	27,665	-	27,665
Total Deferred Inflows of Resources	33,585	-	33,585
Net Position:			
Invested in capital assets, net of related debt	217,868	15,540	233,408
Restricted	24,590	-	24,590
Unrestricted	477,959	9,795	487,754
Total Net Position	\$ 720,417	\$ 25,335	\$ 745,752

OFFICE OF HAWAIIAN AFFAIRS | STATE OF HAWAII

Statement of Activities

June 30, 2023 (dollars in thousands)

Program Revenues

Net (Expenses) Revenue & Changes in Net Positions

Functions / Programs	Expenses	Charges for Services	Operating Grants & Contributions	Governmental Activities	Business-Type Activities	Total
Governmental Activities:						
Beneficiary advocacy	\$ 17,680	\$ -	\$ 422	\$ (17,258)	\$ -	\$ (17,258)
Board of Trustees	2,744	-	-	(2,744)	-	(2,744)
Support services	22,260	10,834	-	(11,426)	-	(11,426)
Unallocated depreciation	1,721	-	-	(1,721)	-	(1,721)
Total Governmental Activities	44,405	10,834	422	(33,149)	-	(33,149)
Business-Type Activities:						
Hīlei Aloha LLC	5,767	9,831	-	-	4,064	4,064
Ho'okele Pono LLC	-	-	-	-	-	-
Total Business-Type Activities	5,767	9,831	-	-	4,064	4,064
Total Government-Wide Activities	\$ 50,172	\$ 20,665	\$ 422	(33,149)	4,064	(29,085)
General Revenues:						
Interest and investment earnings				\$ 38,306	\$ -	\$ 38,306
Public Land Trust revenue				21,500	-	21,500
State allotments				2,254	-	2,254
Unrestricted contributions				495	-	495
Total General Revenues				62,555	-	62,555
Change in net position				29,406	4,064	33,470
Net Position at Beginning of Year				691,011	21,271	712,282
Net Position at End of Year				\$ 720,417	\$ 25,335	\$ 745,752

OFFICE OF HAWAIIAN AFFAIRS | STATE OF HAWAII
Governmental Funds - Balance Sheet
June 30, 2023 (dollars in thousands)

	General Fund	Public Land Trust	Federal Grants	Other	Total
Assets:					
Petty cash	\$ -	\$ 1	\$ -	\$ -	\$ 1
Cash:					
Held in bank	1,107	16,007	4,609	(100)	21,623
Held by investment managers	-	242	70	-	312
Restricted cash	-	-	272	-	272
Accounts receivable, net	-	6,482	99	20	6,601
Lease receivables	-	28,654	-	-	28,654
Due from other funds	-	206,047	7	-	206,054
Interest and dividends receivable	-	-	52	-	52
Inventory, prepaid items and other assets	-	883	-	-	883
Notes receivable, net:	-	-	-	-	-
Due within one year	-	16	1,011	-	1,027
Due after one year	-	51	6,792	-	6,843
Investments	-	520,510	12,029	-	532,539
Total Assets	\$ 1,107	\$ 778,893	\$ 24,941	\$ (80)	\$ 804,861
Liabilities, Deferred Inflows of Resources and Fund Balances:					
Liabilities:					
Accounts payable and accrued liabilities	\$ -	\$ 2,527	\$ 192	\$ 6	\$ 2,725
Due to other funds	3,031	202,913	110	-	206,054
Due to State of Hawai'i	-	-	300	-	300
Total Liabilities	3,031	205,440	602	6	209,079
Deferred inflow of resources related to leases	-	27,665	-	-	27,665
Fund balances:					
Nonspendable:					
Inventory, prepaids and other assets	-	883	-	-	883
Restricted:					
Beneficiary advocacy	-	-	98	-	98
Support services	-	-	(103)	-	(103)
Long-term portion of notes receivable	-	-	6,696	-	6,696
Native Hawaiian loan programs	-	-	17,648	-	17,648
Committed To:	-	-	-	-	-
DHHL-issued revenue bonds	-	21,233	-	-	21,233
Assigned to:					
Beneficiary advocacy	(1,235)	(1,261)	-	14	(2,482)
Board of Trustees	(54)	(2,452)	-	-	(2,506)
Support services	(635)	3,355	-	-	2,720
Long-term portion of notes receivable	-	48	-	-	48
Public Land Trust	-	523,982	-	-	523,982
Unassigned	-	-	-	(100)	(100)
Total Fund Balances	(1,924)	545,788	24,339	(86)	568,117
Total Total Liabilities, Deferred Inflows of Resources, and Fund Balances	\$ 1,107	\$ 778,893	\$ 24,941	\$ (80)	\$ 804,861

OFFICE OF HAWAIIAN AFFAIRS | STATE OF HAWAII

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

Year Ended June 30, 2023 (dollars in thousands)

	General Fund	Public Land Trust	Federal Grants	Other	Total
Revenues:					
Appropriations	\$ 2,254	\$ -	\$ -	\$ -	\$ 2,254
Charges for services	-	10,787	-	47	10,834
Donations and other	-	276	15	207	498
Interest and investment earnings	-	37,893	410	3	38,306
Intergovernmental revenue	-	-	422	-	422
Public Land Trust revenue	-	21,500	-	-	21,500
Total Revenues	2,254	70,456	847	257	73,814
Expenditures:					
Beneficiary advocacy	5,255	12,070	955	-	18,280
Board of Trustees	54	2,677	-	-	2,731
Support services	634	21,604	143	13	22,394
Total Expenditures	5,943	36,351	1,098	13	43,405
Other Financing (Uses) Sources:					
Payment on debt	-	-	-	-	-
Proceeds from debt	-	-	-	-	-
Issuance of leases	-	397	-	-	397
Net transfers from/(to) other funds	-	-	-	-	-
Net Change in Fund Balance	(3,689)	34,502	(251)	244	30,806
Fund Balances:					
Beginning of year	1,765	511,286	24,590	(330)	537,311
End of Year	\$ (1,924)	\$ 545,788	\$ 24,339	\$ (86)	\$ 568,117



About the Mana i Maui Ola Artwork

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

Artwork by Nelson Makua

2023 OHA Annual Report

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