



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ölelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. New Business
 - A. **Action Item BF #26-04:** Approval of OHA funding for Ho'ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

III. New Business (cont.)

- B. Update: Access to Home Ownership (AHO) Program – Six-Month Update
Administration will provide a six-month update on the Access to Home Ownership (AHO) Program.
- C. Update: Kanaaho Program – Final Update
Administration will provide a final update on the Kanaaho Program.

IV. Adjournment

If you need an auxiliary aid/service or other accommodation due to a disability, please contact Keola Fong at 808-626-5484 or by email at keolaf@oha.org as soon as possible. Requests made as early as possible have a greater likelihood of being fulfilled. Upon request, this notice is available in alternate/accessible formats.

Public Testimony will be called for each agenda item and must be limited to matters listed on the meeting agenda. Hawai'i Revised Statutes, Chapter 92, Public Agency Meetings and Records, prohibits Board members from discussing or taking action on matters not listed on the meeting agenda.

The board packet will be available for the public to inspect at OHA's main office located at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817 no later than three full business days before the meeting.

The board packet will also be made available on OHA's website <https://www.oha.org/bf> as soon as practicable thereafter. In the event that the livestream public broadcast is interrupted and cannot be restored, the meeting may continue as audio-only through the phone number and Webinar ID provided at the beginning of this agenda.

Meeting recordings will be made available on OHA's website <https://www.oha.org/about/leadership/board-of-trustees/> as soon as practicable after the meeting.

Testimony can be provided to the Board of Trustees either as:

- (1) **written testimony**; or
- (2) **live, oral testimony online or at the physical meeting location** during the remote meeting.

(1) Persons wishing to provide **written testimony** on items listed on the agenda should submit testimony via **email** to botmeetings@oha.org or via **postal mail** to Office of Hawaiian Affairs, Attn: Board of Trustees Meeting Testimony, 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817. Testimony is requested to be received at least twenty-four hours prior to the scheduled meeting to allow board members with sufficient time to review the testimony before the meeting. Please note that all written testimony will be posted on OHA's meeting website. Please omit or redact any personal information (e.g., name, email address, phone number, home address, or materials) that you do not want to be disclosed publicly online

(2) Persons wishing to provide **oral testimony online** during the remote meeting, please use the link below:

Webinar ID: 823 9412 3302

<https://us06web.zoom.us/j/82394123302>

*(*if you are unable to link directly, copy and paste in search)*

To provide **oral testimony online**, you will need:

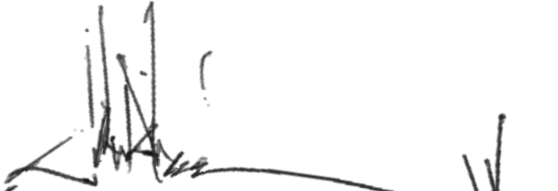
- (1) a computer or mobile device to connect to the virtual meeting;
- (2) internet access; and
- (3) a microphone to provide oral testimony.

Persons wishing to provide **oral testimony at the physical meeting location** can sign up the day-of the meeting at the physical meeting location.

Once your oral testimony is completed, you may be asked to disconnect from the meeting. If you willfully disrupt the meeting or do not disconnect on your own, support staff will remove you from the Zoom meeting.

You can continue to view the remainder of the meeting on the livestream or by telephone, as provided at the beginning of this agenda.

Oral testimony online or at a physical meeting location will be limited to five (5) minutes. Oral testimony by telephone/landline **will not** be accepted at this time.


Trustee John Waihe'e, IV, Chair
Committee on Budget and Finance (BF)

02/24/2026

Date



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

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BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

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**STATE OF HAWAI'I
OFFICE OF HAWAIIAN AFFAIRS
560 N. NIMITZ HIGHWAY, SUITE 200
(VIRTUAL MEETING - VIA ZOOM WEBINAR)
COMMITTEE ON BUDGET AND FINANCE
MINUTES**

February 4, 2026 10:00 a.m.

(or immediately following the conclusion of the OHA Investment and Land Management (ILM) Committee Meeting)

FULL MEETING CAN BE VIEWED AT [02/04/26 Budget and Finance \(BF\) Meeting](#)

ATTENDANCE:

Chairperson John Waihe'e, IV
Vice-Chairperson Dan Ahuna
Trustee Kaleihikina Akaka
Trustee Keli'i Akina
Trustee Luana Alapa
Trustee Brickwood Galuteria
Trustee Kaiali'i Kahele
Trustee C. Hulu Lindsey
Trustee J. Keoni Souza

Lei-Ann Durant
Mark Watanabe
Melissa Wennihan
Morgan Kauai Robello
Nathan Takeuchi
Remy Keliihoomalu
Sommer Soares

ADMINISTRATION STAFF:

Summer Sylva, Interim CEO / Administrator
K. Sean Kekina, COO / Ka Pou Nui
Bill Brennan, *Director of Communications*
Chantelle Belay, *Grants Manager*
Daniel Santos, *IT Systems Engineer & Administrator*
Everett Ohta, *Senior Legal Counsel*
Grace Chen, *Budget Chief*
Kevin Chak, *IT Sr. Systems Engineer & Administrator*
Lise Vaughan-Sekona, *Community Engagement Director*
Ryan Lee, *Investment Director, Interim CFO*

BOARD COUNSEL:

Kapono Kiakona

BOT STAFF:

Alena Auyong
Carina Lee
Crayn Akina

I. CALL TO ORDER

Chair Waihe'e calls the Committee on Budget and Finance meeting for Wednesday, February 4, 2026 to order at **11:04 a.m. (0:01 / 1:53:20)**

Chair Waihe'e notes for the record that **PRESENT** are:

MEMBERS			AT CALL TO ORDER (11:04 a.m.)	TIME ARRIVED
CHAIR	JOHN	WAIHE'E, IV	PRESENT	
VICE-CHAIR	DAN	AHUNA	PRESENT	
TRUSTEE	KALEIHIKINA	AKAKA	PRESENT	
TRUSTEE	KELI'I	AKINA	PRESENT	
TRUSTEE	LUANA	ALAPA	PRESENT	
TRUSTEE	BRICKWOOD	GALUTERIA	PRESENT	
TRUSTEE	KAIALI'I	KAHELE	PRESENT	
TRUSTEE	C. HULU	LINDSEY	PRESENT	
TRUSTEE	J. KEONI	SOUZA	PRESENT	

At the Call to Order, **NINE (9) Trustees are PRESENT**, thereby constituting a quorum.

II. APPROVAL OF MINUTES

NONE

Chair Waihe'e notes that we will take Item III. B. 1 through 14 out of order to accommodate beneficiaries who intend to testify.

III. NEW BUSINESS

B. Action Item BF #26-02:

Approval of OHA funding for Ho'ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025–2026, Quarter 4:

1. Ho'oma'a Foundation – Rell Sunn Menehune Contest
2. Imi Ola Canoe Club – Inaugural 'Imi Ola Canoe Club Long Distance Race
3. Hawai'i Opera Theatre – Ho'oulu Festival: Kamalehua World Premiere
4. Institute for Native Pacific Education and Culture (INPEACE) – Preschool Here I Come (PHIC)
5. 'Āwili – Kālai Hawai'i: Youth Council Launch & Advocacy Summit
6. Nā Leo Kāko'o o Ko'olauloa – Aloha Ko'olauloa
7. Hānai Kaiāulu – Maku'u Cardboard to Soil Festival
8. Four Strings at a Time – 'Ukulele Summit
9. Hawaiian Community Assets – Project Maka'ala: Fraud & Scams Can Happen to Anyone
10. Boys & Girls Club of Hawaii – Project Hope
11. Nā Pu'uwai Native Hawaiian Health Care System – Nā Pu'uwai Hō'ike Mana 2026
12. Hawaiian Historical Society – “Lei Ni'ihau: Ni'ihau is garlanded – with history, language, and beautiful lei pūpū” Gala & Fundraiser
13. Pālehua Conservation Initiative – Ke Kumu O Ke Ola
14. Purple Mai'a Foundation – Hawai'i Cooperative Hui Gathering

Chair Waihe'e moves to approve and authorize OHA funding for Ho'ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025-2026, Quarter 4 (Batch 1): ([5:55 / 1:53:20](#))

#	Organization Name	Event	Event Date(s)	Award Amount Recommendation
1	Ho'oma'a Foundation	Rell Sunn Menehune Contest	April 4-5, 2026	\$11,250
2	Imi Ola Canoe Club	Inaugural 'Imi Ola Canoe Club Long Distance Race	April 4, 2026	\$14,852
3	Hawai'i Opera Theatre	Ho'oulu Festival: Kamalehua World Premiere	April 5 – May 5, 2026	\$15,000
4	Institute for Native Pacific Education and Culture (INPEACE)	Preschool Here I Come (PHIC)	April 6-24, 2026	\$15,000
5	'Āwili	Kālai Hawai'i: Youth Council Launch & Advocacy Summit	April 6 - May 1, 2026	\$15,000
6	Nā Leo Kāko'o o Ko'olauloa	Aloha Ko'olauloa	April 11, 2026	\$7,343
7	Hānai Kaiāulu	Maku'u Cardboard to Soil Festival	April 12, 2026	\$10,500
8	Four Strings at a Time	'Ukulele Summit	April 18, 2026	\$11,250
9	Hawaiian Community Assets	Project Maka'ala: Fraud & Scams Can Happen to Anyone	April 23 – May 21, 2026	\$15,000
10	Boys & Girls Club of Hawaii	Project Hope	April 25, 2026	\$11,250
11	Nā Pu'uwai Native Hawaiian Health Care System	Nā Pu'uwai Hō'ike Mana 2026	April 25, 2026	\$14,998
12	Pālehua Conservation Initiative	Ke Kumu O Ke Ola	April 25, 2026	\$7,500
13	Purple Mai'a Foundation	Hawai'i Cooperative Hui Gathering	April 30, 2026	\$15,000
			TOTAL	\$163,943

Chair Waihe'e so it's on the table. I'm going to accommodate what you guys want to do. We can approve this, ideally we can just approve it or you may want to take some of them separately for various reasons because maybe you want to abstain or vote no if you have a conflict or other reasons. Let me know if you have any questions or if you want to amend any of these, let me know.

Chair Waihe'e recognizes Ka Pou Nui K. Sean Kekina to present.

Ka Pou Nui Kekina calls upon Grants Manager Chantelle Belay to speak on the Ho'ākoakoa event sponsorships.

Grants Manager Belay: Good morning Trustees. So before you, you have 13 applicants, all of them have sent a representative to either speak in person or online today to present their event. This is the first batch, I will say we had a huge increase for quarter 4 applications.

Grants Manager Belay: We received nearly 50 applications and over 30 went through the evaluation process. So these events today, they all occur in the month of April and then in March we'll be bringing the second group with events in May and June. [\(8:00 / 1:53:20\)](#)

Trustee Lindsey: When was the deadline for this group of people?

Grants Manager Belay: The deadline for this was December 5th, and I will say usually we receive between 15 to 20 applications. So, you've seen in past meetings, we usually bring about 12 to 13 for your consideration. So, in the group in March, we are estimating about 17 to come before you.

Chair Waihe'e: Okay. So, members, we have we have all the recipients here, if you want, they're available for questions. If you have questions about their sponsorships or if you want them to present, I can make them present also. So where are you guys at with voting on these sponsorships?

Trustee Lindsey: Well, I'm good with this list of sponsorships, but since they are here, maybe they want to share with us and give them a three-minute limit.

Chair Waihe'e: Okay, so what I'll do is give them each five minutes to present their sponsorships. If you have any questions for them, I will allow you to question them after the presentation. Keep in mind there's 13 of them, in the past, they've always taken the full five minutes. So, keep that in mind when you question them afterwards.

Chair Waihe'e: we'll start with Ho'oma'a Foundation – Rell Sunn Menehune Contest

BF Chair Staff Akina we have Maile DeSoto online.

Maile DeSoto (Ho'oma'a Foundation): [\(10:50 – 13:05 / 1:53:20\)](#)

Thank you for this opportunity. My name is Maile DeSoto, I am the Executive Director of Ho'oma'a Foundation, which helps organize the Rell Sun Menehune Surf Contest. Mahalo for the opportunity to provide testimony today and for recommending our event for sponsorship support. The Rell Sunn Menehune Surf Contest is a youth surf contest held in Mākaha that honors the legacy of Aunty Rell Sunn, who dedicated her life to caring for the ocean, her community, and our keiki. The contest is rooted in Rell Sunn's legacy and supported by the Rell Sunn Educational Fund, and Ho'oma'a Foundation assists with organizing operations and programming to ensure the event can serve the community safely and successfully. It is truly a collaborative effort to continue Aunty Rell's legacy for our keiki. Last year alone, we served 249 keiki, along with their families and support networks. The contest is open to keiki from across O'ahu and is grounded in Native Hawaiian values, cultural practices, and 'ike related to ocean stewardship. This is more than a surf contest. For many keiki, this is their first structured ocean experience. They learn safety, kuleana, and respect for the kai. They are mentored by lifeguards, cultural practitioners, and community leaders who volunteer their time to guide them. OHA's support helps keep this event accessible and affordable for local families. It allows us to provide a safe environment, cultural learning opportunities, and positive mentorship that many of our youth might not otherwise have access to. Most importantly, this contest strengthens identity and belonging. Our keiki leave with greater confidence, stronger ties to their community, and a deeper connection to Hawaiian culture and the ocean that sustains us. We are deeply grateful for OHA's consideration and continued support of programs that uplift our lāhui and invest in our generation. Mahalo for your time and consideration.

Chair Waihe'e: Thank you, Maile.

Chair Waihe'e: Are there any questions for Maile?

There are none.

Chair Waihe'e: Okay, then we will move on to Imi Ola Canoe Club – Inaugural 'Imi Ola Canoe Club Long Distance Race

BF Chair Staff Akina we have received and disseminated written testimony from Director Jonavann Kaulalaau, Valerie Chun and Treasurer Heather Murakami who is also here in person.

Heather Murakami and Kiloaulani Ka'awa-Gonzales (Imi Ola Canoe Club): [\(13:42 – 22:00 / 1:53:20\)](#)

Heather Murakami: Hi, my name is Heather Murakami, I'm the Treasurer of Imi Ola Canoe Club, and this is Kilo, who is actually one of our club members. So, I'm going to let him speak first. I'm here to mostly answer questions.

Kiloaulani Ka'awa-Gonzales: Aloha. Mai ka wehe ana o ke alaula i ka elalani a i kona kiholo ana ma kai honua, ke aloha nui ia kakou a pau. Mahalo for this time to speak. As Heather had mentioned, my name is Kiloaulani Gonzalez. I'm speaking just in my personal capacity as a member of Imi Ola. This is my third year with Imi Ola Canoe Club. Just a little background: Imi Ola Canoe Club is very young. We're only in our first few years of developing ourselves. Initially, we were affiliate members under the Hui Wa'a Canoe Racing Association. As of last year, we transitioned to OHCRA, the O'ahu Hawaiian Canoe Racing Association, so under a different racing group. The major difference is the requirement to have a koa canoe to race in the regatta events. As of last year, we didn't have a koa canoe, and so as an affiliate member we raced under another canoe club's name. A really big advancement for Imi Ola is that we recently purchased Kunāne, an existing koa canoe that was constructed in 1985. With that purchase comes a lot of required maintenance and reconstruction to get Kunāne up to specs for racing in OHCRA. A big part of Imi Ola is that we're in our growth stage. We do not have a 100-plus-year legacy like some of the other OHCRA members. As a club that aspires to go from affiliate to a full active member, with a running and established koa canoe for racing season, a big component of that is raising the funds to not only pay for Kunāne, but for the repairs required to make it raceable and sanctioned within OHCRA.

When we submitted this event, we hadn't yet developed the name. We currently do have an official name: the O Kākou Kunāne Inaugural OHCRA Preseason Race. OHCRA has a set of preseason distance races that range from six to ten or eleven miles in distance. We have keiki, open, novices, and different divisions. The intention is that the funds raised from registration fees would go toward the reconstruction and repair needs of Kunāne to get it up to waterline. This race event will be at Mauiola, or Sand Island, and we're anticipating involvement, and this is open to all clubs within both Hui Wa'a organizations as well as OHCRA.

For OHA, this is an amazing opportunity to interact with numerous different types of clubs and all of their members, who we are adamant about advertising to for participation in this race. Historically, how we fundraise is through Sodexo events, we are at the hot dog booths and set up tables for UH Mānoa. A lot of the funds we would put up for the operational costs of this event would come out of our pockets, in hopes that we profit and that the profits go to the koa canoe. With OHA's support, we're hoping that the operational costs for the escort boats, our safety measures, the medals for the events, as well as the food that we provide to all of our race participants would be covered, and that a lot of the registration costs that the clubs provide to Imi Ola would go directly to Kunāne's repairs.

Kiloaulani Ka'awa-Gonzales: As a whole, our story is one of growth. We are a young club, but also with the intention of succession. A big part of succession is ensuring we have a koa canoe that's operational and in place, that our club can use for generations, from youth all the way to our masters divisions and everyone in between, so they can have an opportunity to race in an organization as an active member. Hopefully, with OH CRA's support, this will be our first year of hosting this race, with the intention that this, in perpetuity, would be an inaugural race within OH CRA's preseason schedule, allowing us to raise funds to continually maintain the koa canoe, which is named Kunāne.

Heather Murakami: He did a great job, but he's very humble. What he didn't tell you is that part of our growth is— I assume all of you know— the Moloka'i to O'ahu races are the Super Bowl, the World Series of canoe racing. In 2024, we sent one junior boys crew, part of our growth, last year was that in 2025 we sent four crews, of which Kilo was in our inaugural open men's crew. We sent junior girls, open women, and our junior boys went again. I'm mostly here to answer the technical elements. I wanted to tell you a story about a friend of mine from the North Shore, her family runs a canoe club, they have a koa canoe. She means no disrespect to her parents, but she told me one time, "I think I come after the canoe." It's that level of investment, that your canoe becomes a member of your family. The canoe club is a family. The koa canoe in particular, Kunāne— becomes the heart and soul of the club. Sometimes the people come after the canoe, but not in a bad way. We want our youth, our novices, people who come to our club, to understand that Kunāne is our heartbeat. He is the soul of our club. He is the reason that we keep on racing all the time, to honor both the traditions, and there's my five minutes. Thank you.

Chair Waihe'e: Thank you. Members, are there any questions for them?

Chair Waihe'e recognizes Trustee Akaka

Trustee Akaka: Aloha no, do you folks have a pa ki'i mo'o ke wa'a, kūnane.

Heather Murakami: So he came from Big Island and there's this technical term called waterlogged, so what the funds are doing, he's sea worthy, he's just not race ready, if he was a car he's not street legal, so I don't actually have a picture of him in action, and I know our application at the time didn't have, but we can send you one.

Chair Waihe'e recognizes Trustee Galuteria

Trustee Galuteria: What's the distance? Starting point, ending point?

Heather Murakami: So, we'll start at Mauiola, we haven't actually developed the entire race course. Chances are we'll start at Mauiola, go out the big channel at Kalihi, hook a left and go East towards Diamond head, set a buoy somewhere out there. It's a point-to-point race, turn on the buoy and come back, that's probably short course. Long course, go Diamond Head, maybe go a little West and then come back in the channel. So, our race is in April, so that's fairly early in the racing season, so we won't want to kill anybody too early on. So maybe six for the short course, eight to ten for the long.

Trustee Galuteria: Okay, thank you.

Chair Waihe'e: Thank you guys.

Chair Waihe'e: Okay, members I'm going to take Hānai Kaiāulu – Maku'u Cardboard to Soil Festival because they have a student that needs to get back to class.

BF Chair Staff Akina we have Khiara Kaleiwahea.

Khiara Kaleiwahea (Hānai Kaiāulu): ([22:45 – 25:35 / 1:53:20](#))

Aloha, my name is Khiara Kaleiwahea, I am a senior at Nānākuli High School on the island of O‘ahu, and I am a youth leader for Hānai Kaiāulu. I just want to give a big thanks to OHA for your time and for your consideration, and I also want to mahalo for allowing me to present. The event is called Cardboard to Soil Festival. It is a youth-led event that will be held on Hawai‘i Island at the Maku‘u Farmer’s Market. What happens is community members can drop off cardboard, and in exchange for their cardboard, we give them fresh produce donated by local farmers. In return, farmers will receive the shredded cardboard to use as mulch, composting material, bedding, etc. This helps create a closed-loop win-win system where waste becomes resource, food returns to families, and farmers reduce their operational costs. Through this event, we will have several stations where participants and the community will learn how shredded cardboard can be innovative and how it can be transformed into rabbit bedding, chicken bedding, farm food, sheet mulch, compostable pots, oil change boxes, and sustainable party décor such as placemats and table runners. This event will also be greatly beneficial to the ‘opio that help or volunteer within this event because it ties directly into high school graduation requirements, offering students the opportunity to earn community service hours for their PTPs. Through participation, youth will deepen their sense of kuleana, develop leadership skills, and learn what it means to actively serve their community by engaging in work that returns ‘āina back to ‘āina. They will also be learning the importance of culturally grounded zero-waste solutions that divert cardboard from landfills and return it back to Papahānaumoku.

Chair Waihe‘e: Thank you, Khiara. That is very cool.

Chair Waihe‘e: Are there any questions for Khiara?

There are none.

Chair Waihe‘e: Okay, we will move on to Hawai‘i Opera Theatre – Ho‘oulu Festival: Kamalehua World Premiere

BF Chair Staff Akina we have Regi Lammers.

Regi Lammers and Patrick Makuakāne (Hawai‘i Opera Theatre): ([26:00 – 31:55 / 1:53:20](#))

Regi Lammers: Hi, actually Patrick Makuakāne who is also on the Zoom will be testifying and I am here to answer any questions.

Patrick Makuakāne: Aloha nui kakou. I am so privileged to be here to speak to you about this incredible opera that I am privileged to be the director of. I had this wonderful prepared script to speak to you about this, but as I was reading it, it sounded so manufactured. I chucked it and decided to speak to you from the heart, this place, because this is an important story. I am a kumu hula in San Francisco on the continent. I’ve been here for 40 years, and one of the things that I’ve learned about being here on the continent is that when I look at my other friends who are from other ethnicities or other nations—be it German, Italian, Saudi Arabian, popolo, whatever—I have noticed that no one speaks as passionately about their homeland as us Native Hawaiians. No one speaks to that place, that intangible place that defies logic and reason at times as to why we are proud to be from this special place.

Patrick Makuakāne: I think about why is that. I'm sure many of us have different reasons, but as a storyteller, one of the most important reasons for me is that we have these stories from our kūpuna and the work that they did that inspire us today. This is one of those stories—of Timoteo Ha'alilio, who was chosen by Kamehameha Paiea to be a close companion for his son Kauikeaouli. They grew up as close friends, he became his secretary, and eventually he was the one responsible for achieving Hawai'i's recognition as an independent sovereign nation, at a time when there was gunboat diplomacy and Kauikeaouli was worried about what was going to happen to this nation. He asked Timoteo to do this for him, and Timoteo told him, "Ask me anything but this. I don't want to leave Hawai'i. I don't want to do this. I will do whatever else you ask." And he told Timoteo, "You're the only one that I can trust to do this important work." So of course he acquiesced and did it. It was an arduous journey that shouldn't have happened. It was an impossible undertaking, because they were asking to be the first non-European nation to be part of the family of nations. Nobody was going to approve that, but yet they did. He achieved that and was sick during the entire journey. They told him he needed to stay in America for a while before he came back home, and he said, "No, I need to go home." And on the way home, he died. Talk about the ultimate sacrifice. For what? For being a Hawaiian patriot.

Today, when we hear the word patriot, for me, the word patriot is sullied by the sort of shenanigans that's going on with the current political environment, that's all I will say, and I know you folks know what I'm talking about. But if we want a clear definition of what a patriot—and mind you, a Hawaiian patriot—looks like, all we have to do is look at this story. It is operatic in theme, I didn't have to turn it into an opera, it's already an operatic-themed story. The whole vehicle is driven by three kānaka: Herb Mahelona, who composed the music; Victoria Kneubuhl, an award-winning playwright who wrote the libretto; and myself as the director, all collaborating to tell this story that was almost relegated to the dustbins of history if not for the courageous and monumental efforts of my dear friend Kau'i Sai-Dudoit, who, with her work in Awaiaulu was able to piece together this story after decades of research because everyone young Hawaiian should know who Timoteo Ha'alilio is. Here we are at this junction of time where we get to tell his story in one of the highest expressions of art form known to man—an opera. I think the highest form of expression in art is hula, but luckily this opera has hula. We are going to be able to tell this story in a way that has never been told before, and it has global impact. This can be told all across the world. And it just so happens that one of the most internationally acclaimed baritone singers is a Native Hawaiian. This is a Native Hawaiian-driven vehicle that will tell a story that no one knows about that is essential to who we are as Native Hawaiians. It gives us an understanding of what aloha 'āina is, because aloha 'āina didn't come from just love of the land. It's all intertwined with the Hawaiian Kingdom as well, all of it in these places which I mentioned earlier—this intangible place that defines our pride of being Hawaiian. This is one of those stories. There are many, I'm going on and on, did I reach my five minutes yet? There are many other things associated with this weekend—bringing in the kids, having master classes and whatnot—but for me, the most important thing is this amazing story that needs to be told and shared with everyone around the world. We are using a medium which has global implications. I am thankful for your support on behalf of the entire team in Hawai'i Opera Theatre.

Chair Waihe'e: Thank you, Patrick.

Chair Waihe'e: Are there any questions for Hawai'i Opera Theatre?

There are none.

Chair Waihe'e: Okay, we will move on to Institute for Native Pacific Education and Culture (INPEACE) – Preschool Here I Come (PHIC)

BF Chair Staff Akina we have Sanoe Marfil.

Sanoe Marfil (INPEACE): [\(32:35 – 34:30 / 1:53:20\)](#)

Aloha, Institute for Native Pacific Education and Culture, also known as INPEACE. Mahalo nui for your time and for allowing us to come and testify.

Our project is really an opportunity for us to create a foundation for our babies. *Preschool Here I Come* is an event that we have been doing for the past four years. This event brings together resources, schools, and individual organizations that have an opportunity to provide care for our youngest children who are seeking some type of support when we're trying to normalize preschool. If we look at the current events happening across the world, family child interactive preschool programs are on the brink of being cut from over 60 sites to about five. So, what *Preschool Here I Come* does is allow families to learn about their best option for preschool and what suits their families best. What we've been able to see in the time that we have done this, which was 18 events across four years, is that we have been able to impact 700 families through this work, and we continue to normalize early childhood education and entering into preschool. This is what our event is going to be, it will be here on O'ahu, specifically in Nānākuli on the west side of the island. We are looking forward to bringing together our community and our resources in celebrating early childhood education and preschool development. 'O ia wale, Mahalo nui.

Chair Waihe'e: Thank you, Sanoe.

Chair Waihe'e: Are there any questions for Sanoe?

There are none.

Chair Waihe'e: Okay, we will move on to 'Āwili – Kālai Hawai'i: Youth Council Launch & Advocacy Summit

BF Chair Staff Akina we have Kāwika Urakami.

Kāwika Urakami ('Āwili – Kālai Hawai'i): [\(35:05 – 37:30 / 1:53:20\)](#)

Aloha kākou, honorable Trustees and members of the Budget and Finance Committee for the Office of Hawaiian Affairs. My name is Kawika Urakami. I root from Hilo Palikū ahupua'a of Umauma and moku of Hilo, Hawai'i Island, I represent 'Āwili. Mahalo nui loa for the opportunity to testify in strong support of the recommended sponsorship for the Kālai Hawai'i Youth Council Launch and Advocacy Summit. This is a huge investment to uplift Hawai'i Island youth through a deeply needed, culturally grounded advocacy initiative. Kālai Hawai'i is a cohort-based summit series that meets twice weekly over four weeks, designed for youth from middle school through young adulthood. This program exists because we see a critical gap. Our youth are being asked to inherit enormous challenges around well-being, education, 'āina, and community resilience. Yet too often they are not given the pathway to influence the systems shaping those realities. Our youth should not only inherit our challenges and problems. They deserve to inherit our knowledge, our tools, and our solutions to shape something better.

Kāwika Urakami: Kālai Hawai'i is different from traditional youth leadership programs because it is not only about confidence or service. It is about building an ongoing youth advocacy and policy council rooted in Hawaiian identity, trauma-informed history, and real civic participation. Youth will

form meaningful relationships with kūpuna, cultural practitioners, and community leaders, becoming confident carriers of the past into the present while gaining the skills to shape Hawai'i's future. Through leadership and communication training, design thinking, data collection, and hands-on prototyping, youth will develop real solutions and present them directly to OHA and County partners. Most importantly, this summit series launches the Kālai Hawai'i Youth Council, ensuring this work continues beyond the program as a long-term force for community change. This aligns strongly with OHA's strategic direction of educational pathways and its strategy of strengthening integrated, culture-based community learning systems. Mahalo again for your consideration and for OHA's dedication to our lāhui. I respectfully urge the committee to approve this sponsorship. Kālai Hawai'i ensures that we pass down not only struggle, but strength; not only problems, but pathways. Mahalo nui.

Chair Waihe'e: Thank you, Kāwika.

Chair Waihe'e: Are there any questions for Kāwika?

There are none.

Chair Waihe'e: Okay, we will move on to Nā Leo Kāko'o o Ko'olauloa – Aloha Ko'olauloa

BF Chair Staff Akina we have in-person Terava Casey and online Jarom Ha'o.

Terava Casey and Jarom Ha'o (Nā Leo Kāko'o o Ko'olauloa): ([38:45 – 43:30 / 1:53:20](#))

Jarom Ha'o: Aloha mai kākou, mahalo ia oukou pākahi no kēia hālāwai i kēia kakahiaka. I am Jarom Ha'o, and with me in person is Terava Casey, we are members of the executive committee for the organization Nā Leo Kāko'o o Ko'olauloa. Our mission is to restore, protect, and perpetuate 'ōlelo Hawai'i and support the students, the 'ohana, and the teachers of Hawaiian language immersion education in the moku of Ko'olauloa. We also help to provide a caring and safe environment for quality teaching and learning. We do this through normalization of utilizing any level of 'ōlelo Hawai'i, 'ohana engagement events, social media communications, providing resources for 'ohana and our kumu for classrooms in huaka'i, and community engagement events in our moku like Aloha Ko'olauloa. Aloha Ko'olauloa has been crucial to restore, protect, and perpetuate 'ōlelo Hawai'i and ensure resourcing and funding to continue to do so in our moku.

Terava Casey: Trustees, Aloha. O wau Terava Casey no Hau'ula mai au. I'm here to represent Aloha Ko'olauloa to you all. Aloha Ko'olauloa, like Jarom our pelekikena introduced, is a free community event that was originally established in 1990. Over the years, it has taken many forms, from small plate lunch sales fundraisers to large-scale community workshops and events like this.

The purpose of Aloha Ko'olauloa is to raise awareness of 'ōlelo Hawai'i in our moku of Ko'olauloa, which spans from Ka'a'awa all the way up to Sunset, and to provide a venue for our own hauman to have a stage to stand on that supports and uplifts our lāhui. We also aim to partner with many community organizations and vendors that highlight the vibrant cultural scene of Ko'olauloa. Currently, we have 10 soft commitments for partnership with Aloha Ko'olauloa, including Lāhui Foundation, Hale Mua, which is a men's cultural group, Voyaging Society, Hui Hau'ula, KEY Project, Nurture Culture Inc., Hui o Ko'olau Canoe Club, and others.

Terava Casey: Our estimated number of attendees runs about 400 to 500, with our primary impact being the Native Hawaiian community. Our haumana that attend the schools, K through 12 education, Kula Kaiapuni, are from Ka'a'awa, Kahana, Hau'ula, Pūnalū'u, all the way up to Kahuku and Sunset, and they get funneled into our Kula Kaiapuni. Our Hui Mākua acts as a support network for our

hauman, our 'ohana and our kumu, and we try to fill that need that acts as a supportive net. We try to find them money because we know that our kumu need support and our families need support. Through this, I spoke to OHA's Mana I Maui Ola strategic plan through the educational pathway, something we are passionate about, which is to provide a platform for our students to stand on and to say 'ōlelo Hawai'i matters and that they are supported in this effort, but also to highlight the effort of our 'ohana, because we know these students cannot make it on their own. We have to support one another. In doing this, our community impact hopes to raise the visibility of mo'omeheu and 'ōlelo Hawai'i in our moku, to provide students more support and community engagement that is uplifting and feels organic and nurturing so that they are a part of our community in an impactful way, and also to have fun together, part of this journey of celebrating Hawaiian culture and language is that they can see themselves as part of a lifelong effort to sustain these values that will sustain them as they continue on. We also spoke to three of OHA's strategic foundations—'ohana, mo'omeheu, and 'āina—in our grant application, again to support and sustain culture and language, to support our families and our students, and to celebrate mele, 'oli, hula, and many of the cultural workshops that we hope to put on through our event, which includes 'upena net throwing, poi pounding, poi tasting, hale mua demonstrations, and more. Our event is really geared toward celebrating Hawaiian culture, celebrating our students, and at a critical time such as this where so much of our culture and language is under attack, we feel like these events help bring us together in a positive and uplifting way. Mahalo.

Chair Waihe'e: Thank you.

Chair Waihe'e: Members, are there any questions for Jarom or Terava?

There are none.

Chair Waihe'e: Okay, we will move on to Four Strings at a Time – 'Ukulele Summit

BF Chair Staff Akina we have in-person Sarah Maisel.

Sarah Maisel (Four Strings at a Time): [\(44:05 – 46:55 / 1:53:20\)](#)

Aloha, my name is Sarah Maisel. I just want to say thank you so so much for this wonderful opportunity to be able to speak on behalf of our organization Four Strings at a Time. Our mission of engaging, educating and enriching all lives around the world through music and the 'ukulele is at the heart of 'ukulele summit. This is also an amazing event that is in partnership with Windward Community College. It is a 100% free community event, it's all day. We host all day 'ukulele and 'ōlelo Hawai'i workshops as well as live stream the mainstage performances of keiki and professional groups. We also have several family activities on the great lawn of the campus as well. And as a sweet treat, we also offer free shave ice in the afternoon. Since we initially did our application, we've actually had several more teachers added to our roster. So, for 'ukulele instruction, we have Dr. Kamuela Kimokeo, as well as Jeff Peterson, Alan Akaka, Herb Ohta Jr., Bryan Tolentino, Jody Kamisato, and Abe Lagrimas Jr. For 'ōlelo Hawai'i, we actually have the honor of having Dr. Kalehua Krug joining us. Yes. We also had Kawaikapuokalani Hewett joining us last year, we have offered him an invitation again this year and we're just waiting on the confirmation from him. One of the things I did want to bring up with you folks is for your sponsorship, we actually would love to have OHA be an active part of Ukulele Summit.

Sarah Maisel: So, I have actually reserved some of our 'ōlelo Hawai'i teaching slots to possibly recommendations or a member of OHA who might want to come and actually teach classes at some. We also have as far as our keiki groups I actually have a fair amount of keiki groups listed including Kamehameha schools led by Kala'e Camarillo Kaimuki Christian 'ukulele hale Nā Maka music,

Kapena School of Music and I'm very excited to have Makaha Elementary's after school 'ukulele program performing for us as well. So, it's a wonderful event we have. We are so incredibly blessed and thank you so much for your consideration for sponsorship. One other small thing I did want to add is on top of course having logos and everything shown on screen during the live stream as well as print on all of our printed materials, we also wanted to offer the opportunity for our professional film crew to come in and actually interview someone from OHA so that you can share your message in our pre-show before the live stream.

Chair Waihe'e: Thank you, Sarah.

Chair Waihe'e: Are there any questions for Sarah?

There are none.

Chair Waihe'e: Okay, we will move on to Hawaiian Community Assets – Project Maka'ala: Fraud & Scams Can Happen to Anyone

BF Chair Staff Akina we have Damayanthi Fernando and Jessica Kaneakua

Damayanthi Fernando and Jessica Kaneakua (Hawaiian Community Assets): ([47:15 – 50:50 / 1:53:20](#))

Jessica Kaneakua: Aloha everyone, mahalo for having us here. I'm going to pass this off to Damayanthi Fernando, our Director of Programs.

Damayanthi Fernando: Aloha, my name is Damayanthi Fernando and I'm the Director of Programs for Hawaiian Community Assets. Mahalo for the opportunity to share with you details of Project Maka'ala and why it is so important to our community. Hawaiian Community Assets, founded in 2000, is Hawaii's largest HUD certified housing counseling agency and a trusted Native Hawaiian nonprofit. HCA delivers culturally grounded financial education, one-on-one housing counseling, and in 2024 alone, we served 7,306 individuals and nearly 60% were Native Hawaiian families. We supported 26 families into home ownership and improved housing situations for close to 4,000. HCA is requesting funding to support events in the Project Maka'ala that will take place from April to May 2026. This project is a series of events focused on kupuna financial scam fraud awareness and education. April is national financial literacy awareness month. So, our hope is to time these events during a period of increased public awareness around the issue. As we know fraud and scams targeting kupuna are on the rise each year. Millions of elderly fall victim to some type of financial fraud or confidence scheme. Kupuna are often targeted because they tend to be trusting, polite, and at times fearful, and they also they usually have financial savings, own a home, and have good credit. All of these factors tend to be very attractive to scammers, so through this project we hope to have community gatherings, panel discussions of film screening, resource fairs and how to seminars and HCA aims to educate and empower kupuna to remain alert and aware to the prevalence of scams to understand resources available to them before and in the unfortunate event of a financial fraud. And then we hope to partner with kupuna communities on O'ahu and eventually segue into future potential statewide endeavors, With OHA support this project will advance policies, programs, practices that strengthen ohana abilities to pursue multiple pathways towards economic stability.

Damayanthi Fernando: This project supports kupuna in becoming more financially literate, supports kupuna learning skills and tools to prevent being exploited financially through a scam or fraud. Will directly contribute to their ability to maintain economic stability. We are assured that by educating and empowering kupuna, we will also yield to the benefit of this knowledge being passed on to their children and grandchildren. We thank you for the opportunity and consideration. Mahalo.

Chair Waihe'e: Thank you, Damayanthi.

Chair Waihe'e: Are there any questions for either of them?

There are none.

Chair Waihe'e: Okay, we will move on to Boys & Girls Club of Hawaii – Project Hope

BF Chair Staff Akina we have Damayanthi Fernando and Jessica Kaneakua

Paddy Kauhane (Boys & Girls Club of Hawaii): ([51:20 – 55:20 / 1:53:20](#))

Aloha Trustees, mahalo for this opportunity to provide testimony. My name is Paddy Kauhane, and I'm Boys & Girls Clubs of Hawaii's President and CEO. Project Hope began as a listening initiative in the summer of 2024 when the Wai'anae community was rocked by a devastating increase in violent crime. As a youth center who serves 400 school-aged youth directly through our club and an additional 300 through outreach services, we immediately saw the negative impact these crimes had on our families and our own employees.

Wai'anae is a small community where residents are connected at many levels, and the violent crimes were creating stress, worry, and often anger among our keiki, 'ōpio, and 'ohana. We gathered with our youth members in smaller peer groups to allow them a safe space to talk about what was happening in their community. We listened, encouraged participation, did not judge, and did not offer solutions. The intent was to allow them to vocalize whatever their feelings were and hear what they were worried about. We provided them with a platform to uplift their voices. The listening sessions were a positive success, and the youth were interested in continuing conversations and expanding the dialogue with thoughts on what safety means, how important their community and home are to them, why their voices are important, and what steps we could take to help. What really struck home to us was how aware these youth are and how they understand how crime happens and how criminals access tools to commit crimes such as illegal firearms.

Additionally, what we saw from all ages was an authentic and passionate love of their home and their culture. Sadly, we witnessed the stress they are under, causing feelings of anxiety, depression, and often anger. Our youth expressed that Wai'anae is so much more than the violent crime that is in the news.

Next, we engaged our youth members in a mapping project which allowed them to identify areas in Wai'anae where they felt safe and unsafe. Our goal again was to continue amplifying their voices and share the results of the mapping with community leaders who had the ability to affect change. The outcome was a wonderful success, which led to multiple 'ohana night gatherings at the club where the youth shared what they created and provided suggestions on how positive changes could be implemented.

Our Wai'anae club has since created strong relationships with the Honolulu Police Department Community Policing Group, the Wai'anae Neighborhood Watch, Wai'anae Coast Comprehensive Health, and other community groups and cultural practitioners. We've increased our Hawaiian culture programs to reinforce and build our youth and 'ohana's connection to their home and culture and increase their sense of pride, healing, and belonging.

Project Hope now continues with our community event in April. The Wai'anae Boys & Girls Club is a trusted entity in the community, a place where people can gather safely without judgment and our event will continue that sense of pilina and pu'uhonua by strengthening healing and good health in our youth and 'ohana. We will offer cultural activities, interactive stations, 'ohana-centered workshops, and youth-led presentations, including sharing the mapping project. By mobilizing youth, 'ohana, and community partners to address safety and healing together the event increases communitywide access to culturally aligned interventions and strengthens the protective factors that contribute to long-term Native Hawaiian well-being. Mahalo nui for your consideration and for this opportunity to apply for support.

Chair Waihe'e: Thank you, Paddy.

Chair Waihe'e: Are there any questions for Paddy?

There are none.

Chair Waihe'e: Okay, we will move on to Nā Pu'uwai Native Hawaiian Health Care System – Nā Pu'uwai Hō'ike Mana 2026

BF Chair Staff Akina we have Dr. Landon Oponui who also provided written testimony that was disseminated yesterday.

Dr. Landon Oponui (Nā Pu'uwai): [\(55:50 – 58:35 / 1:53:20\)](#)

Aloha Trustees and members of the Budget and Finance Committee. E kala mai for not being able to testify in person today. I'm juggling my kauka hats and also seeing patients on Moloka'i this morning. My name is Landon Oponui, and I serve as the Executive Director at Nā Pu'uwai Native Hawaiian Health Care System. Mahalo for the opportunity to be here today to speak in support of our proposed event sponsorship for Hō'ike Mana 2026.

Hō'ike Mana 2026 represents the third consecutive year of this community event on Moloka'i. Over the past two years, it has grown into a dependable and well-attended community gathering. 'Ohana come together not only to access information about health services, but also to reconnect with one another. Our Hō'ike Mana community event is about uplifting the mana of our lāhui. The event creates an accessible, culturally grounded space that brings together preventive health services, fitness and nutrition education, and community-based learning opportunities. Participants are able to receive health screenings with clear pathways to follow-up care, engage in keiki to kūpuna health activities, and connect with more than 15 community partners offering health education and social service resources. This event is closely aligned with OHA's health outcome strategic direction, which focuses on strengthening Hawaiian well-being across physical, mental, emotional, and spiritual domains.

For Moloka'i, where geographic isolation and limited access can create real health challenges, gatherings like Hō'ike Mana play an important role. They support early engagement in care, reinforce cultural connection as an important contributor to health, and strengthen community resilience.

Dr. Landon Oponui: This funding would represent continued investment in a proven, community-driven initiative. Nā Pu'uwai approaches this event with careful planning, fiscal responsibility, and strong partnerships to ensure that OHA funds are used effectively and in direct service to community benefits. Nā Pu'uwai is grateful for OHA's ongoing partnership and commitment to Native Hawaiian

health and well-being. Mahalo for your consideration and for your leadership in supporting community-centered, culturally grounded initiatives across our lāhui. Mahalo.

Chair Waihe'e: Thank you, Dr. Landon Oponui.

Chair Waihe'e: Are there any questions for Dr. Landon?

There are none.

Chair Waihe'e: Okay, we will be moving on, just for your information the Hawaiian Historical Society – “Lei Ni‘ihau: Ni‘ihau is garlanded – with history, language, and beautiful lei pūpū” Gala & Fundraiser; their event unfortunately is being rescheduled to a different quarter so they’re not included in the sponsorship matrix that is currently on the table for discussion.

Chair Waihe'e: We will move on to Pālehua Conservation Initiative – Ke Kumu O Ke Ola

BF Chair Staff Akina we have Liz Fujii in-person.

Liz Fujii (Pālehua Conservation Initiative): ([59:30 – 1:02:15 / 1:53:20](#))

Aloha. Thank you so much trustees for making the time to hear from us today and to all of the community members who are presenting. April sounds like it will be a great month, so thank you for supporting all of this. Thank you to the grant reviewers for recommending support for Ke Kumu O Ke Ola supporting Native Hawaiian Plant Month at Pālehua.

My name is Elizabeth Fujii, I am the executive director at Pālehua Conservation Initiative. We formed in September 2023 to revitalize natural, cultural, and community resources in a dryland mixed mesic and mesic forest in the Wai‘anae Mountains. We are located in the ‘Ewa moku and ahupua‘a of Honouliuli. We currently steward 20 acres of forest across nine kīpuka and three cabin lots. We are caring for a watershed, native plants, habitat for endangered birds, snails, and pollinators, culturally sensitive areas, and uplifting event spaces.

Ke Kumu O Ke Ola is a community event celebrating native plants as sources of health for land and people, cultural connection, and kinship. We are bringing together cultural practitioners, educators, conservationists, and ‘ohana for hands-on learning centered on plants, seeds, soils, water, crafts, and mālama ‘āina. We are planning to serve families in ‘Ewa and Wai‘anae through guided learning stations, demonstrations of cultural practices that arise from pilina with plants, a guided interpretive hike, a workday, and a plant giveaway.

Pālehua is culturally significant, ecologically sensitive, and rugged in many areas, so we are gradually taking steps toward broader community engagement and access. Your support will help us ensure comfortable and supportive conditions for kūpuna and practitioners and a welcoming environment for families to engage as they want throughout the day. It will also provide modest support for our collaborators who do so much in the community and do not expect anything in return.

Liz Fujii: The event aligns with OHA strategic priorities of ‘āina, mo‘omeheu, and ‘ohana through ‘āina-based education and cultural practice. Throughout the day, we hope to strengthen a sense of identity, well-being, and kuleana to care for the forest. This area represents some of the most vulnerable and threatened ecosystems in Hawai‘i and on earth. Restoring this forest will take seven

generations, and your support will take us a step forward in weaving together community, culture, and conservation at Pālehua. Thank you.

Chair Waihe'e: Thank you, Liz.

Chair Waihe'e: Are there any questions for Liz?

There are none.

Chair Waihe'e: Okay, we will move on to Purple Mai'a Foundation – Hawai'i Cooperative Hui Gathering

BF Chair Staff Akina we have Keoni DeFranco

Keoni DeFranco (Purple Mai'a Foundation): ([1:02:40 – 1:06:30 / 1:53:20](#))

Aloha mai Chair and committee members, mahalo for your time and consideration today. O wau Keoni noho au ma Waimānalo. I would like to start by taking a quick moment to say that I am really stoked to watch Timote Ha'alilo play, mahalo nui e Kumu Makuakāne. Watching our renaissance happen in real time makes me so proud to be kanaka. Mahalo to all of our previous testifiers for such mana-full events, maika'i. This is what we are able to accomplish with the limited resources we can access today. Imagine if the state legislature properly funded OHA the full 20% of the Public Land Trust revenues they are constitutionally required to provide and as advocated for in OHA's House Bill 1358 from 2025. Maybe we should be asking for 40%, we would support OHA upping the ante, but I digress.

Mahalo nui for the opportunity to speak today in strong support of the Hawai'i Cooperative Hui Gathering and the funding being requested through the Ho'akoakoa lāhui sponsorship program submitted by the Purple Mai'a Foundation, which I represent today. This April 30, 2026 gathering in Waimānalo is about rebuilding an economy in Hawai'i that works for our people, rooted in 'oiwi values of laulima, kuleana, and aloha 'āina.

In May 2025, over 50 Hawai'i cooperative leaders, farmers, food producers, and community organizers from across Hawai'i came together for the first-ever pae 'āina wide cooperative gathering. This convening, co-organized by the Purple Mai'a Foundation and partners, confirmed something powerful: there is real momentum to build cooperative businesses as pathways for economic sovereignty, food security, and Waiwai community wealth across Hawai'i. Participants shared clear needs for technical training, legal and financial guidance, shared infrastructure, and stronger pilina across our islands. From that gathering, emerged the Hawai'i Cooperative Hui of over 80 members, which has been offering free bimonthly virtual workshops, trainings, and panels, and the vision for a second annual gathering in 2026 with the intention to build a Hawai'i Cooperative Federation of kōkua and support for this hui moving forward, incubated inside of the Purple Mai'a Foundation.

The upcoming Hawai'i Cooperative Hui Gathering will bring together nearly 100 participants, most of them Kānaka 'Ōiwi, for hands-on learning in cooperative governance, financing, policy, and ecosystem building. It will strengthen pilina, support new and existing cooperatives, and move forward a collective strategy for an 'āina-based regenerative economy.

Keoni DeFranco: This work directly aligns with OHA strategy 8 to cultivate economic development in Hawaiian communities and outcome 8.3 to operationalize indigenous economic systems rooted in Native Hawaiian values. Cooperatives mirror our traditional ahupua'a system, where resources, labor, and benefits circulated collectively to sustain our whole community. By supporting this gathering, OHA is investing in an economic future where wealth stays in community, workers share

ownership, and businesses serve people and 'āina, not outside extraction. The requested funds will directly support neighbor island travel and lodging for Kānaka 'Ōiwi, meeting space and mea 'ai, ensuring Native participation from across our kō Hawai'i pae 'āina. Ultimately, this gathering helps lay the foundation for a resilient, culturally grounded cooperative economy that strengthens 'ohana, food systems, and community self-determination. Mahalo nui for your consideration and continued commitment to building economic pathway is rooted in Ea and collective well-being.

Chair Waihe'e: Thank you, Keoni.

Chair Waihe'e recognizes Trustee Akaka ([1:06:30 / 1:53:20](#))

Trustee Akina: Mahalo, Keoni. I have a couple questions, first is how you folks got your name, Purple Mai'a.

Keoni DeFranco: Yeah, it's a great question, our two co-founders Olin and Donovan were trying to come up with a name that was a mix between 'Ōlelo Hawai'i and English, something that would make people ask that question, what does it mean? I think at the core, purple is one of the rarest colors that naturally occurs in nature, it's also the color of our queen. And when we look at the mai'a, the banana, that purple flower is the first growth. So that's a core part of it is that early growth within the mai'a plant is purple itself. And then we look at iholena, one of our 'ōiwi varieties of mai'a, of banana. There was mai'a banana that was kapu for wahine to eat, but the iholena, at least according to the practitioners we've spoken to was known for all. So that's sort of the core of Purple Mai'a.

Trustee Akina: Mahalo for that background. You touched on something that I wanted to mention at some point in this meeting regarding the legislature and testimony and supporting the Office of Hawaiian Affairs so that we can support our community and our beneficiaries. I want to highlight that I would be interested in seeing how our Grants department and those that oversee our sponsorships and that process if we could include when it comes to correspondence if whether the group is sponsored or receives grants or not if they're open to being included in a list of those that we kahea upon when it comes to testimony at the legislature in various matter that really we need to really draw attention to. So mahalo for mentioning that and I think that it's important that we be able to engage our community to advocate alongside us when it comes to our pro-rata share or anything that needs our attention and advocacy and testimony and so forth. So, mahalo nui Keoni, for mentioning that.

Chair Waihe'e: Mahalo Keoni.

Chair Waihe'e recognizes Trustee Lindsey

Trustee Lindsey: Thank you, Chair. I have a discussion from with our administration. So Ho'ākoakoa is an event sponsorship, right? Having listened to the testimonies from our beneficiaries that came to support, and by the way I do support all of these items. However, there's some programs mixed in with events in this 13, maybe three or four events programs. I'm just wondering how are we putting it into sponsorship program, it's mixed up with events and they're not events, it's programs that's stretched over 30 days, and I don't want to name non-profits, but it's just a question of process for our administration. We should not be putting programs into the sponsorships, and we can discuss it afterwards if I need to share the different entities.

Grants Manager Belay: Sure, thank you Trustee for the question. So part of Ho'ākoakoa's programming is that community groups can hold workshops and as long as they're held multiple days within a 30-day period, they're allowed to come in and complete the application, and we forward them through the evaluators.

Trustee Lindsey: I accept your explanation. I may not agree with it, but I accept it and we can discuss it later.

Chair Waihe'e recognizes Trustee Souza ([1:11:30 / 1:53:20](#))

Trustee Souza: I just want to add to that Chair Emerita because I brought up the question to Chantel as well, because I identified an organization I'm not going to mention the name that we are providing funding to who is supposed to be doing that anyway, and so they kind of cleared it up. I think that funding was removed at a certain point and they're distributing other funds for us which does not include workshops currently. So, I think that may be one of your questions, that was definitely one of mine. Mahalo

Chair Waihe'e Okay, members, is there any more discussion on the motion?

Ka Pou Nui Kekina: Actually, Chair, before we move on, we are going to just be prefacing to all of the Trustees that we have two inquiries right now, that we're going to be following up on and we will have more information as it comes to light in tomorrow's BOT meeting.

Chair Waihe'e Okay.

Chair Waihe'e recognizes Trustee Kahele

Trustee Kahele: Hi, I guess this question would be for the administration, Chantelle, looking at two of the sponsorships. One of them is for Purple Mai'a and the other one is for the Boys and Girls Club. When looking at the scoring sheets for both of these sponsorships, the suggested amount for Purple Mai'a was \$11,250 which was also the Boys and Girls Club, they both scored an 83 but Purple Mai'a is being awarded \$15,000. Can you just help me understand the comparison between the two? And when I compare the Purple Mai'a's estimated attendance and estimated Native Hawaiians and the Boys and Girls Club estimated attendance and estimated Native Hawaiians, the Boys and Girls Club has a higher amount of attendance and Native Hawaiian attendance. Both again scored an 83, and were recommended for \$11,250, but Purple Mai'a has been awarded \$15,000. So just trying to figure out the thought process there with these two sponsorships

Grants Manager Belay: Sure, thank you for the question. I think what we're looking at here is, we moved the process to Foundant and so we have some bugs to work out. The attachments may not be the most accurate reflection of the scoring, so for Purple Mai'a the scoring actually came out to a 46 and 45 by the evaluators which when the evaluators recalibrate may not be saving accurately, so they actually have a higher score than the Boys and Girls Club which came in at a 43 and 40 with the evaluators, so they would get the 75% and Purple Mai'a received in the 100% tier.

Trustee Kahele: But is that being accurately presented in the materials before the Board or is that an internal clerical error or issue?

Grants Manager Belay: Yes, that might be internal. I can follow up right away on the forms, we had some issues with during the recalibration period. The forms were not saving even though the evaluators were going in repeatedly saving it still wasn't reflecting accurately. So, I will bring the corrected materials.

Trustee Kahele: Okay, how about we do this, I'm happy to support it in the committee today, but when we bring it in front of the Board for final approval, I'd like to have the accurate scoring sheets for

both of the sponsorship applications and make sure that it's accurate and that we're awarding the right amount. We could always make an amendment if you do identify a discrepancy at the final approval at the board meeting, but I just wanted to highlight that for today's purposes.

Grants Manager Belay: Yes. Thank you. We'll bring that forward.

Trustee Kahele: Okay. Thanks, chair.

Chair Waihe'e Okay, members if there's not further discussion. Here's the motion on the table.

Chair Waihe'e moves to approve and authorize OHA funding for Ho'ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025-2026, Quarter 4 (Batch 1):

#	Organization Name	Event	Event Date(s)	Award Amount Recommendation
1	Ho'oma'a Foundation	Rell Sunn Menehune Contest	April 4-5, 2026	\$11,250
2	Imi Ola Canoe Club	Inaugural 'Imi Ola Canoe Club Long Distance Race	April 4, 2026	\$14,852
3	Hawai'i Opera Theatre	Ho'oulu Festival: Kamalehua World Premiere	April 5 – May 5, 2026	\$15,000
4	Institute for Native Pacific Education and Culture (INPEACE)	Preschool Here I Come (PHIC)	April 6-24, 2026	\$15,000
5	'Āwili	Kālai Hawai'i: Youth Council Launch & Advocacy Summit	April 6 - May 1, 2026	\$15,000
6	Nā Leo Kāko'o o Ko'olauloa	Aloha Ko'olauloa	April 11, 2026	\$7,343
7	Hānai Kaiāulu	Maku'u Cardboard to Soil Festival	April 12, 2026	\$10,500
8	Four Strings at a Time	'Ukulele Summit	April 18, 2026	\$11,250
9	Hawaiian Community Assets	Project Maka'ala: Fraud & Scams Can Happen to Anyone	April 23 – May 21, 2026	\$15,000
10	Boys & Girls Club of Hawaii	Project Hope	April 25, 2026	\$11,250
11	Nā Pu'uwai Native Hawaiian Health Care System	Nā Pu'uwai Hō'ike Mana 2026	April 25, 2026	\$14,998
12	Pālehua Conservation Initiative	Ke Kumu O Ke Ola	April 25, 2026	\$7,500
13	Purple Mai'a Foundation	Hawai'i Cooperative Hui Gathering	April 30, 2026	\$15,000
			TOTAL	\$163,943

Chair Waihe'e calls for a Roll Call Vote

12:21 p.m.						1:16:30 / 1:53:20	
TRUSTEE		1	2	'AE (YES)	A'OLE (NO)	KANALUA (ABSTAIN)	EXCUSED
VICE-CHAIR DAN	AHUNA			X			
KALEIHIKINA	AKAKA			X			
KELI'I	AKINA			X			

LUANA	ALAPA			X			
BRICKWOOD	GALUTERIA			X			
KAIALI'I	KAHELE			X			
CARMEN HULU	LINDSEY			X			
J. KEONI	SOUZA			X			
CHAIR JOHN	WAIHE'E	1		X			
TOTAL VOTE COUNT				9	0	0	0

VOTE: [X] UNANIMOUS [] PASSED [] DEFERRED [] FAILED

Chair Waihe'e notes for the record that ALL (9) members present vote 'AE (YES) and the MOTION PASSES.

III. NEW BUSINESS

A. Action Item BF #26-01:

Approval of a \$500,000 budget for the Permitted Interaction Group (PIG), established by BOT Action Item #25-18 on December 18, 2025, for the purpose of negotiating the official position of the Office of Hawaiian Affairs (OHA) regarding U.S. military land leases scheduled to expire between 2028 and 2031 with the United States Army, United States Air Force, United States Navy, and the National Aeronautics and Space Administration (NASA)

Chair Waihe'e asks if there is anyone signed up to testify on this item.

BF Chair Staff Akina states that Germain Meyers is present to testify.

Germaine Meyers – (1:18:10 – 1:22:50 / 1:53:20)

Thank you, Chair. Aloha Chair and honorable trustees. My name is Germaine Meyers, and I am an OHA beneficiary and a Nānākuli Hawaiian Homestead lessee. Mahalo for the opportunity to provide testimony on action item BF-26-01, the proposed \$500,000 allocation for a Permitted Interaction Group to negotiate OHA's position regarding U.S. military land leases expiring between 2028 and 2031.

First, I want to raise a process concern. Why is this committee being asked to review and advance a budget proposed by the Chair and administration that was never reviewed or discussed by the PIG itself before being brought to Budget and Finance? That undermines the purpose of a permitted interaction group and places this committee in the position of approving substance before process. We have seen this pattern before, including the rushed \$14,500 budget request that came before this committee just two days before an OHA employee holiday party. Budget urgency should not replace planning or transparency.

Germaine Meyers: During last week's meeting, Chair Kahele referenced the fiscal year 2026 National Defense Authorization Act, stating that Section 2831 empowered OHA and DHHL to speak for Native Hawaiians in military land lease negotiations. That statement is not accurate, and it is important to correct the record. On October 9, 2025, the U.S. Senate passed S.2296, its version of the fiscal year 2026 NDAA. Section 2831, as passed by the Senate, authorized the Secretary of each military department to pursue land exchanges or leases involving State of Hawai'i lands, including limited monetary or in-kind consideration and lease terms of up to 50 years. Nowhere in the Senate-

passed version did Section 2831 authorize OHA or DHHL to represent or negotiate on behalf of Native Hawaiians. Before the President signed the NDAA, Congress adopted the House version, S.1071, approved on December 10, 2025. In the final enacted National Defense Authorization Act, Section 2831 was repurposed to address inspections of privatized and government-owned military housing. The language referencing OHA and DHHL consultation applies specifically to U.S. Coast Guard transactions in the House version, not to all armed forces or land lease renewals. That distinction matters. Overstating OHA's statutory authority does not strengthen OHA's position, it weakens it. This is why I support only a \$60,000 allocation to complete the Nā Pa'akai analysis. If OHA intends to engage meaningfully in Coast Guard negotiations, including financial settlements and mitigation, only the Coast Guard, it must rely on evidence, not assumptions. The Nā Pa'akai analysis documents, traditional and customary practices, impacts to Native Hawaiian rights, and cultural subsistence, and environmental findings that federal agencies are legally required to address. If OHA is serious about accountability and stewardship, then we must be precise about what Federal law actually authorizes, respect internal processes, and invest in tools that strengthen OHA's negotiating position with the Coast Guard only.

For those reasons, I urge the committee to support only \$60,000 for the Nā Pa'akai analysis and to exercise caution and transparency with respect to the rest of the proposed PIG budget. Ke Akua pū, God bless all of you.

Chair Waihe'e: Thank you, Germaine.

Chair Waihe'e moves to approve a \$500,000 budget for the Permitted Interaction Group (PIG) established by BOT Action Item #25-18 on December 18, 2025, for the purpose of negotiating the official position of the Office of Hawaiian Affairs (OHA) regarding U.S. military land leases scheduled to expire between 2028 and 2031 with the United States Army, United States Air Force, United States Navy, and the National Aeronautics and Space Administration (NASA), which may include, as appropriate, including funding for Ka Pa'akai and Public Trust analyses for the proposed land retention at the Pōhakuloa Training Area (Hawai'i Island), Kahuku Training Area, Mākua Military Reservation, Kawaihoa-Poamoho Training Area (O'ahu), and the Pacific Missile Range Facility (Kaua'i); advocacy efforts with elected officials in the State of Hawai'i and Washington, D.C., including statewide community briefings and listening sessions; a multi-platform communication strategy using long-form, short-form, and digital media to educate OHA beneficiaries, policymakers, and the general public statewide; and the establishment of a technical advisor working group of subject matter experts to advise PIG members, including a site visit to the island of Kaho'olawe in 2026. [\(1:23:00 / 1:53:20\)](#)

Chair Waihe'e: Before we continue, this motion was deferred from last week's meeting. There are some differences in this action item than were in that one, so I'll call upon K. Sean or someone from Administration that can explain what was added.

Ka Pou Nui Kekina: I am going to call Summer Sylva or Corp Counsel depending on who is prepared to speak. Mahalo. [\(1:26:30 / 1:53:20\)](#)

Ka Pouhana Kuikawā Sylva: Mahalo, so the request from last week was to provide more detailed information around the budget and to be as specific as possible. So in sum, the efforts to speak to that particular concern and address what could be approximated, because this budget is an anticipatory one, so we're trying to be as planful as possible in real time, but then also leave some room for adjustments both on the upper end of the scale and also adjustments that maybe we don't

need to undertake. So there's room for both, but in very sort of summary terms, we just provided more detail in the tables

Chair Waihe'e recognizes Trustee Alapa

Trustee Alapa: I'd like to ask if Bill Brennan is in the house and can come up.

Communications Director Brennan: Aloha Trustee

Trustee Alapa: I have a question regarding your multimedia platform, in regards to the TV broadcast and so forth, videos made, promotions and so forth, social media. Now my question is do you have already designated folks to be in this video? Would it be any of us Trustees? Would it be people of expertise from certain background that would be applicable to being in these videos?

Communications Director Brennan: No, not yet, we'll be consulted. We'll work with a production company to put something together, but we would need approval before we would take those steps. So, we have not, generally speaking, we have some concepts, some ideas that we want to make sure are included in a program like that, but we haven't gotten down to the details that you're referring to yet.

Trustee Alapa: So, once this goes through then you folks obviously will be working on it and getting back to us as to who'll be participating and so forth.

Communications Director Brennan: Of course.

Trustee Alapa: Okay, I'm just thinking because you know it's an election year so..

Communications Director Brennan: Yeah, that'll be part of the consideration.

Trustee Alapa: Okay, Thanks.

Vice Chair Ahuna recognizes Trustee Kahele

Trustee Kahele: Thanks so much for recognizing me. So, first of all, I want to mahalo the administration for their hard work over the last week and really the seriousness and the charge that they took from the Trustees at last week's B&F meeting to provide more detailed information on the various different expenditures and proposed categories of expenditures that would be made through the PIG's effort over the next year. One of the things that was in the action item that the Board adopted in December, just to remind all of us, which the Board approved, was that a budget be brought in front of the Budget and Finance Committee in the first quarter of 2026, and that it address the six specific measurable directives that the negotiating PIG was tasked to come up with.

Trustee Kahele: The negotiating PIG did meet in concept, I discussed with the PIG members a budget that would meet the directives of the Board's action item in December, and this is the budget and the proposal that is in front of us. ([1:31:40 / 1:53:20](#))

The opportunity to gain feedback in an open session with the other Trustees who are not part of the PIG is exactly why we have to go through this process. So, the request was for more detailed information and that is exactly what the administration did. I want to thank them, especially Grace

and Bill and Leina'ala and the advocacy team for really diving into specific details of what these trust funds would be used for in a multi-pronged approach and strategy as we approach this military lease lands issue that's the Office of Hawaiian Affairs is facing. If we as a Board feel that this is one of the most consequential land issues of our generation, then we have to apply the right strategy and dedicate the resources to do that. The strategy and executing that strategy doesn't come without cost. And I think that this budget that is in front of the committee, that is pretty flushed out and is pretty much down to the detail, meets what the majority of the Board requested last week.

I'd also emphasize, this is a year-long strategy and approach. It's a multi-pronged effort that does a bunch of different things, and I would encourage all of us to support it. It has checks and balances in the action item, in terms of how funds are expended. So, no one director or no one Trustee or no group of Trustees or no manager can unilaterally make a decision and spend trust funds. It requires three independent individuals to authorize that. The PIG also sunsets the day before the November 3rd general election, and any funds not used returns back to the Native Hawaiian Trust Fund.

So, the purpose of the resource is not so that we have to come back at a different point of the year for more resources, but to give as much as we think is reasonably prudent for the type of issue that we're trying to address and what we're trying to bring in terms of education and empowerment to our Lāhui and the broader electorate in Hawaii. And this allows OHA to meet that moment. I also believe it allows OHA to use the opportunity to build leverage in our position in negotiating whatever future dispossession is of these military land leases. And that's really important, if we are silent on this issue and we can only do so much with the limited resources we have if the efforts of the permitted interaction group and this budget is not funded. We lose the opportunity to have leverage. We lose that opportunity at the state level, at the federal level, in the public sphere and in public opinion. So, I really think that giving this negotiating PIG the opportunity to get out of the gate and get rocking and rolling and get it running is really important for what we want to achieve on this particular issue and I would I strongly support it.

I want to thank the administration for their hard work on it, a level of detail that we don't too often see at least in other action items we've passed and in other things that this Board has done, so I want to commend them for their work and their efforts and I would ask for your consideration in supporting it and moving forward. Mahalo.

Chair Waihe'e recognizes Trustee Galuteria

Trustee Galuteria: Not having addressed the message, we're just addressing the expenditure. I'll be voting in favor of it because as I take a look and drill down into some of these figures, this is consistent with regular media buys. Unless we own our own stations until such time, we're going to have to play along with everybody else. Right? So, what I'm seeing is 500,000 will cover what we need, I think, for now, and if we need more, you'll come back. But this is sufficient judging from the figures that I'm taking a look at.

Ka Pouhana Kuikawā Sylva: Yes, and I will say if we need less then they will be absorbed, they won't be expended, they'll remain in our trust resources. Yes. ([1:36:35 / 1:53:20](#))

Trustee Galuteria: Okay, thank you.

Chair Waihe'e recognizes Vice-Chair Ahuna

Vice-Chair Ahuna: I just wanted to offer up some comments. Attending all these meetings that's been happening on the military leases. It's the beneficiaries who have mentioned to add a little budget for this PIG committee and also last week Uncle Walter Ritte came here and these are the guys on the front line so I'm here to support it. Thank you.

Chair Waihe'e recognizes Trustee Souza

Trustee Souza: I'd also like to show support for this action item. I will be voting in favor of it. Last week a comment came out about we should seek advice from our beneficiaries, see what they think. There's a number of \$500,000 that was thrown out by Uncle Walter. I talked to another beneficiary who said a million dollar. So, I was coming here today to make the amendment, but we're having a hard enough time passing \$500,000. So, I'll just stick with the 500,000 for now. Thank you

Chair Waihe'e: I'm curious, just because I wasn't here last week. The plan is we're going to get the the PIG's recommendation before we proceed with doing all the kind of media and lobbying things. All those expenses happen after that recommendation comes out.

An inaudible assurance was given.

Chair Waihe'e: Okay

Chair Waihe'e recognizes Trustee Akaka

Trustee Akaka: Mahalo, in this multi-platform communications breakdown at the very bottom it mentions OHA-Composed Advocacy Mele Production, if you folks could elaborate on that.

Ka Pouhana Kuikawā Sylva: Yes, this is such a meaningful, consequential moment in time. It invokes memories of the Kaho'olawe protection effort, all of our lāhui is moving, everyone's galvanized around a particular initiative because it's so resonant, it's so urgent, it's so consequential and so the idea around the advocacy mele is about uplifting an anthem if you will, a kahea, leaving room in the budget to get some of our artists from the community to help us create a galvanizing and meaningful, for this moment kind of anthem. So, we budgeted for that particular opportunity because symbolism and input from practitioners, from diverse voices, not just technical experts, but kumu, our people who craft mele, our hālau, all of them have a role to play in this particular response to what is a very consequential moment that will have legacy effects for multiple generations if we don't get in front of it, if our advocacy doesn't help inform and safeguard and protect what is meaningful and valuable to our lāhui

Chair Waihe'e recognizes Trustee Kahele

Trustee Kahele: Hey, great question Trustee Akaka and thank you for identifying that in the budget. If you remember the Project Kuleana videos, and they were really anthem inspiring videos that were done and I'll give you some examples of them.

Trustee Kahele: The *All Hawaii Stand Together* was one of them with Liko Martin, you can watch his on YouTube. *Kaulana Nā Pua* was another one, very powerful mele and video that was done by Project Kuleana. ([1:41:00 / 1:53:20](#))

Where are the Brothers, was another one that talked to incarceration and injustice in our kāne. The anthem composed by Kumu Hina, I'm sure we're all familiar with that, it was done in the studio. I think even Kale Hannahs was in that as well. So these kānaka inspiring mele set to music, set to place

with some of Hawai'i's most inspiring musical artists and orators and 'āina warriors is what the vision was for this, especially given the 50th anniversary of the landing of Kaho'olawe and so it would probably begin before that, but would definitely include much of that and then it would jump to today and so we put it into the budget. Really it's from talking to people at Project Kuleana and those that have done this, it's probably not enough but some, an initial seed money to start with at least in our budget so we can toss it around and chew it. There's no definitive decision made on whether we would do that or not, I think that is something that the concept of it and what it would look like would need to come in front of the Board for production, but it's in there because we think it's important and it can serve as a rallying cry for our people and bring people together on this issue. So, thanks for the question and allowing me to clarify that expenditure.

Chair Waihe'e: Yeah, we used to, OHA used to produce television programs like we the Kamakako'i series where we would feature different event causes, so this wouldn't be out of character for things we've done in the past. And if it succeeds, we may want to continue this kind of thing with other types of issues. But my only hesitation is hiring a lobbyist because I don't have good feelings about spending money on lobbyists, but that could be necessary.

Chair Waihe'e recognizes Trustee Alapa

Trustee Alapa: Thank you, this is in regards to the advocacy budget ([BF Folder page 16](#)) 2.b. Maui to Kaho'olawe travel and 25,000 set aside but there's 25 persons going, do we have an idea of who they are or is that including any of us or other people outside of us or combination?

Trustee Kahele: I can also answer that question.

Trustee Alapa: Thank you.

Trustee Kahele: I definitely think that I would like all trustees to be able to attend, I know our Vice-Chair who is also a member of the Kaho'olawe Island Reserve Commission is planning an opportunity for us to go to Kaho'olawe in the summer. I also want to be mindful of the Protect Kaho'olawe organization and their area, where they mālama on Kaho'olawe because I really feel like being able to see both aspects of Kaho'olawe is very important. I said last week I for one have never been there, so I'm really looking forward to this opportunity. Beyond the trustees, obviously are key members of our technical advisory group, people we think are really important, would be able to take us there. Maybe the Vice-Chair can speak to KIRC's limitations on how much people can go based on KIRC's numbers, and how much they can accommodate there. The PKO is a little bit of a different animal in terms of, I have heard you need to swim in from the boat to the beach and it's much different than the KIRC camp, but my goal is that we can all experience this, and it can help us frame ourselves in how we approach this particular issue. I also think there'll be people on the technical advisory group that may not necessarily agree with their particular viewpoints on this issue and they may have never been to Kaho'olawe as well and that would give them a perspective to see and feel the island, and the issue through the eyes of people like Uncle Walter, and Daviana McGregor and others that have led deeply on this issue. So hopefully that answers your question. Trustee Alapa.

Trustee Alapa: Mahalo.

Chair Waihe'e recognizes Trustee Akina ([1:46:15 / 1:53:20](#))

Trustee Akina: Thank you very much, I'll be very brief. I'll be voting no, and that doesn't mean that I disagree with most of what has been said. I stand with the Board on our need to go forward and represent the Hawaiian people, but the way we do things has to be done the right way.

First of all, I think it's important for us to define our position and our message; we have not done the work of that.

Secondly, I think it's important for us to set the right precedent in budgeting; we are now again doing ad hoc budgeting. We are justifying the budget by saying that there's extra money left over that has not been spent on filling positions, which we have defined as essential positions for OHA. The money is coming from what was not spent in the last six months of 2025, because we weren't able to find the employees to fill the positions that we've set as priority, and that's been called surplus. I don't think it's surplus, it had an intention. So, it's in goodwill that I'm going to withhold my yes vote, but I hope we can go forward with that. I also apologize that because of scheduling today I'm going to have to leave unless someone else wants to say anything then I'll call for the question.

Chair Waihe'e recognizes Trustee Souza

Trustee Souza: Real fast going back to Trusty Alapa's inquiry, it's actually 21 travelers to Kaho'olawe, not 25, and it's broken down in the packet. Thank you, administration.

Also having conversation recently with uh Mike Naho'opi'i, we're looking at at least 15 members. So like when Summer mentioned earlier, the numbers could also change and the budget could change as well. We may not need the entire budget, but we want to provide opportunity for as many as possible from OHA. 50 years advocating, Uncle Walter Ritte, a lot of our trustees and administration hasn't stepped foot on the island and OHA has a seat at the table on the Kaho'olawe Island Reserve Commission, which I'm fortunate to sit in and Chair Emerita was in before, and so I think we should understand our audience, know what we're talking about. We don't want to throw out numbers or not support something. We have to know what we're talking about, so visiting Kaho'olawe to me is a big part of this budget. Mahalo

Chair Waihe'e recognizes Ka Pouhana Kuikawā Sylva

Ka Pouhana Kuikawā Sylva: I just wanted to be able to respond pointedly to your (*Trustee Akina*) thoughtful and deliberate message.

First, it's always been my understanding, and continues to be that this Board is united in supporting the advocacy effort. I think the one nuance is that if we're going to engage in meaningful consultation, it actually takes some funds upfront in order to allow for the community to inform our final decision-making position or statement. So, the investment of funds upfront allows for consultation to happen so that the PIG and by way of its recommendation to the full Board isn't predetermining its position or its statement, it's actually being informed by all of the Ka Pa'akai analyses that we have to pay for in advance to get the recommendations out of that. That it has

to happen with each of our pae 'āina visits with community in order to get their recommendations and inform our decision and also no different than the site visits at Kaho'olawe, what lessons we can learn from there, or what kind of expertise we can learn from the assembly of technical experts whose time and travel and lodging need to be compensated for.

Ka Pouhana Kuikawā Sylva: So, we are in agreement that advocacy is at the heart of this particular initiative. But in order to reassure our community that OHA has not taken a predetermined stance, that it is still an evolving decision-making mode that will be informed by the feedback our of lāhui we

have to make some initial investments, before we come to that crystallized statement or position.
Thank you

Chair Waihe'e If there's no further discussion, Trustee Akina wanted to call for the question

Chair Waihe'e calls for a **ROLL CALL VOTE**.

12:54 p.m.							1:51:10 / 1:53:20
TRUSTEE		1	2	'AE (YES)	A'OLE (NO)	KANALUA (ABSTAIN)	EXCUSED
VICE-CHAIR DAN	AHUNA	1		X			
KALEIHIKINA	AKAKA			X			
KELI'I	AKINA				X		
LUANA	ALAPA			X			
BRICKWOOD	GALUTERIA			X			
KAIALI'I	KAHELE			X			
CARMEN HULU	LINDSEY					X	
J. KEONI	SOUZA			X			
CHAIR JOHN	WAIHE'E			X			
TOTAL VOTE COUNT				7	1	1	0

VOTE: [] UNANIMOUS [X] PASSED [] DEFERRED [] FAILED

Chair Waihe'e notes for the record that SEVEN (7) members present vote 'AE (YES), ONE (1) Member vote A'OLE (NO) and ONE (1) KANALUA (ABSTAIN) and the **MOTION PASSES**.

V. ADJOURNMENT

Trustee Souza moves to adjourn the BF meeting.

Chair Waihe'e calls for a **ROLL CALL VOTE**.

12:56 p.m.							1:52:10 / 1:53:20
TRUSTEE		1	2	'AE (YES)	A'OLE (NO)	KANALUA (ABSTAIN)	EXCUSED
VICE-CHAIR DAN	AHUNA			X			
KALEIHIKINA	AKAKA			X			
KELI'I	AKINA						Departed at 12:55p.m.
LUANA	ALAPA			X			
BRICKWOOD	GALUTERIA			X			
KAIALI'I	KAHELE			X			
CARMEN HULU	LINDSEY			X			
J. KEONI	SOUZA	1		X			
CHAIR JOHN	WAIHE'E			X			
TOTAL VOTE COUNT				8	0	0	1

VOTE: [X] UNANIMOUS [] PASSED [] DEFERRED [] FAILED

Chair Waihe'e adjourns the BF meeting at 12:56 p.m.

Respectfully submitted,

Melissa Wennihan
Trustee Aide
Committee on Budget and Finance

As approved by the Committee on Budget and Finance (BF) on March 4, 2026

Trustee John Waihee IV
Chair
Committee on Budget and Finance



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ölelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. New Business
 - A. **Action Item BF #26-04:** Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

**STATE OF HAWAI'I
OFFICE OF HAWAIIAN AFFAIRS
560 N. NIMITZ HIGHWAY, SUITE 200
(VIRTUAL MEETING - VIA ZOOM WEBINAR)
COMMITTEE ON BUDGET AND FINANCE
MINUTES**

February 18, 2026 10:00 a.m.

(or immediately following the conclusion of the OHA Investment and Land Management (ILM) Committee Meeting)

FULL MEETING CAN BE VIEWED AT [02/18/26 Budget and Finance \(BF\) Meeting](#)

ATTENDANCE:

Chairperson John Waihe'e, IV
Trustee Kaleihikina Akaka
Trustee Keli'i Akina
Trustee Luana Alapa
Trustee Brickwood Galuteria
Trustee Kaiali'i Kahele
Trustee C. Hulu Lindsey
Trustee J. Keoni Souza

Melissa Wennihan
Nathan Takeuchi
Pohailani Kealoha
Remy Keliioomalua

ADMINISTRATION STAFF:

Summer Sylva, Interim CEO / Administrator
K. Sean Kekina, COO / Ka Pou Nui
Bill Brennan, *Director of Communications*
Chantelle Belay, *Grants Manager*
Daniel Santos, *IT Systems Engineer & Administrator*
Everett Ohta, *Senior Legal Counsel*
Grace Chen, *Budget Chief*
Kuuleianuheia Awo-Chun, *Director of Education & Culture-Based Learning*
Ryan Lee, *Investment Director, Interim CFO*

EXCUSED:

Vice-Chairperson Dan Ahuna

BOARD COUNSEL:

Kapono Kiakona

BOT STAFF:

Crayn Akina
Mark Watanabe

GUESTS:

Janice English
Taffi Wise

I. CALL TO ORDER

Chair Waihe'e calls the Committee on Budget and Finance meeting for Wednesday, February 18, 2026 to order at **10:33 a.m. (2:30 / 17:00)**

Chair Waihe'e notes for the record that **PRESENT** are:

MEMBERS			AT CALL TO ORDER (10:33 a.m.)	TIME ARRIVED
CHAIR	JOHN	WAIHE'E, IV	PRESENT	
TRUSTEE	KALEIHIKINA	AKAKA	PRESENT	
TRUSTEE	KELI'I	AKINA	PRESENT	
TRUSTEE	LUANA	ALAPA		Arrived at 10:34 a.m.
TRUSTEE	BRICKWOOD	GALUTERIA		Arrived at 10:35 a.m.
TRUSTEE	KAIALI'I	KAHELE		Arrived at 10:45 a.m.
TRUSTEE	C. HULU	LINDSEY	PRESENT	
TRUSTEE	J. KEONI	SOUZA	PRESENT	

At the Call to Order, **FIVE (5) Trustees are PRESENT**, thereby constituting a quorum.

EXCUSED from the BF Meeting are:

MEMBERS			COMMENT
VICE-CHAIR	DAN	AHUNA	MEMO – REQUESTING TO BE EXCUSED

II. APPROVAL OF MINUTES

A. January 28, 2026

Chair Waihe'e moves to approve the Minutes of January 28, 2026. (6:35 / 17:00)

Chair Waihe'e asks if anyone has signed up to testify on this item.

BF Chair Staff Akina states that no one is signed up to testify on this agenda item.

Chair Waihe'e asks if there are any changes.

There are none.

Chair Waihe'e calls for a Roll Call Vote

10:37 a.m.							7:00 / 17:00
TRUSTEE		1	2	'AE (YES)	A'OLE (NO)	KANALUA (ABSTAIN)	EXCUSED
VICE-CHAIR DAN	AHUNA						EXCUSED
KALEIHIKINA	AKAKA			X			
KELI'I	AKINA			X			
LUANA	ALAPA			X			
BRICKWOOD	GALUTERIA			X			
KAIALI'I	KAHELE						Arrived at 10:45 a.m.
CARMEN HULU	LINDSEY			X			
J. KEONI	SOUZA			X			
CHAIR JOHN	WAIHE'E	1		X			
TOTAL VOTE COUNT				7	0	0	2

VOTE: [] UNANIMOUS [X] PASSED [] DEFERRED [] FAILED

Chair Waihe'e notes for the record that ALL (7) members present vote 'AE (YES) and the MOTION PASSES.

III. NEW BUSINESS

A. Action Item BF #26-03: Approval of the reallocation of \$50,000 from Account 57255 (Conference/Meetings – Strategy & Implementation) to Account 56540 (Grants in Aid Level II) within Program 7110 (Educational Pathways) to support Ku'i Ka Lono Conference

Chair Waihe'e moves to approve the reallocation of \$50,000 from Account 57255 (Conferences/Meetings – Strategy & Implementation) to Account 56540 (Grants in Aid Level II) within Program 7110 (Educational Pathways), and authorize amendment of the existing grant agreement with Kanu o ka 'Āina Learning 'Ohana (KALO) as the recipient to support implementation of the Ku'i Ka Lono Conference. (7:35 / 17:00)

Chair Waihe'e asks if there is anyone signed up to testify on this item.

BF Chair Staff Akina states that Janice English as raised her hand online to testify.

Janice English – (9:20 / 17:00)

Aloha, my name is Janice English. I am the po‘o at the Waimea Middle Public Conversion Charter School, one of 17 Hawaiian-Focused Charter Schools that you all support. I am in support of the financial request to release \$50,000 to support. I attended the last 10 years as a chaperone, and I have improved relationship with haumana because of these experiences, so I am in support. Mahalo.

Chair Waihe‘e recognizes Ka Pou Nui K. Sean Kekina

Ka Pou Nui Kekina: Mahalo nui, I will turn this over to Anuheia for her presentation.

Director of Education and Culture-Based Learning Awo-Chun: Mahalo, Trustees. I have Taffi Wise who is the Executive Director of Kanu o ka ‘Āina with me virtually to talk today as well, so I’ll just take a brief moment to talk about the actual action item, and then I’ll push it over to Taffi to talk about the conference itself, the aims and objectives and all of the wonderful things they’re going to do.

So, the action item today is requesting a change in the budget line item from account code 57255 which is for conferences organized by OHA, and we’re asking to change it to 56540, Grants in Aid so that we can allow those funds to be added into a contract that KALO already has with OHA, and then that will allow them to spend down the funds for the things that they need to use it for; like airfare for student travel, ground transportation for the schools and some of the other things that they have listed in what they submitted.

So the funds are already allocated, it was already in the Biennium budget, and what we’re asking for is a coding change to make the spending of the funds a little more efficient for KALO’s purposes.

So, I think if the spirit and intention was to support the kids and to allow OHA to have a collaboration in that process, that has definitely occurred. So even if the budget code shifts, we were still incorporated and included in all planning and thinking and leading up to what the schools and KALO is going to talk about. So, there was a very intentional and collaborative effort to incorporate our education team in all the things leading up to the Ku‘i Ka Lono Conference.

The schools are very excited about the things they’re planning this year. So, what the action item is asking for is a change in the coding and an amendment to an already existing contract and I’m going to let Taffi talk a little more about the conference itself.

Chair Waihe‘e states for clarification that we’re still using the money for the purpose it was budgeted for, it’s clerical adjustment so KANU can execute the conference themselves.

Director of Education and Culture-Based Learning Awo-Chun: Yes, it will allow them to make the arrangements, book the bookings, or reimburse the schools versus OHA’s paia doing it.

Chair Waihe‘e: Okay, let’s turn it over to Taffi.

Kanu o ka ‘Āina Learning ‘Ohana Chief Executive Director Wise: Aloha Kakahiaka Chair and Trustees and wonderful staff. O wau Taffi U‘ilei Wise, po‘o Kanu o ka ‘Āina Learning ‘Ohana a me Nā Lei Na‘auao. Mahalo for letting me be with you today, especially virtually, I didn’t want to be on a plane with 50 mph gusts, so mahalo nui.

OHA’s collaboration and partnership, specifically in the last 10 years or so, has really strengthened Nā Lei Naauao’s organizational capacity as a Native network and a public education sector.

Kanu o ka ‘Aina Learning ‘Ohana Chief Executive Director Wise: This conference is key to bringing our haumāna, our kumu, and leaders together to share best practice, hō‘ike and really be authentic with each other in our own spaces. [\(14:05 / 17:00\)](#)

We rotate the conference every year; a school volunteers to host. This year it’s at Ke Kula Ni‘ihau o Kekaha, po‘o Tia is apologizing for the delay, she had to take care of a student issue, but if she can make it, she’ll jump in at any moment.

Just to give you some data, right now we have about 4,721 haumāna in the Nā Lei Na‘auao network, that is 17 kula. Of that, 82% are Kanaka, 95% are Title I or economically disadvantaged, and right now we are serving five islands, to include Maui. So, Ku‘i Ka Lono event directly advances our shared priorities to strengthen and set the foundation of ‘ike Hawai‘i, ‘ōpio leadership, culture-based education, and mālama ‘āina. I did send an internal planning packet for you to review, and I’m happy to take any questions or concerns you may have.

Chair Waihe‘e: Thank you, Taffi.

Chair Waihe‘e asks if there are any questions.

There are none.

Chair Waihe‘e calls for a **ROLL CALL VOTE**.

10:46 a.m.						15:33 / 17:00
TRUSTEE	1	2	'AE (YES)	A'OLE (NO)	KANALUA (ABSTAIN)	EXCUSED
VICE-CHAIR DAN AHUNA						EXCUSED
KALEIHIKINA AKAKA			X			
KELI'I AKINA			X			
LUANA ALAPA						Departed at 10:43a.m.
BRICKWOOD GALUTERIA			X			
KAIALI'I KAHELE			X			
CARMEN HULU LINDSEY			X			
J. KEONI SOUZA			X			
CHAIR JOHN WAIHE'E	1		X			
TOTAL VOTE COUNT			7	0	0	2

VOTE: [X] UNANIMOUS [] PASSED [] DEFERRED [] FAILED

V. ADJOURNMENT

Trustee Souza moves to adjourn the BF meeting.

Chair Waihe'e calls for a ROLL CALL VOTE.

10:46 a.m.						16:10 / 17:00
TRUSTEE	1	2	'AE (YES)	A'OLE (NO)	KANALUA (ABSTAIN)	EXCUSED
VICE-CHAIR DAN AHUNA						EXCUSED
KALEIHIKINA AKAKA			X			
KELI'I AKINA			X			
LUANA ALAPA						Departed at 10:43a.m.
BRICKWOOD GALUTERIA			X			
KAIALI'I KAHELE			X			
CARMEN HULU LINDSEY			X			
J. KEONI SOUZA	1		X			
CHAIR JOHN WAIHE'E			X			
TOTAL VOTE COUNT			7	0	0	2

VOTE: [X] UNANIMOUS [] PASSED [] DEFERRED [] FAILED

Chair Waihe'e adjourns the BF meeting at 10:46 a.m.

Respectfully submitted,

Melissa Wennihan
Trustee Aide
Committee on Budget and Finance

As approved by the Committee on Budget and Finance (BF) on March 4, 2026

Trustee John Waihe'e IV
Chair
Committee on Budget and Finance



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
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AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival



OFFICE OF HAWAIIAN AFFAIRS
Action Item

COMMITTEE ON BUDGET AND FINANCE

March 4, 2026

BF #26-04

Action Item: Approval of OHA funding for Ho‘ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025-2026, Quarter 4 (Batch 2):

1. Kāhuli Leo Le‘a – May Day 2026
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13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

Prepared by: Chantelle Belay Feb 24, 2026
Chantelle Belay Date
Pou Kāko‘o Kaiāulu, Grants Manager

Reviewed by: Lise Vaughan-Sekona Feb 24, 2026
Lise Vaughan-Sekona Date
Ka Pou Kihi Ki‘i, Community Engagement Director

Reviewed by: Everett Ohta Feb 25, 2026
Everett Ohta Date
Ka Paepae Puka, General Counsel

Reviewed by: ~~Sean Kekina~~ Feb 26, 2026
K. Sean Kekina Date
Ka Pou Nui, Chief Operating Officer

Reviewed by: Summer Sylva Feb 25, 2026
Summer Sylva Date
Ka Pouhana Kūikawā, Interim Administrator

Reviewed by: John Waihe‘e IV Feb 24, 2026
Ke Kua, Trustee John Waihe‘e IV Date
Chairperson, Committee on Budget and Finance

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

I. PROPOSED ACTION

Approve and authorize OHA funding for Ho‘ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025-2026, Quarter 4 (Batch 2):

#	Organization Name	Event	Event Date(s)	Evaluation Scores (Out of 50 Points)	Award Amount Recommendation
1	Kāhuli Leo Le‘a	May Day 2026	May 1, 2026	Evaluator A: 41 points Evaluator B: 43 points	\$11,250
2	Conservation Council for Hawai‘i	Manu o Kū Festival	May 2, 2026	Evaluator A: 45 points Evaluator B: 47 points	\$2,500
3	Pakini Loan Fund	Wai‘anae Moku Made	May 2, 2026	Evaluator A: 45 points Evaluator B: 47 points	\$14,400
4	Ka Po‘e Lawai‘a	Manini & Me Holoholo Festival	May 2-3, 2026	Evaluator A: 45 points Evaluator B: 45 points	\$15,000
5	He Ho‘omaka Hou Ana O Puna	Ho‘ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony	May 9, 2026	Evaluator A: 44 points Evaluator B: 40 points	\$11,025
6	Ho‘okāko‘o Corporation	Waimea Middle Public Conversion Charter School’s May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging	May 21-22, 2026	Evaluator A: 40 points Evaluator B: 40 points	\$9,533
7	Acton Digital Inc (Kaulike Academy)	‘Ōpio Mākeke: Summer Kickoff Night Market	May 30, 2026	Evaluator A: 45 points Evaluator B: 50 points	\$10,500
8	Recycle Hawaii	Hawai‘i Zero Waste Youth Planning Convergence	June 1-5, 2026	Evaluator A: 45 points Evaluator B: 48 points	\$15,000
9	Symbrosia Foundation	Kona Kai Festival	June 5-6, 2026	Evaluator A: 48 points	\$10,867

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

				Evaluator B: 45 points	
10	North Kohala Community Resource Center	Kohala Kamehameha Day Celebration	June 11, 2026	Evaluator A: 47 points Evaluator B: 45 points	\$12,800
11	Papa Ola Lokahi	Pūpū ‘Umeke Kā‘eo ‘Ekolu: 3rd Annual Traditional Healers Gathering	June 19-20, 2026	Evaluator A: 46 points Evaluator B: 48 points	\$15,000
12	Festivals of Aloha	Na Kamehameha Commemorative Pā‘ū Parade & Ho‘olaule‘a	June 20, 2026	Evaluator A: 46 points Evaluator B: 45 points	\$15,000
13	Leeward Kai Canoe Club LLC	Lauhoe: Father's Day Regatta Festival	June 20-21, 2026	Evaluator A: 48 points Evaluator B: 46 points	\$15,000
			TOTAL		\$157,875

II. ISSUE

Whether to approve multiple Ho‘ākoakoa Lāhui event sponsorship awards for Fiscal Year 2025–2026, Quarter 4 (Batch 2), subject to the applicant’s compliance with applicable Office of Hawaiian Affairs (“OHA”) Ho‘ākoakoa Lāhui policies and procedures, and authorize the Administrator or designee to execute any sponsorship agreements and related documents necessary to effectuate the approved awards.

Trustees may consider, approve, modify, defer, or decline any individual sponsorship identified below without affecting the remaining awards.

III. BACKGROUND & DISCUSSION

OHA’s Ho‘ākoakoa Lāhui Event Sponsorship Program supports community-based events that align with OHA’s mission and strategic priorities and provide benefit to the Native Hawaiian community. Through its event sponsorship solicitation process, OHA invites eligible organizations to apply for financial sponsorship of cultural, educational, and community-focused events that advance OHA’s strategic outcomes.

Grants staff evaluated event sponsorship applications and recommends approval of the sponsorship awards identified below. Presenting the recommended sponsorship awards as a consolidated Action Item promotes administrative efficiency while preserving Trustee oversight.

1. Kāhuli Leo Le‘a – Mav Day 2026

1.a. Applicant Organization Information

1.a.i. Event Representative: Zachary Lum

1.a.ii Board Members of the Organization: Keli‘i Ruth, President; Holeka Inaba, Vice-President; Keely Rivera, Secretary; Kanoe Wong, Treasurer; Zachary Lum, Executive Director.

1.a.iii Mission Statement: To catalyze aloha ‘āina through the education, composition and presentation of mele and other cultural practices.

1.b. Event Background

Continuing the May Day concert tradition established in 1977 by The Brothers Cazimero at the Waikīkī Shell, KLL has partnered since 2020 with Robert Cazimero and Keauhou to steward and produce this beloved annual celebration. This year’s May Day event will honor distinguished Hawaiian music leaders Keali‘i Reichel and Robert Cazimero, alongside special guests including Keauhou, Hālau Nā Kamalei o Līlīlehua, and the Royal Dance Company. The evening concert, traditionally held from 7:00-9:00 p.m., will be broadcast and live-streamed to local and international audiences, while in-person attendees may engage in pre-concert cultural experiences from 5:00-9:00 p.m., including lei exhibits, food vendors, and additional opportunities for community connection. In alignment with KLL’s organizational mission, this year’s May Day celebration will also generate lasting educational resources. The program will produce professional recordings of four mele and their accompanying hula, along with written fact sheets that analyze lyrics, provide translations, and contextualize each piece within its cultural and historical framework. These materials will be made publicly accessible through KLL’s website to preserve and perpetuate the integrated relationship between mele and hula as interdependent Hawaiian knowledge systems, fostering deeper understanding and engagement for learners of all ages.

1.c. Benefits to OHA and OHA Beneficiaries

1.c.i. Alignment to Mana I Maoli Ola: [Outcome 4.1– Strategy 4]

This event addresses Strategy 4 by elevating mele that honor specific places, landscapes, and ancestral relationships to the ‘āina. Through live performance, community gathering, and global broadcast, the program normalizes and amplifies cultural practices that center Hawaiian worldview, language, and stewardship principles. By institutionalizing the recording and educational distribution of these works, the event strengthens ongoing practices that protect and perpetuate mo‘omeheu while fostering deeper understanding of the reciprocal relationship between po‘e and ‘āina. The event addresses Outcome 4.1 by celebrating and promoting the importance and value of cultural practitioners, specifically those of mele and hula. Celebrating the specific accomplishments of Cazimero and his 50 years of hula presents a particularly unique opportunity to acknowledge and recognize the fruit of 50 years of dedication to language, culture, tradition, identity, the relationships therein and a sense of lāhui that results.

1.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on livestream banners and all promotional collateral

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

- 30 second commercial during the livestream
- Option to livestream the event on OHA-owned platforms
- 20 General Admission tickets or VIP ticket equivalent

2. Conservation Council for Hawai‘i – Manu o Kū Festival

2.a. Applicant Organization Information

2.a.i. Event Representative: Leah Kocher

2.a.ii Board Members of the Organization: Colleen Heyer, President of the Board; Bret Nainoa Mossman, Vice President of the Board; Maka‘ala Ka‘aumoana, Secretary; Mashuri Waite, PhD, Treasurer; Puanani Anderson-Fung, Board of Directors; Steven Lee Montgomery, PhD, Board of Directors; Emily Sarasa, Board of Directors; Les Welsh, Board of Directors; Sunshine Woodford, Board of Directors; Jonnetta Peters, Executive Director

2.a.iii Mission Statement: To protect Hawai‘i’s native plants, animals, and ecosystems for future generations.

2.b. Event Background

The Conservation Council for Hawai‘i will host the 11th annual He Manu o Kū Festival in May 2026 on the Coronation Grounds of ‘Iolani Palace, aligning with awareness of the U.S. Migratory Bird Treaty Act. The family-friendly, community education event celebrates the Manu o Kū (white tern), the official bird of the City & County of Honolulu and a notable urban conservation success story. The festival convenes approximately 18-20 community partners, conservation organizations, government agencies, and academic researchers to provide hands-on educational booths, crafts, games, and conservation information. Programming includes a traditional opening ‘oli and hula by Kumu Hula James Dela Cruz, a speaker series featuring research updates and Native Hawaiian cultural perspectives (including participation from the Polynesian Voyaging Society), live music by Corey Fujimoto and Kalei Gamiao, keiki-focused activities, guided bird walks, and spotting scopes to observe nesting Manu o Kū on-site. Through culturally grounded and science-based engagement, the festival fosters community awareness, strengthens stewardship values, and builds the next generation of environmental caretakers for Hawai‘i’s native species.

2.c. Benefits to OHA and OHA Beneficiaries

2.c.i. Alignment to Mana I Maoli Ola: [Outcome 4.2 – Strategy 4]

The event addresses Strategy 4 by implementing a culturally grounded community education program that strengthens both the health of the ‘āina and the perpetuation of mo‘omeheu. By elevating the Manu o Kū as a living urban conservation success and integrating Native Hawaiian cultural perspectives, such as traditional ‘ike shared through ‘oli, hula, and navigation knowledge, the event reinforces the reciprocal relationship between po‘e and ‘āina while normalizing stewardship practices. The festival addresses Outcome 4.2 by increasing community stewardship of Hawai‘i’s natural and cultural resources through hands-on learning, guided bird walks, keiki-focused activities, and

engagement with conservation partners. These interactive experiences foster deeper connection to ‘āina, ‘ohana, and community, helping cultivate informed, culturally grounded environmental stewards committed to protecting Hawai‘i’s native species and ecosystems.

2.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on all printed promotional materials, event t-shirts, and thank you board at the event
- OHA mention in any television or print promotion (including a potential segment with Sunrise with Billy V on Hawaii News Now)
- 15-minute speaking opportunity for an OHA representative
- Option for an OHA information table

3. Pakini Loan Fund – Wai‘anae Moku Made

3.a. Applicant Organization Information

3.a.i. Event Representative: Lei Riedel

3.a.ii Board Members of the Organization: Joseph Lapilio, Board President; Croccifixio “Cross” Makani Crabbe, Board Vice President; Vicki Paresa, Board Treasurer & Secretary; Annie Ferreira, Outgoing Board Treasurer; Shavone Lave, Board Director; Carryssa Krzyska, Board Director; Lei Riedel, Executive Director

3.a.iii Mission Statement: To increase economic opportunities by providing the financial resources necessary to enhance the personal and entrepreneurial capacity of Native Hawaiian individuals, businesses, and community organizations throughout the State of Hawai‘i.

3.b. Event Background

Wai‘anae Moku Made is a place-based community activation event hosted in partnership by the Pakini Loan Fund and the Wai‘anae Economic Development Council to celebrate Native Hawaiian-owned small businesses, cultural practitioners, and ‘ohana-centered engagement along the Wai‘anae Coast. The event transforms the area into a vibrant, family-friendly gathering space beginning with guest arrival and welcome activities, followed by traditional opening protocol led by Kumu Hula Nettie Armitage-Lapilio and Hālau Hula O Kekaikuihala. Throughout the evening, the mākeke features Native Hawaiian-owned and Wai‘anae-based vendors offering handmade art, locally sourced products, specialty foods, and service-based offerings, alongside food trucks and opportunities for attendees to talk story directly with entrepreneurs. The event also includes live cultural demonstrations such as niu weaving with Josh Kila of Kila-Wea, lei making with Hālau Hula O Kekaikuihala, and kāhili pa‘a lima demonstrations with ‘Ahahui Siwila Hawai‘i o Kapolei, as well as storytelling sessions and mele and hula performances that deepen connection to place. ‘Ohana-centered programming features keiki arts and crafts, interactive cultural activities, bingo-style exploration games, and booths hosted by community partners such as Keiki Rise, Da Braddahs, and Healing Arts Therapy Hawai‘i. Dedicated spaces support business-to-business networking, mentorship

for youth, and resource sharing with partner organizations including Hawaiian Council, Hawai‘i Community Lending, Hawai‘iUSA Federal Credit Union, the Small Business Administration, and others.

3.c. Benefits to OHA and OHA Beneficiaries

3.c.i. Alignment to Mana I Maoli Ola: [Outcome 7.3 – Strategy 7]

This event aligns with Strategy 7 because Wai‘anae Moku Made is intentionally designed to strengthen ‘ohana economic stability by expanding community-driven pathways to entrepreneurship, income generation, and long-term financial resilience. By activating Wai‘anae with a vibrant mākeke, cultural demonstrations, and comprehensive business support services, the event removes barriers that often prevent families from engaging in economic opportunities and instead positions local ‘ohana as leaders in shaping the economic future of their moku. The event addresses Outcome 7.3 by creating a place-based community experience designed to strengthen the resource stability of Native Hawaiian ‘ohana by providing multiple, culturally grounded pathways toward economic, subsistence, and social resilience. By activating Wai‘anae with a vibrant mākeke, cultural demonstrations, and centralized business resources, the event directly supports families in accessing income, entrepreneurial guidance, and traditional knowledge that contribute to both immediate and long-term stability.

3.c.ii. OHA Funding Event Sponsorship Benefits

- OHA advertisements in event programs, television, radio, and print ads
- OHA logo on event signage and flyers
- Speaking opportunities for an OHA representative
- Option for an OHA information table

4. Ka Po‘e Lawai‘a – Manini & Me Holoholo Festival

4.a. Applicant Organization Information

4.a.i. Event Representative: Jessica Bates

4.a.ii Board Members of the Organization: President- La‘Ena Torrence; Vice President- Logan Liberato; Treasurer- Beeper Nakamaejo; Secretary- Leilani Willing; Director at Large- Kalani Pokipala; Executive Director-Jessica Bates

4.a.iii Mission Statement: To empower our keiki by cultivating the skills and knowledge of traditional Hawaiian fishing practices while encouraging a sustainable stewardship with the ocean.

4.b. Event Background

The Manini & Me Holoholo Festival is a culturally grounded, family-centered educational event held at Poka‘i Bay that immerses keiki and their ‘ohana in traditional Hawaiian fishing practices while strengthening intergenerational learning and community connection. Designed as a paired keiki-adult experience, the two-day program begins with participant check-in, orientation, and shoreline boundary guidance before teams engage in

supervised fishing from morning through sunset on Saturday and continuing Sunday morning. Hydration stations, volunteer support, and the piko check-in area provide ongoing guidance and safety monitoring throughout the event. Educational partners, including Ka Po‘e Lawai‘a, the Westside Lifeguard Association, and the Hawaii Department of Land and Natural Resources Division of Aquatic Resources, lead structured sessions on traditional fishing practices, fish identification, marine species awareness, and ocean safety. In addition to hands-on fishing, the festival includes dedicated cultural integration activities on Sunday, volunteer and educator support throughout the weekend, and coordinated lunch and rest periods to ensure participant wellbeing. The experience culminates in a formal weigh-in and fish submission process, followed by an awards ceremony and Hawaiian blessing that celebrate participant learning and cultural practice. The event concludes with organized cleanup and site restoration to ensure the bay remains pristine. Through immersive, place-based learning and family participation, the festival builds practical subsistence skills, strengthens stewardship behaviors, and perpetuates Native Hawaiian fishing knowledge for the next generation.

4.c. Benefits to OHA and OHA Beneficiaries

4.c.i. Alignment to Mana I Maoli Ola: [Outcomes 4.2, 4.3 – Strategy 4]

This event advances Strategy 4 by implementing a culturally grounded, place-based program that strengthens both the health of the ‘āina and the perpetuation of Native Hawaiian fishing knowledge. Through hands-on shoreline fishing, cultural instruction, and ocean safety education at Poka‘i Bay, the event deepens participants’ understanding of mālama ‘āina and responsible resource use. The paired keiki-adult learning model, guided activities, and engagement with partners such as the Westside Lifeguard Association and the Hawaii Department of Land and Natural Resources Division of Aquatic Resources directly support Outcome 4.2 by increasing community stewardship and strengthening connections among ‘āina, ‘ohana, and community. The festival also contributes to Outcome 4.3 by perpetuating traditional Hawaiian fishing practices that support local food systems and by incorporating structured site cleanup and restoration efforts that help maintain the health and integrity of the coastal environment.

4.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on event materials, event signage, and printed and digital materials
- OHA promotion on digital platforms and in community outreach such as local newsletters and partner networks
- Speaking opportunity for OHA representatives
- Opportunity for OHA representatives to participate in cultural activities
- Option for an OHA information table
- OHA’s support acknowledged during awards ceremony

5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana KūkāKūkā Program Completion and Kihei Tying Ceremony

5.a. Applicant Organization Information

5.a.i. Event Representative: Jessica Cockrell

5.a.ii Board Members of the Organization: President - Carol Matayoshi; Vice President - Desiree Lui; Treasurer - Terre Allen, PhD; Board Member - Denay Jones; Board Member - Princess Negrana; Board Member - Ihilani Niles; Founder and Executive Director - Jessica Cockrell; Co-Founder and Co-Director - Professor Renee Rivera, MSW

5.a.iii Mission Statement: To inspire lifelong learning of Aloha, to strengthen and create leadership in our community.

5.b. Event Background

The Kīhei Tying and Graduation Ceremony is a public, culturally grounded recognition and fundraising event honoring 21 wāhine, 95 percent of whom are Native Hawaiian, who have completed the Hāumana Kūkākūkā Program. The ceremony will open with a formal piko protocol featuring pule, oli, and ho‘okupu led by kumu and cultural practitioners, followed by welcoming remarks and program overview from organizational leadership. Each haumāna will present a brief mo‘olelo of transformation through hula, chant, spoken word, or visual artwork (including spirit animal and Lōkahi Wheel reflections), culminating in the symbolic tying of kīhei by mentors and cultural leaders to mark each woman’s emergence as a healed and empowered community leader. The event will conclude with a closing circle, certificate presentations, and ho‘omaika‘i to graduates and supporters. In addition to the formal ceremony, the gathering will include a community pa‘ina with local food vendors, open seating to encourage relationship-building, and multiple resource and cultural demonstration tables. Planned offerings include Native Hawaiian resource outreach, mental health and domestic violence support information, and hands-on cultural activities such as lei making, lomilomi, and lā‘au lapa‘au demonstrations. The event is designed to be free and accessible to the public while also serving as a fundraising and partnership-building opportunity to sustain future cohorts of the Hāumana Kūkākūkā Program. Through integrated ceremony, storytelling, cultural practice, and community connection, the event uplifts ‘ike kūpuna, strengthens wāhine leadership, and expands culturally grounded healing pathways for the broader lāhui.

5.c. Benefits to OHA and OHA Beneficiaries

5.c.i. Alignment to Mana I Maoli Ola: [Outcome 3.1 – Strategy 3]

The event aligns with Strategy 3 because it centers on the cultural and emotional healing of Native Hawaiian wāhine through the Hāumana Kūkākūkā program. The Kīhei Tying and Graduation Ceremony honors the completion of this transformative process, which uses culturally grounded practices such as hula, oli, mo‘olelo, huaka‘i to wahi pana, and ancestral reflection as pathways to holistic wellness. This event embodies Hawaiian well-being by acknowledging the sacred balance between mind, body, and spirit, while creating a space for survivors of trauma to reconnect with their ‘āina, ancestors, and identity. Through this ceremony, participants and community members witness the living application of ‘ike kupuna as a tool for emotional healing, leadership development, and empowerment. The event addresses the outcome by celebrating and advancing the healing journey of Native Hawaiian wāhine who have completed the Hāumana Kūkākūkā program, a trauma-informed, culturally grounded initiative that utilizes ancestral

knowledge and practices such as hula, oli, mo‘olelo, huaka‘i, and the creation of spiritual representations like the Lokahi Wheel and ‘aumākua artwork. The event not only recognizes the wāhine for their deep inner work and cultural reconnection, but also reinforces ‘ike kūpuna as a legitimate and vital form of healing. The event will feature traditional protocol, sacred ceremony, and community sharing, all of which uplift and model the practical use of Hawaiian culture in contemporary wellness and recovery spaces. By bringing this healing model into the public eye, through community attendance, media coverage, and OHA visibility, the event helps normalize the use of cultural practices in addressing trauma and rebuilding ‘Ōiwi identity. It fosters a safe and empowering space for cultural transmission, while simultaneously securing funds to ensure continued access to these culturally anchored interventions for future cohorts of wāhine.

5.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on printed materials including event flyers, programs, signage, and event booklets
- OHA acknowledgement in opening and closing ceremonies
- Speaking opportunity for an OHA representative
- Option for an OHA information booth
- OHA recognition in social media posts, press releases, and post-event videos/recap
- Reserved seating for OHA representatives
- OHA listed as primary event sponsor in printed program with short blurb highlighting mission
- Event photos provided to OHA for use in newsletters, reporting, or social media

6. Ho‘okāko'o Corporation – Waimea Middle Public Conversion Charter School’s May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging

6.a. Applicant Organization Information

6.a.i. Event Representative: David Gibson

6.a.ii Board Members of the Organization: Ivan Takushi, Chair/Treasurer; Susan Maddox, Vice Chair; Kumau Pineda-Akiona, Secretary; Pualani S. Akaka, Director; Jonathan Ching, Director; Dr. Kealoha Fox, Director; Mary Komomua, Director; David Y. Gibson, Executive Director

6.a.iii Mission Statement: We empower communities to develop high quality, student-centered, and sustainable Hawaiian-focused charter schools by providing exceptional educational support services, mutual accountability, and a culture of learning.

6.b. Event Background

Waimea Middle School’s May Day program serves as the culminating celebration of its schoolwide learning results and IKAIR values (‘Ike, Kaizen, Accountability, and Respect) through a yearlong focus on educating the whole child. Throughout the academic year, students participate in place- and project-based learning that includes huaka‘i, service

learning, and instruction from teachers and cultural practitioners on the history, mo‘olelo, chants, and stewardship practices associated with the places they visit. These experiences emphasize mālama ‘āina and environmental responsibility, preparing grade levels to collaboratively select and perform mele or hula that reflect their learning at the schoolwide May Day program. The event also features a May Day Court that models the school’s core values through demonstrated leadership, positive behavior, and community service. Complementary family and community engagement activities, including participation in local parades, first responder recognition, student-led conferences, entrepreneurship projects, and service initiatives such as Kindness for Kūpuna Day, reinforce the program’s goal of developing competent, culturally grounded learners who actively contribute to their school and broader Waimea community.

6.c. Benefits to OHA and OHA Beneficiaries

6.c.i. Alignment to Mana I Maoli Ola: [Outcome 1.3 – Strategy 1]

This event aligns with Strategy 1 because all students attending Waimea Middle Public Conversion Charter School will participate in the May Day Ho‘ike. Cultural practitioners will provide leadership to the students in the months preceding the ho‘ike and during the event. Through their participation in this project, students will develop lasting memories with their peers, their families, and community members. They will have a sense of pride as they make learning visible and relevant and will understand their responsibility to care for their environment. Through the theme, “A Sense of Place, a Sense of Belonging,” their connection to place will be long-lasting and will result in caring and concerned citizens. This event addresses Strategic Outcome 1.3 as it is a culmination of a yearlong strong ‘Ike Hawai‘i cultural learning program which focuses on the overarching theme of “Sense of Place, Sense of Identity.” Each grade level selects a theme which is incorporated through the year’s learning activities and is then reflected in their May Day Ho‘ike selections. Grade 6 has focused on the pu‘u of Waimea. Through their extended core classes, they have expressed their Sense of Place/ Sense of Identity through mixed media products that represent their favorite sites on the island. They have also written pieces to explain their connections to their area(s) and, additionally, have planted native plants throughout the campus to further “root “ themselves to their school. An overnight excursion to the volcano provided an opportunity to learn various mo‘olelo. In Grade 7, the focus has been on Native Birds, the "Jewels of the Forest". Students have researched the variety of native plants and created projects to share with their classmates and, ultimately, with their families. The team of 7th-grade teachers has participated in Professional Development offered by the Hawaiian Festival of Birds (October 4, 2025), and the American Bird Conservancy Hawai‘i (November 15, 2025)- KS sponsored. Eighth graders have been learning about weather and climate in science and will soon examine the geology of Waimea and the Kohala/Kona coasts in relation to water and fishponds. Students went on a huaka‘i to the fishponds at Kīholo, Kalahuipua‘a, and ‘Anaeho‘omalū to begin making connections between upland water and the geology that supports these coastal resources. The goal for the May Day Hō‘ike is to share mo‘olelo that highlight the weather and waters of Waimea and how they connect to the shoreline fishponds. In their extended core classes they have created products that are inspired by their sense of place.

6.c.ii. OHA Funding Event Sponsorship Benefits

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

- OHA logo included on all physical and digital flyers and programs
- Verbal recognition of OHA support during welcoming remarks

7. Acton Digital Inc (Kaulike Academy) – ‘Ōpio Mākeke: Summer Kickoff Night Market

7.a. Applicant Organization Information

7.a.i. Event Representative: Wendy Awai-Dakroub

7.a.ii Board Members of the Organization: Wendy Awai-Dakroub – Board Chair and Mentor; Youssef Dakroub – Treasurer and Executive Director; Sasha Kamahele – Secretary; Arsena Kailihiwa – Director; Coen Cadhina – Youth Advocate; Leah Dakroub - Youth Advocate; Program Manager - Laurie Akana

7.a.iii Mission Statement: To expand digital equity, economic opportunity, and lifelong learning for Hawai‘i’s youth and families.

7.b. Event Background

‘Ōpio Mākeke is a quarterly youth pop-up market and cultural gathering designed to advance Native Hawaiian youth entrepreneurship, cultural perpetuation, and intergenerational connection. The event will feature approximately 30 Native Hawaiian youth vendors operating from the first-floor center corridor, offering locally made products including jewelry, accessories, fashion items, baked goods, and specialty snacks. Vendors will gain real-world experience in sales, pricing, customer engagement, and business operations within a supportive, mentored environment designed to lower barriers to entrepreneurship. The evening program will also include live musical entertainment on the main stage, featuring multiple Hawaiian music performers delivering 30-minute sets, with a master of ceremonies providing event flow, introductions, and announcements throughout the night. Tech Savvy Teens will offer free technology assistance for kūpuna during the event, further supporting intergenerational engagement. Event operations include a structured full-day setup period, coordinated vendor check-in and sound support, active sales hours for participating businesses, and an organized breakdown following the market close. By combining youth enterprise, cultural expression, live music, and kūpuna services within a single accessible gathering space, ‘Ōpio Mākeke creates a vibrant, family-friendly environment that strengthens community connection, uplifts emerging Native Hawaiian entrepreneurs, and reestablishes Nā Lama Kukui as a place of learning, exchange, and shared ‘ike.

7.c. Benefits to OHA and OHA Beneficiaries

7.c.i. Alignment to Mana I Maoli Ola: [Outcome 8.2 – Strategy 8]

The event aligns with Strategy 8 and Outcome 8.2 because it directly invests in the growth, visibility, and long-term success of youth-led businesses across Hawai‘i. By providing a professional marketplace environment where young entrepreneurs can showcase and sell their products, the event creates real pathways for income generation, financial learning, and business advancement. It encourages youth to step into roles as producers, innovators, and contributors to Hawai‘i’s economic landscape, strengthening their confidence while expanding their practical experience. The event also stimulates

community-based economic activity by inviting families, organizations, and local supporters to intentionally circulate their dollars within Hawai‘i. This keeps economic value rooted in the community and reinforces a culture of choosing local first. By elevating youth businesses alongside established community partners, the event fosters intergenerational collaboration, mentorship, and shared economic growth.

Ultimately, the event contributes to a resilient economic ecosystem where young people are empowered to build sustainable ventures, Hawaiian communities benefit from locally generated wealth, and the broader economic foundation of Hawai‘i is strengthened through innovation, entrepreneurship, and community-driven opportunity.

7.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on printed event marketing materials, social media posts, vendor emails, and event signage
- Option for an OHA information table
- Reserved seats for OHA guests

8. Recycle Hawaii – Hawai‘i Zero Waste Youth Planning Convergence

8.a. Applicant Organization Information

8.a.i. Event Representative: Kristine Kubat

8.a.ii Board Members of the Organization: Board President: Topher Dean; Board Vice President: Sam De La Paz; Board Treasurer: Ronald Robinson; Board Secretary: Terri Markovich; Board Member: Tanya Yamanaka Aynessazian; Board Member: Amanda Rose; Executive Director: Kristine Kubat; Operations Director: Justin Canelas; EPA REO Program Director: Alesha "Ulu" Makuakane

8.a.iii Mission Statement: To educate, inspire, and empower youth leaders, individuals, communities, and local governments to reduce waste, conserve natural resources, and live sustainably in balance with the ‘āina.

8.b. Event Background

The Hawai‘i Zero Waste Youth Planning Convergence builds upon momentum generated through Recycle Hawai‘i’s \$1.5 million U.S. Environmental Protection Agency-funded youth recycling education and outreach initiative and the successful statewide youth convergence held in Ka‘ū in October 2024. During the closing plenary of that gathering, participating youth and partners formed the Hawai‘i Zero Waste Youth Alliance and identified the need for a more inclusive, youth-driven planning process to prepare for the 2027 National Zero Waste Youth Convergence on O‘ahu. In response, Recycle Hawai‘i, in collaboration with Hānai Kaiaulu and youth representatives from the Hawaiian Academy of Arts and Sciences, Maui Huliau Foundation, R.I.S.E. E Ala E Kohala, and the Moloka‘i Educational Center, developed this Kaua‘i-based planning convergence to ensure broader geographic representation, particularly from Kaua‘i youth who were unable to participate previously, and to strengthen authentic cultural grounding. The

multi-day immersive gathering will convene approximately 40 youth and adult mentors in a structured agenda that includes opening cultural protocol and pule led by kūpuna; youth-led project updates highlighting initiatives such as cafeteria food recovery, cardboard reclamation, and community composting; facilitated visioning and work sessions to advance the 2027 convergence plan (including site selection, budget development, and task assignments); and site visits to Kaina Makua at Aloha ‘Āina Poi Co., the Kaua‘i Salt Ponds, and Compost Kaua‘i to connect traditional ‘ike with modern waste diversion practices. Participants will also engage in cultural and environmental fieldwork through a marine debris beach cleanup and data collection activity, evening relationship-building and talent-sharing sessions, and preparation for a public Zero Waste presentation and meal for the Homestead community.

8.c. Benefits to OHA and OHA Beneficiaries

8.c.i. Alignment to Mana I Maoli Ola: [Outcome 4.2 – Strategy 4]

The Hawai‘i Zero Waste Youth Planning Convergence advances Strategy 4 by strengthening the health of the ‘āina and mo‘omeheu through youth-centered education, cultural grounding, and community-based environmental action. The multi-day gathering equips emerging leaders with practical Zero Waste planning skills while integrating Native Hawaiian values through opening pule, guidance from kūpuna, and site visits that highlight ‘ike kūpuna and contemporary sustainability practices. Outcome 4.2 is directly addressed by increasing community stewardship of Hawai‘i’s natural and cultural resources. Participants engage in beach cleanup and marine debris data collection, share school- and community-based waste reduction projects, and collaborate across islands to build a statewide youth alliance. By fostering inter-island relationships, hands-on mālama ‘āina practices, and youth leadership capacity, the convergence deepens participants’ connection to ‘āina, ‘ohana, and their communities while building the next generation of environmental stewards.

8.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo included in all communications and social media postings
- Qualification as a sponsor for the 2027 National Zero Waste Youth Convergence, with OHA’s logo on all event promotional materials
- Speaking opportunity for an OHA representative

9. Symbrosia Foundation – Kona Kai Festival

9.a. Applicant Organization Information

9.a.i. Event Representative: Samantha Makanahelu Miles

9.a.ii Board Members of the Organization: Alexia Akbay (Interim Executive Director), Mari Netsu (Controller), Makanahelu Miles (Secretary)

9.a.iii Mission Statement: To support Hawai‘i’s transition from an extractive, tourism-dependent economy toward a regenerative, food-secure, and place-based future.

9.b. Event Background

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

The Kona Kai Festival is a two-day, community-led celebration designed to honor Hawai‘i’s relationship with the ocean while fostering intergenerational learning, cultural perpetuation, and workforce development in the blue economy. Friday’s Career Pathways Day provides students with immersive experiences, including rotations through career fair stations hosted by conservation organizations, cultural practitioners, and local employers, introducing youth to opportunities in restoration aquaculture, fisheries, limu stewardship, cultural resource management, science communication, filmmaking, and ‘āina-based entrepreneurship. Students also participate in presentations highlighting sustainable ocean practices, such as the Ta‘ape Project’s work on eating invasive species to support ecosystem health, and interactive discussions with practitioners like Hui Kāhuwai and ‘Ewalu Industries, culminating in a screening and discussion of The ‘Uluwehi Project. On Saturday, the main public festival begins with an opening ceremony and pule to ground attendees in aloha ‘āina, followed by morning panels such as “Mo‘olelo for the Next Generation,” featuring kūpuna and cultural practitioners sharing traditional ocean knowledge and resource stewardship teachings. Midday programming includes Hawaiian culinary demonstrations emphasizing local ingredients, nutrition, and food sovereignty, while afternoon panels such as “Kūleana in Action,” “Saving Our Ko‘a,” and “Waterwomen & Watermen” spotlight practitioners in coral restoration, reef management, and coastal conservation. Throughout the day, educational booths and hands-on activities, such as net making, limu identification and pressing, fishing pole building, keiki scavenger hunts, and limu touch tanks, offer engaging, family-friendly learning experiences. The festival concludes with live music, closing remarks, and a community mahalo, with a small 21+ beer garden providing informal networking opportunities. Together, these activities create a culturally grounded, educational, and experiential space that uplifts Hawaiian ocean knowledge, connects community members to the kai, and fosters pathways for youth leadership and economic opportunity in Hawai‘i’s blue economy.

9.c. Benefits to OHA and OHA Beneficiaries

9.c.i. Alignment to Mana I Maoli Ola: [Outcomes 4.1, 4.2, 4.3 – Strategy 4]

The event aligns with Strategy 4 because it directly supports Native Hawaiian relationships to ‘āina and kai through culturally grounded ocean education, limu knowledge, and stewardship practices led by kūpuna, cultural practitioners, and community experts. By offering hands-on activities, such as limu identification, restoration workshops, ocean-safety education, and cultural demonstrations, the event strengthens ‘Ōiwi identity and perpetuates Hawaiian culture and practices tied to marine environments (Outcome 4.1). The event also increases community stewardship of natural and cultural resources by engaging participants in restoration opportunities and teaching ways to care for nearshore ecosystems (Outcome 4.2). Furthermore, the focus on limu restoration and traditional food systems supports the revitalization of Native Hawaiian cultural landscapes, food practices, and coastal abundance (Outcome 4.3), contributing to ‘āina momona and long-term community well-being.

9.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on all event flyers, digital promotions, printed outreach materials, event programs, and event signage

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

- Acknowledgement of OHA sponsorship in radio, social media, and community announcements
- Option for an OHA information table with space for OHA brochures and promotional items
- Speaking opportunity for an OHA representative
- Formal invitation for OHA representatives to attend as guests, with reserved seating
- Recognition of OHA during opening and closing remarks
- Opportunity for OHA to participate in a panel or discussion

10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration

10.a. Applicant Organization Information

10.a.i. Event Representative: Annalene Williams

10.a.ii Board Members of the Organization: Nathan Trump, President; Jay Vega, Vice President; Shani Carvalho, Secretary; Todd Apo, Treasurer; Chairperson, Desiree Lokelani Hooton; Co-Chair/Treasurer, Ekela Kahuanui; Statue Coordinator, Hokani Maria & Desiree Lokelani Hooton; Lei Draping, Nani Lehano-Tolentino & Keke Kaniho; Pa‘u Units, Ha‘aheo Neves; Roving Marshals, Amoo Ching-Kainoa; Floats, Lachelle Crabbe & Phylis Badayos; Ho‘olaule‘a, Kahealani Taomia (Food & Craft Booths); Ekela Kahuanui/Randee Golden (Hana no‘eau); Miulan (Entertainment); Security & MC Coordinator, Miulan Pa‘alua; Media, Leoni Lancaster

10.a.iii Mission Statement: To empower a thriving North Kohala.

10.b. Event Background

The Kohala Kamehameha Day Celebration is an annual, multi-faceted event that honors King Kamehameha I and fosters cultural continuity, community engagement, and economic opportunity. The day begins with early morning protocol at the original Kapa‘au statue, where Native Hawaiian residents and practitioners perform oli and hula, drape leis donated by organizations across the island, and offer ho‘okupu in recognition of the King’s mana. Following the ceremony, the two-mile floral parade moves from Honomaka‘u to the statue, featuring Pā‘ū Princesses representing each of the eight Hawaiian Islands, a Grand Marshall, Aloha Ambassador, descendants of Kamehameha, floats, marching units, and horseback riders celebrating Kohala’s paniolo heritage. Each unit presents a ho‘okupu to honor the King, while the parade allows community members, local businesses, and cultural organizations to actively participate and celebrate Hawaiian identity. The day concludes at Kamehameha Park with a lively Ho‘olau‘le‘a, where attendees enjoy hands-on educational experiences, cultural demonstrations, and live performances. Cultural practitioners, including hula kumu, la‘au lapa‘au experts, voyagers, and artisans, share knowledge of traditional practices, crafts, mele, and aloha ‘āina. The event also features food booths serving culturally diverse menus, giving visitors a taste of Hawaiian culinary traditions, while supporting local vendors and charitable organizations. Throughout the celebration, participants of all ages engage in learning experiences that connect them to Hawaiian history, values, and stewardship, creating a culturally rich, educational, and economically supportive environment for the North Kohala community.

10.c. Benefits to OHA and OHA Beneficiaries

10.c.i. Alignment to Mana I Maoli Ola: [Outcomes 4.1, 4.2 – Strategy 4]

The Kohala Kamehameha Day celebration is a living embodiment of Strategy 4 and its outcomes. It actively works to preserve and perpetuate Hawaiian culture, strengthen cultural identity, fosters a connection to the land and community, and implicitly supports the appreciation and potential restoration of culturally significant sites. The event is a powerful example of how cultural celebrations can contribute to the overall well-being and resilience of the Native Hawaiian community. The event addresses Outcome 4.1 by preserving and perpetuating Hawaiian cultural traditions associated with King Kamehameha through oli, hula, the floral parade, and Ho‘olau‘le‘a activities, reinforcing Native Hawaiian identity, cultural continuity, and community pride. It addresses Outcome 4.2 by fostering connection to ‘āina and community stewardship, engaging ‘ohana and attendees in culturally significant spaces, raising awareness of North Kohala’s historical and environmental resources, and inspiring ongoing care and protection of cultural and natural landscapes.

10.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on flyers and advertisements
- Speaking opportunity for an OHA representative
- OHA logo banner can be displayed at the Statue and Ho‘olau‘le‘a
- Option for an OHA information booth

11. Papa Ola Lokahi – Pūpū ‘Umeke Kā‘eo ‘Ekolu: 3rd Annual Traditional Healers Gathering

11.a. Applicant Organization Information

11.a.i. Event Representative: Napua Casson-Fisher

11.a.ii Board Members of the Organization: Kilipaki Vaughan (President), Brooke Holderbaum (Vice-President), Loretta Hussey (Secretary), Chessa Harris (Treasurer), Kū`ikeokalani Kamakea-`Ōhelo (Director), Deborah Kim Morikawa (Director), Paige Ann Kapi`olani Barber (Director), Noelani Hoopai (Director), Cora Schnackenberg (Director), Farrah Burke (Director)

11.a.iii Mission Statement: To improve the health status and wellbeing of Native Hawaiians and others by advocating for, initiating and maintaining culturally appropriate strategic actions aimed at improving the physical, mental and spiritual health of Native Hawaiians and their ‘ohana (families) and empowering them to determine their own destinies.

11.b. Event Background

The Pūpū ‘Umeke Kā‘eo ‘Ekolu – Traditional Hawaiian Healers Gathering is a two-day, immersive convening designed to preserve, perpetuate, and strengthen Native Hawaiian healing practices while fostering inter-island collaboration and cultural continuity. Hosted

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

by Papa Ola Lōkahi in partnership with the Traditional Hawaiian Healing Kūpuna Councils and community health organizations, the event includes a full suite of cultural and educational activities. Day one begins with arrival and check-in, welcome mele, and opening pule and oli led by respected practitioners such as Kamaki Kanahale and Sean Chun, followed by reflections on the outcomes of the 2025 gathering and the current landscape of Hawaiian healing. Participants engage in presentations and updates from kūpuna councils and partner organizations, as well as a full-group breakout session on topics such as supporting the Maui community’s healing needs. Day two begins with a youth-led ‘āina kakahiaka, followed by small-group breakout discussions addressing succession planning, cultural protection, access to healing, and systems integration. Attendees participate in ‘āina awakea with cultural food storytelling, group share-back sessions to reflect on commitments and next steps, and a closing pule and mele lāhui. The gathering also features structured opportunities for intergenerational mentorship, peer-to-peer learning, and relationship-building among healers, cultural practitioners, and youth. Speakers and facilitators include prominent practitioners and educators such as Dr. Sheri Daniels, Loea Lynette Paglinawan, Malina Kaulukukui, Leinaala Bright, Keoki Baclayon, and Puni Jackson, ensuring that participants gain access to both ancestral knowledge and contemporary strategies for sustaining traditional healing practices across Hawai‘i.

11.c. Benefits to OHA and OHA Beneficiaries

11.c.i. Alignment to Mana I Maoli Ola: [Outcomes 3.1, 3.2, 3.3, 3.4 – Strategy 3]

This event addresses Strategy 3 by fostering a space where traditional Hawaiian healing practices, such as lā‘au lapa‘au, lomilomi, and ho‘oponopono, can be shared, protected, and perpetuated. The gathering increases access to culturally based healing methods (Outcome 3.1) by connecting practitioners and health allies from across the pae ‘āina and supporting their role in communities, schools, and ‘ohana settings. It strengthens coordination within the Native Hawaiian health ecosystem (Outcome 3.2) by bringing together key stakeholders like the Native Hawaiian Health Care Systems and kūpuna councils, contributing to the vision of a unified and culturally grounded health system. The gathering also uplifts traditional practices like ho‘oponopono that can be applied to restorative and preventative approaches in justice-impacted communities (Outcome 3.3), supporting broader efforts to reduce incarceration rates. Finally, through protocol and cultural teachings, the event reinforces values and practices related to honoring and caring for iwi kūpuna (Outcome 3.4), helping communities uphold their kuleana to protect ancestral remains and sacred sites.

11.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on event signage, the official event agenda, and any digital promotional materials
- Distribution of OHA-approved materials relevant to the purpose of the gathering
- Acknowledgment of OHA’s sponsorship and support during opening and closing remarks

12. Festivals of Aloha – Na Kamehameha Commemorative Pā‘ū Parade & Ho‘olaule‘a

12.a. Applicant Organization Information

12.a.i. Event Representative: Daryl Fujiwara

12.a.ii Board Members of the Organization: Jaydon Isobe (Secretary), Dawn Fujiwara (Treasurer), Toddy Lilikoi (Board Member)

12.a.iii Mission Statement: To honor and preserve Hawai‘i’s diverse cultures and heritage, with a special focus on Native Hawaiian traditions, through community events, music, hula, arts, and cultural practices.

12.b. Event Background

The King Kamehameha I Celebration in Central Maui is a community-centered cultural event that honors the legacy of King Kamehameha I and his illustrious ‘ohana, who once made Lahaina the capital of the Hawaiian Kingdom. Following the Lahaina fires and the closure of Front Street, the event has been thoughtfully relocated to Central Maui to ensure the continuity of this important tradition while the Lahaina community recovers. The day begins with a vibrant pā‘ū parade at 9:45 a.m., showcasing riders and horses adorned with lei and traditional pā‘ū attire, reflecting the rich paniolo and equestrian heritage of Hawai‘i. The celebration continues with a family-friendly ho‘olaule‘a featuring free keiki cultural activities such as lei making, coconut frond weaving, palaie, kāpala, kōnane, and coloring stations highlighting native flora and fauna. Live Hawaiian music and hula performances run throughout the day from 9:00 a.m. to 5:00 p.m., along with story time, community gathering spaces, and parade and pā‘ū awards. Together, these activities provide an immersive cultural learning environment that uplifts ‘ike ku‘una, strengthens community connection, and ensures the perpetuation of Hawaiian traditions for future generations.

12.c. Benefits to OHA and OHA Beneficiaries

12.c.i. Alignment to Mana I Maoli Ola: [Outcome 4.1 – Strategy 4]

Strengthening health outcomes begins with ensuring our culture is present in our physical spaces. By holding space to share our language, culture, and traditions, we help foster identity and a deepened sense of lāhui by honoring our ali‘i. The Nā Kamehameha Commemorative Pā‘ū Parade and Ho‘olaule‘a plays a vital role in supporting Health Outcomes 4.1, which emphasizes the preservation and perpetuation of Hawaiian language, culture, traditions, identity, and sense of lāhui. By honoring King Kamehameha and showcasing traditional Hawaiian attire, mele, hula, and oli, the event fosters pride in Hawaiian heritage, reinforcing a strong sense of identity and well-being. Cultural identity has been linked to better mental and emotional health outcomes for Native Hawaiians. The use of ‘ōlelo Hawai‘i in chants, announcements, and presentations throughout the parade and ho‘olaule‘a strengthens language preservation efforts. Increased exposure to Hawaiian language in public spaces normalizes its use, encouraging broader community engagement and learning. The parade’s pā‘ū riding, equestrian skills, ceremonial protocols, and artistic expressions ensure the continued practice of time-honored Hawaiian traditions, reinforcing cultural resilience and pride. The event brings together people from across the islands, fostering a sense of lāhui. Gathering in celebration and cultural practice nurtures emotional, social, and spiritual well-being among participants and attendees. Engagement in cultural activities improves mental health, lowers stress, and promotes overall well-being. The parade and ho‘olaule‘a provide a meaningful space

for people to connect with their roots, reinforcing cultural wellness as a key aspect of health outcomes.

12.c.ii. OHA Funding Event Sponsorship Benefits

- Opportunity for an OHA representative to ride in the parade
- Speaking opportunity for an OHA representative
- Option for an OHA information table
- OHA recognition in radio promotions, social media, and live parade announcements

13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

13.a. Applicant Organization Information

13.a.i. Event Representative: Alfred Van Gieson

13.a.ii Board Members of the Organization: Rena Rzonca — President; Lawena Painter — Vice President / Treasurer; Kepa Resentes — Treasurer; Kehaulani Kaalouahi — Secretary; Alfred Van Gieson — Director; Don Lui-Kwan — Director

13.a.iii Mission Statement: Leeward Kai Canoe Club is dedicated to perpetuating and cultivating cultural, educational, and physical excellence by providing an environment that encourages personal growth through the art of Hawaiian Canoe paddling.

13.b. Event Background

Lauhoe: Father’s Day Regatta Festival is a free, two-day community gathering hosted by Leeward Kai Canoe Club that advances Native Hawaiian cultural perpetuation, intergenerational connection, and holistic wellbeing through immersive cultural education and competitive paddling. Rooted in the value of lauhoē, the festival convenes keiki, ‘ohana, and kūpuna for a full weekend of place-based learning and community celebration. Saturday’s Cultural Day opens with oli and pule followed by welcome remarks that ground participants in the significance of wa’a culture. Attendees then rotate through in-depth, hands-on workshops led by experienced canoe caretakers and cultural practitioners covering koa wa’a history, traditional lashing and rigging techniques, canoe building demonstrations, and navigation knowledge, alongside live hula and Hawaiian music performances. The day also features artisan and educational booths, cultural craft demonstrations, and a community lunch area with local vendors serving traditional Hawaiian foods, creating space for talk story and informal mentorship between generations. Sunday’s Father’s Day Regatta shifts to high-energy competition and community celebration, beginning with opening protocol and acknowledgments. More than 45 sprint races are held throughout the day across divisions ranging from keiki to kūpuna, showcasing endurance, teamwork, and ‘ike wa’a in action. The regatta grounds include live race commentary, spectator viewing areas, cultural entertainment between race blocks, and a robust vendor village offering Hawaiian food, crafts, and community resource tables. The day culminates in an awards ceremony recognizing race winners and recipients of special honors such as the Spirit of Aloha award, followed by a closing oli and community gathering to mahalo participants and volunteers. Together, these components create a comprehensive cultural, educational, and athletic experience that

uplifts ‘ike kupuna, promotes healthy lifestyles, strengthens ‘ohana bonds, and reinforces the enduring pilina between the lāhui, the ‘āina, and the kai.

13.c. Benefits to OHA and OHA Beneficiaries

13.c.i. Alignment to Mana I Maoli Ola: [Outcome 4.1 – Strategy 4]

This event addresses Strategy 4 by creating a culturally grounded, intergenerational space that strengthens Native Hawaiian identity, cultural practice, and community cohesion through ‘ike wa‘a, hula, and hands-on cultural learning. The two-day structure intentionally integrates protocol, practitioner-led workshops, and active participation across age groups, reinforcing ‘ike kupuna and normalizing Hawaiian cultural expression within a community setting. The event advances Outcome 4.1 by preserving and perpetuating traditional Hawaiian knowledge and practices through direct transmission between cultural practitioners, canoe caretakers, and participants. Saturday’s workshops on koa wa‘a history, rigging, canoe building, and navigation ensure that ancestral skills are actively taught and experienced rather than passively observed. Sunday’s regatta further reinforces cultural continuity by engaging keiki through kūpuna in living wa‘a traditions that embody aloha, kuleana, and collective pride. Together, these elements strengthen cultural identity, promote pride in Hawaiian heritage, and support the ongoing continuity of ‘ike and practice within the lāhui.

13.c.ii. OHA Funding Event Sponsorship Benefits

- OHA logo on event signage, event programs and flyers, social media posts, and race gear and awards
- OHA mention in local newspaper ads, podcasts, digital newsletters, event website, and community bulletins
- Speaking opportunity for an OHA representative
- Option for an OHA information table
- Option for OHA to host cultural activities, demonstrations, or workshops
- Opportunity for OHA to form a team of 5 to compete in the regatta
- Designated VIP tables reserved for OHA guests
- OHA to serve as the official awards sponsor for all top 3 finishers in each race, with medals awarded to winners featuring OHA branding

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

IV. BUDGET AUTHORIZATION

Approval of this Action Item authorizes expenditure of funds for the recommended Ho‘ākoakoa Lāhui event sponsorship awards for Fiscal Year 2025-2026, Quarter 4 (Batch 2), as reflected below.

Fund	Year	Program Name	Acct Name	Acct Group	Budget	Prior Action Items Qtr1	Prior Action Items Qtr 2	Prior Action Items Qtr 3	Qtr 4 BF #26-02	Pending BOT Approval Qtr 4 BF #26-02	Qtr 4 BF #26-04	Total Consumption	Funds Available
930	2026	3800 Grants	56560 Grants-In-Aid Sponsorships	Grants	\$635,000	\$79,334	\$84,250	\$130,650	\$127,193.00	\$22,500.00	\$157,875.00	\$601,802	\$33,198
				FY26	Event Dates 2025-2026	JUL, AUG, SEP	OCT, NOV, DEC	JAN, FEB, MAR	APR, MAY, JUN				JUL, AUG, SEP
					Application Deadline	3/31/2025	6/2/2025	9/1/2025	12/1/2025				2/27/2026
				FY27	Event Dates 2026-2027	OCT, NOV, DEC	JAN, FEB, MAR	APR, MAY, JUN	JUL, AUG, SEP				
					Application Deadline	5/29/2026	8/31/2026	11/30/2026	2/26/2027				

V. CERTIFICATION

The following is the certification by the Budget Chief that the funds are available.



Grace Chen

Budget Chief

Date: Feb 24, 2026

VI. RECOMMENDED ACTION

Approve and authorize OHA funding for Ho‘ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025-2026, Quarter 4 (Batch 2):

#	Organization Name	Event	Event Date(s)	Evaluation Scores (Out of 50 Points)	Award Amount Recommendation
1	Kāhuli Leo Le‘a	May Day 2026	May 1, 2026	Evaluator A: 41 points Evaluator B: 43 points	\$11,250
2	Conservation Council for Hawai‘i	Manu o Kū Festival	May 2, 2026	Evaluator A: 45 points Evaluator B: 47 points	\$2,500
3	Pakini Loan Fund	Wai‘anae Moku Made	May 2, 2026	Evaluator A: 45 points Evaluator B: 47 points	\$14,400
4	Ka Po‘e Lawai‘a	Manini & Me Holoholo Festival	May 2-3, 2026	Evaluator A: 45 points Evaluator B: 45 points	\$15,000
5	He Ho‘omaka Hou Ana O Puna	Ho‘ike o nā Wāhine –	May 9, 2026	Evaluator A: 44 points	\$11,025

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

		Hāumana KūkāKūkā Program Completion and Kīhei Tying Ceremony		Evaluator B: 40 points	
6	Ho'okāko'o Corporation	Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging	May 21-22, 2026	Evaluator A: 40 points Evaluator B: 40 points	\$9,533
7	Acton Digital Inc (Kaulike Academy)	‘Ōpio Mākeke: Summer Kickoff Night Market	May 30, 2026	Evaluator A: 45 points Evaluator B: 50 points	\$10,500
8	Recycle Hawaii	Hawai‘i Zero Waste Youth Planning Convergence	June 1-5, 2026	Evaluator A: 45 points Evaluator B: 48 points	\$15,000
9	Symbrosia Foundation	Kona Kai Festival	June 5-6, 2026	Evaluator A: 48 points Evaluator B: 45 points	\$10,867
10	North Kohala Community Resource Center	Kohala Kamehameha Day Celebration	June 11, 2026	Evaluator A: 47 points Evaluator B: 45 points	\$12,800
11	Papa Ola Lokahi	Pūpū ‘Umeke Kā‘eo ‘Ekolu: 3rd Annual Traditional Healers Gathering	June 19-20, 2026	Evaluator A: 46 points Evaluator B: 48 points	\$15,000
12	Festivals of Aloha	Na Kamehameha Commemorative Pā‘ū Parade & Ho‘olaule‘a	June 20, 2026	Evaluator A: 46 points Evaluator B: 45 points	\$15,000
13	Leeward Kai Canoe Club LLC	Lauhoe: Father's Day Regatta Festival	June 20-21, 2026	Evaluator A: 48 points Evaluator B: 46 points	\$15,000
			TOTAL		\$157,875

VII. ALTERNATIVES TO RECOMMENDED ACTION

Action Item BF #26-04: Approval of Ho‘ākoakoa Lāhui Event Sponsorship Awards (FY 2025–2026, Q4, Batch 2)

- A. Approve a different funding amount for one or more of the proposed sponsorship awards.
- B. Do not sponsor one or more of the proposed events.

VIII. ATTACHMENTS

#1 Kāhuli Leo Le‘a – May Day 2026

- 1.a. Event Information
- 1.b. Sponsorship Application
- 1.c. Scoring Matrix

#2 Conservation Council for Hawai‘i – Manu o Kū Festival

- 2.a. Event Information
- 2.b. Sponsorship Application
- 2.c. Scoring Matrix

#3 Pakini Loan Fund – Wai‘anae Moku Made

- 3.a. Event Information
- 3.b. Sponsorship Application
- 3.c. Scoring Matrix

#4 Ka Po‘e Lawai‘a – Manini & Me Holoholo Festival

- 4.a. Event Information
- 4.b. Sponsorship Application
- 4.c. Scoring Matrix

#5 He Ho‘omaka Hou Ana O Puna – Ho‘ike o nā Wāhine – Hāumana KūkāKūkā Program Completion and Kīhei Tying Ceremony

- 5.a. Event Information
- 5.b. Sponsorship Application
- 5.c. Scoring Matrix

#6 Ho‘okāko‘o Corporation – Waimea Middle Public Conversion Charter School’s May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging

- 6.a. Event Information
- 6.b. Sponsorship Application
- 6.c. Scoring Matrix

#7 Acton Digital Inc (Kaulike Academy) – ‘Ōpio Mākeke: Summer Kickoff Night Market

- 7.a. Event Information
- 7.b. Sponsorship Application
- 7.c. Scoring Matrix

#8 Recycle Hawaii – Hawai‘i Zero Waste Youth Planning Convergence

- 8.a. Event Information**
- 8.b. Sponsorship Application**
- 8.c. Scoring Matrix**

#9 Symbrosia Foundation – Kona Kai Festival

- 9.a. Event Information**
- 9.b. Sponsorship Application**
- 9.c. Scoring Matrix**

#10 North Kohala Community Resource Center – Kohala Kamehameha Day Celebration

- 10.a. Event Information**
- 10.b. Sponsorship Application**
- 10.c. Scoring Matrix**

#11 Papa Ola Lokahi – Pūpū ‘Umeke Kā‘eo ‘Ekolu: 3rd Annual Traditional Healers Gathering

- 11.a. Event Information**
- 11.b. Sponsorship Application**
- 11.c. Scoring Matrix**

#12 Festivals of Aloha – Na Kamehameha Commemorative Pā‘ū Parade & Ho‘olaule‘a

- 12.a. Event Information**
- 12.b. Sponsorship Application**
- 12.c. Scoring Matrix**

#13 Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

- 13.a. Event Information**
- 13.b. Sponsorship Application**
- 13.c. Scoring Matrix**



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ölelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

May Day 2026

Application - 'Ho'ākoako Lāhui Sponsorship Program

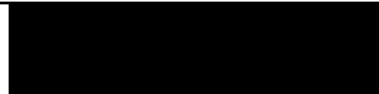
Kāhuli Leo Le'a

Mr. Zachary Lum
P.O.Box 6024
Kaneohe, HI 96744



Mr. Zachary Lum

P.O.Box 6024
Kaneohe, HI 96744



Application Form

APPLICANT & EVENT INFORMATION

Name of Applicant Organization*

Kāhuli Leo Le'a

Name of event representative*

Event representative must be someone who is authorized to communicate with OHA staff and submit any required documents or information on behalf of the awarded organization.

Zachary Lum

Event Representative email*

[REDACTED]

Event Representative phone number*

[REDACTED]

Describe the mission of the organization.*

Kāhuli Leo Le'a is a Native Hawaiian, 501(c)3 nonprofit organization dedicated to catalyzing aloha 'āina through the education, composition and presentation of mele and other cultural practices.

Organization's Governing Board and/or Executive Team*

List the organization's governing board members' names and titles and the executive team members' names and titles. Please DO NOT include emails and phone numbers.

Keli'i Ruth, President
Holeka Inaba, Vice-President
Keely Rivera, Secretary
Kanoë Wong, Treasurer
Zachary Lum, Executive Director

Name of event to be sponsored*

May Day 2026

Start date of event to be sponsored*

05/01/2026

End date of event to be sponsored

For one day events, leave blank. For multi-day events, duration should be no longer than 30 days.

Time of event to be sponsored:*

Please provide start and end time for one day events. For multiple day events, please specify the hours for each day.

5:00PM - 9:00PM

Address of event/activity:*

Bishop Museum, 1525 Bernice St, Honolulu, HI 96817

Identify island(s) where event will be held:*

O'ahu

EVENT SCOPE

Purpose Statement*

Please provide a short statement that describes the proposed event and its purpose.

Besides the making, wearing, and giving of lei, May Day celebrations eventually became synonymous with a variety of Hawaiian cultural practices including mele, hula, and hana no'eau. In 1977, May Day celebrations were codified into contemporary memory with an annual concert by the Brothers Cazimero at the Waikīkī Shell. This beloved annual tradition would last decades and become the dependable beacon and culmination of these important cultural practices, a representation of our people, and lei celebration. Since 2020, Kāhuli Leo Le'a ("KLL") has partnered with Robert Cazimero and Keauhou to continue producing the annual event – celebrating the cultural practices of mele and hula for live and broadcast audiences around the world.

Describe the event services and activities from start to finish.*

The description should depict what the event would encompass. Demonstrate the substance of the event. Include information from the following:

- Agenda (draft/past flyer)
- Event flyer (draft/past flyer);
- List of speakers and their area of expertise;
- List of exhibitors and their offerings; and/or

- Summaries of seminars, workshops, or other opportunities provided at the event.

This year's May Day celebrates legends of Hawaiian music, Keali'i Reichel and Robert Cazimero, alongside special guests, including Keauhou, Hālau Nā Kamalei o Lilīehua, the Royal Dance Company and more. The concert traditionally occurs between 7:00pm - 9:00pm and is broadcast/live-streamed to local and international audiences. Additional cultural opportunities for in-person attendees include lei and food exhibits between 5:00pm - 9:00pm.

With our organizational mission aimed at mele, this year's May Day celebration will also produce educational materials that preserve and perpetuate the linguistic connection and methodological framework to mele and hula as a knowledge management system. The event will showcase the unique and interdependent relationship between the Hawaiian cultural practices of mele and hula by recording mele and hula and producing educational resources therefrom. The event will produce recordings of four (4) mele and hula and written educational resources - fact sheets providing analyses of lyrics, translations, etc. in order to cultivate a deeper understanding of the specific mele as well as the accompanying hula. Recordings and resources will be available via the KLL website (mele.com) to the general public. Ultimately, May Day produces a set of resources that promotes education and understanding to learners of all ages in order to engage with these cultural practices of knowledge – mele and hula – that have yet to be presented together as an integrated cultural practice.

Additional Supporting Document (Optional)

Total estimated number of individuals to attend the event:*

1500

Estimated number of Native Hawaiians to attend the event:*

1000

ALIGNMENT TO MANA I MAULI OLA

Indicate the event's alignment to one of OHA's strategic directions below.*

Identify the Strategic Outcome your event best aligns with and provide your reasoning. Link to Strategic Plan: <https://www.oha.org/about/mana-to-mauli-ola/>

Educational Pathways

Identify the strategy the event aligns to and describe how it aligns to it.*

Note: The strategy should fall under the strategic direction identified in the previous question.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Strategy must be clearly identified.**

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health. The event aligns with Strategy 3 because...

Strategy 1: Support development and use of educational resources for all Hawaiian lifelong learners in schools, communities and ‘ohana. The event aligns with Strategy 1 because of the educational resources that will be produced from the event, namely the collection of video recordings and supplemental educational documents that preserve and perpetuate the linguistic connection and methodological framework to mele and hula as a knowledge management system, as expertly demonstrated by Kumu Hula Robert Cazimero. Beyond these direct educational resources, the May Day program, both live and broadcast, is framed as an edu-tainment – where mele and hula are the conduits of knowledge transmission, as they have been for centuries.

Identify the strategic outcome(s) the event aligns to it and describe how it aligns to it.*

Addresses the outcome and the impact the event will have. Note: The outcome should fall under the strategic direction and strategy identified in the previous responses.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-maui-ola/>

Please use the format in the example below: **The Outcome(s) must be clearly identified.**

Strategy Outcome 3.4: Communities are empowered to take care of iwi kupuna. This event addresses the outcome by...

Strategic Outcome 1.3: Increased number of Native Hawaiians engaged in traditional learning systems (i.e., hale, hālau, hale mua, hale pe‘a) that reestablish/maintain strong cultural foundations and identity. This event addresses this outcome by promoting the value of hālau hula, not only for the cultural knowledge that is stewarded and transmitted therein, but also as a traditional learning system tied to cultural foundations and identity. Specifically, the event aims to increase the number of Native Hawaiians engaged in hālau hula and mele by 1) providing another opportunity to present these cultural practices, and 2) promoting the cultural practice as a valuable and viable pathway for emerging and aspiring practitioners.

Strategic Outcome 3.1: Increased availability and access to quality, culturally based and culturally adapted prevention and treatment interventions in ‘ohana, schools and communities. The event addresses this outcome by promoting cultural practices, specifically mele and hula, that are culturally based prevention and treatment interventions for communities. The commitment and lifestyle of the hula practitioner, is one that advances Hawaiian well-being through cultural identity, adapting Hawaiian language and place-based learning, engaging in community and social cohesion which include both traditional and contemporary interventions to support a thriving community.

Strategic Outcome 4.1: Preservation and perpetuation of Hawaiian language, culture, tradition, identity and sense of lāhui. The event addresses this outcome by celebrating and promoting the importance and value of cultural practitioners, specifically those of mele and hula. Celebrating the specific accomplishments of Cazimero and his 50 years of hula presents a particularly unique opportunity to acknowledge and recognize the fruit of 50 years of dedication to language, culture, tradition, identity, the relationships therein and a sense of lāhui that results. This particular event stands out as an opportunity to realize this strategic outcome, simply because of the fact that such celebrations of landmark accomplishments in hula, in impact and duration, have not yet been realized at large within the community.

Strategic Outcome 4.2: Increased community stewardship of Hawai‘i’s natural and cultural resources that foster connection to ‘āina, ‘ohana and communities. The event addresses this outcome because of the particular cultural practices that will be featured in the event: mele and hula. While it may not be obvious to some, mele and hula are, in fact, ‘āina-based cultural practices. Mele, as the oral documents of our history, have preserved ino ‘āina and geographical information that would otherwise be lost to antiquity. Even today,

mele continue to function as knowledge transmitters for 'āina-based knowledge and stewardship practices. The same can be said for hula, which is the physical embodiment of mele themselves. As hula traditions proliferate, so, too, does the 'āina knowledge embedded within. The event promotes mele and hula as a means of increasing the recognition of these cultural practices as an act of stewardship of Hawai'i's natural and cultural resources that foster connection to 'āina and each other.

Strategic Outcome 7.2: Increase access to capital and credit for community strengthening Native Hawaiian businesses and individuals. The event addresses this outcome by aggregating supportive sponsors of mele, hula, and Native Hawaiian-driven media. The event is largely supported by organizations, both public and private, both local and beyond, as a means of creating opportunities for Native Hawaiian partners of Kāhuli Leo Le'a that would otherwise not be possible – namely, the high-value, live and broadcast production. Vendors of the event are largely Native Hawaiian businesses, and as such, these businesses have an increased access to capital (and therefore, credit) by engaging in the production of the event.

Strategic Outcome 7.3: Increase number of Native Hawaiian 'ohana who are resource stable (financial, subsistence, other). The event addresses this outcome by the fact that a majority of paid vendors, partners and participants of the event are Native Hawaiian. Paid "gig" opportunities for both cultural practitioners and production crew help to increase the number of Native Hawaiian 'ohana who are resource stable, specifically, stable financially.

Strategic Outcome 7.4: Increased Native Hawaiian employment rate. The event addresses this outcome by engaging Native Hawaiian businesses and contractors. The event has traditionally been produced by Native Hawaiian employees of various Native Hawaiian businesses. As the event grows, so, too, does the capacity for the event to increase Native Hawaiian employment rate.

Strategic Outcome 8.1: Increased number of successful, community strengthening Native Hawaiian-owned businesses. The event addresses this outcome by providing more paid opportunities for Native Hawaiian-owned businesses, specifically those of cultural practitioners and event/broadcast production. The event increases the number of these organizations by creating another venue to support their work, and thus sustain their business. As the event grows, the event requires more Native Hawaiian-owned businesses, further increasing the demand (and number of) successful, community strengthening Native Hawaiian-owned businesses.

Strategic Outcome 8.2: Establishment of new markets for Native Hawaiian products (eg. kalo, loko i'a grown fish, etc.) that can provide Native Hawaiian producers a liveable wage. The event addresses this outcome by supplementing a new market for Native Hawaiian digital products – namely the media created from the event that is monetized to the benefit of Native Hawaiian practitioners. These digital products are created on Kāhuli Leo Le'a's streaming platform, mele.com, where subscription revenue is utilized to provide new revenue streams for Hawai'i-based practitioners and creators.

Strategic Outcome 8.3: Established and operationalized indigenous economic system consistent with Native Hawaiian knowledge, culture, values and practices. The event addresses this outcome by live streaming and hosting video content on mele.com, Kāhuli Leo Le'a's streaming platform, where on-demand views of videos are monetized to the benefit of the cultural practitioners and creators who produced them. This economic model is consistent with the ahupua'a system, where the economic benefit of one creator implies the economic benefit of all creators on mele.com. Add the fact that the platform is specifically for the benefit of Hawai'i-based practitioners and creators, the event facilitates and supports this indigenous economic system consistent with Native Hawaiian knowledge, culture, values and practices.

Describe how the event aligns to and addresses one or more of OHA's strategic foundation(s):*

'Ohana – Family. 'Ohana is instrumental to community empowerment. When families are strong and healthy, and when there is positive engagement within the 'ohana, from keiki to kūpuna, communities thrive. Connections to mo'omeheu and 'āina begin with connections within families.

Mo'omeheu – Culture. Culture is the essence of who Native Hawaiians are as a people. It includes all those things that distinguish the community: language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of culture are both internal and external. Culture shapes Native Hawaiian worldview and thinking. It informs the ways in which individuals interact with one another and with 'āina. It influences the way Native Hawaiians interpret events and approach problem-solving.

'Āina – Land & Water. To Native Hawaiian kūpuna, the land was life. Imbued with mana, 'āina provides everything the community needs to survive. On an intimate level, Native Hawaiians are connected to the land by the generations of kūpuna who lived on the land and whose iwi rest here. Thus, the emotional ties to family, and the aloha for them, extends to the land that feeds us.

Use the following format: The Foundation(s) must be clearly identified.

First, list the name of the foundation(s). Second, demonstrate how the proposed event aligns with the selection.

Strategic Foundation: 'Ohana – Family. May Day is a family event – where Native Hawaiian and other families are welcomed to enjoy the event's festivities together. This particular event cultivates an opportunity for positive engagement with cultural practices within 'ohana, from keiki to kūpuna, making 'ohana strong and healthy.

Strategic Foundation: Mo'omeheu – Culture. The event hosts a variety of cultural aspects, including the amplification of language, stories, customs, music, art, food, protocols, religions, values, traditions and celebrations. The event primarily features cultural practices of mele and hula, and a collection of practitioners who continue to advance these practices within contemporary times. The worldviews encapsulated in the mele hula reinforce individual internal identity and externally represent cultural excellence to the world. The event becomes an annual opportunity to recognize excellence in cultural practice, and honor those keepers of legacy.

Strategic Foundation: 'Āina – Land and Water. It is important to understand that mele and hula are, in fact, 'āina-based practices. As mentioned above, mele, as the oral documents of our history, have preserved inoa 'āina and geographical information that would otherwise be lost to antiquity. Even today, mele continue to function as knowledge transmitters for 'āina-based knowledge and stewardship practices. The same can be said for hula, which is the physical embodiment of mele themselves. As hula traditions proliferate, so, too, does the 'āina knowledge embedded within. The event promotes mele and hula as a means of increasing the recognition of these cultural practices as an act of stewardship of Hawai'i's natural and cultural resources that foster connection to 'āina and each other.

BUDGET

Provide the total amount of money being requested from OHA for the event.*

Maximum amount is **\$15,000**. No minimum amount. Requests for exceptions to the maximum budget request may require justification in the comments/questions section of the application.

\$15,000.00

Indicate each expense for which OHA funds will be used as a line item.*

Provide a brief description for each item. The items should sum to the total amount requested. For sponsorship packages, please list the sponsorship benefits.

OHA funds *shall not* be used for entertainment or perquisites (perks) per HRS 10-17(b)(3) however, HRS 10-17(b) does not expressly prohibit grantees from having or providing "entertainment or perquisites" as some aspect of their event. This includes live music, band, performance groups, musicians, DJ, Emcee, etc.

Amount: \$15,000

Line-Item: Broadcast Production Vendors

Description:

These funds will provide partial support for the expenses related to production vendors support the production of the broadcast and educational video content from the live event. Vendors include audio, video, lighting, staging, tenting and general event equipment.

Total production costs for event: \$55,000 (\$15,000 funded by OHA, \$40,000 funded by KLL)

For a sponsorship of \$15,000, OHA will receive logo placement on livestream banners and all promotional collateral, a 30 sec commercial during the livestream, as well as the option to livestream the event on OHA-owned platforms. Additionally, OHA will receive 20 General Admission tickets or VIP ticket equivalent.

Line-Item Budget Upload

OHA Ho'ākoakoa Lāhui - Line Item Budget.pdf

OPPORTUNITIES FOR OHA COMMUNITY ENGAGEMENT, PARTNERSHIPS, AND PUBLIC RELATIONS

Opportunities for OHA recognition:*

List and clearly describe the community engagement, partnership, and public relations opportunities the event offers for OHA which may include, but are not limited to:

- Advertisements in event programs/television/radio/print ads
- OHA logo on event goods or items
- OHA logo on event signage
- OHA logo on event flyers
- Speaking opportunities for OHA representative
- Providing a table or method for distributing OHA program information at the event

Please outline specifically if your event is offering any formal tables for OHA representatives to attend as guests

For a sponsorship of \$15,000, OHA will receive logo placement on livestream banners and all promotional collateral, a 30 sec commercial during the livestream, as well as the option to livestream the event on OHA-owned platforms. Additionally, OHA will receive 20 General Admission tickets or VIP ticket equivalent.

Social Media/Marketing Platforms:*

Please provide your **organizations** social media usernames/handles, as well as any other platforms the event will be broadcasted on.

Please use the following format:

Instagram: @example

Facebook: link

X: @example

Website:

Other:

Instagram: @kahulileolea

Website: <https://www.kahulileolea.org/>

REQUIREMENTS

Event Information (flyers, posters, website details, etc.) DO NOT submit flyers for previous events.*

Attachment 1 - May Day Event Info 2026.pdf

IRS Letter of Determination-document upload*

The applicant must have IRS tax-exempt nonprofit status and be registered to do business in the State of Hawai'i. The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. See Attachment A. Sample - IRS Letter of Determination.

Attachment 2 - IRS Tax Exempt Determination.pdf

Certificate of Vendor Compliance (CVC)-document upload*

The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i (**must be valid within the calendar year**). To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Applicants must be registered and compliant with Hawai'i Compliance Express (HCE). We do not accept your DCCA. *See Attachment B. Sample - HCE Certificate of Vendor Compliance.*

Attachment 3 - Vendor Compliance.pdf

Download and complete the W9 form found here and upload below.

Checks will not be processed and mailed (to the address on the W-9) until all reporting/required documents are submitted.

Completed W-9*

Please upload the completed W-9 (must be valid within the calendar year).

Attachment 4 - W9.pdf

If the application is recommended for approval to the Board of Trustees, the event representative will be asked to attend the OHA Budget and Finance Committee meeting to respond to any questions. Attendance may be in-person or virtual.**

I understand the attendance requirement if recommended for approval.

OPTIONAL: Please add any additional comments or questions below. Mahalo for your application!

ACKNOWLEDGEMENTS

Please read the following statements thoroughly:

By submitting this sponsorship application and selecting the following options, your agency and its affiliates, officers, employees and/or agents agree to indemnify, defend and hold harmless the Office of Hawaiian Affairs (OHA) from any and all claims, demands, liabilities, losses, damages, costs, and expenses, including reasonable attorney's fees, arising out of or in connection with this sponsorship application and participation in the associated event/activities. *

- "I have applied for or received all applicable licenses and permits, when such is required to conduct the activities or provide the services for which a grant is awarded."
- "I agree to comply with all applicable federal, state and county laws."
- "I shall not use these funds for the purposes of entertainment or perquisites (perks)."
- "I agree that all activities and improvements undertaken with funds received shall comply with all applicable federal, state, and county statutes and ordinances, including applicable building codes and agency rules; "
- "The applicant will indemnify and hold harmless the office, the State of Hawai'i, its officers, agents, and employees from and against any and all claims arising out of or resulting from activities carried out or projects undertaken with funds provided hereunder, and procure sufficient insurance to provide this indemnification if requested to do so."
- "I agree to make available to the office all records the applicant may have relating to the operation of the applicant's activity, business, or enterprise, to allow the office to monitor the applicant's compliance with the purpose of this chapter; "
- "I agree OHA can have access to records pertaining to this grant."
- "I understand that this grant award shall be monitored by the OHA to ensure compliance with Hawaii Revised Statutes § 10-17 and the purposes and intent of the Grant;"
- "I agree to complete evaluation(s) follow-up by OHA to determine whether the event attained the intended results in the manner contemplated."

*

I agree to the above statements.

Authorized Signatory*

By typing/signing your name below, you certify that the information provided is true and accurate to the best of your knowledge. You also acknowledge that typing your name acts as your electronic signature, which holds the same legal weight and validity as a handwritten signature, and you consent to be bound by the terms and conditions outlined in this agreement.

Zachary Lum

Date of Submission*

11/18/2025

Mahalo for your submission, you will receive an email confirmation that your application has been received once you submit. We will be in contact with you regarding award and non-award via email.

File Attachment Summary

Applicant File Uploads

- OHA Ho'ākoakoa Lāhui - Line Item Budget.pdf
- Attachment 1 - May Day Event Info 2026.pdf
- Attachment 2 - IRS Tax Exempt Determination.pdf
- Attachment 3 - Vendor Compliance.pdf
- Attachment 4 - W9.pdf

Kāhuli Leo Le‘a

Proposed Project Budget: 5/1/26

Item	Cost	Description
Event/Broadcast Production Vendors	\$15,000	<p>These funds will provide partial support for the expenses related to production vendors support the production of the broadcast and educational video content from the live event. Vendors include audio, video, lighting, staging, tenting and general event equipment.</p> <p>Total production costs for event: \$55,000 (\$15,000 funded by OHA, \$40,000 funded by KLL)</p>



Hawaiian Airlines May Day 2026, presented by Mele

By Kahuli Leo Le'a [Follow](#)

1525 Bernice Street
May 1 from 5pm to 9pm HST

On Sale Mar 31, 2026 at 12:00 AM

[Remind me](#)

[Details](#)

Overview

The annual Lei Day concert celebrates the remarkable talents of Keali'i Reichel and Robert Uluwehi Cazimero.

Hawaiian Airlines May Day 2026 presented by Mele continues the annual Lei Day tradition by the Brothers Cazimero with Keauhou, the 19-time Nā Hōkū Hanohano award-winning group, returning to headline the concert experience alongside special guests, including Robert Cazimero, Keali'i Reichel, Hālau Nā Kamalei o Lilīehua, Hālau Ke'alaokamaile, and co-hosts, Billy V. and Debbie Nakanelua-Richards, director of community & cultural relations at Hawaiian Airlines.

The live concert will be on Friday, May 1, from 5-9 p.m. at the Great Lawn of Bishop Museum. Concert tickets are available for purchase at mele.com. Audiences around the world can enjoy the live broadcast on May 1 at 7pm on mele.com.

Good to know

Highlights

In person

Refund Policy

Refunds up to 7 days before event

On Sale Mar 31, 2026 at 12:00 AM

[Remind me](#)

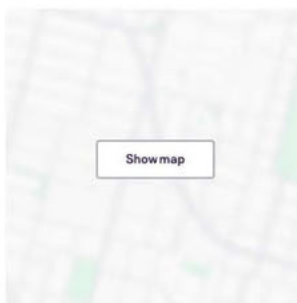
[Details](#)

Location

Bishop Museum
1525 Bernice Street
Honolulu, HI 96817

How do you want to get there?

- Driving
- Public transport
- Biking
- Walking



Agenda

Doors Open

5:00 PM - 7:00 PM
Food & Pre-Show Entertainment

7:00 PM - 9:00 PM
May Day Concert

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

DEC 13 2019

KAHULI LEO LEA
47-430 HUI NENE STREET
KANEHOE, HI 96744-0000

Employer Identification Number:
84-3718571
DLN:
26053726003349
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
509(a)(2)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
November 13, 2019
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Letter 947

KAHULI LEO LEA

Sincerely,

Stephen A. Martin

Director, Exempt Organizations
Rulings and Agreements



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

Vendor Name: KAHULI LEO LE`A

Issue Date: 10/29/2025

Status: **Compliant**

Hawaii Tax#:

New Hawaii Tax#: GE-1732602368-01

FEIN/SSN#: XX-XXX8571

UI#: No record

DCCA FILE#: 313719

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See <i>Specific Instructions</i> on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Kāhuli Leo Le á	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input checked="" type="checkbox"/> Other (see instructions) Nonprofit corporation exempt under IRS Code Section 501(c)3	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ <i>(Applies to accounts maintained outside the United States.)</i>	
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>	
	5 Address (number, street, and apt. or suite no.). See instructions. PO Box 6024	Requester's name and address (optional)
	6 City, state, and ZIP code Kāne ohe HI 96744	
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
or									
Employer identification number									
8	4	-	3	7	1	8	5	7	1

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	Date 10/28/25
------------------	--------------------------	----------------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or "doing business as" (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner's name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABL accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

May Day 2026

Kāhuli Leo Le'a

Mr. Zachary Lum
P.O.Box 6024
Kaneohe, HI 96744



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P.O.Box 6024
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Evaluation Summary

Overall Score: 84% - 2/2 Evaluations Complete

Evaluator:	86.00%
Evaluator:	82.00%

EVENT SCOPE

Benefits to Native Hawaiian Community*

The application outlines event services or activities that provide significant benefits to the Native Hawaiian community.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: When reviewing this section, the score reflects the following strengths:

- This is a strong cultural event that uplifts mele and hula in a meaningful way.
- It engages a large Native Hawaiian audience.
- It creates educational materials that will live beyond the night of the concert.
- It clearly supports cultural identity and connection for our lāhui.

The score stops short of "exceptional" because:

- The application doesn't describe how the educational materials will be implemented long-term.
- It doesn't outline structured follow-up with schools, hālau, or other learning partners.
- There are no measurable targets tied to how many learners will directly benefit beyond the event audience.

Overall, this is strong, culturally grounded work. The scoring reflects "significant benefit", while reserving "exceptional" for events that demonstrate sustained, measurable impact beyond the event itself.

Evaluator: *[Unanswered]*

Attendee Reach & Feasibility*

The application indicates a proposed number of total attendees which is achievable and reflects an opportunity for significant OHA reach into the community.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: May Day has a long cultural history dating back to 1977, and Kāhuli Leo Le'a has continued producing it since 2020 with strong community turnout. The projected 1,500 attendees, including approximately 1,000 Native Hawaiians, reflects that proven history and is both realistic and significant.

Given the scale, Native Hawaiian concentration, and livestream reach, I am scoring attendance as an "exceptional reach."

Evaluator: *[Unanswered]*

Native Hawaiian Attendance & Impact*

The application indicates a proposed number of Native Hawaiian attendees which is achievable and reflects a significant positive impact on the betterment of conditions of Native Hawaiians.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: The projected 1,000 Native Hawaiian attendees is substantial and historically consistent with May Day's cultural draw. The scale of Native Hawaiian participation reflects meaningful cultural engagement and impact within the lāhui.

While the projection appears reasonable and aligned with the event's history, how is Native Hawaiian participation tracked or substantiated? Clearer documentation of how participation is measured would strengthen future applications.

Evaluator: *[Unanswered]*

ALIGNMENT TO MANA I MAULI OLA STRATEGIC PLAN

Alignment with Selected Strategy*

The application clearly demonstrates how the event will directly and meaningfully address the selected Strategy.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The application clearly identifies Strategy 1 under Educational Pathways and explains how the event will produce and share educational resources through recorded mele and accompanying written materials. The connection to lifelong learning in schools, communities, and 'ohana is direct and well-articulated. It stops short of exceptional because the application does not outline structured implementation or measurable adoption of the educational materials beyond public availability.

Evaluator: Educational resources available following the event but have some concern about accessibility to those resources. Is it freely available to lahui?

Community Impact & Strategic Outcome Alignment*

The application clearly demonstrates how the event will have significant community impact in alignment with one or more Strategic Outcome.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: The application clearly identifies and meaningfully aligns with multiple Strategic Outcomes, particularly those focused on preservation and perpetuation of Hawaiian language, culture, identity, and traditional learning systems. The event directly advances engagement in hālau hula and mele as living knowledge systems and strengthens cultural identity and community cohesion at scale.

Given the depth of cultural grounding and the event's demonstrated ability to convene and engage Native Hawaiians in traditional learning practices, the community impact under this section meets the exceptional threshold.

Evaluator: Demonstrated alignment with MANY MiMO strategies. Still concerned about accessibility to those educational resources.

Alignment with Strategic Foundation*

The application clearly demonstrates how the event will align with one or more Strategic Foundation.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: The application clearly identifies 'Ohana, Mo'omeheu, and 'Āina and thoughtfully explains how the event aligns with each. May Day brings families together across generations, uplifts culture through mele and hula, and reinforces 'āina-based knowledge systems embedded within these practices.

The alignment is culturally grounded, direct, and well-articulated. Under this section, it meets the exceptional threshold.

Evaluator: *[Unanswered]*

Budget*

The amount requested is appropriate and a reasonable line-item budget is included.

Max Score: 10

Evaluator: 5

Evaluator: 8

Comments

Evaluator: Final award is contingent upon verification of allowable expenses consistent with OHA policy.

The budget includes production-related costs that require confirmation to ensure OHA funds are applied only toward expenses permitted under sponsorship guidelines.

Evaluator: Evaluator still uncertain about disallowed costs for budget item.

Opportunity for OHA Public Recognition*

The application describes community engagement, partnership, and public relations opportunities for OHA that are appropriate and reflects an opportunity for significant OHA reach into the community.

Max Score: 10

Evaluator: 9

Evaluator: 8

Comments

Evaluator: The event provides strong visibility for OHA. This includes logo placement on promotional materials and livestream banners, a 30-second commercial during the broadcast, and the option to stream the event on OHA platforms. That gives OHA exposure not just to the in-person audience, but also to viewers online.

Given the size of the event and its legacy & cultural importance, the level of recognition is high and offers meaningful visibility for OHA in the community. For those reasons, it scores near the exceptional range.

Evaluator: [Unanswered]

Recommend Sponsorship*

Evaluator: Yes

Evaluator: Yes

Recommended Amount*

Evaluator: 15000

Evaluator: 11250.00

Brief Explanation for Recommendation

Evaluator: Final award is subject to approval of the proposed use of funds and verification that all expenses are allowable under OHA policy.

The event demonstrates strong cultural alignment and meaningful community reach, warranting support at 75% of the requested amount. The reduced award reflects budget detail considerations and ensures appropriate stewardship of OHA funds.

Evaluator: 75% sponsorship

EVALUATOR SIGNATORY

Name of Sponsorship Evaluator*

By typing your first name and last name you certify that you are the individual certifying the document and you verify that the information in this form is true and accurate.

Evaluator: [REDACTED]

Evaluator: [REDACTED]

Date of Evaluation*

Evaluator: 02/17/2026

Evaluator: 02/17/2026



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ōlelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

Manu o Kū Festival

*Application - 'Ho'ākoako Lāhui Sponsorship
Program*

Conservation Council For Hawaii

Jonnetta Peters
P.O. Box 2923
Honolulu, HI 96802



Jonnetta Peters



Application Form

APPLICANT & EVENT INFORMATION

Name of Applicant Organization*

Conservation Council for Hawai'i

Name of event representative*

Event representative must be someone who is authorized to communicate with OHA staff and submit any required documents or information on behalf of the awarded organization.

Leah Kocher

Event Representative email*

[REDACTED]

Event Representative phone number*

[REDACTED]

Describe the mission of the organization.*

Founded in 1950, our mission is to protect Hawai'i's native plants, animals, and ecosystems for future generations. While not species nor location specific, we work to protect our plant and animal species from mauka to makai across all of our Hawaiian Islands and into our ocean depths. We have a long history of working to protect and expand critical habitat for our Hawaiian monk seals, advocating for greater protection of our native sea and forest birds, and defending our marine national monuments from industrial fishing interests and the threat of deep-sea mining. We work primarily through community outreach, public education, and advocacy, and when necessary, litigation.

Organization's Governing Board and/or Executive Team*

List the organization's governing board members' names and titles and the executive team members' names and titles. Please DO NOT include emails and phone numbers.

Colleen Heyer, President of the Board
Bret Nainoa Mossman, Vice President of the Board
Maka'ala Ka'aumoana, Secretary
Mashuri Waite, PhD, Treasurer
Puanani Anderson-Fung, Board of Directors
Steven Lee Montgomery, PhD, Board of Directors
Emily Sarasa, Board of Directors
Les Welsh, Board of Directors

Sunshine Woodford, Board of Directors
Jonnetta Peters, Executive Director

Name of event to be sponsored*

Manu o Kū Festival

Start date of event to be sponsored*

05/02/2026

End date of event to be sponsored

For one day events, leave blank. For multi-day events, duration should be no longer than 30 days.

Time of event to be sponsored:*

Please provide start and end time for one day events. For multiple day events, please specify the hours for each day.

10am - 2pm

Address of event/activity:*

'Iolani Palace Coronation grounds, 364 S King St, Honolulu, HI 96813

Identify island(s) where event will be held:*

O'ahu

EVENT SCOPE

Purpose Statement*

Please provide a short statement that describes the proposed event and its purpose.

The Manu o Kū Festival is an annual event usually held in May to coincide with the US Migratory Bird Treaty Act. This event celebrates the Manu o Kū, or white tern, as the official bird of the City & County of Honolulu and true urban success. These birds, nesting in the trees overhead during the festival, serve as ambassadors for our community to become engaged in learning about and subsequently protecting our native flora and fauna. While the Manu o Kū are thriving in downtown Honolulu, many of our other native species are suffering. 2026 will mark our 11th annual festival, bringing together various community partners, conservation organizations, government agencies, and academic researchers to share about the Manu o Kū as well as other relevant causes. We have approximately 20 participant booths, each providing education and information coupled with an activity, craft, or game. Additionally, throughout the event, we

host a speaker series to keep festival goers informed and up to date, covering topics such as current research results, the cultural significance of the Manu o Kū to Hawai'i, and the ties that our community, companies, and organizations have to these birds. We add in some entertainment throughout the day, to include a traditional opening 'oli and hula performance as well as an ukulele duo. Hosting the festival on the coronation grounds of 'Iolani Palace also provides the perfect backdrop to celebrate these wonderful birds, as they are regularly nesting or raising small chicks in the branches overhead. The festival sets up spotting scopes to get a "birds eye view" of these guests of honor, as well as leading bird walks throughout the property to learn about how to spot the birds in the trees. In order to further engage our keiki, we have several costume characters that mingle in the crowd for photos and lead a kids nature themed costume contest parade. Through family-friendly activities and crafts, our guests can learn more about the Manu o Kū and their connection to Hawai'i and significance to Native Hawaiian navigation, helping to create future environmental stewards to lead the charge and fight for our native species.

Describe the event services and activities from start to finish.*

The description should depict what the event would encompass. Demonstrate the substance of the event. Include information from the following:

- Agenda (draft/past flyer)
- Event flyer (draft/past flyer);
- List of speakers and their area of expertise;
- List of exhibitors and their offerings; and/or
- Summaries of seminars, workshops, or other opportunities provided at the event.

The event begins under our large tent at 10am with an 'oli by Kumu Hula James Dela Cruz to open our program. The emcee will then welcome our participants, volunteers, and guests. A representative from National Wildlife Federation (a longtime festival sponsor) will speak for approximately 5 minutes about the importance of this event and their connection to the event as founding sponsors. Then we will move onto a hula performance from James Dela Cruz and Nā 'Ōpio a me Nā Kupuna O Ko'olau. We will then move onto begin our speaker series. Each speaker is allotted 15 minutes for their talk and to answer questions from the guests. Next is the first appearance of the costume characters, as they are introduced and then mingle with the crowd and take photos for approximately 15 minutes. The costume characters that we have in attendance include: Ranger Rick the racoon (from National Wildlife Federation), Hina the monk seal, Kaleo the pueo, Pono the nene, Kolea Nui the kolea, and Aloha Kea the Manu o Kū. Following the costume characters appearance, we will have another speaker as well as opportunity for another sponsor to speak to the guests. Up next is an ukulele musical performance by Corey Fujimoto and Kalei Gamiao. Following this, we will have another speaker to conclude our speaker series. To finish out the formal program, we will have our costume characters come out for a final appearance as they lead our keiki nature themed costume contest and award prizes.

While the formal program is taking place under the large tent, we also have plenty more to do during the festival. We will have approximately 18-20 participant booths set up for guests to visit. At each booth, guests can engage with a variety of organizations, community partners, and government agencies, learn about each group and participate in a family friendly craft, game, or activity. Additionally, there are several spotting scopes set up for guests to view the Manu o Kū that are actively nesting in the trees. We will often have a set of scopes viewing an adult that is sitting on an egg and another set viewing a chick. Throughout the day, guests can also participate in a bird walk on property, led by one of our partner organizations, to view additional Manu o Kū and the wide variety of birds on 'Iolani Palace grounds.

Speaker Series Plan for 2026 (*Note: list is subject to change):

1) Kapiolani Community College students will speak about current research results about Manu o Kū on KCC grounds

2) Polynesian Voyaging Society will speak about the cultural and historical significance of the Manu o Kū in Native Hawaiian navigation

3) We plan to honor a local company or organization that is doing good for conservation of native species, talk about the issue at hand, what changes are being made to help, and present a certificate to this company; the company will then be given a chance to speak as well about how they are dedicated to helping our native species. An example of this may be an arbor company that has dedicated time and money to provide extra training to their staff about trimming trees near nesting Manu o Kū and the importance of working together as a community.

Expected Exhibitors for 2026 (*Note: list is subject to change):

- 1) Conservation Council for Hawai'i
- 2) National Wildlife Federation
- 3) Hawai'i Audubon Society
- 4) Pacific Rim Conservation
- 5) US Fish & Wildlife Service
- 6) Hui Manu o Kū
- 7) American Bird Conservancy/Birds not Mosquitoes
- 8) Feather & Fur Animal Hospital
- 9) Lyon Arboretum
- 10) UH Arboretum and Aloha Arborists Association
- 11) DLNR Division of Forestry and Wildlife
- 12) Sierra Club Hawai'i Chapter
- 13) Hawaiian Monk Seal Preservation Ohana
- 14) Hawai'i Wildlife Center
- 15) Honolulu Zoo Society
- 16) Bishop Museum
- 17) Livable Hawaii Kai Hui
- 18) DLNR - Diamond Head Interpretive Center
- 19) Oahu Army Natural Resources Program
- 20) UH School of Hawaiian Knowledge (Ka Papa Lo'i O Kānewai)

Additional Supporting Document (Optional)

MOKF 2025 Agenda Board (22 x 34 in).pdf

Total estimated number of individuals to attend the event:*

500

Estimated number of Native Hawaiians to attend the event:*

150

ALIGNMENT TO MANA I MAULI OLA

Indicate the event's alignment to one of OHA's strategic directions below.*

Identify the Strategic Outcome your event best aligns with and provide your reasoning. Link to Strategic Plan: <https://www.oha.org/about/mana-to-mauli-ola/>

Educational Pathways

Identify the strategy the event aligns to and describe how it aligns to it.*

Note: The strategy should fall under the strategic direction identified in the previous question.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Strategy must be clearly identified.**

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health. The event aligns with Strategy 3 because...

Strategy 1: Support development and use of educational resources for all Hawaiian lifelong learners in schools, communities and 'ohana. The event aligns with Strategy 3 because we provide a free event the community, to include families with younger children, school-age kids, high school and college aged students, young professionals, and our kūpuna. Our participant organizational booths all provide family friendly crafts, activities, or games to engage with the festival goers, share their knowledge and mission, and spread awareness of conservation related issues in our islands. Booth hosts are able to disseminate materials such as educational posters or flyers, engage one on one with the guests to foster a connection with our native species, showcase a cultural connection through hula and music, and pass along knowledge through educational speakers.

Identify the strategic outcome(s) the event aligns to it and describe how it aligns to it.*

Addresses the outcome and the impact the event will have. Note: The outcome should fall under the strategic direction and strategy identified in the previous responses.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Outcome(s) must be clearly identified.**

Strategy Outcome 3.4: Communities are empowered to take care of iwi kupuna. This event addresses the outcome by...

Strategy Outcome 1.1: Increase number or percent of Native Hawaiian students who enter educational systems ready to learn. This event addresses the outcome by educating our young guests about native species, with a variety of keiki friendly crafts and activities, developing a sense of kuleana and introducing them to the wonders of our natural world. The children can express creativity by dressing up to participate in our nature themed costume contest, view Manu o Kū chicks or adults sitting on their eggs through spotting scopes, and learn from the variety of organizations and partner agencies.

Strategy Outcome 1.2: Increase number or percent of Native Hawaiian students graduating high school who are college, career, and community ready. This event addresses the outcome by providing an insight to our older students about future career pathways. High school and college age students will have the perfect opportunity to engage with the festival partner organizations and agencies, learn about the work they do, find out about internship, volunteer, or employment opportunities, or sign up to join community support

activities. Through these interactions, this generation can be further developed as environmental stewards to further protect and save our native species.

Describe how the event aligns to and addresses one or more of OHA's strategic foundation(s):*

'Ohana – Family. 'Ohana is instrumental to community empowerment. When families are strong and healthy, and when there is positive engagement within the 'ohana, from keiki to kūpuna, communities thrive. Connections to mo'omeheu and 'āina begin with connections within families.

Mo'omeheu – Culture. Culture is the essence of who Native Hawaiians are as a people. It includes all those things that distinguish the community: language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of culture are both internal and external. Culture shapes Native Hawaiian worldview and thinking. It informs the ways in which individuals interact with one another and with 'āina. It influences the way Native Hawaiians interpret events and approach problem-solving.

'Āina – Land & Water. To Native Hawaiian kūpuna, the land was life. Imbued with mana, 'āina provides everything the community needs to survive. On an intimate level, Native Hawaiians are connected to the land by the generations of kūpuna who lived on the land and whose iwi rest here. Thus, the emotional ties to family, and the aloha for them, extends to the land that feeds us.

Use the following format: The Foundation(s) must be clearly identified.

First, list the name of the foundation(s). Second, demonstrate how the proposed event aligns with the selection.

Mo'omeheu - Culture: This event aligns with this strategic foundation as many aspects of our event are steeped in maintaining a thriving native Hawaiian culture and its relationship to 'āina and the natural world. To honor our Hawaiian home and festival location at 'Iolani Palace, as well as our beloved Manu o Kū, we begin our program with a traditional 'oli. Additional Hawaiian customs are highlighted and maintained throughout the festival during our hula performance and speaker series. Our speakers series for 2026 plans to include a talk about the cultural and historical significance of the Manu o Kū and its connection to Native Hawaiian ocean navigation by the Polynesian Voyaging Society. These talks help to connect our guests to the Manu o Kū through historical stories and cultural references. Additionally, a variety of our participant organization booths provide a Hawaiian cultural component through their outreach, such as Conservation Council for Hawai'i, Sierra Club Hawai'i Chapter, Hawaiian Monk Seal Preservation Ohana, Lyon Arboretum, Hawai'i Audubon Society, and the UH School of Hawaiian Knowledge/Ka Papa Lo'i O Kānewai.

BUDGET

Provide the total amount of money being requested from OHA for the event.*

Maximum amount is **\$15,000**. No minimum amount. Requests for exceptions to the maximum budget request may require justification in the comments/questions section of the application.

\$2,500.00

Indicate each expense for which OHA funds will be used as a line item.*

Provide a brief description for each item. The items should sum to the total amount requested. For sponsorship packages, please list the sponsorship benefits.

OHA funds *shall not* be used for entertainment or perquisites (perks) per HRS 10-17(b)(3) however, HRS 10-17(b) does not expressly prohibit grantees from having or providing "entertainment or perquisites" as some aspect of their event. This includes live music, band, performance groups, musicians, DJ, Emcee, etc.

We are requesting \$2,500.00 in sponsorship funds to cover the cost of several items at our event, essential to a successful outcome. This amount comprises less than 19% of the total event budget. The items that we would like to use the sponsorship funds for are as follows:

1- 40' x 40' white track tent (\$1,500.00) - This is our central gathering tent for the event. Under this structure, we have our speaker series throughout the event, shaded seating for our guests (keiki to kūpuna), and we can host our information booth and passport redemption prize hut booths. We also will have our entertainment under this tent.

8 - 55 gal water barrels (\$320.00) - Per 'Iolani Palace grounds rules, we are not allowed to stake any tents into the grounds. Therefore, we are required to utilize water barrels to secure the large tent.

1 - 25 KW generator (\$750.00) - This generator provides power to our event to run our sound system for our emcee, speakers, and entertainment to utilize. Also, there are often 2-3 partner booths that require power as part of their outreach (i.e. to show photos or videos at their booth).

At the \$2,500.00 sponsor amount, that is considered our top-tier sponsor level, referred to as our "Manu o Kū" or "White Tern" sponsor. The sponsor benefits for this include having the OHA name and logo on our festival website, program passports, day of festival donor signage, and all printed promotional material (i.e. event tshirts, save the date flyers, and posters). Also, we will include live mentions or printed name recognition in any news segments or interviews about the festival. During the festival, the emcee will mention OHA as a sponsor at least two times throughout the day. Sponsors are also given a speaking slot (up to 15 minutes) if desired and booth space to host a participant booth at the event (tent, table, and chairs provided). Additionally, sponsor names/logos will be displayed on a banner ad on the main website for Conservation Council for Hawai'i.

Line-Item Budget Upload

2026 MOKF Expense Income_OHA.xlsx

OPPORTUNITIES FOR OHA COMMUNITY ENGAGEMENT, PARTNERSHIPS, AND PUBLIC RELATIONS

Opportunities for OHA recognition:*

List and clearly describe the community engagement, partnership, and public relations opportunities the event offers for OHA which may include, but are not limited to:

- Advertisements in event programs/television/radio/print ads
- OHA logo on event goods or items
- OHA logo on event signage
- OHA logo on event flyers
- Speaking opportunities for OHA representative

- Providing a table or method for distributing OHA program information at the event

Please outline specifically if your event is offering any formal tables for OHA representatives to attend as guests

There are several opportunities for OHA recognition at our event and in the promotional period leading up to the event. As a sponsor, the OHA name and logo would be displayed prominently on all printed promotional materials to include our save the date flyer and graphic, printed passports, posters, sponsor thank you board at the festival, and event t-shirts. Please note, event t-shirts can only be purchased online as we cannot sell any materials on 'Iolani Palace grounds. For any television or print promotion, the OHA name and/or logo will be printed or mentioned during any interviews. We usually do one on-air segment on Sunrise with Billy V on Hawaii News Now. During the event, we can reserve a speaking slot, up to 15 minutes, for OHA to speak and will provide a tent, table, and chairs should OHA like to host a booth during the event to distribute materials.

Social Media/Marketing Platforms:*

Please provide your organizations social media usernames/handles, as well as any other platforms the event will be broadcasted on.

Please use the following format:

Instagram: @example

Facebook: link

X: @example

Website:

Other:

Facebook: <https://www.facebook.com/Conservation.Council.for.Hawaii>

Instagram: @conservation_council_hawaii

Conservation Council for Hawai'i Website: <https://www.conservehawaii.org/>

Manu o Kū Festival Webpage: <https://www.conservehawaii.org/events/manu-o-ku-festival/2026-manu-o-ku-festival/>

REQUIREMENTS

Event Information (flyers, posters, website details, etc.) DO NOT submit flyers for previous events.*

2026 MOKF Poster.png

IRS Letter of Determination-document upload*

The applicant must have IRS tax-exempt nonprofit status and be registered to do business in the State of Hawai'i. The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. See Attachment A. Sample - IRS Letter of Determination.

CCH 501c3 determination letter .pdf

Certificate of Vendor Compliance (CVC)-document upload*

The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i (**must be valid within the calendar year**). To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Applicants must be registered and compliant with Hawai'i Compliance Express (HCE). We do not accept your DCCA. *See Attachment B. Sample - HCE Certificate of Vendor Compliance.*

State of HI Cert of Vendor Compliance.pdf

Download and complete the W9 form found here and upload below.

Checks will not be processed and mailed (to the address on the W-9) until all reporting/required documents are submitted.

Completed W-9*

Please upload the completed W-9 (**must be valid within the calendar year**).

CCH W-9 Form.pdf

If the application is recommended for approval to the Board of Trustees, the event representative will be asked to attend the OHA Budget and Finance Committee meeting to respond to any questions. Attendance may be in-person or virtual.**

I understand the attendance requirement if recommended for approval.

OPTIONAL: Please add any additional comments or questions below. Mahalo for your application!

We would be honored and excited to partner with OHA on this year's Manu o Kū Festival. Mahalo nui for your consideration of our request.

ACKNOWLEDGEMENTS

Please read the following statements thoroughly:

By submitting this sponsorship application and selecting the following options, your agency and its affiliates, officers, employees and/or agents agree to indemnify, defend and hold harmless the Office of Hawaiian Affairs (OHA) from any and all claims, demands, liabilities, losses, damages, costs, and expenses, including reasonable attorney's fees, arising out of or in connection with this sponsorship application and participation in the associated event/activities. *

- "I have applied for or received all applicable licenses and permits, when such is required to conduct the activities or provide the services for which a grant is awarded."
- "I agree to comply with all applicable federal, state and county laws."
- "I shall not use these funds for the purposes of entertainment or perquisites (perks)."

- "I agree that all activities and improvements undertaken with funds received shall comply with all applicable federal, state, and county statutes and ordinances, including applicable building codes and agency rules; "
- "The applicant will indemnify and hold harmless the office, the State of Hawai'i, its officers, agents, and employees from and against any and all claims arising out of or resulting from activities carried out or projects undertaken with funds provided hereunder, and procure sufficient insurance to provide this indemnification if requested to do so."
- "I agree to make available to the office all records the applicant may have relating to the operation of the applicant's activity, business, or enterprise, to allow the office to monitor the applicant's compliance with the purpose of this chapter; "
- "I agree OHA can have access to records pertaining to this grant."
- "I understand that this grant award shall be monitored by the OHA to ensure compliance with Hawaii Revised Statutes § 10-17 and the purposes and intent of the Grant;"
- "I agree to complete evaluation(s) follow-up by OHA to determine whether the event attained the intended results in the manner contemplated."

*

I agree to the above statements.

Authorized Signatory*

By typing/signing your name below, you certify that the information provided is true and accurate to the best of your knowledge. You also acknowledge that typing your name acts as your electronic signature, which holds the same legal weight and validity as a handwritten signature, and you consent to be bound by the terms and conditions outlined in this agreement.

Leah Kocher

Date of Submission*

11/25/2025

Mahalo for your submission, you will receive an email confirmation that your application has been received once you submit. We will be in contact with you regarding award and non-award via email.

File Attachment Summary

Applicant File Uploads

- MOKF 2025 Agenda Board (22 x 34 in).pdf
- 2026 MOKF Expense Income_OHA.xlsx
- 2026 MOKF Poster.png
- CCH 501c3 determination letter .pdf
- State of HI Cert of Vendor Compliance.pdf
- CCH W-9 Form.pdf



MAY 3, 2025 PROGRAM

- 10:00 am.....Opening ‘Oli and Welcome Remarks
- 10:15 am.....Hula (James Dela Cruz and Nā ‘Ōpio a me Nā Kupuna O Ko‘olau)
- 10:30 am.....Instructional Painting session #1
- 10:45 am.....Book Reading (Keiki Reading Corner)
- 10:50 am.....Speaker - Darienne Dey, Polynesian Voyaging Society
- 11:10 am.....Speaker - Rich Downs, Eric VanderWerf, and Keith Swindle
- 11:15 am.....Book Reading (Keiki Reading Corner)
- 11:30 am.....Costume characters photo op
- 11:30 am.....Instructional Painting session #2
- 11:45 am.....Speaker - Dita Holifield, Office of Mayor Blangiardi
- 11:45 am.....Book Reading (Keiki Reading Corner)
- 12:00 pm.....Royal Hawaiian Band
- 12:40 pm.....Speaker #4 (KCC student research)
- 12:45 pm.....Book Reading (Keiki Reading Corner)
- 1:00 pm.....Corey Fujimoto and Kalei Gamiao, ukulele duo
- 1:30 pm.....Instructional Painting session #3
- 1:30 pm.....Costume Contest, Parade, and Prizes

Various Times: Bird Walks - see Hui Manu o Kū/Pacific Rim Conservation booth to sign up

Mahalo to all of our volunteers and participants!

Special Thanks To:

Patrick Ching
Rich Downs

Kumu Hula James Dela Cruz and Nā ‘Ōpio a me Nā Kupuna O Ko‘olau

Friends of ‘Iolani Palace

Corey Fujimoto and Kalei Gamiao

Dita Holifield
Christopher McDonough
Bryan Min
Christine Ogura
The Royal Hawaiian Band
Keith Swindle

Partners



Founding Sponsors



Sponsors



2026 Manu o Kū Festival Budget

EXPENSE		
Name	Amount	Purpose
Platinum Tents & Events	\$3,396.50	Tents, Tables, Chairs, Generator
Platinum Tents & Events	\$1,200.00	tents, tables, chairs additional
Chemi-Toi	\$460.00	port-a-potty rental
Friends of Iolani Palace	\$5,500.00	venue rental
Entertainment:		
Corey & Kalei ukulele duo	\$700.00	entertainment + sound system rental
Hula Halau (James Dela Cruz)	\$600.00	entertainment
Emcee	\$350.00	emcee
Printing:		
Aloha Graphics	\$125.00	Passports
Threadless	\$200.00	MOKF event t-shirts
Event Signage	\$100.00	Event Signs
Photographer:		
Christopher McDonough	\$600.00	event photography
Prize Hut:		
Various stores	\$125.00	~100 prizes for prize hut
Refreshments:		
Breakfast Coffee and snacks	\$100.00	coffee, pastries, water
Lunch for vendors/volunteers	\$150.00	lunch bentos/bags
Total:	\$13,606.50	
INCOME		
Donor/Name	Amount	Purpose
National Wildlife Federation	\$3,000.00	Sponsorship
OHA - Ho'ākoakoa Lāhui Event Sponsorship	\$2,500.00	Sponsorship
Conservation Council for Hawai'i	\$1,000.00	Sponsorship
Emcee	\$350.00	In-Kind Donation
Hawaii Audubon Society	\$1,000.00	Sponsorship
Friends of Iolani Palace	\$5,500.00	Sponsorship

Total:	\$13,350.00	
Balance Sheet		
Income	\$13,350.00	
Expenses	\$13,606.50	
Balance	(\$256.50)	CCH assumes this balance

Photo Rich Downs



Manu O Kū Festival

Saturday, May 2, 2026

10 am - 2 pm

‘Iolani Palace
Coronation lawn



- Bird Scopes and Bird Walks
- Entertainment performances by:
 - Kumu Hula James Dela Cruz and Nā ‘Ōpio a me Nā Kupuna O Ko‘olau
 - Corey Fujimoto & Kalei Gamiao, ukulele duo
- Kids nature-themed Costume Contest
- Costume Characters
- Educational talks
- Organization and Agency booths with family friendly crafts and activities



Additional
sponsor
logos here



Internal Revenue Service
District Director

Department of the Treasury

LA:EO:80:2099

Date: SEP 19 1980

Employer Identification Number:

Accounting Period Ending:

April 30

Form 990 Required: Yes No

Conservation Council for Hawaii
Post Office Box 2923
Honolulu, Hawaii 96802

Person to Contact:

B. Brewer

Contact Telephone Number:

(213) 688-4889

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in section 509(a)(2).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. Also, you should inform us of all changes in your name or address.

Generally, you are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. If you have paid FICA taxes without filing the waiver, you should contact us. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excise, employment, or other Federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

The box checked in the heading of this letter shows whether you must file Form 990, Return of Organization Exempt from Income tax. If Yes is checked, you are required to file Form 990 only if your gross receipts each year are normally more than \$10,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

P.O. Box 2350, Los Angeles, Calif. 90053

(over)

Letter 947(DO) (5-77)

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter, we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees.

If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

W. H. Connett

District Director

vp

Employer ID #
99-0199211



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

Vendor Name: CONSERVATION COUNCIL FOR HAWAII

DBA/Trade Name: CONSERVATION COUNCIL FOR HAWAII

Issue Date: 11/25/2025

Status: **Compliant**

Hawaii Tax#: 40412950-01
New Hawaii Tax#: GE-0939089920-01
FEIN/SSN#: XX-XXX9211
UI#: XXXXXX9209
DCCA FILE#: 40356

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Conservation Council for Hawai'i		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____		
	5 Address (number, street, and apt. or suite no.) See instructions. PO Box 2923		Requester's name and address (optional)
	6 City, state, and ZIP code Honolulu, HI 96802		
	7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)																																														
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later.																																														
Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																																														
	<table border="1" style="margin: auto;"> <tr><td colspan="9" style="text-align: center;">Social security number</td></tr> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr> <tr><td colspan="3" style="text-align: center;">-</td><td colspan="3" style="text-align: center;">-</td><td colspan="3"></td></tr> </table> <p style="text-align: center;">or</p> <table border="1" style="margin: auto;"> <tr><td colspan="9" style="text-align: center;">Employer identification number</td></tr> <tr><td style="width: 20px; height: 20px;">9</td><td style="width: 20px; height: 20px;">9</td><td style="width: 20px; height: 20px;">-</td><td style="width: 20px; height: 20px;">0</td><td style="width: 20px; height: 20px;">1</td><td style="width: 20px; height: 20px;">9</td><td style="width: 20px; height: 20px;">9</td><td style="width: 20px; height: 20px;">2</td><td style="width: 20px; height: 20px;">1</td></tr> </table>	Social security number																		-			-						Employer identification number									9	9	-	0	1	9	9	2	1
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Part II Certification	
Under penalties of perjury, I certify that:	
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and	
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and	
3. I am a U.S. citizen or other U.S. person (defined below); and	
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.	
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.	

Sign Here	Signature of U.S. person ▶	Date ▶ 1/31/2025
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

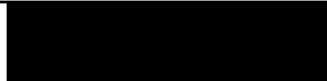
Manu o Kū Festival

Conservation Council For Hawaii

Jonnetta Peters
P.O. Box 2923
Honolulu, HI 96802



Jonnetta Peters



Evaluation Summary

Overall Score: 92% - 2/2 Evaluations Complete

Evaluator:	94.00%
Evaluator:	90.00%

EVENT SCOPE

Benefits to Native Hawaiian Community*

The application outlines event services or activities that provide significant benefits to the Native Hawaiian community.

Max Score: 5

Evaluator: 4

Evaluator: 5

Comments

Evaluator: The event provides meaningful benefits to the Native Hawaiian community through culturally grounded environmental education and 'āina stewardship. Programming integrates 'ike Hawai'i through 'oli, hula, and presentations on the cultural significance of the Manu o Kū, engaging keiki, 'ohana, and kūpuna in a family-centered learning environment that reinforces cultural connection and kuleana to 'āina.

Evaluator: *[Unanswered]*

Attendee Reach & Feasibility*

The application indicates a proposed number of total attendees which is achievable and reflects an opportunity for significant OHA reach into the community.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The proposed attendance of approximately 500 participants is reasonable and achievable based on the applicant's demonstrated history of successfully hosting this annual event. The event design, venue, and logistics support effective community engagement at the proposed scale.

Evaluator: *[Unanswered]*

Native Hawaiian Attendance & Impact*

The application indicates a proposed number of Native Hawaiian attendees which is achievable and reflects a significant positive impact on the betterment of conditions of Native Hawaiians.

Max Score: 5

Evaluator: 5

Evaluator: 3

Comments

Evaluator: The estimated Native Hawaiian attendance of 150 participants is realistic and reflects a meaningful level of impact. The event intentionally engages Native Hawaiians across generations through culturally relevant programming, hands-on learning, and exposure to conservation and stewardship pathways.

Evaluator: *[Unanswered]*

ALIGNMENT TO MANA I MAULI OLA STRATEGIC PLAN

Alignment with Selected Strategy*

The application clearly demonstrates how the event will directly and meaningfully address the selected Strategy.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The application demonstrates clear alignment with Strategy 1: Support development and use of educational resources for all Hawaiian lifelong learners by providing accessible, community-based educational opportunities that connect Native Hawaiian learners to culture, conservation, and 'āina.

Evaluator: *[Unanswered]*

Community Impact & Strategic Outcome Alignment*

The application clearly demonstrates how the event will have significant community impact in alignment with one or more Strategic Outcome.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: The event aligns with Strategic Outcomes 1.1 and 1.2 by fostering early learning, cultural awareness, and environmental stewardship among keiki, while introducing older students to educational, volunteer, and career pathways related to conservation and natural resource management.

Evaluator: Direct alignment with MiMO strategic outcome and great opportunity to capture more native hawaiian participation and attendance.

Alignment with Strategic Foundation*

The application clearly demonstrates how the event will align with one or more Strategic Foundation.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: The event aligns with the Mo'omeheu and 'Āina strategic foundations by integrating Native Hawaiian cultural practices and reinforcing the relationship between people, land, and natural resources through 'ike-based programming.

Evaluator: *[Unanswered]*

Budget*

The amount requested is appropriate and a reasonable line-item budget is included.

Max Score: 10

Evaluator: 10

Evaluator: 10

Comments

Evaluator: The \$2,500 request is reasonable, modest, and well-supported by a clear line-item budget. Funds are limited to essential infrastructure costs and comply with statutory requirements, representing a small portion of the overall event budget.

Evaluator: Great opportunity for OHA participation along with other government and non profit organizations.

Opportunity for OHA Public Recognition*

The application describes community engagement, partnership, and public relations opportunities for OHA that are appropriate and reflects an opportunity for significant OHA reach into the community.

Max Score: 10

Evaluator: 10

Evaluator: 10

Comments

Evaluator: The application outlines appropriate opportunities for OHA recognition through event materials, signage, and media mentions, as well as opportunities for OHA presence through speaking and informational engagement.

Evaluator: *[Unanswered]*

Recommend Sponsorship*

Evaluator: Yes

Evaluator: Yes

Recommended Amount*

Evaluator: 2500

Evaluator: 2500

Brief Explanation for Recommendation

Evaluator: The event demonstrates strong alignment with OHA's strategic priorities through culturally grounded education, 'āina stewardship, and meaningful Native Hawaiian engagement. The request is modest, compliant, and supports an established event with broad community reach.

Evaluator: Full sponsorship of \$2500.00 recommended

EVALUATOR SIGNATORY

Name of Sponsorship Evaluator*

By typing your first name and last name you certify that you are the individual certifying the document and you verify that the information in this form is true and accurate.

Evaluator: [REDACTED]

Evaluator: [REDACTED]

Date of Evaluation*

Evaluator: 02/05/2026

Evaluator: 02/17/2026



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ōlelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. **Pakini Loan Fund – Wai'anae Moku Made**
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

Wai'anae Moku Made

Application - 'Ho'ākoakoa Lāhui Sponsorship Program

Pakini Loan Fund

Ms. Lei Riedel
87-151 LILIANA ST
Waianae, HI 96792



Ms. Lei Riedel

87-151 LILIANA ST
Waianae, HI 96792



Application Form

APPLICANT & EVENT INFORMATION

Name of Applicant Organization*

Pakini Loan Fund

Name of event representative*

Event representative must be someone who is authorized to communicate with OHA staff and submit any required documents or information on behalf of the awarded organization.

Lei Riedel

Event Representative email*

[REDACTED]

Event Representative phone number*

[REDACTED]

Describe the mission of the organization.*

The Pakini Loan Fund's mission is to increase economic opportunities by providing the financial resources necessary to enhance the personal and entrepreneurial capacity of Native Hawaiian individuals, businesses, and community organizations throughout the State of Hawai'i.

Organization's Governing Board and/or Executive Team*

List the organization's governing board members' names and titles and the executive team members' names and titles. Please DO NOT include emails and phone numbers.

Joseph Lapilio, Board President
Croccifixio "Cross" Makani Crabbe, Board Vice President
Vicki Paresa, Board Treasurer & Secretary
Annie Ferreira, Outgoing Board Treasurer
Shavone Lave, Board Director
Carryssa Krzyska, Board Director
Lei Riedel, Executive Director

Name of event to be sponsored*

Wai'anae Moku Made

Submitted On: 1 December
2025

Start date of event to be sponsored*

05/02/2026

End date of event to be sponsored

For one day events, leave blank. For multi-day events, duration should be no longer than 30 days.

05/02/2026

Time of event to be sponsored:*

Please provide start and end time for one day events. For multiple day events, please specify the hours for each day.

One day, 9am to 3pm

Address of event/activity:*

85-888 Farrington Hwy, Suite 201

Identify island(s) where event will be held:*

O'ahu

EVENT SCOPE

Purpose Statement*

Please provide a short statement that describes the proposed event and its purpose.

Wai'anae Moku Made is a community event hosted in partnership by the Pakini Loan Fund and Wai'anae Economic Development Council celebrating Native Hawaiian-owned small businesses, cultural practitioners, and 'ohana-centered engagement. Its purpose is to strengthen the local, place-based economy; build community connections; and honor the cultural integrity of the Wai'anae Coast by uplifting the natural, cultural, and human resources that define the moku.

Describe the event services and activities from start to finish.*

The description should depict what the event would encompass. Demonstrate the substance of the event. Include information from the following:

- Agenda (draft/past flyer)

- Event flyer (draft/past flyer);
- List of speakers and their area of expertise;
- List of exhibitors and their offerings; and/or
- Summaries of seminars, workshops, or other opportunities provided at the event.

Event Agenda (based on previous events)

1. Arrival & Welcome (4:00 PM)

As guests arrive at the 'Ohana Kako'o Resource Center parking lot and surrounding businesses, they are greeted by event hosts, signage, and volunteers who provide program schedules and directions. The area is transformed into a vibrant community zone, with wayfinding that guides attendees to the mākeke, cultural demonstration spaces, and keiki and 'ohana activities.

2. Opening Protocol

The event begins with opening oli, grounding the evening in respect for the 'āina, community, and kūpuna provided by Kumu Hula Nettie Armitage-Lapilio and Hālau Hula O Kekaikuihala.

3. Mākeke Activation

Throughout the evening, the mākeke comes alive with:
Native Hawaiian-owned and Wai'anae-based vendors
Handmade art, crafts, and locally sourced products
Food trucks and specialty food booths
Service-based businesses promoting local offerings
Guests can shop, talk story with entrepreneurs, and learn about the products and cultural practices behind them.

4. Cultural Demonstrations & Performances

Across the event space, cultural practitioners share their expertise through:

Live demonstrations such as:

Niu weaving with Josh Kila of Kila-Wea

Lei making with Hālau Hula O Kekaikuihala

Kāhili Pa'a Lima demonstrations with 'Ahahui Siwila Hawai'i o Kapolei

Storytelling sessions connecting people to Wai'anae's history

Performances showcasing mele, hula, and the traditions of the moku

Performances by Hālau Hula O Kekaikuihala

These moments foster deeper connection to place and emphasize community-led cultural continuity.

5. 'Ohana-Centered Activities

Families are encouraged to participate in interactive engagements such as:

Keiki arts and crafts by Keiki on the Rocks

Hands-on cultural activities

Interactive booths hosted by community organizations including Keiki Rise, Da Braddahs and Healing Arts Therapy Hawai'i

Bingo card hunts guiding families through event spaces

The goal is to draw families into the heart of Wai'anae's main corridor and reinforce it as a community gathering place.

6. Networking & Community Building

Entrepreneurs, families, youth, and kūpuna mingle throughout the evening. Dedicated spaces allow:

Business-to-business networking

Conversations between residents and service providers

Mentorship opportunities for youth

Community organizations to share resources

Previous community resource partners include Hawaiian Council, Hawaii Community Lending, HawaiiUSA FCU, DBEDT, Small Business Administration, Tagata Moana Hui Foundation, RYSE, etc. This social fabric-building is central to reimagining Wai'anae's core as a thriving town center.

7. Evening Programming & Featured Moments

Throughout the night, the event flows with:

Live music or entertainment

Spotlight moments for key cultural practitioners, small business owners, community resources and community leadership

Announcements highlighting local successes or opportunities with the resources available to support development.

Additional Supporting Document (Optional)

event flyer.pdf

Total estimated number of individuals to attend the event:*

500

Estimated number of Native Hawaiians to attend the event:*

300

ALIGNMENT TO MANA I MAULI OLA

Indicate the event's alignment to one of OHA's strategic directions below.*

Identify the Strategic Outcome your event best aligns with and provide your reasoning. Link to Strategic Plan: <https://www.oha.org/about/mana-to-mauli-ola/>

Economic Stability

Identify the strategy the event aligns to and describe how it aligns to it.*

Note: The strategy should fall under the strategic direction identified in the previous question.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Strategy must be clearly identified.**

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health. The event aligns with Strategy 3 because...

Strategy 7: Advance policies, programs and practices that strengthen 'ohana abilities to pursue multiple pathways toward economic stability. This event aligns with Strategy 7 because Wai'anae Moku Made is intentionally designed to strengthen 'ohana economic stability by expanding community-driven pathways to

entrepreneurship, income generation, and long-term financial resilience. By activating Wai'anae with a vibrant mākeke, cultural demonstrations, and comprehensive business support services, the event removes barriers that often prevent families from engaging in economic opportunities and instead positions local 'ohana as leaders in shaping the economic future of their moku.

At the center of the event is a place-based mākeke featuring Native Hawaiian-owned and Wai'anae-based businesses, providing both seasoned and emerging entrepreneurs with direct revenue, new customer relationships, and the ability to test products in a supportive community environment. For many 'ohana, participating in or benefiting from the mākeke represents an accessible, culturally grounded entry point into entrepreneurship aligning with their skills, traditions, and aspirations. This approach expands the number of viable, community-rooted pathways toward economic stability.

Wai'anae Moku Made also amplifies cultural practitioners and place-based knowledge as legitimate economic opportunities. Through live demonstrations, storytelling, and performances, practitioners share 'ike kūpuna while also promoting their work, building clientele, and increasing income. This reinforces cultural identity as an economic strength and demonstrates that Native Hawaiian cultural practices are viable, respected avenues for economic stability.

In addition, the event fosters intergenerational engagement, encouraging keiki, youth, parents, and kūpuna to participate together in activities that spark interest in local enterprise, community leadership, and cultural stewardship. This social cohesion increases the flow of information, mentorship, and opportunity within families and the wider community centralizing them as key drivers of long-term financial resilience.

By combining entrepreneurship, resource access, cultural integrity, and 'ohana engagement, Wai'anae Moku Made exemplifies a community-led strategy that empowers families to build stable, self-determined economic futures. The event not only aligns with the Office of Hawaiian Affairs' Strategy 7, it operationalizes it at the moku level, ensuring that 'ohana have the tools, support, and culturally rooted pathways they need to thrive.

Identify the strategic outcome(s) the event aligns to it and describe how it aligns to it.*

Addresses the outcome and the impact the event will have. Note: The outcome should fall under the strategic direction and strategy identified in the previous responses.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-maui-ola/>

Please use the format in the example below: **The Outcome(s) must be clearly identified.**

Strategy Outcome 3.4: Communities are empowered to take care of iwi kupuna. This event addresses the outcome by...

7.3. Increase number of Native Hawaiian 'ohana who are resource stable (financial, subsistence, other). This event addresses the outcome by creating a place-based community experience designed to strengthen the resource stability of Native Hawaiian 'ohana by providing multiple, culturally grounded pathways toward economic, subsistence, and social resilience. By activating Wai'anae with a vibrant mākeke, cultural demonstrations, and centralized business resources, the event directly supports families in accessing income, entrepreneurial guidance, and traditional knowledge that contribute to both immediate and long-term stability.

The mākeke offers Native Hawaiian vendors and Wai'anae-based entrepreneurs the opportunity to generate revenue, build customer relationships, and test new products in a supportive, community-centered environment. For many 'ohana, participation represents a direct, tangible means of supplementing household

income and developing sustainable small business ventures, aligning closely with financial stability objectives.

Complementing the mākeke, on-site business resources provides access to more than 10 technical assistance providers offering guidance in business planning, marketing, financing, permitting, and digital tools. This low-barrier, local access to resources often unavailable in the moku ensures that Native Hawaiian families can develop the skills, knowledge, and networks necessary to grow their enterprises and achieve ongoing economic resilience.

Cultural programming at Wai'anae Moku Made further enhances resource stability by integrating subsistence and traditional practices. Demonstrations in niu weaving, lā'au lapa'au, lei-making, and other Native Hawaiian arts not only preserve cultural knowledge but also provide pathways for economic and subsistence resource generation. These activities reinforce intergenerational learning and ensure that cultural expertise contributes to tangible household and community well-being.

In addition, Wai'anae Moku Made fosters social and community capital, connecting 'ohana with each other, cultural practitioners, and institutional support networks. These relationships enhance access to mentorship, cooperative opportunities, and shared resources, which are essential elements of long-term household stability. Engagement across generations from keiki, 'opio, makua, and kūpuna ensures that knowledge, skills, and resources circulate within families, strengthening multigenerational resilience as was done pre-colonization.

By combining immediate income opportunities, capacity-building support, subsistence practices, and social connectivity, Wai'anae Moku Made provides a holistic approach to increasing resource stability for Native Hawaiian 'ohana. The event embodies a culturally responsive, community-led model that equips families with the tools, skills, and networks needed to pursue sustainable, multi-dimensional economic and subsistence pathways.

Describe how the event aligns to and addresses one or more of OHA's strategic foundation(s):*

'Ohana – Family. 'Ohana is instrumental to community empowerment. When families are strong and healthy, and when there is positive engagement within the 'ohana, from keiki to kūpuna, communities thrive. Connections to mo'omeheu and 'āina begin with connections within families.

Mo'omeheu – Culture. Culture is the essence of who Native Hawaiians are as a people. It includes all those things that distinguish the community: language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of culture are both internal and external. Culture shapes Native Hawaiian worldview and thinking. It informs the ways in which individuals interact with one another and with 'āina. It influences the way Native Hawaiians interpret events and approach problem-solving.

'Āina – Land & Water. To Native Hawaiian kūpuna, the land was life. Imbued with mana, 'āina provides everything the community needs to survive. On an intimate level, Native Hawaiians are connected to the land by the generations of kūpuna who lived on the land and whose iwi rest here. Thus, the emotional ties to family, and the aloha for them, extends to the land that feeds us.

Use the following format: The Foundation(s) must be clearly identified.

First, list the name of the foundation(s). Second, demonstrate how the proposed event aligns with the selection.

The Pakini Loan Fund has identified all three Foundations in alignment with Wai'anae Moku Made.

'Ohana – Family

Submitted On: 1 December
2025

Wai'anae Moku Made places 'ohana at the heart of its programming, recognizing that strong families are essential to thriving communities. The event engages keiki, 'opio, makua, and kūpuna through interactive cultural activities, games, and storytelling, fostering positive engagement across generations. By creating a shared space for families to gather, shop, learn, and celebrate together, the event strengthens family bonds, promotes intergenerational knowledge transfer, and supports the resilience and well-being of the Wai'anae community. Strong 'ohana connections serve as the foundation for broader community empowerment, multigenerational income generation and collective growth.

Mo'omeheu – Culture

Culture is woven throughout Wai'anae Moku Made. The event features live performances, cultural demonstrations, and artisan showcases that highlight Native Hawaiian language, arts, protocols, and traditions. Cultural practitioners share knowledge in areas such as lei making, weaving, hula, mele, and lā'au lapa'au, allowing attendees to engage actively with Native Hawaiian worldviews and practices. By centering cultural expression in all aspects of the event, Wai'anae Moku Made fosters pride in heritage, strengthens cultural identity, and reinforces the ways culture informs decision-making, problem-solving, income generation and community engagement.

'Āina – Land & Water

Wai'anae Moku Made emphasizes the deep connection between people and place, activating the physical space of the Wai'anae Moku while honoring the ancestral and spiritual ties to the 'āina. Programming and storytelling encourage awareness of local history, environmental stewardship, and the relationship between the land and the community's sustenance. By emphasizing Native Hawaiian and Wai'anae-based small businesses, traditional practices, and the cultural significance of Wai'anae's landscapes, the event reinforces aloha 'āina, ensuring that economic, social, and cultural activities are grounded in respect for the land and its generational importance.

BUDGET

Provide the total amount of money being requested from OHA for the event.*

Maximum amount is **\$15,000**. No minimum amount. Requests for exceptions to the maximum budget request may require justification in the comments/questions section of the application.

\$14,400.00

Indicate each expense for which OHA funds will be used as a line item.*

Provide a brief description for each item. The items should sum to the total amount requested. For sponsorship packages, please list the sponsorship benefits.

OHA funds ***shall not*** be used for entertainment or perquisites (perks) per HRS 10-17(b)(3) however, HRS 10-17(b) does not expressly prohibit grantees from having or providing "entertainment or perquisites" as some aspect of their event. This includes live music, band, performance groups, musicians, DJ, Emcee, etc.

The total projected budget for Wai'anae Moku Made is \$14,400, covering essential services, equipment, facilities, marketing, supplies, honoraria, and food to ensure a safe, well-coordinated, and impactful community event. Each line item has been carefully planned to maximize both efficiency and community benefit. Please see attached budget for worksheet format.

Contractual Services:

We have allocated \$1,000 for the Honolulu Police Department to provide security and manage safe roadway crossings along Farrington Highway, ensuring the safety of attendees, vendors, and volunteers.

An additional \$1,000 is budgeted for professional marketing services to coordinate overall promotional efforts and ensure broad community awareness of the event.

Equipment – Lease/Rental:

To support event logistics and attendee comfort, \$1,500 is allocated for a portable porta-lua trailer.

Roadway safety will be enhanced through \$2,000 for two mobile signs, three event safety lights, and directional signage.

A total of \$2,000 is budgeted for tents, tables, chairs, weights, and lighting to provide sheltered, organized spaces for vendors, activities, and attendees.

Equipment – Purchase:

\$500 is allocated for an eight-pack of two-way radios to ensure reliable communication among event organizers and the information booth throughout the evening.

Facilities – Lease/Rental:

The Waianae Neighborhood Place will be used as a central facility for the event, with a \$1,000 rental fee for the day.

Other Expenses – Event Support and Insurance:

Staffing will be provided in-kind through the Pakini Loan Fund and event partners. A \$50 certificate of insurance is included to cover event liability.

Marketing Expenses:

Marketing and promotional efforts are critical to attracting a diverse audience. This includes \$500 for social media advertising on Instagram and Facebook, \$600 for community and tent signage including banners and A-frames, \$500 for event t-shirts for staff and volunteers, \$750 for West Side Stories advertising, and \$250 for flyers, printed materials, and printer ink.

Supplies:

A budget of \$500 is allocated for miscellaneous event supplies such as bungee cords, trash bags, gloves, and zip ties to support setup, cleanup, and general operations.

Honoraria:

To honor the contributions of cultural practitioners, \$1,500 is allocated for honoraria, providing \$500 per organization for three organizations.

Food

Additionally, \$750 is budgeted for meal vouchers for staff, volunteers, community resource providers, and cultural practitioners at \$15 per meal for 50 individuals.

Line-Item Budget Upload

OHA Event Grant Line Item Budget.pdf

OPPORTUNITIES FOR OHA COMMUNITY ENGAGEMENT, PARTNERSHIPS, AND PUBLIC RELATIONS

Opportunities for OHA recognition:*

List and clearly describe the community engagement, partnership, and public relations opportunities the event offers for OHA which may include, but are not limited to:

- Advertisements in event programs/television/radio/print ads
- OHA logo on event goods or items
- OHA logo on event signage
- OHA logo on event flyers
- Speaking opportunities for OHA representative
- Providing a table or method for distributing OHA program information at the event

Please outline specifically if your event is offering any formal tables for OHA representatives to attend as guests

- Advertisements in event programs/television/radio/print ads
- OHA logo on event signage
- OHA logo on event flyers
- Speaking opportunities for OHA representative
- Providing a table or method for distributing OHA program information at the event

Wai'anae Moku Made does not have formal guest tables but will have space for an OHA representative to table the event with OHA information.

Social Media/Marketing Platforms:*

Please provide your **organizations** social media usernames/handles, as well as any other platforms the event will be broadcasted on.

Please use the following format:

Instagram: @example

Facebook: link

X: @example

Website:

Other:

Instagram: @pakiniloanfund & @thewedc.hi

Facebook: <https://www.facebook.com/thewedc.hi>

<https://www.pakiniloanfund.org/>

<https://www.thewedc.com/>

REQUIREMENTS

Event Information (flyers, posters, website details, etc.) DO NOT submit flyers for previous events.*

Event Info.pdf

IRS Letter of Determination-document upload*

The applicant must have IRS tax-exempt nonprofit status and be registered to do business in the State of Hawai'i. The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. See Attachment A. Sample - IRS Letter of Determination.

IRS Letter of Determination PLF.pdf

Certificate of Vendor Compliance (CVC)-document upload*

The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i (**must be valid within the calendar year**). To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Applicants must be registered and compliant with Hawai'i Compliance Express (HCE). We do not accept your DCCA. See Attachment B. Sample - HCE Certificate of Vendor Compliance.

2025 10 24 Certificate of Vendor Compliance.pdf

Download and complete the W9 form found here and upload below.

Checks will not be processed and mailed (to the address on the W-9) until all reporting/required documents are submitted.

Completed W-9*

Please upload the completed W-9 (**must be valid within the calendar year**).

PLF 2025 W9 SIGNED.pdf

If the application is recommended for approval to the Board of Trustees, the event representative will be asked to attend the OHA Budget and Finance Committee meeting to respond to any questions. Attendance may be in-person or virtual.**

I understand the attendance requirement if recommended for approval.

OPTIONAL: Please add any additional comments or questions below. Mahalo for your application!

ACKNOWLEDGEMENTS

Please read the following statements thoroughly:

By submitting this sponsorship application and selecting the following options, your agency and its affiliates, officers, employees and/or agents agree to indemnify, defend and hold harmless the Office of Hawaiian Affairs (OHA) from any and all claims, demands, liabilities, losses, damages, costs, and expenses, including reasonable attorney's fees, arising out of or in connection with this sponsorship application and participation in the associated event/activities. *

- "I have applied for or received all applicable licenses and permits, when such is required to conduct the activities or provide the services for which a grant is awarded."
- "I agree to comply with all applicable federal, state and county laws."
- "I shall not use these funds for the purposes of entertainment or perquisites (perks)."
- "I agree that all activities and improvements undertaken with funds received shall comply with all applicable federal, state, and county statutes and ordinances, including applicable building codes and agency rules; "
- "The applicant will indemnify and hold harmless the office, the State of Hawai'i, its officers, agents, and employees from and against any and all claims arising out of or resulting from activities carried out or projects undertaken with funds provided hereunder, and procure sufficient insurance to provide this indemnification if requested to do so."
- "I agree to make available to the office all records the applicant may have relating to the operation of the applicant's activity, business, or enterprise, to allow the office to monitor the applicant's compliance with the purpose of this chapter; "
- "I agree OHA can have access to records pertaining to this grant."
- "I understand that this grant award shall be monitored by the OHA to ensure compliance with Hawaii Revised Statutes § 10-17 and the purposes and intent of the Grant;"
- "I agree to complete evaluation(s) follow-up by OHA to determine whether the event attained the intended results in the manner contemplated."

*

I agree to the above statements.

Authorized Signatory*

By typing/signing your name below, you certify that the information provided is true and accurate to the best of your knowledge. You also acknowledge that typing your name acts as your electronic signature, which holds the same legal weight and validity as a handwritten signature, and you consent to be bound by the terms and conditions outlined in this agreement.

Lei Riedel

Date of Submission*

12/01/2025

Mahalo for your submission, you will receive an email confirmation that your application has been received once you submit. We will be in contact with you regarding award and non-award via email.

File Attachment Summary

Applicant File Uploads

- event flyer.pdf
- OHA Event Grant Line Item Budget.pdf
- Event Info.pdf
- IRS Letter of Determination PLF.pdf
- 2025 10 24 Certificate of Vendor Compliance.pdf
- PLF 2025 W9 SIGNED.pdf

WAI'ANAE MOKU MADE

Wai'anae Moku Made celebrates the creativity and culture of the Wai'anae Coast. Enjoy local vendors, artisans, and food! Plus, a Business Resource Hub with tools and workshops to help small businesses thrive. You're invited to shop local, learn, and connect.



WHEN:

November 8, 2025 @ 4 - 8pm

WHERE:

'Ohana Kako'o Resource Center
85-888 Farrington Hwy.
Wai'anae, HI 96792

ADMISSION:

FREE for the whole 'ohana!

VENDORS:

Contact support@thewedc.com
for more information.



Waianae Moku Made Budget

Type	OHA	Description & Justification
CONTRACTUAL SERVICES		
Honolulu Police Department	\$1,000	Event security and safe road crossgin across Farrington Hwy.
Professional Marketing Services	\$1,000	Overall marketing coordination for event
EQUIPMENT - Lease/Rental		
Port-o-Potty Trailer	\$1,500	One portable lua trailer
Roadway Safety	\$2,000	(2) Mobile signs, (3) event safety lighting, directional signage.
Tent, tables & chairs	\$2,000	Rental of tent, tables, chairs, weights, lighting for event.
EQUIPMENT - Purchase		
Two-Way Business Radio Bundle 8 Pack	\$500	Communications for event organizers and info booth
FACILITIES - Lease/Rental		
Waianae Neighborhood Place	\$1,000	Rental fee for day event
OTHER EXPENSES - Event Support		
Staff for Event		In-kind from Pakini Loan Fund and event partners
OTHER EXPENSES - Insurance		
COI for Event	\$50	Event Certificate of Insurance
OTHER EXPENSES - Marketing		
Social Media Advertising	\$500	Paid advertising for Instagram and Facebook.
Event Signage	\$600	Community banners, tent signage, A-frame signage
Event Tees	\$500	Event t-shirts for staff and volunteers.
Community Event Marketing	\$750	West side stories advertisement
Print Materials	\$250	Flyers, event signage, ink for printer
OTHER EXPENSES - Supplies		
Supplies for the event	\$500	Bungee cords, trash bags, gloves, zip ties, etc.
HONORARIA		
Cultural Practitioners	\$1,500	\$500 honoraria per org X 3 orgs.
OTHER EXPENSES - Food		

Meal Vouchers		\$750	
TOTALS			
	Subtotal:	\$14,400	

\$15 per meal voucher X 50 vouchers for staff, volunteers, community resources, & cultural practitioners.

Event Information

The Pakini Loan Fund and Waianae Economic Development Council are currently in planning for the upcoming event and will have marketing materials soon.

Mahalo!



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

PAKINI LOAN FUND
87-151 LILIANA ST
WAIANAE, HI 96792-3143

Date:
05/15/2023
Employer ID number:
92-3039687
Person to contact:
Name: Customer Service
ID number: 31954
Telephone: (877) 829-5500
Accounting period ending:
December 31
Public charity status:
509(a)(2)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
March 21, 2023
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053528004933

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

Vendor Name: PAKINI LOAN FUND

Issue Date: 10/24/2025

Status: **Compliant**

Hawaii Tax#:

New Hawaii Tax#: GE-1411655168-01

FEIN/SSN#: XX-XXX9687

UI#:

DCCA FILE#: 325218

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Pakini Loan Fund	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ <i>(Applies to accounts maintained outside the United States.)</i>	
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>	
	5 Address (number, street, and apt. or suite no.). See instructions. 87-151 LILIANA ST	Requester's name and address (optional)
	6 City, state, and ZIP code WAIANA, HI 96792	
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
			-			-			
or									
Employer identification number									
9	2	-	3	0	3	9	6	8	7

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person <i>Lei Kiedel</i>	Date 11/24/2025
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

- **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

- **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

- **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

- **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

- **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

- A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).
- B—The United States or any of its agencies or instrumentalities.
- C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).
- E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLÉ accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

Wai'anae Moku Made

Pakini Loan Fund

Ms. Lei Riedel
87-151 LILIANA ST
Waianae, HI 96792



Ms. Lei Riedel

87-151 LILIANA ST
Waianae, HI 96792



Evaluation Summary

Overall Score: 92% - 2/2 Evaluations Complete

Evaluator:	90.00%
Evaluator:	94.00%

EVENT SCOPE

Benefits to Native Hawaiian Community*

The application outlines event services or activities that provide significant benefits to the Native Hawaiian community.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: Wai'anae Moku Made demonstrates exceptional benefit to the Native Hawaiian community by centering Native Hawaiian-owned businesses, cultural practitioners, and 'ohana engagement in a place-based setting. The event strengthens economic opportunity while reinforcing cultural identity and community pride within the Wai'anae moku. The programming is intentional, culturally grounded, and directly responsive to community needs. This reflects meaningful and wide-ranging benefit aligned with OHA's mission and priorities.

Evaluator: Amazing line up for this event to support kanaka entrepreneurs and makers!

Attendee Reach & Feasibility*

The application indicates a proposed number of total attendees which is achievable and reflects an opportunity for significant OHA reach into the community.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The proposed attendance of 500 participants is realistic and well-aligned with the size and capacity of the Wai'anae community. The projection reflects strong local engagement and represents a significant opportunity for OHA to connect directly with residents and 'ohana in a high-priority Native Hawaiian moku. The estimate is achievable and demonstrates meaningful, place-based reach.

Evaluator: *[Unanswered]*

Native Hawaiian Attendance & Impact*

The application indicates a proposed number of Native Hawaiian attendees which is achievable and reflects a significant positive impact on the betterment of conditions of Native Hawaiians.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The projected attendance of 300 Native Hawaiian participants is reasonable and aligned with the demographics of the Wai'anae community and the event's Native Hawaiian-centered business focus. This estimate reflects strong engagement within a community with a high Native Hawaiian population. The projected participation demonstrates meaningful and significant impact for Native Hawaiians in the moku.

Evaluator: Good turnout considering the size and location of event

ALIGNMENT TO MANA I MAULI OLA STRATEGIC PLAN

Alignment with Selected Strategy*

The application clearly demonstrates how the event will directly and meaningfully address the selected Strategy.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: The application clearly demonstrates direct and meaningful alignment with Strategy 7 by intentionally designing the event around Native Hawaiian entrepreneurship, business development, and access to economic resources. The programming structure reflects a deliberate focus on strengthening economic pathways for 'ohana within the Wai'anae moku. The Strategy alignment is embedded in the event's purpose and overall framework.

Evaluator: *[Unanswered]*

Community Impact & Strategic Outcome Alignment*

The application clearly demonstrates how the event will have significant community impact in alignment with one or more Strategic Outcome.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: The application clearly demonstrates significant community impact aligned with Outcome 7.3 by outlining how the event will strengthen Native Hawaiian 'ohana resource stability through income generation, business technical assistance, cultural practice, and intergenerational engagement. These activities provide both immediate economic benefit and longer-term resilience within the community. The projected impact on household and multigenerational stability is well-supported and clearly connected to the Strategic Outcome.

Evaluator: *[Unanswered]*

Alignment with Strategic Foundation*

The application clearly demonstrates how the event will align with one or more Strategic Foundation.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: The application clearly demonstrates strong alignment with OHA’s Strategic Foundations of ‘Ohana, Mo‘omeheu, and ‘Āina. The event centers intergenerational engagement, uplifts Native Hawaiian cultural practices, and activates a place-based gathering grounded in the Wai‘anae moku. Cultural knowledge, community connection, and economic activity are intentionally integrated throughout the programming. The alignment with the Strategic Foundations is clear, culturally grounded, and well-embedded in the event design.

Evaluator: *[Unanswered]*

Budget*

The amount requested is appropriate and a reasonable line-item budget is included.

Max Score: 10

Evaluator: 9

Evaluator: 9

Comments

Evaluator: the line-item budget clearly identifies how OHA funds will be used. All expenses are thoroughly budgeted and explained, with costs directly tied to event operations and consistent with allowable cost guidance. The budget reflects careful planning and alignment with the proposed activities, supporting a 9 under the rubric.

Evaluator: Still wondering about honorariums on disallowed costs for sponsorship but otherwise budget looks appropriate for this event

Opportunity for OHA Public Recognition*

The application describes community engagement, partnership, and public relations opportunities for OHA that are appropriate and reflects an opportunity for significant OHA reach into the community.

Max Score: 10

Evaluator: 8

Evaluator: 10

Comments

Evaluator: The application outlines meaningful public recognition opportunities for OHA, including logo placement on event materials, advertising inclusion, a speaking opportunity, and space for tabling and direct community engagement. These opportunities provide visible and intentional presence within a well-attended, place-based event. While the reach is strong within the Wai‘anae community, the exposure remains primarily localized and does not include broader media amplification, supporting a 8 under the rubric.

Evaluator: *[Unanswered]*

Recommend Sponsorship*

Evaluator: Yes

Evaluator: Yes

Recommended Amount*

Evaluator: 14400

Evaluator: 14400.00

Brief Explanation for Recommendation

Evaluator: Wai'anae Moku Made demonstrates exceptional alignment with OHA's Strategic Framework by intentionally centering Native Hawaiian entrepreneurship, cultural practice, and 'ohana resource stability within a place-based, community-led event. The application clearly outlines significant benefit and measurable opportunity for economic activation within the Wai'anae moku, supported by a well-structured and allowable budget. Public recognition opportunities provide meaningful OHA presence and direct engagement within a high-priority Native Hawaiian community. Based on the strength of alignment, community impact, and thoughtful planning demonstrated throughout the application, full funding of \$14,400 is recommended.

Evaluator: *[Unanswered]*

EVALUATOR SIGNATORY

Name of Sponsorship Evaluator*

By typing your first name and last name you certify that you are the individual certifying the document and you verify that the information in this form is true and accurate.

Evaluator: [REDACTED]

Evaluator: [REDACTED]

Date of Evaluation*

Evaluator: 02/17/2026

Evaluator: 02/17/2026



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ölelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. **Ka Po'e Lawai'a – Manini & Me Holoholo Festival**
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

Manini & Me Holoholo Festival

Application - 'Ho'ākoako Lāhui Sponsorship Program

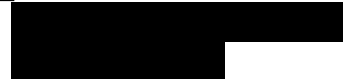
Ka Po'e Lawai'a

Ms Jessica Bates
PO Box 138
Waianae, HI 96792-2610



Ms Jessica Bates

PO Box 138
Waianae, HI 96792-2610



Application Form

APPLICANT & EVENT INFORMATION

Name of Applicant Organization*

Ka Po'e Lawai'a

Name of event representative*

Event representative must be someone who is authorized to communicate with OHA staff and submit any required documents or information on behalf of the awarded organization.

Jessica Bates

Event Representative email*

[REDACTED]

Event Representative phone number*

[REDACTED]

Describe the mission of the organization.*

To empower our keiki by cultivating the skills and knowledge of traditional Hawaiian fishing practices while encouraging a sustainable stewardship with the ocean.

Organization's Governing Board and/or Executive Team*

List the organization's governing board members' names and titles and the executive team members' names and titles. Please DO NOT include emails and phone numbers.

President- La'Ena Torrence
Vice President- Logan Liberato
Treasurer- Beeper Nakamaejo
Secretary- Leilani Willing
Director at Large- Kalani Pokipala
Executive Director- Jessica Bates

Name of event to be sponsored*

Manini & Me Holoholo Festival

Start date of event to be sponsored*

05/02/2026

End date of event to be sponsored

For one day events, leave blank. For multi-day events, duration should be no longer than 30 days.

05/03/2026

Time of event to be sponsored:*

Please provide start and end time for one day events. For multiple day events, please specify the hours for each day.

7:30am - 7:00 PM (Saturday). 7:30-4pm (Sunday)

Address of event/activity:*

89-101 Farrington Hwy, Waianae, HI 96792

Identify island(s) where event will be held:*

O‘ahu

EVENT SCOPE

Purpose Statement*

Please provide a short statement that describes the proposed event and its purpose.

The Manini & Me Holoholo Festival is a hands-on, educational experience designed to immerse keiki & their ‘ohana in Hawaiian fishing traditions while fostering intergenerational bonds by pairing each keiki with an adult. Through guided fishing activities, cultural instruction, and piko engagement, (Poka‘i Bay) participants develop sustainable fishing practices, ocean safety awareness, and a deep respect for mālama ‘āina—caring for both land and sea. The festival nurtures community connections by creating a space for families and mentors to share knowledge, practice environmental stewardship, and responsibly interact with natural resources. Participants gain practical skills for sustaining themselves and supporting local food security, while cultivating a lasting appreciation for the ocean and the traditions of their kūpuna. Rooted in Hawaiian values and cultural practices, the event empowers keiki to engage meaningfully with their community and strengthens the continuity of Hawaiian heritage through immersive, hands-on experience.

Describe the event services and activities from start to finish.*

The description should depict what the event would encompass. Demonstrate the substance of the event. Include information from the following:

- Agenda (draft/past flyer)
- Event flyer (draft/past flyer);
- List of speakers and their area of expertise;
- List of exhibitors and their offerings; and/or
- Summaries of seminars, workshops, or other opportunities provided at the event.

Agenda / Schedule

Saturday

- 6:00 AM: Volunteer and staff breakfast
- 7:00 AM: Check-in & orientation, greeting, rules overview
- 7:30 AM – Sunset (approximately 7:00pm): Fishing begins along designated shoreline boundaries
- 12:00 – 1:00 PM: Lunch for volunteers
- 4:00 Pm Clean up & prep for next day
- Hydration stations: Available throughout the day for participants and volunteers
- Piko (Poka'i Bay): Check-in support, optional educational guidance for teams

Sunday

- 6:00 AM: Volunteer breakfast
- 6:00 AM – 1:00 PM: Fishing continues
- 10:00 AM – 12:00 PM: Educational engagement activities:
- Ka Po'e Lawai'a will guide initial cultural integration sessions & fish identification
- Westside Lifeguard Association will be providing ocean safety activities
- Department of Land and Natural Resources Aquatics Division will lead marine species awareness
- 12:00 – 1:00 PM: Lunch for volunteers and educators
- 1:00 – 3:00 PM: Weigh-in and submission of fish
- 3:00 – 4:00 PM: Awards ceremony & Hawaiian blessing
- 4:00 – 5:00 PM: Cleanup and site restoration, ensuring Poka'i Bay remains pristine

Additional Supporting Document (Optional)

[Unanswered]

Total estimated number of individuals to attend the event:*

125

Estimated number of Native Hawaiians to attend the event:*

95

ALIGNMENT TO MANA I MAULI OLA

Indicate the event's alignment to one of OHA's strategic directions below.*

Identify the Strategic Outcome your event best aligns with and provide your reasoning. Link to Strategic Plan: <https://www.oha.org/about/mana-to-mauli-ola/>

Educational Pathways

Identify the strategy the event aligns to and describe how it aligns to it.*

Note: The strategy should fall under the strategic direction identified in the previous question.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Strategy must be clearly identified.**

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health. The event aligns with Strategy 3 because...

'Ohana – Family & Community

The Manini & Me Holoholo Festival supports the 'Ohana foundation by creating meaningful opportunities for keiki and their caregivers to engage together in hands-on learning, cultural practice, and community building. By pairing each keiki with an adult, the event strengthens intergenerational bonds and encourages 'ohana participation in ocean stewardship. Keiki to kūpuna will share experiences while fishing, learning safety practices, and celebrating their accomplishments together, fostering a sense of unity, pride, and collective well-being within the Hawaiian community. By perpetuating traditional fishing practices as a 'ohana they are passing down through generations, reinforcing the cultural values that ground and guide our la hui today and for generations to come.

Mo'omeheu – Culture & Education

This event immerses participants in Hawaiian cultural traditions and knowledge. Through educational stations, hands on activities, fish identification lessons, invasive species awareness, and marine stewardship discussions, keiki gain both technical fishing skills and understanding of their ancestral practices. The tournament highlights the importance of mālama (care), kuleana (responsibility), and aloha for the environment, connecting participants to the wisdom of their kūpuna while cultivating respect for our Hawaiian culture, the 'āina and kai.

'Āina – Land, Water & Sustainability

The festival emphasizes & strengthens the deep connection between our Hawaiian people and the ocean. By fishing responsibly along the shoreline from Nānākuli to Keawe'ula, all will learn about sustainable practices, including the identification and removal of invasive species, responsible catch limits, and respect for marine ecosystems. Activities at the Piko (Poka'i Bay) home base reinforce stewardship values and environmental mindfulness, teaching keiki how to care for the land and ocean while understanding the ocean as both a provider and a source of substance and learning.

Impact & Measurable Outcomes

The event's success will be assessed through multiple forms of documentation and participant engagement, including:

*Registration data: Number of keiki/adult teams, age distribution, and geographic participation

*Visual documentation: Photos and video of fishing, educational activities, and awards ceremonies

*Community feedback: QR-code survey for participants to provide input on their experiences

*Educational outcomes: Participation in fish identification, invasive species awareness, and conservation lessons

*Cultural engagement: Active learning of Hawaiian fishing traditions and stewardship practices

Identify the strategic outcome(s) the event aligns to it and describe how it aligns to it.*

Addresses the outcome and the impact the event will have. Note: The outcome should fall under the strategic direction and strategy identified in the previous responses.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-maui-ola/>

Please use the format in the example below: The Outcome(s) must be clearly identified.

Strategy Outcome 3.4: Communities are empowered to take care of iwi kupuna. This event addresses the outcome by...

The Manini & Me Holoholo Festival directly advances OHA's strategic foundations by creating an intergenerational, culturally grounded fishing experience that strengthens 'ohana connections, reinforces Hawaiian identity, and deepens community stewardship of our nearshore resources. Together, this event uplifts 'ike kahiko by helping families reconnect with the rhythms of kai and 'āina, strengthening the relationship our kūpuna maintained through practice, observation, and respect. As keiki and caregivers learn side-by-side, they deepen their kuleana to care for the resources that sustain us, reinforcing the values that keep our lāhui strong. In this way, the Manini & Me Holoholo Festival becomes more than a weekend activity—it becomes a living pathway for sharing 'ike, nurturing pilina, and ensuring our ocean heritage thrives for the generations yet to come.

1. 'Ohana — Strengthening Family Connections

The event is intentionally designed around a one keiki + one adult team format, creating natural opportunities for families to learn, teach, and holoholo together. This structure perpetuates the Hawaiian value of a'o aku a'o mai—learning both ways—by encouraging kūpuna, parents, and guardians to guide keiki in safe, respectful, and responsible traditional shoreline practices.

Impact: Families strengthen their bonds through shared cultural activity, and keiki gain confidence through hands-on learning with trusted adults.

2. Mo'omeheu — Advancing Hawaiian Cultural Knowledge

Across both days, participants engage in fishing practices rooted in Hawaiian tradition, such as, tides, and reef behavior; identifying proper species; and learning respectful harvesting protocols. Cultural practitioners and program staff provide education through short lessons, demonstrations, and activity stations integrated into the Sunday weigh-in fair.

Impact: Participants deepen their cultural literacy, develop pride in cultural identity, and strengthen their connection to Hawaiian ancestral knowledge.

3. 'Āina — Promoting Stewardship and Resource Health

The event incorporates stewardship education focused on invasive species awareness, catch composition, proper handling, and mālama i ka 'āina/kai behaviors. Participants are encouraged to turn in invasive species for small incentives, creating real-time learning on ecosystem balance.

Impact: Community members gain understanding of nearshore resource health, contributing to long-term behavior change and reinforcing collective responsibility for the wellbeing of our fisheries.

4. Community Reach & Broader Impact

While the tournament itself is able to serve 50 fishing teams, the overall event reaches far more. Family members, siblings, and supporters attend Sunday's activities, cultural stations, and weigh-in, expanding the cultural impact beyond the core participants. Hydration, stations, and activity areas are prepared to accommodate this broader community presence.

Impact: The festival becomes a multi-generational community gathering that promotes cultural pride, healthy outdoor activity, and collective engagement.

5. Participant Feedback & Continuous Improvement

A digital survey accessible through QR code will be available to all families on Sunday. The survey collects feedback on cultural learning, event experience, and perceived community impact, supporting measurable evaluation aligned with OHA's outcome expectations.

Impact: Ka Po'e Lawai'a gains data to strengthen future program delivery and demonstrate meaningful cultural, family, and stewardship outcomes.

Overall Outcome Alignment

The Manini & Me Holoholo Festival uplifts Hawaiian identity, reinforces the intergenerational transmission of cultural knowledge, and builds a stronger community relationship with our coastal resources. By bringing 'ohana together through traditional fishing practices and culturally informed education, the event supports OHA's mission to improve the wellbeing of Native Hawaiians through grounded, culturally centered community engagement. This two-day experience provides a safe, supportive space where keiki and their 'ohana can learn side-by-side, guided by values that honor our kūpuna and the wisdom passed down through generations. The event encourages participants to recognize their role in caring for our 'āina and nearshore ecosystems, strengthening the understanding that stewardship is both a privilege and a responsibility. Through cultural learning, family connection, and time spent on the shoreline together, the festival nurtures a deeper sense of belonging and pride. These shared experiences help foster stronger, healthier communities—rooted in culture, connected to place, and committed to sustaining our resources for the next generation. These shared moments along the shoreline help reaffirm that our practices are more than activities — they are expressions of identity, belonging, and kuleana. By grounding the festival in tradition, seasonal rhythms, and respect for kai holokai, we strengthen the pilina that binds us to each other and to place. In doing so, the event becomes not only a weekend gathering, but a continuation of the generational pathway that honors our kūpuna, uplifts our keiki, and keeps our Hawaiian practices thriving for the future.

Describe how the event aligns to and addresses one or more of OHA's strategic foundation(s):*

'Ohana – Family. 'Ohana is instrumental to community empowerment. When families are strong and healthy, and when there is positive engagement within the 'ohana, from keiki to kūpuna, communities thrive. Connections to mo'omeheu and 'āina begin with connections within families.

Mo'omeheu – Culture. Culture is the essence of who Native Hawaiians are as a people. It includes all those things that distinguish the community: language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of culture are both internal and external. Culture shapes Native Hawaiian worldview and thinking. It informs the ways in which individuals interact with one another and with ‘āina. It influences the way Native Hawaiians interpret events and approach problem-solving.

‘Āina – Land & Water. To Native Hawaiian kūpuna, the land was life. Imbued with mana, ‘āina provides everything the community needs to survive. On an intimate level, Native Hawaiians are connected to the land by the generations of kūpuna who lived on the land and whose iwi rest here. Thus, the emotional ties to family, and the aloha for them, extends to the land that feeds us.

Use the following format: **The Foundation(s) must be clearly identified.**

First, list the name of the foundation(s). Second, demonstrate how the proposed event aligns with the selection.

‘Ohana (Family & Community Engagement):

The Manini & Me Holoholo Festival fosters intergenerational learning by pairing each keiki with an adult mentor, emphasizing the importance of family, mentorship, and community connection. Participants and their families engage in shared experiences that strengthen bonds, cultivate mutual respect, and encourage collaboration within the community. This approach ensures that the lessons learned extend beyond the event itself, reinforcing cultural values and community cohesion that support long-term resilience and social connection among Native Hawaiians.

Mo‘omeheu (Cultural Practice & Heritage):

Through hands-on fishing activities, guided by Hawaiian traditions and best practices, the festival allows keiki to connect directly with their cultural heritage. Participants learn not only the skills necessary to fish sustainably but also the stories, rituals, and values passed down by their ancestors. Cultural lessons integrated into the festival highlight the significance of the ocean in Hawaiian life, emphasizing respect, stewardship, and the interconnectedness of people, land, and water. This immersive approach ensures that cultural knowledge is actively transmitted to the next generation in a meaningful and memorable way.

‘Āina & Moana (Land & Water Stewardship):

The festival underscores sustainable fishing practices, environmental awareness, and the responsible use of natural resources. By engaging in activities that highlight marine ecology, invasive species awareness, and conservation techniques, participants develop a deeper understanding of their role in caring for ‘āina and moana. The festival’s hands-on approach encourages participants to cultivate a sense of responsibility for their environment while learning practical skills for sustainable living. Collectively, these outcomes promote a more environmentally conscious, culturally grounded, and socially connected community, ensuring that the values of stewardship and respect are passed forward to future generations.

BUDGET

Provide the total amount of money being requested from OHA for the event.*

Maximum amount is **\$15,000**. No minimum amount. Requests for exceptions to the maximum budget request may require justification in the comments/questions section of the application.

\$15,000.00

Indicate each expense for which OHA funds will be used as a line item.*

Provide a brief description for each item. The items should sum to the total amount requested. For sponsorship packages, please list the sponsorship benefits.

OHA funds ***shall not*** be used for entertainment or perquisites (perks) per HRS 10-17(b)(3) however, HRS 10-17(b) does not expressly prohibit grantees from having or providing “entertainment or perquisites” as some aspect of their event. This includes live music, band, performance groups, musicians, DJ, Emcee, etc.

Participant Materials & Awards

-Participant Materials & Awards: \$4,500

Event Promotion

-Marketing & Outreach: \$650

-Logo Placements: \$550

Food

-Food & Hydration: \$2,500

Infrastructure & Logistics

-Permits & Contingency: \$700

-Insurance: \$600

Security (HPD*): \$800

*Security cost may vary depending on crowd size.

Miscellaneous

-Staffing & Honorariums: \$3,000

-First Aid Station: \$200

Event Operations

-Equipment Rentals / Logistics: \$1,500

TOTAL = \$15,000

Line-Item Budget Upload

OHA Manini & Me Budget 15K.pdf

***OPPORTUNITIES FOR OHA COMMUNITY ENGAGEMENT,
PARTNERSHIPS, AND PUBLIC RELATIONS***

Opportunities for OHA recognition:*

List and clearly describe the community engagement, partnership, and public relations opportunities the event offers for OHA which may include, but are not limited to:

- Advertisements in event programs/television/radio/print ads
- OHA logo on event goods or items

- OHA logo on event signage
- OHA logo on event flyers
- Speaking opportunities for OHA representative
- Providing a table or method for distributing OHA program information at the event

Please outline specifically if your event is offering any formal tables for OHA representatives to attend as guests

The Manini & Me Holoholo Festival offers a meaningful platform for the Office of Hawaiian Affairs (OHA) to engage with Native Hawaiian youth, families, and the broader community, aligning with its strategic foundations of 'Ohana (Family), Mo'omeheu (Culture), and 'Āina (Land & Water). Opportunities for OHA include:

*Logo Placement on Event Materials

*Event Signage: Prominent display of OHA's logo at the piko, activity stations, and official weigh-in locations, ensuring visibility to all participants and spectators.

*Printed & Digital Materials: Inclusion in event programs, flyers, and digital promotions, reinforcing OHA's commitment to keiki empowerment, cultural preservation, and marine stewardship.

Advertising and Media Promotion

*Social Media & Digital Platforms: OHA's involvement highlighted on official tournament social media channels, with pre-event posts, live coverage, and post-event summaries.

*Community Outreach: Promotion through local newsletters and partner networks, emphasizing OHA's leadership in supporting youth engagement and cultural education.

Speaking Opportunities

*Opening or Closing Remarks: OHA representatives may address participants and families during official ceremonies, sharing the importance of cultural connection, ocean stewardship, and community responsibility.

*Cultural or Educational Engagement: Participation in mini-lessons, fish identification stations, or conservation demonstrations, offering direct interaction with keiki and families.

Booth or Table for Information Distribution

*OHA Information Table: Opportunity to share educational materials, programs, and initiatives directly with event attendees.

*Interactive Activities: Hands-on demonstrations or cultural stations showcasing OHA's work, encouraging engagement with Native Hawaiian traditions and marine sustainability.

Exclusive Community Engagement Opportunities

*Team Participation: OHA may select representatives to engage with keiki and adult participants, observing and interacting in the tournament experience.

*Cultural Mentorship: OHA staff or volunteers may help guide educational or stewardship activities, fostering hands-on learning and cultural connection.

Recognition at Awards Ceremony

*OHA's support acknowledged during awards presentations, reinforcing the organization's role in empowering keiki, celebrating Hawaiian culture, and promoting community stewardship.

By participating in Manini & Me, OHA will strengthen its connection to the community, support Native Hawaiian cultural education, and promote keiki engagement with the ocean, all while reinforcing its strategic mission and ongoing programs.

Social Media/Marketing Platforms:*

Please provide your **organizations** social media usernames/handles, as well as any other platforms the event will be broadcasted on.

Please use the following format:

Instagram: @example

Facebook: link

X: @example

Website:

Other:

Insatgram: @ka.poe.lawaia

website: kapoelawaia.org

REQUIREMENTS

Event Information (flyers, posters, website details, etc.) DO NOT submit flyers for previous events.*

Manini and Me Holoholo Festival.docx - Google Docs.pdf

IRS Letter of Determination-document upload*

The applicant must have IRS tax-exempt nonprofit status and be registered to do business in the State of Hawai'i. The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. See Attachment A. Sample - IRS Letter of Determination.

Determination Letter .pdf

Certificate of Vendor Compliance (CVC)-document upload*

The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i (**must be valid within the calendar year**). To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Applicants must be registered and compliant with Hawai'i Compliance Express (HCE). We do not accept your DCCA. *See Attachment B. Sample - HCE Certificate of Vendor Compliance.*

HCE .pdf

Download and complete the W9 form found here and upload below.

Checks will not be processed and mailed (to the address on the W-9) until all reporting/required documents are submitted.

Completed W-9*

Please upload the completed W-9 (**must be valid within the calendar year**).

fw9-2.pdf

If the application is recommended for approval to the Board of Trustees, the event representative will be asked to attend the OHA Budget and Finance Committee meeting to respond to any questions. Attendance may be in-person or virtual.**

I understand the attendance requirement if recommended for approval.

OPTIONAL: Please add any additional comments or questions below. Mahalo for your application!

We are grateful for the opportunity to submit this application for the inaugural Manini & Me Holoholo Festival. As this is the first year of the event, we do not have a flyer to share at this time. Our goal is to establish a structured, hands-on educational fishing experience that connects keiki to Hawaiian traditions, ocean stewardship, and family bonding, while fostering sustainable practices and respect for natural resources.

Looking ahead, we hope to include additional vendors on Sunday to create an even more engaging and immersive experience for attendees. While specific participants are still being confirmed, we are excited about the opportunity to expand the offerings and to enhance the overall event.

With the support of the Office of Hawaiian Affairs, we hope to build this festival into an annual event that grows in scope and impact over time. This event is designed to provide meaningful cultural and community engagement opportunities, strengthen connections between generations, and promote knowledge of traditional fishing practices that support food sustainability. We are humbled and honored to have the chance to share this vision and look forward to partnering with OHA to support keiki, 'ohana, and the broader Hawaiian community.

ACKNOWLEDGEMENTS

Please read the following statements thoroughly:

By submitting this sponsorship application and selecting the following options, your agency and its affiliates, officers, employees and/or agents agree to indemnify, defend and hold harmless the Office of Hawaiian Affairs (OHA) from any and all claims, demands, liabilities, losses, damages, costs, and expenses, including reasonable attorney's fees, arising out of or in connection with this sponsorship application and participation in the associated event/activities. *

- "I have applied for or received all applicable licenses and permits, when such is required to conduct the activities or provide the services for which a grant is awarded."
- "I agree to comply with all applicable federal, state and county laws."
- "I shall not use these funds for the purposes of entertainment or perquisites (perks)."

- "I agree that all activities and improvements undertaken with funds received shall comply with all applicable federal, state, and county statutes and ordinances, including applicable building codes and agency rules; "
- "The applicant will indemnify and hold harmless the office, the State of Hawai'i, its officers, agents, and employees from and against any and all claims arising out of or resulting from activities carried out or projects undertaken with funds provided hereunder, and procure sufficient insurance to provide this indemnification if requested to do so."
- "I agree to make available to the office all records the applicant may have relating to the operation of the applicant's activity, business, or enterprise, to allow the office to monitor the applicant's compliance with the purpose of this chapter; "
- "I agree OHA can have access to records pertaining to this grant."
- "I understand that this grant award shall be monitored by the OHA to ensure compliance with Hawaii Revised Statutes § 10-17 and the purposes and intent of the Grant;"
- "I agree to complete evaluation(s) follow-up by OHA to determine whether the event attained the intended results in the manner contemplated."

*

I agree to the above statements.

Authorized Signatory*

By typing/signing your name below, you certify that the information provided is true and accurate to the best of your knowledge. You also acknowledge that typing your name acts as your electronic signature, which holds the same legal weight and validity as a handwritten signature, and you consent to be bound by the terms and conditions outlined in this agreement.

Jessica Bates

Date of Submission*

12/01/2025

Mahalo for your submission, you will receive an email confirmation that your application has been received once you submit. We will be in contact with you regarding award and non-award via email.

File Attachment Summary

Applicant File Uploads

- OHA Manini & Me Budget 15K.pdf
- Manini and Me Holoholo Festival.docx - Google Docs.pdf
- Determination Letter .pdf
- HCE .pdf
- fw9-2.pdf

Ka Poe Lawai'a

Event Manini and Me Holoholo Festival

Revenue Sources

Grant	15,000.00
Donors	-

Total Revenue 15,000.00

Expenditures

Participant Material & Awards

Participant Material & Awards	4,500.00
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Event Promotion

Marketing & Outreach	650.00
Logo placements	550.00

Food

Food & Hydration	2,500.00
------------------	----------

Infrastructe & Logistics

Permits & Contingency	700.00
Insurance	600.00
Security (HPD)*	800.00

Miscellaneous

Staffing & Honorariums	3,000.00
First Aid Station	200.00

Event Operations

Equipment Rentals/Logistics	1,500.00
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TOTAL EXPENDITURES 15,000.00

Net Profit/(Loss) 0.00

* Depending on crowd



Manini and Me Holoholo Festival

Agenda / Schedule

Saturday

- 6:00 AM: Volunteer and staff breakfast
- 7:00 AM: Check-in & orientation, greeting, rules overview
- 7:30 AM – Sunset (approximately 7:00pm): Fishing begins along designated shoreline boundaries
- 12:00 – 1:00 PM: Lunch for volunteers
- 4:00 Pm Clean up & prep for next day
- Hydration stations: Available throughout the day for participants and volunteers
- Piko (Poka'i Bay): Check-in support, optional educational guidance for teams

Sunday

- 6:00 AM: Volunteer breakfast
- 6:00 AM – 1:00 PM: Fishing continues
- 10:00 AM – 12:00 PM: Educational engagement activities:
- Ka Po'e Lawai'a will guide initial cultural integration sessions & fish identification
- Westside Lifeguard Association will be providing ocean safety activities
- **Department of Land and Natural Resources Aquatics Division will lead marine conservation lessons and invasive species awareness**
- 12:00 – 1:00 PM: Lunch for volunteers and educators
- 1:00 – 3:00 PM: Weigh-in and submission of fish
- 3:00 – 4:00 PM: Awards ceremony & Hawaiian blessing
- 4:00 – 5:00 PM: Cleanup and site restoration, ensuring Poka'i Bay remains pristine



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

KA POE LAWAIA
C/O JESSICA BATES
85-929 IMIPONO STREET
WAIANAE, HI 96792-0000

Date:
01/18/2024
Employer ID number:
99-0497102
Person to contact:
Name: Customer Service
ID number: 31954
Telephone: (877) 829-5500
Accounting period ending:
December 31
Public charity status:
509(a)(2)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
November 26, 2023
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053412002634

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

Vendor Name: KA PO'E LAWAI'A

Issue Date: 12/01/2025

Status: **Compliant**

Hawaii Tax#:

New Hawaii Tax#:

FEIN/SSN#: XX-XXX7102

UI#: No record

DCCA FILE#: 329496

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
 requester. Do not
 send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See <i>Specific Instructions</i> on page 3.	1	Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)		
	2	Business name/disregarded entity name, if different from above.		
	3a	Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input checked="" type="checkbox"/> Other (see instructions) _____ Non-Profit 501(c)(3)	4	Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ <i>(Applies to accounts maintained outside the United States.)</i>
	3b	If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions _____ <input type="checkbox"/>		
	5	Address (number, street, and apt. or suite no.). See instructions. PO Box 138	Requester's name and address (optional)	
	6	City, state, and ZIP code Waianae, HI 96792		
	7	List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
or									
Employer identification number									
9	9		0	4	9	7	1	0	2

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person		Date
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

Manini & Me Holoholo Festival

Ka Po'e Lawai'a

Ms Jessica Bates
PO Box 138
Waianae, HI 96792-2610



Ms Jessica Bates

PO Box 138
Waianae, HI 96792-2610



Evaluation Summary

Overall Score: 90% - 2/2 Evaluations Complete

Evaluator:	90.00%
Evaluator:	90.00%

EVENT SCOPE

Benefits to Native Hawaiian Community*

The application outlines event services or activities that provide significant benefits to the Native Hawaiian community.

Max Score: 5

Evaluator: 4

Evaluator: 5

Comments

Evaluator: Event perpetuates cultural practices of lawai'a, values of mālama 'āina, and the development of pilina between makua and keiki in the activities.

Evaluator: *[Unanswered]*

Attendee Reach & Feasibility*

The application indicates a proposed number of total attendees which is achievable and reflects an opportunity for significant OHA reach into the community.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The event projects a realistic and sustainable amount of attendees for its scope and purpose (125 individuals).

Evaluator: Seems appropriate for a smaller org and event.

Native Hawaiian Attendance & Impact*

The application indicates a proposed number of Native Hawaiian attendees which is achievable and reflects a significant positive impact on the betterment of conditions of Native Hawaiians.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The event projects 95 of 125 attendees will be Native Hawaiian.

Evaluator: *[Unanswered]*

ALIGNMENT TO MANA I MAULI OLA STRATEGIC PLAN

Alignment with Selected Strategy*

The application clearly demonstrates how the event will directly and meaningfully address the selected Strategy.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The event provides engaging and intergenerational learning opportunities that highlight cultural practice, science, and conservation.

Evaluator: amazing demonstration of alignment with strategic foundations.. maybe they misunderstood the question/this part of the application

Community Impact & Strategic Outcome Alignment*

The application clearly demonstrates how the event will have significant community impact in alignment with one or more Strategic Outcome.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: The approach allows community to come together in ways that make education fun and uplifting. The lessons learned and memories made support long-term application of the skills and practices shared for the day.

Evaluator: *[Unanswered]*

Alignment with Strategic Foundation*

The application clearly demonstrates how the event will align with one or more Strategic Foundation.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: The event combines aspects of several strategic foundations, including 'ohana interactions, cultural learning and perpetuation, and a focus on 'āina sustainability. The format allows for these foundations to occur simultaneously and naturally.

Evaluator: *[Unanswered]*

Budget*

The amount requested is appropriate and a reasonable line-item budget is included.

Max Score: 10

Evaluator: 9

Evaluator: 9

Comments

Evaluator: The budget is reasonable and justified.

Evaluator: Unsure about marketing costs, as it's included on disallowed list. Willing to discuss with co-evaluator.

Opportunity for OHA Public Recognition*

The application describes community engagement, partnership, and public relations opportunities for OHA that are appropriate and reflects an opportunity for significant OHA reach into the community.

Max Score: 10

Evaluator: 10

Evaluator: 10

Comments

Evaluator: Multiple opportunities for OHA to be recognized

Evaluator: *[Unanswered]*

Recommend Sponsorship*

Evaluator: Yes

Evaluator: Yes

Recommended Amount*

Evaluator: 15000

Evaluator: 15000.00

Brief Explanation for Recommendation

Evaluator: Scored 45 out of 50 points; Supports perpetuation of lawai'a practices by connecting keiki to makua in fun and interactive learning activities; Builds capacity for community to continue sustainable practices past their event and into the future

Evaluator: *[Unanswered]*

EVALUATOR SIGNATORY

Name of Sponsorship Evaluator*

By typing your first name and last name you certify that you are the individual certifying the document and you verify that the information in this form is true and accurate.

Summary

Ka Po'e Lawai'a

E

Evaluator:



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ōlelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoako Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. **He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kihei Tying Ceremony**
 6. Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

Ho'ike o nā Wāhine – Hāumana KūkāKūkā Program Completion and Kīhei Tying Ceremony

*Application - 'Ho'ākoako Lāhui Sponsorship
Program*

He Ho'omaka Hou Ana O Puna

Mrs. Jessica Ipina
260 Kamehameha Ave
208
Hilo, HI 96720



Mrs. Jessica Ipina

PO Box 1502
Hilo, HI 96721



Application Form

APPLICANT & EVENT INFORMATION

Name of Applicant Organization*

He Ho'omaka Hou Ana O' Puna

Name of event representative*

Event representative must be someone who is authorized to communicate with OHA staff and submit any required documents or information on behalf of the awarded organization.

Jessica Cockrell

Event Representative email*

[REDACTED]

Event Representative phone number*

[REDACTED]

Describe the mission of the organization.*

"To inspire lifelong learning of Aloha, to strengthen and create leadership in our community."

Organization's Governing Board and/or Executive Team*

List the organization's governing board members' names and titles and the executive team members' names and titles. Please DO NOT include emails and phone numbers.

Board of Directors
January 1, 2025 - Present

President
Carol Matayoshi

Vice President
Desiree Lui

Treasurer
Terre Allen, PhD

Board Member
Denay Jones

Board Member
Princess Negrana

Board Member
Ihilani Niles

Founder and Executive Director
Jessica Cockrell

Co-Founder and Co-Director
Professor Renee Rivera, MSW

Name of event to be sponsored*

Ho'ike o nā Wāhine – Hāumana KūkāKūkā Program Completion and Kīhei Tying Ceremony

Start date of event to be sponsored*

05/09/2026

End date of event to be sponsored

For one day events, leave blank. For multi-day events, duration should be no longer than 30 days.

05/09/2026

Time of event to be sponsored:*

Please provide start and end time for one day events. For multiple day events, please specify the hours for each day.

7:00 am until 2:00 pm

Address of event/activity:*

28-1908 Mamalahoa Highway, Honomu, HI 96728

Identify island(s) where event will be held:*

Hawai'i Island

EVENT SCOPE

Purpose Statement*

Please provide a short statement that describes the proposed event and its purpose.

He Ho'omaka Hou Ana O Puna respectfully submits this application for support of our upcoming Kīhei Tying and Graduation Ceremony — a public, culturally grounded recognition and fundraising event to celebrate the completion of our Hāumana Kūkākūkā Program by 21 women with 95 percent being Native Hawaiian wāhine. This ceremonial event will take place in East Hawai'i and is designed to both honor the accomplishments of our haumāna (students) and raise funds to continue delivering this critical cultural healing program to new cohorts.

Event Overview and Purpose: This ceremony will feature traditional protocol, oli, and the symbolic tying of kīhei to graduates — marking their completion of a years-long journey through ancestral healing, trauma recovery, and cultural reclamation. Each woman will be acknowledged through a cultural presentation that integrates hula, storytelling, and offerings rooted in 'ike kūpuna. Their stories reflect resilience in the face of domestic violence, substance use disorders, homelessness, and sexual trauma.

The event is free and open to the public and serves three interconnected purposes:

Recognition – To publicly honor the wāhine graduates who have completed the Hāumana Kūkākūkā program, including their cultural growth and leadership.

Cultural Perpetuation – To uplift 'ike kupuna and 'ōiwi wellbeing through ceremony, protocol, and storytelling rooted in Native Hawaiian worldview.

Community Engagement & Fundraising – To raise awareness and support for the continuation of this program, including attracting new community partners and donors who believe in our culturally grounded model of trauma healing.

About the Hāumana Kūkākūkā Program: Hāumana Kūkākūkā is a culturally grounded, trauma-informed mentorship program designed for Native Hawaiian women (and women-identifying participants) on Hawai'i Island. Through biweekly in-person group sessions on the 'āina, guided cultural practices, structured journaling, healing assignments, and huaka'i to wahi pana, women reconnect to themselves, each other, and their ancestral roots. The program serves survivors of intergenerational trauma, domestic violence, addiction, and displacement, and offers a pu'uhonua — a safe space — for deep emotional, spiritual, and cultural restoration.

Women complete the program by engaging in reflection projects such as building sacred spaces, understanding moon phases as tools for emotional regulation, and creating symbolic representations of ancestral guides (e.g., spirit animals or 'aumākua).

Their growth culminates in the kīhei ceremony — a cultural rite of passage and visible acknowledgment of their readiness to step forward in their healing and leadership journeys.

Community Impact: In our previous cohort, 14 wāhine completed the program and shared their stories at our first Ho'ike, which was featured in Big Island Now (July 2025). The ceremony provided a powerful platform for cultural healing, with extended impact across generations. Our evaluations documented improved emotional balance, increased cultural connection, and stronger 'ohana engagement. The stories, art, and protocol shared by our haumāna touched not only attendees but inspired community stakeholders and funders alike.

Alignment with OHA Strategic Goals: This event directly supports Strategy 3 of the Mana i Maui Ola Strategic Plan: advancing the wellbeing of Native Hawaiians through physical, emotional, mental, and spiritual health rooted in traditional knowledge. The graduation ceremony reinforces identity, leadership, and intergenerational healing, while the fundraising component ensures the continuation of culturally rooted services that uplift our lāhui.

Conclusion: Our Kīhei Tying and Graduation Ceremony is both a sacred cultural celebration and a call to action, a moment where community, tradition, and healing converge. With OHA's support, we can honor these wāhine in a way that uplifts the broader lāhui, while ensuring the sustainability of this transformative program for future cohorts.

This event represents a rare and timely opportunity to publicly elevate the healing journey of Native Hawaiian women and activate deeper communal investment in the perpetuation of 'ike kupuna. We invite OHA to join us in this ceremonial celebration of resilience, restoration, and reawakening.

Describe the event services and activities from start to finish.*

The description should depict what the event would encompass. Demonstrate the substance of the event. Include information from the following:

- Agenda (draft/past flyer)
- Event flyer (draft/past flyer);
- List of speakers and their area of expertise;
- List of exhibitors and their offerings; and/or
- Summaries of seminars, workshops, or other opportunities provided at the event.

Event Services and Activities (Agenda Overview):

9:30 AM – Opening Protocol (Piko Ceremony) Led by Kumu and cultural practitioners, the event will open with pule, oli, and ho'okupu to ground attendees in sacred intention and acknowledge the 'āina.

10:00 AM – Welina & Introduction Opening remarks from Co-Director and Cultural Leads of He Ho'omaka Hou Ana O Puna. Overview of the program's journey, significance of the kīhei, and call to community.

10:30 AM – Mo'olelo of Transformation Each haumāna will share a short testimony, mo'olelo, or presentation of their personal journey — through hula, chant, artwork (spirit animal, Lokahi Wheel), or spoken word.

11:30 AM – Kīhei Tying Ceremony Cultural practitioners and program mentors tie kīhei on each wāhine to mark her emergence as a healed and empowered leader within her 'ohana and community.

12:15 PM – Community Pa'ina & Resource Tables Local food vendors and chefs will provide lunch (with vegetarian options). Open seating encourages community connection. Exhibitor tables include:

Resource Table TBD – Mental health & wellness programs

Resource Table TBD– Support services for survivors of domestic violence

Native Hawaiian Resource Table

Cultural arts table: lei making, lomilomi, and lā'au lapa'au demos

OHA Table (if attending) – Materials, staff, and community sign-up

1:30 PM – Closing Circle & Ho'omaika'i Ceremony concludes with closing oli, certificate presentations, and mahalo to sponsors, supporters, and OHA.

Speakers and Cultural Leads Include:

TBD – Oli, hula, and protocol expert

Renee Rivera, MSW – Program Co-Director, trauma-informed practitioner

TBD – Kupuna cultural mentor and healer

Two graduate speakers – Haumāna sharing their journeys of transformation

Conclusion: Our Kīhei Tying and Graduation Ceremony is both a sacred cultural celebration and a call to action — a moment where community, tradition, and healing converge. With OHA's support, we can honor these wāhine in a way that uplifts the broader lāhui, while ensuring the sustainability of this transformative program for future cohorts.

This event represents a rare and timely opportunity to publicly elevate the healing journey of Native Hawaiian women and activate deeper communal investment in the perpetuation of 'ike kupuna. We invite OHA to join us in this ceremonial celebration of resilience, restoration, and reawakening.

Additional Supporting Document (Optional)

Ceremony Flyer.pdf

Total estimated number of individuals to attend the event:*

100

Estimated number of Native Hawaiians to attend the event:*

90

ALIGNMENT TO MANA I MAULI OLA

Indicate the event's alignment to one of OHA's strategic directions below.*

Identify the Strategic Outcome your event best aligns with and provide your reasoning. Link to Strategic Plan: <https://www.oha.org/about/mana-to-mauli-ola/>

Health Outcomes

Identify the strategy the event aligns to and describe how it aligns to it.*

Note: The strategy should fall under the strategic direction identified in the previous question.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Strategy must be clearly identified.**

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health. The event aligns with Strategy 3 because...

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health.

The event aligns with Strategy 3 because it centers on the cultural and emotional healing of Native Hawaiian wāhine through the Hāumana Kūkākūkā program. The Kīhei Tying and Graduation Ceremony honors the completion of this transformative process, which uses culturally grounded practices such as hula, oli, mo'olelo, huaka'i to wahi pana, and ancestral reflection as pathways to holistic wellness.

This event embodies Hawaiian well-being by acknowledging the sacred balance between mind, body, and spirit, while creating a space for survivors of trauma to reconnect with their 'āina, ancestors, and identity. Through this ceremony, participants and community members witness the living application of 'ike kupuna as a tool for emotional healing, leadership development, and empowerment.

Additionally, the fundraising aspect of the event ensures the sustainability of the program, allowing more wāhine and their 'ohana to access culturally appropriate support services. By integrating traditional healing

practices with community celebration and resource sharing, the event directly advances OHA's goal of strengthening the overall wellbeing of Native Hawaiians in both spiritual and practical ways.

Identify the strategic outcome(s) the event aligns to it and describe how it aligns to it.*

Addresses the outcome and the impact the event will have. Note: The outcome should fall under the strategic direction and strategy identified in the previous responses.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-maui-ola/>

Please use the format in the example below: The Outcome(s) must be clearly identified.

Strategy Outcome 3.4: Communities are empowered to take care of iwi kupuna. This event addresses the outcome by...

Strategy Outcome 3.1: 'Ōiwi wellbeing is strengthened through the use of traditional Hawaiian cultural practices. This event addresses the outcome by celebrating and advancing the healing journey of Native Hawaiian wāhine who have completed the Hāumana Kūkākūkā program, a trauma-informed, culturally grounded initiative that utilizes ancestral knowledge and practices such as hula, oli, mo'olelo, huaka'i, and the creation of spiritual representations like the Lokahi Wheel and 'aumākua artwork.

The Kīhei Tying and Graduation Ceremony not only recognizes the wāhine for their deep inner work and cultural reconnection, but also reinforces 'ike kūpuna as a legitimate and vital form of healing. The event will feature traditional protocol, sacred ceremony, and community sharing, all of which uplift and model the practical use of Hawaiian culture in contemporary wellness and recovery spaces.

By bringing this healing model into the public eye — through community attendance, media coverage, and OHA visibility — the event helps normalize the use of cultural practices in addressing trauma and rebuilding 'Ōiwi identity. It fosters a safe and empowering space for cultural transmission, while simultaneously securing funds to ensure continued access to these culturally anchored interventions for future cohorts of wāhine.

The impact extends beyond the graduates: families, community members, and younger generations will witness the transformative power of culture in action, making this event a living demonstration of Outcome 3.1 in the Mana i Maui Ola Strategic Plan.

Describe how the event aligns to and addresses one or more of OHA's strategic foundation(s):*

'Ōhana – Family. 'Ōhana is instrumental to community empowerment. When families are strong and healthy, and when there is positive engagement within the 'ohana, from keiki to kūpuna, communities thrive. Connections to mo'omeheu and 'āina begin with connections within families.

Mo'omeheu – Culture. Culture is the essence of who Native Hawaiians are as a people. It includes all those things that distinguish the community: language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of culture are both internal and external. Culture shapes Native Hawaiian worldview and thinking. It informs the ways in which individuals interact with one another and with 'āina. It influences the way Native Hawaiians interpret events and approach problem-solving.

'Āina – Land & Water. To Native Hawaiian kūpuna, the land was life. Imbued with mana, 'āina provides everything the community needs to survive. On an intimate level, Native Hawaiians are connected to the land by the generations of kūpuna who lived on the land and whose iwi rest here. Thus, the emotional ties to family, and the

aloha for them, extends to the land that feeds us.

Use the following format: The Foundation(s) must be clearly identified.

First, list the name of the foundation(s). Second, demonstrate how the proposed event aligns with the selection.

Foundations: 'Ohana, Mo'omeheu, 'Āina

'Ohana – Family

The event honors and uplifts Native Hawaiian wāhine graduates of the Hāumana Kūkākūkā program in front of their families and communities. The kīhei tying ceremony is a moment of pride and reconnection, not only for the graduates but also for their 'ohana — including keiki, kūpuna, and extended family. The event encourages intergenerational support and healing by inviting family members to witness and participate in a cultural rite of passage. This strengthens bonds within families and reinforces the vital role of 'ohana in each woman's healing journey. By creating space for courageous conversations (kūkākūkā) rooted in love, the event empowers families to become safe, healing-centered units.

Mo'omeheu – Culture

Culture is the core of this event. The kīhei ceremony itself is steeped in traditional protocol and guided by cultural practitioners. Each haumāna shares her story through oli, hula, art, or mo'olelo, demonstrating how Hawaiian values and worldview shape their healing. The use of cultural tools such as the Lokahi Wheel, moon calendars, 'aumākua representations, and huaka'i to wahi pana reinforces cultural identity and continuity. The event also includes lei-making and lā'au lapa'au demonstrations, perpetuating Hawaiian knowledge and engaging the community in cultural practice. This expression of mo'omeheu is both intimate and communal, providing internal reflection and external celebration.

'Āina – Land and Water

The Hāumana Kūkākūkā program — and this culminating event — are deeply connected to the land. Throughout the program, sessions take place on the 'āina, and graduates form a relationship with specific places of cultural and spiritual significance. The ceremony acknowledges this connection by incorporating elements of protocol, ho'okupu, and grounding practices drawn from the 'āina. Graduates reflect on their healing as supported by the land — often citing the forest, ocean, or volcano as active participants in their growth. By hosting the event in East Hawai'i and honoring place-based healing, the ceremony models aloha 'āina and fosters continued protection of sacred spaces for cultural restoration.

BUDGET

Provide the total amount of money being requested from OHA for the event.*

Maximum amount is **\$15,000**. No minimum amount. Requests for exceptions to the maximum budget request may require justification in the comments/questions section of the application.

\$15,000.00

Indicate each expense for which OHA funds will be used as a line item.*

Provide a brief description for each item. The items should sum to the total amount requested. For sponsorship packages, please list the sponsorship benefits.

OHA funds ***shall not*** be used for entertainment or perquisites (perks) per HRS 10-17(b)(3) however, HRS 10-17(b)

does not expressly prohibit grantees from having or providing “entertainment or perquisites” as some aspect of their event. This includes live music, band, performance groups, musicians, DJ, Emcee, etc.

Cultural Practitioner Honoraria: \$4,000---Stipends for Kumu and cultural practitioners leading protocol, oli, hula, and ho'oponopono.

Kihei Materials + Graduation Gifts : \$1,200--Fabric, dyes, printing, and supplies for custom kihei; graduation lei and certificates.

Cultural Activity Supplies: \$1,200--Materials for lei-making, lā'au demo, Lokahi Wheel art, and other ceremony tools.

Food and Refreshments: \$3,000--Catering for ~100 guests with culturally appropriate and health-conscious options.

Venue Rental + Equipment (Chairs, Tents): \$2,000--Outdoor venue rental, tenting, tables, and seating for public accessibility.

AV/Documentation Services: \$1,000--Sound system rental, recording services, photography for community use and evaluation.

Print Materials + Program Booklets: \$500--Flyers, signage, graduate bios, and printed programs to support cultural literacy.

Safety, Sanitation & Insurance: \$800--Cleaning supplies, portable restroom rental, and one-day liability event insurance.

OHA Outreach Booth Setup: \$300--Tent, table, printing, and signage for OHA's use at the event.

Transportation Assistance: \$1,000--Gas cards or group van rental to help graduates and families in rural areas attend.

Line-Item Budget Upload

Budget FY26 Ho'ākoakoa Lāhui Event Sponsorship.xlsx

OPPORTUNITIES FOR OHA COMMUNITY ENGAGEMENT, PARTNERSHIPS, AND PUBLIC RELATIONS

Opportunities for OHA recognition:*

List and clearly describe the community engagement, partnership, and public relations opportunities the event offers for OHA which may include, but are not limited to:

- Advertisements in event programs/television/radio/print ads
- OHA logo on event goods or items
- OHA logo on event signage
- OHA logo on event flyers

- Speaking opportunities for OHA representative
- Providing a table or method for distributing OHA program information at the event

Please outline specifically if your event is offering any formal tables for OHA representatives to attend as guests

Opportunities for OHA Recognition

Our Kihei Tying and Graduation Ceremony offers several meaningful and high-visibility opportunities for OHA community engagement, public relations, and partnership recognition. As a public, culturally grounded event honoring Native Hawaiian wāhine, we are committed to uplifting and acknowledging the organizations that make this ceremony possible.

OHA Visibility Opportunities:

OHA Logo on Printed Materials:The OHA logo will be prominently displayed on all event flyers, printed programs, signage, and event booklets distributed to attendees (approximately 100–150).

OHA Acknowledgement in Opening and Closing Ceremonies:A formal mahalo to OHA will be included in the event's opening remarks by our Executive Director, and again during the closing circle, honoring their sponsorship role in supporting 'Ōiwi wellbeing.

Speaking Opportunity for OHA Representative:A designated 3–5 minute speaking slot will be reserved for an OHA representative to address the attendees, share program updates, or offer words of encouragement and support.

OHA Resource Table/Booth:We will provide a formal 10x10 booth space (shaded tent, table, chairs, and signage) for OHA staff to share outreach materials, information on current programs, and connect with attendees. The booth will be positioned prominently near our cultural practitioner and community partner tables.

Media & Social Media Recognition:OHA will be acknowledged in all media materials including:

Press releases sent to Big Island Now, Hilo Tribune-Herald, and local news outlets

Social media posts and event promotions on Instagram and Facebook (with tags and sponsor highlight posts)

Acknowledgment in any post-event video or recap shared publicly

Printed Program Feature:OHA will be listed as a primary event sponsor with a short blurb in the printed program detailing their mission and support for this event.

Event Photos for OHA Use:We will provide OHA with a selection of high-quality images from the ceremony (with appropriate photo release) for use in newsletters, reporting, or social media.

Formal Invitation for OHA Guests:

OHA representatives are warmly invited to attend the ceremony as honored guests. Reserved seating will be provided at the front of the gathering for OHA staff and leadership. They will be included in our pre-event communications and event logistics briefings to ensure a meaningful experience.

Social Media/Marketing Platforms:*

Please provide your **organizations** social media usernames/handles, as well as any other platforms the event will be broadcasted on.

Please use the following format:

Instagram: @example

Facebook: link

X: @example

Website:

Other:

Website: Hehoomakahouanaopuna.org

We do not have social media specifically for our nonprofit due to the nature of our services, but all events and happenings regarding our nonprofit are shared across multiple pages and channels, with local media being at all events we have hosted.

REQUIREMENTS

Event Information (flyers, posters, website details, etc.) DO NOT submit flyers for previous events.*

Event Flyer Draft 2026.png

IRS Letter of Determination-document upload*

The applicant must have IRS tax-exempt nonprofit status and be registered to do business in the State of Hawai'i. The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. See Attachment A. Sample - IRS Letter of Determination.

IRS Determination Letter.pdf

Certificate of Vendor Compliance (CVC)-document upload*

The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i (**must be valid within the calendar year**). To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Applicants must be registered and compliant with Hawai'i Compliance Express (HCE). We do not accept your DCCA. See Attachment B. Sample - HCE Certificate of Vendor Compliance.

certificate of vendor compliance.pdf

Download and complete the W9 form found here and upload below.

Checks will not be processed and mailed (to the address on the W-9) until all reporting/required documents are submitted.

Completed W-9*

Please upload the completed W-9 (**must be valid within the calendar year**).

Non-Profit W-9.pdf

If the application is recommended for approval to the Board of Trustees, the event representative will be asked to attend the OHA Budget and Finance Committee meeting to respond to any questions. Attendance may be in-person or virtual.**

I understand the attendance requirement if recommended for approval.

OPTIONAL: Please add any additional comments or questions below. Mahalo for your application!

We are deeply grateful for OHA's continued support and commitment to uplifting the Native Hawaiian community. If awarded, this sponsorship will allow us to fully realize the intent of Hō'ike O Nā Wāhine—a culturally grounded celebration of healing, leadership, and resilience among wāhine who have completed our Haumāna Kūkākūkā program.

This event not only serves as a cultural graduation for our Native Hawaiian participants but also offers a rare opportunity for the community to witness and support their transformation through mo'olelo, hula, and 'ike kūpuna. We believe it embodies OHA's vision of thriving Hawaiian communities guided by mana and self-determination.

Should OHA have any suggestions for strengthening alignment with the Mana i Maui Ola Strategic Plan or increasing the visibility of its sponsorship, we welcome that feedback and would be happy to collaborate.

Mahalo nui loa for your time and consideration.

ACKNOWLEDGEMENTS

Please read the following statements thoroughly:

By submitting this sponsorship application and selecting the following options, your agency and its affiliates, officers, employees and/or agents agree to indemnify, defend and hold harmless the Office of Hawaiian Affairs (OHA) from any and all claims, demands, liabilities, losses, damages, costs, and expenses, including reasonable attorney's fees, arising out of or in connection with this sponsorship application and participation in the associated event/activities. *

- "I have applied for or received all applicable licenses and permits, when such is required to conduct the activities or provide the services for which a grant is awarded."
- "I agree to comply with all applicable federal, state and county laws."
- "I shall not use these funds for the purposes of entertainment or perquisites (perks)."
- "I agree that all activities and improvements undertaken with funds received shall comply with all applicable federal, state, and county statutes and ordinances, including applicable building codes and agency rules; "
- "The applicant will indemnify and hold harmless the office, the State of Hawai'i, its officers, agents, and employees from and against any and all claims arising out of or resulting from activities carried out or projects undertaken with funds provided hereunder, and procure sufficient insurance to provide this indemnification if requested to do so."
- "I agree to make available to the office all records the applicant may have relating to the operation of the applicant's activity, business, or enterprise, to allow the office to monitor the applicant's compliance with the purpose of this chapter; "
- "I agree OHA can have access to records pertaining to this grant."
- "I understand that this grant award shall be monitored by the OHA to ensure compliance with Hawaii Revised Statutes § 10-17 and the purposes and intent of the Grant;"

- "I agree to complete evaluation(s) follow-up by OHA to determine whether the event attained the intended results in the manner contemplated."

*

I agree to the above statements.

Authorized Signatory*

By typing/signing your name below, you certify that the information provided is true and accurate to the best of your knowledge. You also acknowledge that typing your name acts as your electronic signature, which holds the same legal weight and validity as a handwritten signature, and you consent to be bound by the terms and conditions outlined in this agreement.

Jessica Cockrell

Date of Submission*

10/22/2025

Mahalo for your submission, you will receive an email confirmation that your application has been received once you submit. We will be in contact with you regarding award and non-award via email.

File Attachment Summary

Applicant File Uploads

- Ceremony Flyer.pdf
- Budget FY26 Ho'ākoakoa Lāhui Event Sponsorship.xlsx
- Event Flyer Draft 2026.png
- IRS Determination Letter.pdf
- certificate of vendor compliance.pdf
- Non-Profit W-9.pdf



HE HO'OMAKA HOU ANA O' PUNA
PRESENTS

HO'IKE O' NA WAHINE

A Community Celebration of Culture, Healing,
and Empowerment

***BRING YOUR
OHANA***

JULY 12, 2025
10:00AM-3:00PM
WAILOA RIVER
STATE PARK,
MAIN PAVILION

***CULTURAL
LUNCH
12-1***

**NATIVE HAWAIIAN CULTURAL
WORKSHOPS, EXHIBITS AND RESOURCES**
LEI-MAKING STATION – LEARN
TRADITIONAL LEI MAKING TECHNIQUES
WITH NATIVE PLANTS
MAHINA WORKSHOPS
'OLELO WORKSHOPS
HULA
KUPUNA KUKAKUKA

HO' IKE O' NA WAHINE

	Item	Amount	Description
	Cultural Practitioner Honoraria	\$4,000	Stipends for Kumu and cultural practitioners leading protocol, oli, hula, and ho'oponopono.
	Kihei Materials + Graduation Gifts	\$1,200	Fabric, dyes, printing, and supplies for custom kihei; graduation lei and certificates.
	Cultural Activity Supplies	\$1,200	Materials for lei-making, lā'au demo, Lokahi Wheel art, and other ceremony tools.
	Food and Refreshments	\$3,000	Catering for ~100 guests with culturally appropriate and health-conscious options.
	Venue Rental + Equipment (Chairs, Tents)	\$2,000	Outdoor venue rental, tenting, tables, and seating for public accessibility.
	AV/Documentation Services	\$1,000	Sound system rental, recording services, photography for community use and evaluation.
	Print Materials + Program Booklets	\$500	Flyers, signage, graduate bios, and printed programs to support cultural literacy.
	Safety, Sanitation & Insurance	\$800	Cleaning supplies, portable restroom rental, and one-day liability event insurance.
	OHA Outreach Booth Setup	\$300	Tent, table, printing, and signage for OHA's use at the event
	Transportation Assistance	\$1,000	Gas cards or group van rental to help graduates and families in rural areas attend.
	Total Grant Request	\$15,000	

HE HO'OMAKA HOU ANA O PUNA

HŌ'IKE O NĀ WĀHINE

KIHEI TYING CEREMONY

MAY 9 • 9:30 AM – 1:30 PM

- 9:30 AM Opening Protocol
(Piko Ceremony)
- 10:00 AM Welina & Introduction
- 10:30 AM Mō'olelo of Transformation
- 11:30 AM Kihei Tying Ceremony
- 12:15 PM Community Pa'ina &
Resource Tables
- 1:30 PM Closing Circle & Hō'omaikī'ai

Speakers and Cultural Leads Include:

- Oli, hula, and protocol expert
- Renee Rivera, MSW – Program Co-Director
- Kupuna cultural mentor and healer
- Two graduate speakers

hehoomakahouanoapuna.org



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

HE HOOMAKA HOUANA O PUNA INC
PO BOX 7266
HILO, HI 96720

Date:
October 18, 2022
Employer ID number:
88-0992490
Person to contact:
Name: Sonserae Stallings
ID number: 10055
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(vi)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
February 8, 2022
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053664001972

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

Vendor Name: HE HO'OMAKA HOU'ANA 'O PUNA INC.

Issue Date: 03/29/2025

Status: **Compliant**

Hawaii Tax#:

New Hawaii Tax#: GE-0759305728-01

FEIN/SSN#: XX-XXX2490

UI#: XXXXXX7918

DCCA FILE#: 321290

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

Ho'ike o nā Wāhine – Hāumana KūkāKūkā Program Completion and Kīhei Tying Ceremony

He Ho'omaka Hou Ana O Puna

Mrs. Jessica Ipina
260 Kamehameha Ave
208
Hilo, HI 96720



Mrs. Jessica Ipina

PO Box 1502
Hilo, HI 96721



Evaluation Summary

Overall Score: 84% - 2/2 Evaluations Complete

Evaluator:	80.00%
Evaluator:	88.00%

EVENT SCOPE

Benefits to Native Hawaiian Community*

The application outlines event services or activities that provide significant benefits to the Native Hawaiian community.

Max Score: 5

Evaluator: 4

Evaluator: 5

Comments

Evaluator: *[Unanswered]*

Evaluator: Programs + spaces like these are needed for lahui.

Attendee Reach & Feasibility*

The application indicates a proposed number of total attendees which is achievable and reflects an opportunity for significant OHA reach into the community.

Max Score: 5

Evaluator: 3

Evaluator: 4

Comments

Evaluator: *[Unanswered]*

Evaluator: Appropriate turnout for smaller org

Native Hawaiian Attendance & Impact*

The application indicates a proposed number of Native Hawaiian attendees which is achievable and reflects a significant positive impact on the betterment of conditions of Native Hawaiians.

Max Score: 5

Evaluator: 3

Evaluator: 4

Comments

Evaluator: *[Unanswered]*

Evaluator: *[Unanswered]*

ALIGNMENT TO MANA I MAULI OLA STRATEGIC PLAN

Alignment with Selected Strategy*

The application clearly demonstrates how the event will directly and meaningfully address the selected Strategy.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: *[Unanswered]*

Evaluator: *[Unanswered]*

Community Impact & Strategic Outcome Alignment*

The application clearly demonstrates how the event will have significant community impact in alignment with one or more Strategic Outcome.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: *[Unanswered]*

Evaluator: *[Unanswered]*

Alignment with Strategic Foundation*

The application clearly demonstrates how the event will align with one or more Strategic Foundation.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: *[Unanswered]*

Evaluator: *[Unanswered]*

Budget*

The amount requested is appropriate and a reasonable line-item budget is included.

Max Score: 10

Evaluator: 8

Evaluator: 9

Comments

Evaluator: [Unanswered]

Evaluator: Seems appropriate from a smaller org, budget items seem reasonable. Willing to discuss further with co-evaluator

Opportunity for OHA Public Recognition*

The application describes community engagement, partnership, and public relations opportunities for OHA that are appropriate and reflects an opportunity for significant OHA reach into the community.

Max Score: 10

Evaluator: 7

Evaluator: 10

Comments

Evaluator: [Unanswered]

Evaluator: [Unanswered]

Recommend Sponsorship*

Evaluator: Yes

Evaluator: Yes

Recommended Amount*

Evaluator: 11,250.00

Evaluator: 11250.00

Brief Explanation for Recommendation

Evaluator: [Unanswered]

Evaluator: Great event that aligns with MiMO health outcomes.

EVALUATOR SIGNATORY

Name of Sponsorship Evaluator*

By typing your first name and last name you certify that you are the individual certifying the document and you verify that the information in this form is true and accurate.

Evaluator: [REDACTED]

Evaluator: [REDACTED]

Date of Evaluation*

Evaluator: 02/17/2026

Evaluator: 02/17/2026



John D. Waihe'e IV - Chairperson
Dan Ahuna - Vice Chair

Phone: (808) 594-1888
Fax: (808) 594-1868

MEMBERS

Kaleihikina Akaka
Keli'i Akina, Ph.D.
Luana Alapa
Brickwood Galuteria
Kaiali'i Kahele
Carmen "Hulu" Lindsey
Keoni Souza

OFFICE OF HAWAIIAN AFFAIRS

KE'ENA KULEANA HAWAI'I

BUDGET AND FINANCE COMMITTEE

560 N. Nimitz Hwy., Suite 200
Honolulu, HI 96817

COMMITTEE ON BUDGET AND FINANCE (BF)

DATE: Wednesday, March 4, 2026
TIME: 10:00 a.m. or immediately following the conclusion of the OHA Committee on Beneficiary Advocacy and Empowerment (BAE) Meeting
PLACE: Remote Meeting by Interactive Conference Technology
Viewable at www.oha.org/livestream OR
Listen by phone: (213) 338-8477, Webinar ID: 823 9412 3302

This meeting can be viewed via livestream on OHA's website at www.oha.org/livestream or listened to by phone using the call-in information above. Additionally, this meeting can be viewed live on 'Ölelo Community Media <https://olelo.org/>. A physical meeting location, open to members of the public who would like to provide oral testimony or view the meeting, will be available at 560 N. Nimitz Hwy., Suite 200, Honolulu, HI 96817.

AGENDA

- I. Call to Order
- II. Approval of Minutes
 - A. February 4, 2026
 - B. February 18, 2026
- III. **New Business**
 - A. **Action Item BF #26-04: Approval of OHA funding for Ho'ākoakoa Lāhui event sponsorship awards for the following organizations and events for Fiscal Year 2025 - 2026, Quarter 4 (Batch 2):**
 1. Kāhuli Leo Le'a – May Day 2026
 2. Conservation Council for Hawai'i – Manu o Kū Festival
 3. Pakini Loan Fund – Wai'anae Moku Made
 4. Ka Po'e Lawai'a – Manini & Me Holoholo Festival
 5. He Ho'omaka Hou Ana O Puna – Ho'ike o nā Wāhine – Hāumana Kūkākūkā Program Completion and Kīhei Tying Ceremony
 6. **Ho'okāko'o Corporation – Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging**
 7. Acton Digital Inc (Kaulike Academy) – 'Ōpio Mākeke: Summer Kickoff Night Market
 8. Recycle Hawaii – Hawai'i Zero Waste Youth Planning Convergence
 9. Symbrosia Foundation – Kona Kai Festival
 10. North Kohala Community Resource Center – Kohala Kamehameha Day Celebration
 11. Papa Ola Lokahi – Pūpū 'Umeke Kā'eo 'Ekolu: 3rd Annual Traditional Healers Gathering
 12. Festivals of Aloha – Na Kamehameha Commemorative Pā'ū Parade & Ho'olaule'a
 13. Leeward Kai Canoe Club LLC – Lauhoe: Father's Day Regatta Festival

Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging

Application - 'Ho'ākoako Lāhui Sponsorship Program

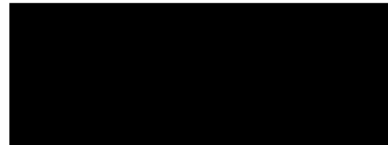
Ho'okāko'o Corporation

Mr. David Y. Gibson
1360 S. Beretania Street
Suite 204
Honolulu, HI 96814



Mr. David Y. Gibson

1360 S. Beretania Street
Suite 204
Honolulu, HI 96814



Application Form

APPLICANT & EVENT INFORMATION

Name of Applicant Organization*

Ho'okāko'o Corporation

Name of event representative*

Event representative must be someone who is authorized to communicate with OHA staff and submit any required documents or information on behalf of the awarded organization.

David Gibson

Event Representative email*

[REDACTED]

Event Representative phone number*

[REDACTED]

Describe the mission of the organization.*

Ho'okako'o Mission: We empower communities to develop high quality, student-centered, and sustainable Hawaiian-focused charter schools by providing exceptional educational support services, mutual accountability, and a culture of learning.

Waimea Middle Public Conversion Charter School Mission: The mission of Waimea Middle Public Conversion Charter School is to empower all students with the skills, values and cultural understanding to navigate high school and beyond.

Organization's Governing Board and/or Executive Team*

List the organization's governing board members' names and titles and the executive team members' names and titles. Please DO NOT include emails and phone numbers.

Ivan Takushi, Chair/Treasurer - Controller, PVT Land Company
Susan Maddox, Vice Chair - Executive Team Leader, Friends of the Future
Kumau Pineda-Akiona, Secretary, Attorney at Law In Motion Design Inc.
Pualani S. Akaka, Director, Retired Public School Educator
Jonathan Ching, Director, Government Relations Kaiser Permanente
Dr. Kealoha Fox, Director
Mary Komomua, Director, Licensed Social Worker Kaiser Permanente
David Y. Gibson, Executive Director, Ho'okāko'o Corporation, Governing Board Member (non-voting)

Name of event to be sponsored*

Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging

Start date of event to be sponsored*

05/21/2026

End date of event to be sponsored

For one day events, leave blank. For multi-day events, duration should be no longer than 30 days.

05/22/2026

Time of event to be sponsored:*

Please provide start and end time for one day events. For multiple day events, please specify the hours for each day.

Thursday: 05/21/26 – Student rehearsal 9:00 AM – 10 AM; Parent and Staff Committees Set-Up – 8:00 PM – 10 PM; Friday: 05/22/25 – Event and Protocol – 7:00 AM – 12 PM

Address of event/activity:*

Spencer Kalani Schutte Park (Waimea District Park) 67-1315 Ala 'Ohia Road Kamuela, HI 96743

Identify island(s) where event will be held:*

Hawai'i Island

EVENT SCOPE

Purpose Statement*

Please provide a short statement that describes the proposed event and its purpose.

Our schoolwide learning results state, "With a focus on educating the whole child, we seek to ensure that our students become competent learners who embody our core values of 'Ike, Kaizen, Accountability, and Respect." These are our IKAIR values, which serve as a foundation for the school.

This project is a celebration of student learning. Throughout the year, students are provided with opportunities to learn and experience what it means to care for (mālama) their place. They participate in place/project-based learning activities, which include huaka'i to complete service learning projects.

Students are guided by their teachers and by cultural practitioners and learn the history of the places they visit. Many of the activities include chants, dances, mo'olelo, why the place is important, and the steps that must be taken to preserve the environment.

Utilizing this as a background, grade levels are then guided by the teachers and the cultural practitioners to select a song or a dance to perform at our school-wide May Day program, which serves as a culmination of what they have learned.

Included is a May Day Court, which takes the lead in demonstrating what IKAIR looks like in and out of the classroom setting for the student body to recognize and follow. They are held to strict attendance criteria as well as behavioral expectations. They all enter Court at various points on the spectrum, but they set their own personal growth goals and are reminded to uphold their core values on a daily basis. They have minor setbacks, but they are very resilient to redirection; they must be if they want to continue representing the school on the Court. In addition to their academic and overall behavior, they are highly encouraged to participate in community service events outside of school hours. Many of them were active participants in the Aloha Festivals Paniolo Parade in addition to assisting and representing our WMS activity booth at community meals events like Food Truck Friday.

As a school, we offer family and student engagement through community events. Students at Waimea Middle also acknowledge first responders annually through handwritten notes presented at a community meal. This year's gathering of first responders was on November 21, 2025. November is parent-teacher-student conferences, where students present their academic and personal growth portfolio. Some 8th-grade students are demonstrating entrepreneurship by marketing items they made in the field studies class during conference time this year.

December is the Waimea Christmas parade. Last year, students decorated a school van that was driven in the parade. We hope to participate again on Dec. 6, 2025. The robotics team decorated a tree for fundraising, which is featured at the Mauna Lani resort in Waikoloa.

In January, the seventh-grade students will travel on an overnight excursion to volcano.

In February, students will collaborate with the counselor to complete community service with a Kindness for Kaupuna Day. This is expected to be year 2, and will take place in February around Valentine's Day. The robotics team will present at the state championships on Oahu.

Describe the event services and activities from start to finish.*

The description should depict what the event would encompass. Demonstrate the substance of the event. Include information from the following:

- Agenda (draft/past flyer)
 - Event flyer (draft/past flyer);
 - List of speakers and their area of expertise;
 - List of exhibitors and their offerings; and/or
 - Summaries of seminars, workshops, or other opportunities provided at the event.
 - List of speakers and their area of expertise – Cultural Practitioners to be determined as event is closer.
- Last year's practitioners: Michael Hodson, Waimea Hawaiian Homesteaders Association, Maria Hokani, Chadd Paishon, Charlyn Taniguchi, Ana Bertelmann

- List of exhibitors and their offerings; and/or - None
- Summaries of seminars, workshops, or other opportunities provided at the event - None

Additional Supporting Document (Optional)

May Day Program.pdf

Total estimated number of individuals to attend the event:*

500

Estimated number of Native Hawaiians to attend the event:*

300

ALIGNMENT TO MANA I MAULI OLA

Indicate the event's alignment to one of OHA's strategic directions below.*

Identify the Strategic Outcome your event best aligns with and provide your reasoning. Link to Strategic Plan: <https://www.oha.org/about/mana-to-mauli-ola/>

Educational Pathways

Identify the strategy the event aligns to and describe how it aligns to it.*

Note: The strategy should fall under the strategic direction identified in the previous question.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-mauli-ola/>

Please use the format in the example below: **The Strategy must be clearly identified.**

Strategy 3: Advance policies, programs and practices that strengthen Hawaiian well-being, including physical, spiritual, mental and emotional health. The event aligns with Strategy 3 because...

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

This event aligns with Strategy 1 because all students attending Waimea Middle Public Conversion Charter School will participate in the May Day Ho'ike. Cultural practitioners will provide leadership to the students in the months preceding the ho'ike and during the event. Through their participation in this project, students will develop lasting memories with their peers, their families, and community members. They will have a sense of pride as they make learning visible and relevant and will understand their responsibility to care for their environment. Through the theme, "A Sense of Place, a Sense of Belonging," their connection to place will be long-lasting and will result in caring and concerned citizens.

Identify the strategic outcome(s) the event aligns to it and describe how it aligns to it.*

Addresses the outcome and the impact the event will have. Note: The outcome should fall under the strategic direction and strategy identified in the previous responses.

Link to Mana i Maui Ola for more information: <https://www.oha.org/about/mana-to-maui-ola/>

Please use the format in the example below: The Outcome(s) must be clearly identified.

Strategy Outcome 3.4: Communities are empowered to take care of iwi kupuna. This event addresses the outcome by...

Strategic Outcome 1.3: Increase number of Native Hawaiians engaged in traditional learning systems, e.g., hele, halau, mua, hale pe'a) that reestablish/maintain strong cultural foundations and identity.

This event addresses Strategic Outcome 1.3 as it is a culmination of a yearlong strong 'Ike Hawai'i cultural learning program which focuses on the overarching theme of "Sense of Place, Sense of Identity."

Each grade level selects a theme which is incorporated through the year's learning activities and is then reflected in their May Day Ho'ike selections.

Grade 6 has focused on the pu'u of Waimea. Through their extended core classes, they have expressed their Sense of Place/ Sense of Identity through mixed media products that represent their favorite sites on the island. They have also written pieces to explain their connections to their area(s) and, additionally, have planted native plants throughout the campus to further "root" themselves to their school. An overnight excursion to the volcano provided an opportunity to learn various mo'olelo.

In Grade 7, the focus has been on Native Birds, the "Jewels of the Forest". Students have researched the variety of native plants and created projects to share with their classmates and, ultimately, with their families. The team of 7th-grade teachers has participated in Professional Development offered by the Hawaiian Festival of Birds (October 4, 2025), and the American Bird Conservancy Hawai'i (November 15, 2025)- KS sponsored.

Eighth graders have been learning about weather and climate in science and will soon examine the geology of Waimea and the Kohala/Kona coasts in relation to water and fishponds. Students went on a huaka'i to the fishponds at Kīholo, Kalahuipua'a, and 'Anaeho'omalua to begin making connections between upland water and the geology that supports these coastal resources. The goal for the May Day Hō'ike is to share mo'olelo that highlight the weather and waters of Waimea and how they connect to the shoreline fishponds. In their extended core classes they have created products that are inspired by their sense of place. An example is the laser-cut earrings in a lauhala mat design

Describe how the event aligns to and addresses one or more of OHA's strategic foundation(s):*

'Ohana – Family. 'Ohana is instrumental to community empowerment. When families are strong and healthy, and when there is positive engagement within the 'ohana, from keiki to kūpuna, communities thrive. Connections to mo'omeheu and 'āina begin with connections within families.

Mo'omeheu – Culture. Culture is the essence of who Native Hawaiians are as a people. It includes all those things that distinguish the community: language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of culture are both internal and external. Culture shapes Native Hawaiian worldview and thinking. It informs the ways in which individuals interact with one another and with 'āina. It influences the

way Native Hawaiians interpret events and approach problem-solving.

'Āina – Land & Water. To Native Hawaiian kūpuna, the land was life. Imbued with mana, 'āina provides everything the community needs to survive. On an intimate level, Native Hawaiians are connected to the land by the generations of kūpuna who lived on the land and whose iwi rest here. Thus, the emotional ties to family, and the aloha for them, extends to the land that feeds us.

Use the following format: The Foundation(s) must be clearly identified.

First, list the name of the foundation(s). Second, demonstrate how the proposed event aligns with the selection.

Foundations 1 – 'Ohana and 2 – Mo'omeheu

'Ohana – Family: Traditionally, all families of WMPCCS students have been able to attend our May Day Ho'ike. For the three years before SY 2024-25, however, due to the disrepair of the Thelma Parker Gym, only May Day Court families have been able to attend, and no additional families or community members were allowed. Families have, rightfully, been disappointed as they would have liked to see their children perform. Last year, due to a Kukio Ho'omana Fund grant, we were able to stage the event at the Spencer Kalani Schutte Park (Waimea District Park). Most families and a large number of the Waimea community attended. This was a one-time grant, and we would like to continue this practice. As one teacher shared, "We were able to host this celebration in a venue large enough to welcome all families and the wider school community. It was a powerful moment of pride and connection as students shared their hula and honored the stories of the wa'a as a symbol of how we should care for our 'aina and the paniolo traditions of Waimea."

Mo'omeheu – Culture: Another teacher shared, "The May Day Ho'ike was far more than a performance – it was a powerful expression of culture, identity, and unity. Whether Hawaiian or not, each student stood proudly and purposefully, honoring the deep meaning behind every chant, every hula, every word. This celebration enriched our sense of place and reminded us of the strength found in shared traditions."

BUDGET

Provide the total amount of money being requested from OHA for the event.*

Maximum amount is **\$15,000**. No minimum amount. Requests for exceptions to the maximum budget request may require justification in the comments/questions section of the application.

\$14,710.00

Indicate each expense for which OHA funds will be used as a line item.*

Provide a brief description for each item. The items should sum to the total amount requested. For sponsorship packages, please list the sponsorship benefits.

OHA funds ***shall not*** be used for entertainment or perquisites (perks) per HRS 10-17(b)(3) however, HRS 10-17(b) does not expressly prohibit grantees from having or providing "entertainment or perquisites" as some aspect of their event. This includes live music, band, performance groups, musicians, DJ, Emcee, etc.

Grant funds will be utilized to hire cultural practitioners and to provide supplies for our culminating May Day Ho'ike. The rough breakdown is as follows:

Supplies – \$7,710

Stage and Chairs - \$4,210

Sound System – \$1,500
Decorations and Court Members' Attire - \$2,000
Cultural Practitioners - \$7,000

Line-Item Budget Upload

Budget - OHA Grant.docx

OPPORTUNITIES FOR OHA COMMUNITY ENGAGEMENT, PARTNERSHIPS, AND PUBLIC RELATIONS

Opportunities for OHA recognition:*

List and clearly describe the community engagement, partnership, and public relations opportunities the event offers for OHA which may include, but are not limited to:

- Advertisements in event programs/television/radio/print ads
- OHA logo on event goods or items
- OHA logo on event signage
- OHA logo on event flyers
- Speaking opportunities for OHA representative
- Providing a table or method for distributing OHA program information at the event

Please outline specifically if your event is offering any formal tables for OHA representatives to attend as guests

The OHA logo will be included on all hard copy and on-line flyers and programs. In our welcome to the program, we will verbally express our gratitude to OHA for the support.

Social Media/Marketing Platforms:*

Please provide your organizations social media usernames/handles, as well as any other platforms the event will be broadcasted on.

Please use the following format:

Instagram: @example

Facebook: link

X: @example

Website:

Other:

Website: <https://waimeamiddleschool.org>

YouTube Channel: <https://www.youtube.com/@wmsvideo96743>

Facebook: [facebook.com/WaimeaMiddleSchool](https://www.facebook.com/WaimeaMiddleSchool)

Instagram: @Waimea.middle.pccs

Instagram: @waimea_middle_principal

REQUIREMENTS

Event Information (flyers, posters, website details, etc.) DO NOT submit flyers for previous events.*

May Day Program DRAFT.pdf

IRS Letter of Determination-document upload*

The applicant must have IRS tax-exempt nonprofit status and be registered to do business in the State of Hawai'i. The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. See Attachment A. Sample - IRS Letter of Determination.

Hookakoo - IRS Determination Letter 2003 (2).pdf

Certificate of Vendor Compliance (CVC)-document upload*

The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i (**must be valid within the calendar year**). To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Applicants must be registered and compliant with Hawai'i Compliance Express (HCE). We do not accept your DCCA. *See Attachment B. Sample - HCE Certificate of Vendor Compliance.*

Hookakoo Hawaii Certificate of Vendor Compliance 11-25-25.pdf

Download and complete the W9 form found here and upload below.

Checks will not be processed and mailed (to the address on the W-9) until all reporting/required documents are submitted.

Completed W-9*

Please upload the completed W-9 (**must be valid within the calendar year**).

HC Form W9 11-19-25 signed.pdf

If the application is recommended for approval to the Board of Trustees, the event representative will be asked to attend the OHA Budget and Finance Committee meeting to respond to any questions. Attendance may be in-person or virtual.**

I understand the attendance requirement if recommended for approval.

OPTIONAL: Please add any additional comments or questions below. Mahalo for your application!

ACKNOWLEDGEMENTS

Please read the following statements thoroughly:

By submitting this sponsorship application and selecting the following options, your agency and its affiliates, officers, employees and/or agents agree to indemnify, defend and hold harmless the Office of Hawaiian Affairs (OHA) from any and all claims, demands, liabilities, losses, damages, costs, and expenses, including reasonable attorney's fees, arising out of or in connection with this sponsorship application and participation in the associated event/activities. *

- "I have applied for or received all applicable licenses and permits, when such is required to conduct the activities or provide the services for which a grant is awarded."
- "I agree to comply with all applicable federal, state and county laws."
- "I shall not use these funds for the purposes of entertainment or perquisites (perks)."
- "I agree that all activities and improvements undertaken with funds received shall comply with all applicable federal, state, and county statutes and ordinances, including applicable building codes and agency rules; "
- "The applicant will indemnify and hold harmless the office, the State of Hawai'i, its officers, agents, and employees from and against any and all claims arising out of or resulting from activities carried out or projects undertaken with funds provided hereunder, and procure sufficient insurance to provide this indemnification if requested to do so."
- "I agree to make available to the office all records the applicant may have relating to the operation of the applicant's activity, business, or enterprise, to allow the office to monitor the applicant's compliance with the purpose of this chapter; "
- "I agree OHA can have access to records pertaining to this grant."
- "I understand that this grant award shall be monitored by the OHA to ensure compliance with Hawaii Revised Statutes § 10-17 and the purposes and intent of the Grant;"
- "I agree to complete evaluation(s) follow-up by OHA to determine whether the event attained the intended results in the manner contemplated."

*

I agree to the above statements.

Authorized Signatory*

By typing/signing your name below, you certify that the information provided is true and accurate to the best of your knowledge. You also acknowledge that typing your name acts as your electronic signature, which holds the same legal weight and validity as a handwritten signature, and you consent to be bound by the terms and conditions outlined in this agreement.

David Y. Gibson

Date of Submission*

11/26/2025

Mahalo for your submission, you will receive an email confirmation that your application has been received once you submit. We will be in contact with you regarding award and non-award via email.

File Attachment Summary

Applicant File Uploads

- May Day Program.pdf
- Budget - OHA Grant.docx
- May Day Program DRAFT.pdf
- Hookakoo - IRS Determination Letter 2003 (2).pdf
- Hookakoo Hawaii Certificate of Vendor Compliance 11-25-25.pdf
- HC Form W9 11-19-25 signed.pdf



Musicians



Keanali'i Bertelmann, Hokani Maria, Chadd Paishon

Mālana Mai Ka'u

Mālana mai Ka'u, Me Puna,
me Hilo,
Hele mai Kona me Kohala
me Hāmākua,

He ka'ele 'O Waipi'o, he pola
'O mahiki
He uka 'O Waimea, he awa
Kawaihae

He kupe no ka wa'a O
Polihahu
He pala Mauna A Wākea i
luna

Pa'a kuahiwi ike alii'i ika wa'a
Ohohia i ka hana 'ana aku e

Hawai'i Aloha

E Hawai'i e ku'u one hānau e
Ku'u home kulaiwi nei
'Oli nō au i nā pono lani ou
E Hawai'i, aloha ē

Hui:

E hau'oli nā 'ōpio o Hawai'i
nei
'Oli ē! 'Oli ē!
mai nei

Mai nā aheahē makani e pā
Mau ke aloha, no Hawai'i

E hā'i mai kou mau kini lani e
Kou mau kupa aloha, e
Hawai'i
Nā mea 'ōlino kamaha'o no
luna mai
E Hawai'i aloha ē

Na ke Akua E mālama mai iā
'oe

Kou mau kudlona aloha nei
Kou mau kahawai 'ōlinolino
mou

Kou mau māla pua nani ē

Mahalo nui

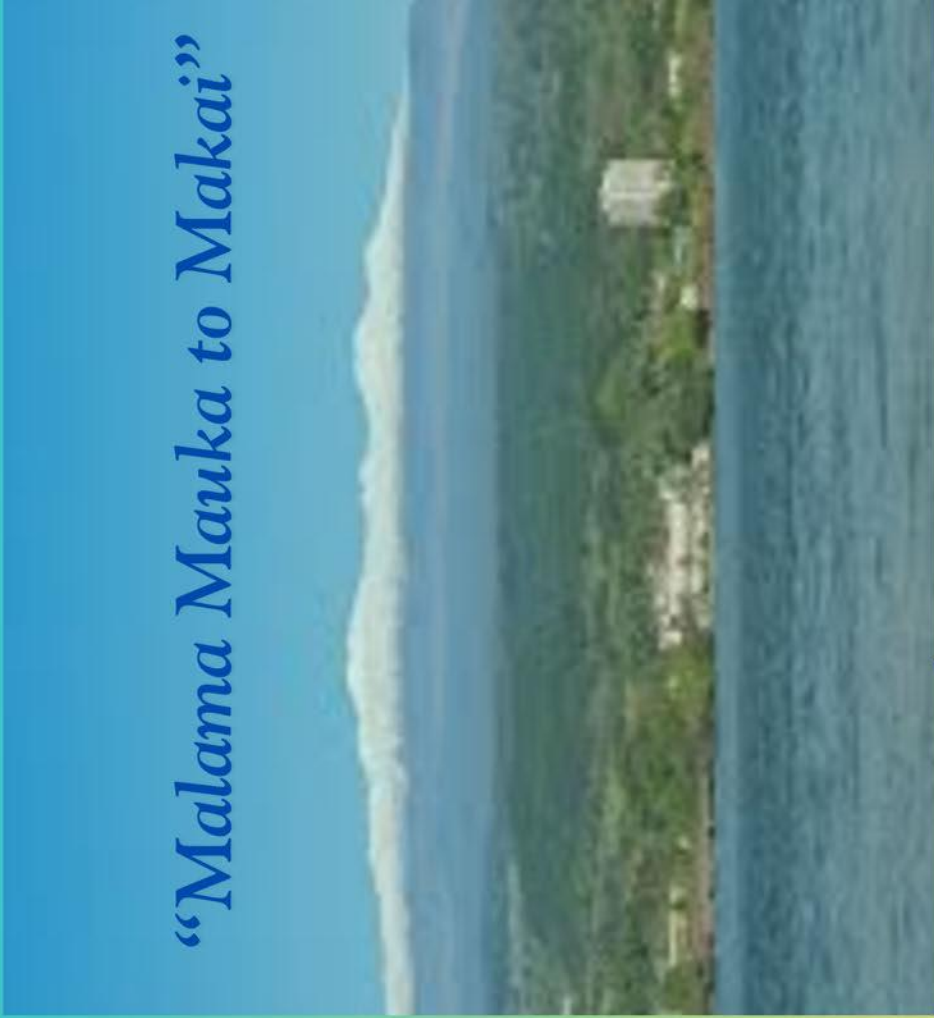


Waimea Middle School entire faculty, staff, custodians, EA's, support staff, students, Court members, parents and families, Pa'ahoa LLC, Ana B., Chadd Paishon, Hokani Maria, Kahae Hodson-Kamohoali'i (Baba), Micah Kamohoali'i, Halau Nā Kipu'upu'u, Mala'ai Garden 'Ohana, Kukio Ho'omana Fund Community Grant, Green Point Nurseries, Patti Cook, Lelehua Bray, David Miranda, Halau Hula Ke'ala'umoe, Charlyn "Tita" Taniguchi, Kooksie & Tim Mccollough, Nat Revilla, Murphy 'Ohana, Gusman 'Ohana, Takenouchi 'Ohana, Anastacio 'Ohana, DeMello 'Ohana, Onaka 'Ohana, Ho'opai 'Ohana, Frankie Pang, Howard of Kona, Kalahiki 'Ohana, Kubey 'Ohana, Marsh 'Ohana, Nansen 'Ohana, Kawamura 'Ohana, Ching 'Ohana, Taniguchi 'Ohana, Michael Mundon, Malani 'Ohana, Kathy Cazimero, Urbanozo 'Ohana, Alice Fujii, Mareko 'Ohana, Ontiveros 'Ohana, Zoe Kosmas, Lewis 'Ohana, Keolanui 'Ohana, Big Island Tents 'Ohana, Live Live LLC, Polynesian Adventure Tours LLC, Melissa Samura, Parks & Recreation (County of Hawaii), Ayat 'Ohana, Kunishige 'Ohana, Iman 'Ohana, Geri Giffen, Deede Bertelmann, Laua'e Sanchez, Kekoho Bertelmann, Hoapili Sanchez, Jenkins 'Ohana.



Waimea Middle School May Day Program SY 2024-2025

“Malama Mauka to Makai”



May 16, 2025

2025 May Day Court



Pu Blowers

Napono Calipano Dela Cruz, Kuuleimanaola David-Chapman,
Favian Gomez, Jeremy Kamakea



Hawai'i

Joah Hooley & Maile Revilla



Maui

Travis Cariaga & Hailey Jade (Peachy) Ng

O'ahu

Dylan Kaulukui-Fatu & Sensi Kalani



Kaua'i

Noa Mossman & Noelle Urbanozo



Moloka'i

Isaac Hoopai & Kiana Chong



Lana'i

Hunter Takushi & Imelia Giltharngan

Ni'ihau

J-sty Sosar & Debbie Clement



Kaho'olawe

Kamahoi Takushi & Riley Ventura



King & Queen

Jakob Alcantara & Sophia Rose Mareko

Performances



Queen's Hula: Ka Lehua Imilia

Words by: Mary Kawena Pukui
Music by: Maddy Lam



Wahine Hula: Pua O Ka Mākāhala

Written by: Katie Stevens i'i
Choreographed by: Kumu Ana Bertelmann



Kane Hula: 'O Kūmokuhālī'i

Written & Choreographed by:
Kumu Ana Bertelmann



Schoolwide: Holo Ia I Ta Motu (Hula Kahiko)

By: Kamohoali'i Collection
Paepae Baba Kahae Kamohoali'i



Grade 6: Ka Rodeo O Waimea (Hula Auwana)

By: Johnny Lum Ho
Paepae Baba Kahae Kamohoali'i



Grade 7: Holo Wa'a Pā (Hula Auwana)

By: Lena Machado
Kumu Cherise Mundon



Grade 8: Kilakila Na Roughriders (Hula Auwana)

Traditional
Paepae Baba Kahae Kamohoali'i



Queen's Special: La'u Samoa

Written by: Marina Davis
Aunty Nee Nee



Schoolwide Mele: Hokule'a Star of Gladness

Written by: George Kalama



Hawaii Aloha



Star of Gladness

Composer: George Kalama

Raindrops they hamper my vision

Falling down, they make an impression upon my mind
While we sail away our time

Blow makani, shout jubilation

Carry us down to our destination
wikiwiki, a keala Tahiti

Millions of stars up in the sky

Looking up they all make us sigh, but

Hokule'a, Star of Gladness (You're the Happy Star)
Hokule'a, Star of Gladness (You're the Happy Star)

Stand beside me and be my friend

Make me smile and laugh again,

Hokule'a, Star of Gladness (You're the Happy Star)
Hokule'a, Star of Gladness (You're the Happy Star)

BRIDGE:

Lift your bow, your hull glides through the sea

Guide Hokule'a, We ask you please

To you we say, please show us the way

Hokule'a, Star of Gladness (You're the Happy Star)
Hokule'a, star of Gladness (You're the Happy Star)

Star of Gladness

Composer: George Kalama

Raindrops they hamper my vision

Falling down, they make an impression upon my mind
While we sail away our time

Blow makani, shout jubilation

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wikiwiki, a keala Tahiti

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Hokule'a, Star of Gladness (You're the Happy Star)
Hokule'a, Star of Gladness (You're the Happy Star)

BRIDGE:

Lift your bow, your hull glides through the sea

Guide Hokule'a, We ask you please

To you we say, please show us the way

Hokule'a, Star of Gladness (You're the Happy Star)
Hokule'a, star of Gladness (You're the Happy Star)



WAIMEA MIDDLE PUBLIC CONVERSION CHARTER SCHOOL
Ho'ākoakoa Lāhui Event Sponsorship Program

BUDGET

Category	Items	Amount
Supplies	<ul style="list-style-type: none"> • Rental of Stage and Chairs 	<ul style="list-style-type: none"> • \$4,210
	<ul style="list-style-type: none"> • Rental of Sound System 	<ul style="list-style-type: none"> • \$1,500
	<ul style="list-style-type: none"> • Decorations and Court Member Attire 	<ul style="list-style-type: none"> • \$2,000
Practitioners	<ul style="list-style-type: none"> • Musicians, kumu hula, narrators, support personnel 	<ul style="list-style-type: none"> • \$7,000
TOTAL		<ul style="list-style-type: none"> • \$14,710



Musicians

Keanali'i Bertelmann, Hokani Maria, Chadd Paishon

Mālana Mai Kā'u

Mālana mai Kā'u, Me Puna,
me Hilo,
Hele mai Kona me Kohala
me Hāmākua,

He kā'ele 'O Waiipio, he pola
'O mahiki
He uka 'O Waimea, he awa
Kawaihae

He kupe no ka wa'a O
Polihahu
He pala Mauna A Wākea i
luna

Pa'a kuahiwi ike alii'i ika wa'a
Ohohia i ka hana 'ana aku e

Hawai'i Aloha

E Hawai'i e ku'u one hānau e
Ku'u home kulawi nei
'Oli nō au i nā pono lani ou
E Hawai'i, aloha ē

Hui:

E hau'oli nā 'ōpio o Hawai'i
nei

'Oli ē! 'Oli ē!
Mai nā aheahē makani e pā
mai nei

Mau ke aloha, no Hawai'i

E hā'i mai kou mau kīni lani e
Kou mau kupa aloha, e
Hawai'i

Nā mea 'ōlino kamaha'o no
luna mai

E Hawai'i aloha ē

Na ke Akua E mālama mai iā
'oe

Kou mau kudlona aloha nei
Kou mau kahawai 'ōlinolino
mou

Kou mau māla pua nani ē

Mahalo nui

Waimea Middle School entire faculty, staff, custodians, EA's, support staff, students, Court members, parents and families, Pa'ahoa LLC, Ana B., Chadd Paishon, Hokani Maria, Kahae Hodson-Kamohoali'i (Baba), Micah Kamohoali'i, Halau Nā Kipu'upu'u, Mala'ai Garden 'Ohana, Kukio Ho'omana Fund Community Grant, Green Point Nurseries, Patti Cook, Lelehua Bray, David Miranda, Halau Hula Ke'ala'aumoe, Charlyn "Tita" Taniguchi, Kooksie & Tim Mccollough, Nat Revilla, Murphy 'Ohana, Gusman 'Ohana, Takenouchi 'Ohana, Anastacio 'Ohana, DeMello 'Ohana, Onaka 'Ohana, Ho'opai 'Ohana, Frankie Pang, Howard of Kona, Kalahiki 'Ohana, Kubey 'Ohana, Marsh 'Ohana, Nansen 'Ohana, Kawamura 'Ohana, Ching 'Ohana, Taniguchi 'Ohana, Michael Mundon, Malani 'Ohana, Kathy Cazimero, Urbanozo 'Ohana, Alice Fujii, Mareko 'Ohana, Ontiveros 'Ohana, Zoe Kosmas, Lewis 'Ohana, Keolanui 'Ohana, Big Island Tents 'Ohana, Live Live LLC, Polynesian Adventure Tours LLC, Melissa Samura, Parks & Recreation (County of Hawaii), Ayat 'Ohana, Kunishige 'Ohana, Iman 'Ohana, Geri Giffen, Deedee Bertelmann, Laua'e Sanchez, Kekoho Bertelmann, Hoapili Sanchez, Jenkins 'Ohana.

Oli Mahalo

'Uhola 'a ka Makaloa iā
Pū 'ai ke aloha iā

Kū ka'i ia ka hā loa iā

Pāwehi mai nā lehua

Mai ka ho'oku'i a ka
hālāwai iā

Mahalo e nā akua

Mahalo e nā kūpuna iā 'eā

Mahalo me ke aloha iā

Mahalo me ke aloha iā

Waimea Middle School May Day Program

SY 2025-2026

Senes of Place Sense of Belonging



May XX, 2026

2026 May Day Court

Pu Blowers
XXX, XXX, XXX, XXX

Hawai'i
XXX & XXX

Maui
XXX & XXX

O'ahu
XXX & XXX

Kaua'i
XXX & XXX

Moloka'i
XXX & XXX

Lana'i
XXX & XXX

Ni'ihau
XXX & XXX

Kaho'olawe
XXX & XXX

Ladies In Waiting
XXX & XXX

Kahili Bearers
XXX & XXX

King & Queen
XXX & XXX

Performances

Queen's Hula: Ka
Words by:
Music by:

Wahine Hula:
Written by:
Choreographed by:

Kane Hula:
Written & Choreographed by:

Schoolwide:
(Hula Kahiko)
By:

Grade 6:
(Hula Auwana)
By:

Grade 7:
(Hula Auwana)
By:

Grade 8:
(Hula Auwana)
Traditional

Schoolwide Mele:
Written by:

Hawaii Aloha

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 21 2003**

HO OKAKO O CORPORATION
C/O JEFFREY S PIPER
1099 ALAKEA ST STE 1800
HONOLULU, HI 96813-0000

Employer Identification Number:
76-0717301
DLN:
17053091041043
Contact Person:
ELIZABETH WAGNER ID# 31380
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
June 30
Form 990 Required:
Yes
Addendum Applies:
Yes

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in sections 509(a)(1) and 170(b)(1)(A)(ii).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the

Letter 947 (DO/CG)

HO OKAKO O CORPORATION

part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of Code sections 2055, 2106, and 2522.

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

In the heading of this letter we have indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. If Yes is indicated, you are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete, so be sure your return is complete before you file it.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

Letter 947 (DO/CG)

HO OKAKO O CORPORATION

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

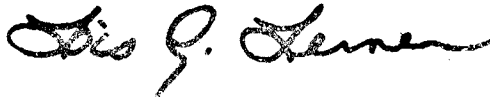
If we have indicated in the heading of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

We have sent a copy of this letter to your representative as indicated in your power of attorney.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,



Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

HO OKAKO O CORPORATION

You are not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you are operating under a contract with the local government. If your method of operation changes to the extent that your charter is not approved, terminated, cancelled, or not renewed, you should notify us. You will also be required to comply with Revenue Procedure 75-50.

Letter 947 (DO/CG)



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

Vendor Name: HO'OKAKO'O CORPORATION

DBA/Trade Name: HO'OKAKO'O CORPORATION

Issue Date: 11/25/2025

Status: **Compliant**

Hawaii Tax#: 20157584-10
New Hawaii Tax#: T-1074470912
FEIN/SSN#: XX-XXX7301
UI#: XXXXXX3972
DCCA FILE#: 201767

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. HO'OKAKO'O CORPORATION</p> <p>2 Business name/disregarded entity name, if different from above</p> <p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) ▶ _____</p> <p>5 Address (number, street, and apt. or suite no.) See instructions. 1360 S. BERETANIA STREET, SUITE 204</p> <p>6 City, state, and ZIP code HONOLULU, HI 96814</p> <p>7 List account number(s) here (optional)</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p> <p>Requester's name and address (optional)</p>
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Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-					
or									
Employer identification number									
7	6	-	0	7	1	7	3	0	1

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	<p>Signature of U.S. person ▶ </p>	<p>Date ▶ 11/19/2025</p>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

Waimea Middle Public Conversion Charter School's May Day Program – SY 2025-26 – Sense of Place, Sense of Belonging

Ho'okāko'o Corporation

Mr. David Y. Gibson
1360 S. Beretania Street
Suite 204
Honolulu, HI 96814



Mr. David Y. Gibson

1360 S. Beretania Street
Suite 204
Honolulu, HI 96814



Evaluation Summary

Overall Score: 80% - 2/2 Evaluations Complete

Evaluator:	80.00%
Evaluator:	80.00%

EVENT SCOPE

Benefits to Native Hawaiian Community*

The application outlines event services or activities that provide significant benefits to the Native Hawaiian community.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The event itself is not of great benefit to the Native Hawaiian community, but the work leading up to the event and the content that comprises the hoike could be viewed as such. As the performances are linked to their classroom learning, which does show some benefit to 'āina and kānaka, there are some contributions evident.

Evaluator: *[Unanswered]*

Attendee Reach & Feasibility*

The application indicates a proposed number of total attendees which is achievable and reflects an opportunity for significant OHA reach into the community.

Max Score: 5

Evaluator: 5

Evaluator: 5

Comments

Evaluator: Estimated attendance of 500 individuals

Evaluator: *[Unanswered]*

Native Hawaiian Attendance & Impact*

The application indicates a proposed number of Native Hawaiian attendees which is achievable and reflects a significant positive impact on the betterment of conditions of Native Hawaiians.

Max Score: 5

Evaluator: 5

Evaluator: 4

Comments

Evaluator: Estimated 300 of 500 attendees Native Hawaiian

Evaluator: [Unanswered]

ALIGNMENT TO MANA I MAULI OLA STRATEGIC PLAN

Alignment with Selected Strategy*

The application clearly demonstrates how the event will directly and meaningfully address the selected Strategy.

Max Score: 5

Evaluator: 3

Evaluator: 4

Comments

Evaluator: While the event itself only lists "memories and pride" as tangible outcomes, the content leading up to the event seem to address the strategy more directly. Learning from cultural practitioners is part of the overall event structure. So, while the event does not "develop" resources, it does "use" them throughout the prep leading up to the event.

Evaluator: [Unanswered]

Community Impact & Strategic Outcome Alignment*

The application clearly demonstrates how the event will have significant community impact in alignment with one or more Strategic Outcome.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: Again, the event alone does not hold the impact, but the learning leading up to the event DOES. As a culmination of learning that connects 'āina, literacy, science, and community, the event is a showcase of the impact students had because of their work.

Evaluator: [Unanswered]

Alignment with Strategic Foundation*

The application clearly demonstrates how the event will align with one or more Strategic Foundation.

Max Score: 5

Evaluator: 4

Evaluator: 4

Comments

Evaluator: The event is a good 'ohana engagement for their school community and showcase of cultural performances.

Evaluator: [Unanswered]

Budget*

The amount requested is appropriate and a reasonable line-item budget is included.

Max Score: 10

Evaluator: 8

Evaluator: 8

Comments

Evaluator: I view the "supplies" costs as necessary to deliver the described event format, but I can also see those categorized under a blanket of "entertainment." More details around how many cultural practitioners would be hired, what the monies would pay for, etc. would have been helpful.

Evaluator: *[Unanswered]*

Opportunity for OHA Public Recognition*

The application describes community engagement, partnership, and public relations opportunities for OHA that are appropriate and reflects an opportunity for significant OHA reach into the community.

Max Score: 10

Evaluator: 7

Evaluator: 7

Comments

Evaluator: OHA reach will be appropriate to the amount of marketing they will do, which is limited to their school 'ohana. It is a realistic projection given the format and intent of the event. May Day programs, in general, target the internal school community and do not require copious amounts of marketing.

Evaluator: *[Unanswered]*

Recommend Sponsorship*

Evaluator: Yes

Evaluator: Yes

Recommended Amount*

Evaluator: 12,504

Evaluator: 11032.50

Brief Explanation for Recommendation

Evaluator: Scored 40 = 75% of budget requested; The event should be considered as inclusive of the prep leading up in order to align with OHA mission and strategic plan outcomes. In general, May Day programs for schools might not meet the criteria for sponsorship, but this particular program is tied to curricula that does show alignment to the rubric criteria.

Evaluator: 75% sponsorship recommended.

EVALUATOR SIGNATORY

Name of Sponsorship Evaluator*

By typing your first name and last name you certify that you are the individual certifying the document and you verify that the information in this form is true and accurate.

Evaluator: [REDACTED]

Evaluator: [REDACTED]

Date of Evaluation*

Evaluator: 02/11/2026

Evaluator: 02/17/2026