

Grant Solicitation

No. OHA 24-07.0.01

Community Grant – **Pohala Mai-** **‘Ohana Experiencing Financial Hardship**

March 13, 2024

**All applications must be submitted online via the OHA Grants Portal by
Friday, April 12, 2024, by 11:59 p.m. (HST)**

For additional information regarding this grant solicitation, please email:

grantsinfo@oha.org

**For technical assistance with the online application and/or concerns regarding the
OHA Grants Portal, please email:**

grantsadmin@oha.org

<p>It is the responsibility of applicants to check the OHA Grants webpage at https://www.oha.org/grants for solicitation amendments, attachments or other information pertaining to the solicitation.</p>
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GRANTS PROGRAM

The Grants Program is responsible for overseeing the Office of Hawaiian Affairs' (OHA) granting processes, including solicitation development; application review and evaluation facilitation; award recommendation to the OHA Board of Trustees; Grant Contract execution; and monitoring and reporting on grantee performance.

OHA will release the following grant solicitations to support projects aligned with OHA's Mana i Maui Ola Strategic Plan Strategies:

- Kumuwaiwai Na'auao- Educational Resources;
- Ola Ke Kanaka- Physical, Spiritual, Mental & Emotional Health;
- Ola Nā Iwi- Iwi Kupuna Repatriation & Reinterment;
- Ola Ka Mo'omeheu- Culture Preservation & Perpetuation;
- Ola Ka 'Āina- Health of Land and Water;
- Lako Ko Kauhale- 'Ohana Resource Management & Housing;
- Ho'omohala Waiwai 'Ohana- 'Ohana Economic Stability; and
- Ho'omohala Waiwai Kaiaulu- Community Economic Development.

In addition, grant solicitations will be released to support projects focused on Special Populations, including:

- 'Āina Ho'opulapula- Hawaiian Homestead communities;
- Ola Ka Lāhui- Vulnerable Populations; and
- Pohala Mai- 'Ohana Experiencing Financial Hardship

Funding to support mission aligned events, organization capacity building, and other categories will also be available. For general information regarding these grants, go to the Grants Program webpage at www.oha.org/grants.

The contact information for the OHA Grants Program is:

**Grants Program
Office of Hawaiian Affairs
560 North Nimitz Highway, Suite 200
Honolulu, Hawai'i 96817**

For additional information regarding this grant solicitation, please email:

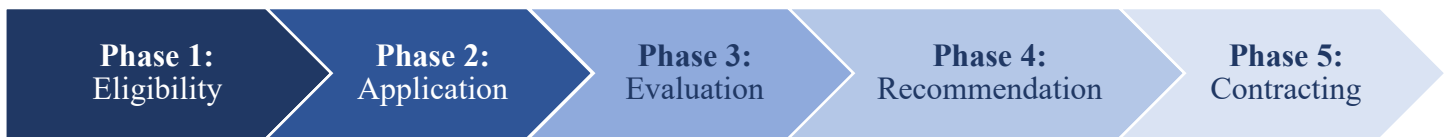
grantsinfo@oha.org

SOLICITATION ORGANIZATION

Each applicant is advised to read all sections of this solicitation. The solicitation is organized into eight sections:

- Section I. Solicitation Description
- Section II. OHA Award Information
- Section III. Phase 1 - Eligibility
- Section IV. Phase 2 - Application
- Section V. Application Submission
- Section VI. Application Evaluation
- Section VII. OHA Award Administration
- Section VIII. Attachments

Figure 1. Grants Program Phases



SECTION I. SOLICITATION DESCRIPTION

This section provides information on the grant purpose, solicitation timetable, OHA, community grants, and alignment with the Mana i Maui Ola Strategic Plan.

Pohala Mai- ‘Ohana Experiencing Financial Hardship Grant Purpose: Support a project that provides social services, including direct financial assistance, case management, and referral services, to Native Hawaiians to immediately address an unexpected crisis and improve resource stability during the emergency financial situation. The intent of the emergency funds is to assist Native Hawaiians to achieve and/or reestablish economic stability and prevent a reoccurring cycle of debt.

Program services shall include:

1. Establishing an OHA Emergency Financial Assistance Fund to provide temporary financial assistance for individuals and families who are facing hardships due to loss of income, loss of employment, debilitating illness or injury, death of household member, or other unanticipated circumstances.

OHA Emergency Financial Assistance shall be used for rent or mortgage payments to prevent an impending eviction; utility payments to prevent impending termination of services; car repair; funeral expenses; out-of-pocket medical expenses; and other similar exigent time-sensitive expenses.

2. Case management.
3. Referrals and information to link Native Hawaiians to other services and activities.
4. Financial literacy services.
5. Collaboration with OHA on outreach, project marketing, and public relations.

A. Solicitation Timetable

The timetable of activities represents OHA’s **estimated** schedule and is provided for planning purposes only. The OHA Grants Program reserves the right to cancel any activity or revise the timetable if needed.

Activity	Key Dates
1. Availability of Solicitation (Phase 1)	Wednesday, March 13, 2024
2. Online Access to Letter of Interest (LOI) (Phase 1)	Wednesday, March 13, 2024

Activity	Key Dates
3. Letter of Interest Deadline – (Phase 1) ¹	Friday, April 12, 2024 11:59 pm. HST
4. Online Access to Application (Phase 2)	Upon approval of LOI
5. Application Deadline – (Phase 2) ²	Friday, April 12, 2024 11:59 p.m. HST
6. Application Evaluation Period (Phase 3)	April - May 2024
7. Administration Recommendation, Board Action (Phase 4)	May - June 2024
8. Notification of Award, Non-Award (Phase 4)	May - June 2024
9. Contracting (Phase 5)	June - July 2024
10. Commencement of Contract Activities	July - August 2024

B. OHA

OHA was established to better the conditions of Native Hawaiians and Hawaiians as defined in HRS sections 10-2, 10-4(4), 10-4(6) and 10-4(8), and other applicable law(s), as amended. Thus, OHA's grant funds are directed to support this purpose.

C. Community Grants Purpose

Community Grants are programmatic grants for organizations to administer projects in the State of Hawai'i designed to meet the needs of our Native Hawaiian community in alignment with OHA's Mana i Maui Ola Strategic Plan. The opportunity for grant contract extension beyond the initial grant period awarded shall be based on outcomes of grant monitoring, evaluation, and availability of funding.

D. Project Alignment with Mana i Maui Ola Strategic Plan: Strategy & Outcome

This Community Grant is aligned with OHA's Strategy 7: Advance policies, programs and practices that strengthen 'ohana abilities to pursue multiple pathways toward economic stability. Applicants will be required to align their project to this Strategy and the associated Strategic Outcome, as listed below.

Strategy 7: Advance policies, programs and practices that strengthen 'ohana abilities to pursue multiple pathways toward economic stability.

¹ Note: Applicant(s) have one opportunity to address any review comments from the Grants Program, returned within the 48–72-hour review period.

² Note: Once the application is submitted, no resubmission is allowed, even if before the deadline date/time.

Outcome 7.3. Increase number of Native Hawaiian ‘ohana who are resource stable (financial, subsistence, other).

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SECTION II. OHA AWARD INFORMATION

This section details the anticipated award period, the minimum and maximum amount of OHA funds that can be requested, restrictions, matching funds, geographic service area, and grant award renewal information.

A. Grant Award Period

The grant award period is two (2) years from the contract start date.

B. Amount Requested

The grant amount is **\$1,660,000** over two (2) years for this project. Applications in which the Amount Requested is below or exceeds this amount will be deemed ineligible.

C. Administrative Cost Restrictions

Administrative Costs cannot exceed 30% of the total OHA grant budget (\$498,000) and must be justified. Administrative costs are defined as all program operating costs, which are not payments directly distributed to Native Hawaiian beneficiaries as emergency financial assistance. The Administrative Cost Restriction is inclusive of Indirect Costs. Applications with more than 30% Administrative Costs will be deemed ineligible.

D. Indirect Cost Restrictions

Indirect Costs cannot exceed 20% of the total OHA grant budget (\$332,000) and must be justified. Indirect costs are defined as operating costs not directly associated with the program or costs associated with the general overhead operation of your organization. The Administrative Cost Restriction is inclusive of Indirect Costs. Applications with more than 20% Indirect Costs will be deemed ineligible.

E. Multiple OHA Grant Application & Award Restrictions

Organizations may apply for the Pohala Mai- 'Ohana Experiencing Financial Hardship Grant and another project in any other OHA grant solicitations.

Current OHA grantees may apply for the Pohala Mai- 'Ohana Experiencing Financial Hardship Grant.

F. Matching Funds

Applicants are required to provide matching funds for a grant award period of at least fifteen percent (15%) of the OHA grant award amount per year. Matching funds priority should be comprised of cash sources, including other grantor cash sources. Post award, OHA funds can be used as matching funds for other grant(s) with OHA notification. Matching funds can be committed from the applicant and/or a partner organization. Appropriate supporting documentation will be required. Applications with less than 15% matching funds will be deemed ineligible.

G. Geographic Service Area

Geographic coverage of the project's service and/or activities areas includes the islands of Hawai'i, Maui, Lāna'i, Moloka'i, O'ahu, and Kaua'i.

H. Grant Award Renewal

At the end of the grant term, grantees that meet the criteria for exemplary performance and compliance may be offered an option to renew their grant, subject to Administration recommendation and Board approval.

For a grantee to be recommended to the Board for award renewal, grantee's grant performance shall be reviewed by the Grants Program to determine if the following criterion has been met:

1. Exceeded, met, or on track to meet or exceed all performance output and outcome targets.
2. Met all grant contract compliance requirements.
3. Submitted all required information and reports in a timely manner. All reports were considered complete and sufficient by OHA Grants Program staff.
4. Demonstrated that the project has had the impact proposed in the grant application as aligned to OHA's Strategic Plan and in the Native Hawaiian community.
5. Agreed to complete contracting renewal requirements.

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SECTION III. PHASE 1 – ELIGIBILITY (LOI- LETTER OF INTEREST)

The information included in this section addresses the grant application and award restrictions; eligibility submission process; and required documents. If you need clarification on the minimum eligibility requirements, contact the Grants Program at grantsinfo@oha.org.

Letter of Interest Submission Process & Required Documents

The applicant shall provide information and upload the required documents to the OHA Grants Portal to meet the solicitation minimum eligibility requirements.

The applicant shall complete the eligibility requirement sections: 1) Applicant & Project Information, and 2) Certifications.

After submission of the foregoing eligibility requirement sections, the Grants Program will review the information and documents.

Applicants will receive an email notification regarding eligibility status and access to the application. If the applicant receives an email notification that it did not meet the Phase 1 – Eligibility- LOI (Letter of Interest) requirements, the applicant can return to the OHA Grants Portal to complete and submit the required documents **one additional time**.

Email notification of eligibility status shall be sent within **72 hours** of initial submission, Monday – Friday during OHA business hours, 7:45 a.m. to 4:30 p.m. [excluding Holidays].

Upon approval of eligibility, the applicant will be notified via email and gain access to the application.

The required minimum eligibility information, certifications, and documents are as follows:

A. Applicant & Project Information

1. **Organization Name** – The applicant shall provide the name of the applicant organization.
2. **Project Name** – The applicant shall provide the name of the project.
3. **Amount Requested** – The applicant shall indicate the amount of money being requested from OHA for the project. **Minimum Amount: \$1,660,000. Maximum Amount: \$1,660,000.** *If the Amount Requested is below the minimum amount or exceeds the maximum amount, the application will be deemed ineligible.

4. **Project Alignment with Mana i Maui Ola Strategic Plan Strategy & Outcome(s)** – The applicant shall align their project to the Strategy and associated Strategic Outcome, as listed below.

Strategy 7: Advance policies, programs and practices that strengthen ‘ohana abilities to pursue multiple pathways toward economic stability.

Outcome 7.3. Increase number of Native Hawaiian ‘ohana who are resource stable (financial, subsistence, other).

5. **Project Contacts** – The applicant shall provide contact information (name, title, mailing address, phone number, email address) for a Primary Project Contact and Secondary Project Contact for the grant contract. Project Contacts must be directly engaged in the administration and implementation of the project. By being listed in the application, Project Contacts are authorized to communicate, submit required reports, and provide authorization for additional Project Contacts on behalf of the awarded organization as necessary.
6. **Governing Board** – The applicant shall list its organizations’ governing board. The list shall include board members’ names and titles.
7. **Executive Team** – The applicant shall list its organizations’ executive team. The list shall include executive team members’ names and titles.
8. **Authorized Signatory Form - *document upload*** – The applicant shall complete and upload the Authorized Signatory Form. This form needs to be completed and signed by the organization’s Authorized Signatory for both the OHA Grant Application and the OHA Grant Contract. *See Attachment A. Authorized Signatory Form.*

B. Certifications

1. **Licenses/Permits Certification** – The applicant shall certify that applicable licenses and/or permits required for the project have been secured when notified of award. Applicants that will be recommended for award will be contacted to ensure that licenses/and or permits have been secured. If an applicant cannot provide the approved licenses/permits, the Grants Program will not recommend the applicant to the Board of Trustees for award.
2. **Sufficient Funds Certification** – The applicant shall certify that it has sufficient funds available for the effective operation of the project proposed in the grant application for the duration of the grant period, including fifteen percent (15%) in matching funds to support the project, confirmed or pending at time of application. Applicants will be asked to submit supporting documentation of matching funds in their application. This grant is a reimbursement grant, with an initial payment and cost reimbursement for allowable incurred costs provided at the end of each reporting period, to the extent prescribed in the grant contract.

3. **IRS Letter of Determination – document upload** – The applicant shall upload the organization's IRS Letter of Determination verifying tax-exempt nonprofit status. Should the current Organization Name not match the name listed on the original IRS Letter of Determination, the applicant shall submit the approved Board Meeting minutes indicating the name change. *See Attachment B. Sample - IRS Letter of Determination.*
4. **Certificate of Vendor Compliance (CVC) - document upload** –The applicant shall upload the Certificate of Vendor Compliance issued by the State of Hawai'i verifying the applicant is registered to do business in the State of Hawai'i. To obtain this document, applicants must register with Hawai'i Compliance Express online at <http://vendors.ehawaii.gov>. Registration with Hawai'i Compliance Express may take up to **two weeks** before access to the online CVC is granted. This certificate **must be current within three (3) months of this application deadline**. We do not accept your DCCA Certificate of Good Standing. *See Attachment C. Sample - HCE Certificate of Vendor Compliance.*
5. **Board Governance Certification** – The applicant shall certify the following:
 - a. The members of the organization's governing board have no material conflict of interest and serve without compensation in their capacity as governing board members;
 - b. The organization's governing board has bylaws or policies that describe the manner in which business is conducted and policies relating to nepotism and management of potential conflict of interest situations; and
 - c. The organization employs or contracts with no two or more members of a family, or kin, of the first or second degree of consanguinity (i.e., a spouse, parent, child, grandparent, grandchild, or sibling of another employee or contractor of the organization). If the organization employs or contracts with two or more members of a family, or kin, of the first or second degree of consanguinity, the organization shall disclose such employment or contractual relationship to OHA, along with the organization's efforts to mitigate concerns over nepotism or conflicts of interest arising from the relationship, and OHA shall then determine whether the organization may proceed with its grant application.
6. **Native Hawaiians to be Served** – The applicant shall certify that OHA grant funding for this project shall be used to **directly** serve Native Hawaiian individuals only. If the project does not serve Native Hawaiians, the application will be deemed ineligible. Matching funds for this project from other sources may be used to serve non-Hawaiian community or 'ohana members as needed.
7. **Geographic Service Area** – The applicant shall certify service delivery for this project will be implemented statewide on the island(s) of Hawai'i, Maui, Lāna'i, Moloka'i, O'ahu, and Kaua'i.

SECTION IV. PHASE 2 – APPLICATION

The information included in this section addresses the application process via the OHA Grants Portal, required application elements, and documents that must be uploaded.

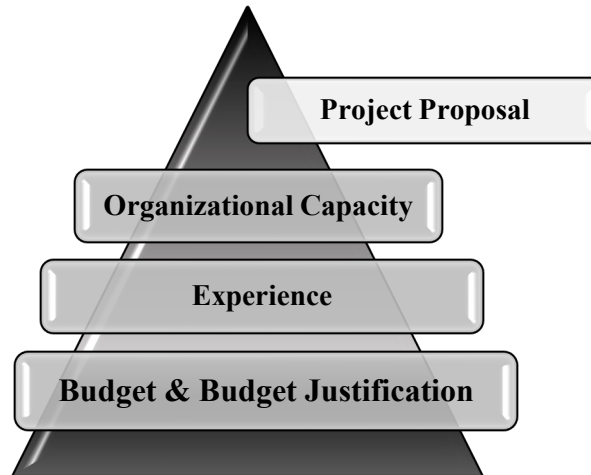
The application will be evaluated and scored using the criteria in this section. The highest score for the application is 100 points. This section includes a set of four main criterion, and corresponding components. Each component will include scoring elements and instructions. Address each element required and follow all component instructions. All parts provided here will be evaluated by OHA Grant Application Evaluators using OHA’s scoring criteria as defined below.

APPLICATION CRITERIA & POINTS
Criterion 1: Project Proposal – Maximum: 65 Points
Criterion 2: Organizational Capacity – Maximum: 10 Points
Criterion 3: Experience – Maximum: 15 Points
Criterion 4: Budget & Budget Justification – Maximum: 10 Points

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Criterion 1

Project Proposal | Maximum Points: 65



The Project Proposal criterion will be used by Grant Application Evaluators to consider the degree to which the project is feasible, effective, community-based, and will successfully achieve the intended outcomes. This section contains the majority of the application narrative and describes the following in detail:

Components:

1. Project Service Design (0-20 points)
2. Project Service Delivery (0-20 points)
3. Project Alignment with Mana i Maui Ola Strategic Plan (0-5 points)
4. Scope of Services (0-10 points)
5. Performance Measurement Table (0-10 points)

1. Project Services Design (0-20 points)

<u>Scoring Elements</u>

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| <ul style="list-style-type: none">▪ <i>The application outlines a comprehensive design that is sufficient to implement the required Emergency Financial Assistance Fund services. (0-5 points)</i>▪ <i>The application outlines a comprehensive design that is sufficient to implement the required case management services. (0-5 points)</i>▪ <i>The application outlines a comprehensive design that is sufficient to implement the required referral services. (0-5 points)</i>▪ <i>The application outlines a comprehensive design that is sufficient to implement the required financial literacy services. (0-5 points)</i> |
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The application outlines a comprehensive design that is sufficient to implement the required Emergency Financial Assistance Fund services.

Instructions

Describe how the project will establish an Emergency Financial Assistance Fund to provide temporary financial assistance for Native Hawaiian individuals and ‘ohana who are facing hardships. Include policies and processes that will be implemented to support individuals and ‘ohana to obtain emergency financial assistance, such as funding levels; eligibility criteria; required documentation; screening, intake, and assessment procedures; payment processes; and other requirements.

OHA Required Emergency Financial Assistance Elements

- Eligible hardship includes loss of income, loss of employment, debilitating illness or injury, death of household members, or other unanticipated circumstances.
- Eligible uses of assistance include rent or mortgage payments to prevent an impending eviction; utility payments to prevent impending termination of services; car repair; funeral expenses; out-of-pocket medical expenses; and other similar exigent time-sensitive expenses.
- Emergency funding shall be limited to one-time per grant year, per Native Hawaiian individual.
- Payments shall be made directly to the vendor with required documentation.
- Individual screening, intake, and assessment shall assure compliance with specific guidelines and policies relating to eligibility, level of financial assistance, Native Hawaiian Ancestry verification, and other program requirements.

The application outlines a comprehensive design that is sufficient to implement the required case management services.

Instructions

Describe how the project will provide case management services, including but not limited to, supporting individuals and ‘ohana to obtain and maintain the services they need; helping participants develop a plan that coordinates and integrates the social services that the patient/client needs to optimize their own economic and resource stability goals and outcomes. Describe the case management data system and financial tracking system that will be used for this project.

The application outlines a comprehensive design that is sufficient to implement the required referral services.

Instructions

Describe how the project will competently provide multi-services referrals to link Native Hawaiians with other services and activities designed to improve economic and resource stability. Describe the organization’s familiarity and networking ability to coordinate with wide array of community agencies/resources that can provide the necessary multiple services to Native Hawaiian individuals and ‘ohana. Include details on how the referrals will be coordinated.

The application outlines a comprehensive design that is sufficient to implement the required financial literacy services.

Instructions

Describe how the project will provide financial literacy services for Native Hawaiian individuals and ‘ohana who are facing hardships. Include policies and processes that will be implemented to support Native Hawaiian individuals and ‘ohana to improving their financial literacy to achieve and/or reestablish economic stability and prevent a reoccurring cycle of debt.

OHA Required Financial Literacy Elements

- Financial literacy education on budgeting, savings, spending, debt, and credit.

2. Project Service Delivery (0-20 points)

Scoring Elements

- *The application outlines outreach strategies that are appropriate and reasonable to recruit the proposed number of Native Hawaiian participants. (0-5 points)*
- *The application provides a plan that is appropriate and reasonable to provide services on all islands. (0-5 points)*
- *The application provides a plan to respond to participant requests that reflects a timely, appropriate, and reasonable process. (0-5 points)*
- *The application identifies strategies to coordinate with OHA on outreach, project marketing and public relations. (0-5 points)*

The application outlines outreach strategies that are appropriate and reasonable to recruit the proposed number of Native Hawaiian participants.

Instructions

Number of Native Hawaiians to be Served

Provide the total number of Native Hawaiian individuals that the project intends to **directly** serve through OHA funding, including through direct financial assistance, referral services, and financial literacy services.

The number of Native Hawaiian individuals served shall include project participants that can be documented on registration forms, referral forms, sign-in sheets, and/or other approved data collection and verification documents. It shall not include project staff and subcontractors, hits, and likes on social media platforms, or individuals indirectly served. This number shall align with OHA reporting definitions of:

- **Newly Served Participant:** A newly served participant is a first-time project participant who has not previously received services under this OHA project funding. Newly served participants shall NOT include individuals that have only enrolled, registered, or inquired but have not received project services.
- **Served:** Provided an act of assistance or benefit.
- **Native Hawaiian:** Native Hawaiian refers to all persons of Hawaiian ancestry regardless of blood quantum; any individual any of whose ancestors were natives of the area which consists of the Hawaiian Islands prior to 1778. (Source. US Code 3057k)

Outreach

Describe the outreach activities to promote and encourage Native Hawaiians to access project services process to recruit participants for the project. Identify the detailed methods of outreach and recruitment, including if the project uses partnerships in outreach and recruitment strategies.

Example:

The (Organization Name) shall reach out to (areas aligned to proposed project, e.g., schools, clinics, partnerships) through (medium, e.g., presentations at community meetings, radio advertisements, flyers, door to door outreach, social media) to recruit project participants.

The application provides a plan that is appropriate and reasonable to provide services on all islands.

Instructions

Geographic Service Area

The islands where project services will be delivered include Hawai‘i, Maui, Lāna‘i, Moloka‘i, O‘ahu, and Kaua‘i.

Island Service Plan

Provide a detailed description of how the project plans to provide services on each island and describe how beneficiaries will be able to access services, including completing intake forms and processes. Also identify how the project will provide services to beneficiaries that may not be near office locations, i.e., how services will be provided to beneficiaries on Moloka‘i, Lāna‘i, Hāna, Kona, Kohala, Ka‘ū, Wai‘anae, Lā‘ie and other rural areas.

The application provides a plan to respond to participant requests that reflects a timely, appropriate, and reasonable process.

Instructions

Provide a detailed plan on how the project will respond to participant requests for services, including, if applicable, response time to website inquiries, email inquiries, telephone inquiries and walk-ins.

OHA Required Response Time

- 1-2 business days from participant contact.

The application identifies strategies to coordinate with OHA on outreach, project marketing and public relations.

Describe how the project will inform OHA of upcoming project activities; and coordinate marketing and outreach strategies.

OHA Required Coordination

- Coordination with OHA to issue a press release announcing grant award.
- Acknowledgement of the support of OHA in all publicity, publications, and other materials produced in connection with this grant and prominent citation of the underwriting/sponsorship of OHA in any promotional events and materials, which become an integral part of the project.

3. Project Alignment with Mana i Maui Ola Strategic Plan (0-5 points)

Scoring Elements

- *The application clearly demonstrates how the project will have significant community impact through engaging one or more Strategic Foundation. (0–5 points)*

Instructions

Describe how the project approach and implementation will build upon and/or strengthen one or more Strategic Foundations:

‘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.

4. Scope of Services (0-10 points)

Scoring Elements

- *The application outlines detailed project activities that are sufficient to achieve the project objective(s), outputs, and outcomes. (0-10 points)*

Scoring Element: *The application outlines detailed project activities that are sufficient to achieve the project objective(s), outputs, and outcomes.*

Instructions

Provide a list of all project activities in detail and by process. Provide one sentence for each activity. This list should include all activities the project will implement to achieve the outputs and outcomes listed in the Performance Measurement Table (PMT) component.

Sample:

- Recruit participants from local schools and through kupuna care partnership.
- Complete participant intake and baseline assessments within 72 hours of receipt.
- Design, print, and prepare workshops curriculum within 30 days of grant start date.
- Obtain facilities at Waialua ranch to use to conduct workshops on one Saturday per month.
- Schedule workshops within first 30 days of grant start date.
- Conduct monthly workshops and collect participant attendance.
- Complete participant assessments reports 30 days from end of workshop
- Ensure all workshops participants complete and receive completion certifications.
- Plant native plants at Waialua ranch within an area of 10 x 10 plots west of the entry gate within 30 days of grant start date.
- Obtain materials and licenses to comply with the building of the fencing to block deer from destroying farm plots located west of the entry gate.

5. Performance Measurement Table (0-10 points)

Scoring Elements

- *The Performance Measurement Table provides targets, definitions, and data collection methods for the **mandatory outputs**, which are achievable, and which reflect a significant positive impact on the betterment of conditions of Native Hawaiians. (0–5 points)*
- *The Performance Measurement Table describes the **OHA Strategic Outcome** targets, definitions, and data collection methods, which are achievable, and which reflect a significant positive impact on the betterment of conditions of Native Hawaiians. (0–5 points)*

Complete and upload the *Performance Measurement Table*. See Attachment D. Performance Measurement Table. The performance measures, targets, definitions, and data collection methods should provide detailed information on what that project will produce, the results of the project, and what changes will be seen in the community condition because of the project. Upload individual *Performance Measurement Tables* for each island and a statewide *Performance Measurement Table*.

Scoring Element: The Performance Measurement Table provides targets, definitions, and data collection methods for the mandatory outputs, which are achievable, and which reflect a significant positive impact on the betterment of conditions of Native Hawaiians.

Instructions

Provide projected year-end targets for the indicated mandatory outputs (1 through 7), based on the OHA Definition. The newly served Native Hawaiian targets should match those entered in the Project Service Delivery. Enter information on how these outputs will be defined within the context of the project in the Project Definition section. In the Project Data Collection section, enter information on how the mandatory outputs will be measured, tracked, and documented in the participants' files and/or project records. Describe the data collection and reporting tools to be used to measure each output, including how data on Native Hawaiian ancestry will be collected and tracked (verified through documentation such as Birth Certificate, DHHL Lease, Ho'oulu data letter, OHA registry, etc.).

Scoring Element: The Performance Measurement Table describes the OHA Strategic Outcome targets, definitions, and data collection methods, which are achievable, and which reflect a significant positive impact on the betterment of conditions of Native Hawaiians.

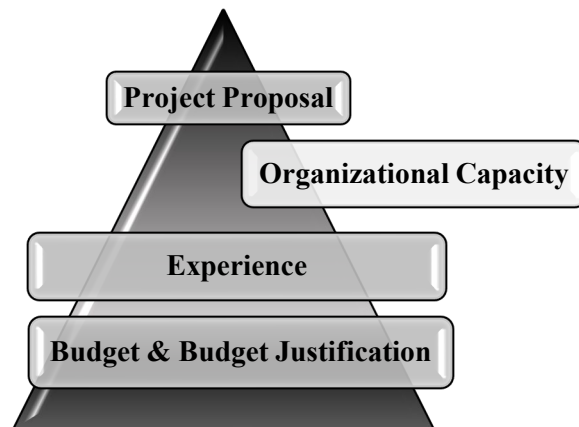
Instructions

Provide projected year-end targets for the OHA Strategic Outcome. Enter information on how these outcomes will be defined within the context of the project in the Project Definition section. In the Project Data Collection section, enter information on how the OHA Strategic Outcome will be measured, tracked, and documented in the participants' files and/or project records. Describe the data collection and reporting tools to be used to measure each outcome, including how data on Native Hawaiian ancestry will be collected and tracked (verified through documentation such as Birth Certificate, DHHL Lease, Ho'oulu data letter, OHA registry etc.)

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Criterion 2

Organizational Capacity | Maximum Points: 10



The Organizational Capacity criterion will be used by Grant Application Evaluators to consider the degree to which the organization is able to execute and complete the project. This section contains the follow components:

Components:

1. Organizational Description, Chart, & Functions (0-5 points)
2. Fiscal Oversight (0-5 points)

1. Organizational Description, Chart, & Functions (0-5 points)

<u>Scoring Elements</u>

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| <ul style="list-style-type: none">▪ <i>The organization's background, history, and years serving the Native Hawaiian community is sufficient to implement the project. (0-1 point)</i>▪ <i>The organizational chart clearly identifies adequate staff to implement the project and indicates where each position falls within the organization. (0-1 point)</i>▪ <i>The application clearly defines appropriate responsibilities for each staff position (or subcontractor) in the implementation of the project. (0 –2 points)</i>▪ <i>The application identifies appropriate strategies for recruiting and hiring project staff. (0-1 point)</i> |
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Scoring Element: The organization's background, history, and years serving the Native Hawaiian community is sufficient to implement the project.

Instructions

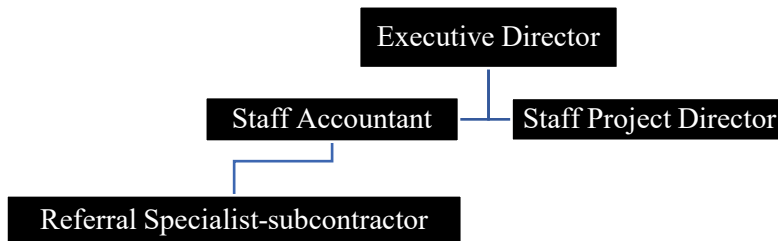
Briefly describe how the organization was founded and how many years the organization has been serving Native Hawaiian communities.

Scoring Element: The organizational chart clearly identifies adequate staff to implement the project and indicates where each position falls within the organization.

Instructions

Clearly document a staffing and organizational structure that will support full implementation of the project upon receipt of award, including identification of a Project Director and all project staff.

Sample:



Scoring Element: The application clearly defines appropriate responsibilities for each staff position (or subcontractor) in the implementation of the project.

Instructions

Identify which staff member(s) will manage any partners, contractors, subcontractors, and consultants (Contracts, MOUs, Statements of Work, Letters of Commitment, etc.).

Identify each designated position that will be responsible for grant monitoring, reporting, data collection, performance measurement data and expenditures, including years of experience performing these requirements.

Scoring Element: The application identifies appropriate strategies for recruiting and hiring project staff.

Instructions

For any positions that will be vacant at the start of the project, outline a recruitment and hiring plan that aligns with the organization's current policies and procedures. Include an estimated timeframe needed for recruitment and hiring. Lastly, if the Project Director or related position needs to be filled, identify who will be responsible for the implementation of activities until they are hired.

2. Fiscal Oversight (0-5 points)

Scoring Elements

- *The application describes a plan for proper oversight of OHA award funds, including the identification of sufficient staff and internal controls for financial management; demonstration of knowledge or experience in the proper and timely disbursement of funds and accurate accounting practices. (0-3 points)*

Instructions

Describe the financial internal controls of the organization including the policies which clearly define how disbursement of funds, purchasing, cash drawdowns, and related authorizations are handled.

Identify the relevant financial staff or the financial contractor (individual CPAs or Accounting Firms), their responsibilities, qualifications, and experience.

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Criterion 3

Experience | Maximum Points: 15



The Experience criterion will be used by Grant Application Evaluators to consider the organization's prior experience providing the project services in order to assess the organization's ability to successfully implement the project.

Components:

1. Experience in Proposed Services (0-5 points)
2. Native Hawaiian Percentage of Client/ Participant Base (0, 5 or 10 points)

1. Experience in Proposed Services (0-5 points)
--

<u>Scoring Elements</u>

- | |
|---|
| <ul style="list-style-type: none">▪ <i>The application clearly demonstrates meaningful prior experience providing the proposed or directly related project services. (0-5 points)</i> |
|---|

Instructions

Identify projects in which the applicant has directly related experience providing the proposed project services. Provide projects related in scope as evidence of the organization's financial and project management capabilities. For each project, provide the funder name, grant purpose, general grant scope, number of years services were provided, and dates of service.

2. Native Hawaiian Percentage of Client/Participant Base (0, 5 or 10 points)

Scoring Elements

- *The application indicates that fifty percent (50%) or more of the organization's overall current client and/or participant base is Native Hawaiian, as supported by sufficient data. (0 or 5 points)*
- *The application indicates that seventy-five percent (75%) or more of the organization's overall current client and/or participant base is Native Hawaiian, as supported by sufficient data. (0 or 5 points)*

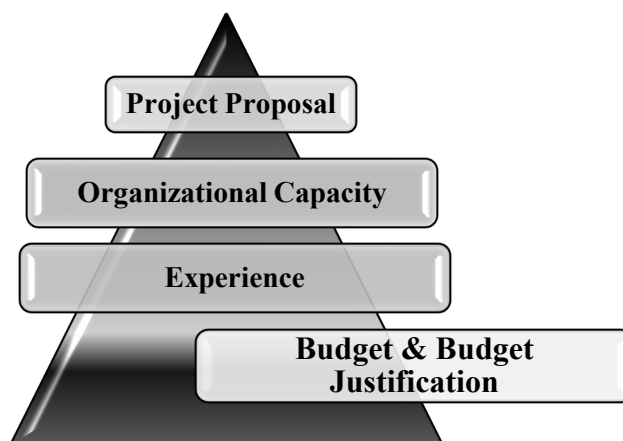
Instructions

Provide information and data to substantiate how the percentage was derived. The information and data should not be based solely on the project proposed in this application, but the organization's overall participant and/or client base for all services provided by the organization.

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Criterion 4

Budget & Budget Justification | Maximum Points: 10



The Project Budget and Budget Justification will be used by Grant Application Evaluators to consider the degree to which the application designates adequate resources to carry out the proposed activities while ensuring that the proposed costs are reasonable. The following components will be evaluated:

Components:

1. Line-Item Budget (0-5 points)
2. Budget Justification (0-5 points)

1. Line-Item Budget (0-5 points)

Scoring Elements

- *The budget includes a reasonable line-item budget with object class categories for each year of the project that fully details the costs allocated for OHA and Matching Funds shares. The budget includes funds for all required items to successfully implement the project budget, as provided in previous sections. (0–5 points)*

NOTE: Disallowed Costs should not be included in the line-time budget. See Attachment J. Reference Guide to Disallowed Costs

The Application shall be deemed INELIGIBLE if any of the following apply:

- *Matching Funds are less than 15% of the Requested OHA Funds Budget (\$249,000)*
- *Administrative Costs are more than 30% of the Requested OHA Funds Budget (\$498,000)*
- *Indirect Costs are more than 20% of the Requested OHA Funds Budget. (\$332,000) See Attachment K. Reference Guide to Direct and Indirect Costs*
- *The Request OHA Funds Budget is more than maximum allowed for this solicitation. (\$1,660,000) See Section II. OHA Award Information. B. Amount Requested*

Instructions

Complete and upload a line-item budget for each year of the project. The line-item budget is a list of the resources and services required to complete the project and their associated costs which are organized by Budget Categories. See Attachment F. Budget & Budget Justification Form and Attachment G. Sample- Budget & Budget Justification Form.

Expenses listed under each budget category should reflect the annual cost, for example, the costs for personnel are the annual salaries based on the position's full-time equivalent or percentage of time to the project and travel is the annual cost per trip. See Attachment E. Budget Category Table.

Matching Funds

Applications with less than 15% Matching Funds will be deemed ineligible.

Complete and upload the required *OHA Matching Funds Confirmation Form* and supporting documentation, which identifies all sources that will provide cash match funds for the grant period. The Matching Funds Confirmation Form should verify that the applicant has at least fifteen percent (15%) cash match of the OHA grant amount requested per year. For the purpose of this application, OHA funds cannot be used as matching funds. Provide cash amount(s) whether the funding is confirmed or pending, and the anticipated award period. For any pending funds, also indicate the anticipated final determination date in the Notes column. If only a percentage of another funding source is dedicated as a match to the OHA funds, explain in the Notes column. See Attachment H. Matching Funds Confirmation Form.

If an applicant's partner organization is committing matching funds to support the project, indicate the partner organization on the Matching Funds Confirmation Form and complete and upload the *Partner Organization Certification Form for Matching Funds*. If there are multiple partner organizations that commit match funding, each organization is required to complete a Partner Organization Certification Form for Matching Funds. See Attachment I. Partner Organization Certification Form for Matching Funds.

The applicant will upload supporting documentation for all listed Matching Funds sources. Examples of supporting documentation for confirmed sources include: a bank statement, letter of commitment from a funder/bank, or a letter of agreement with another organization. Examples of supporting documentation for pending sources include: dated documentation verifying grant application submission including grant details - funder name, amount, and term; and/or dated documentation verifying loan/other fund application submission including loan/fund details - funder name, amount, and term.

Administrative Cost Restrictions

Applications with more than 30% Administrative Costs will be deemed ineligible.

Indicate on the *Budget & Budget Justification Form* a minimum of \$1,162,000 on the Distribution line-item for direct payments distributed to Native Hawaiian beneficiaries as emergency financial assistance. All other line-items, which are not payments directly distributed to Native Hawaiian beneficiaries as emergency financial assistance, should be detailed. The Administrative Cost Restriction is inclusive of Indirect Costs.

Indirect Costs

Applications with more than 20% Indirect Costs will be deemed ineligible.

Indicate on the *Budget & Budget Justification Form* which line-item costs will be used for direct and indirect costs. *See Attachment F. Budget and Budget Justification Form.* Should a budget item need to be split to indicate a direct cost portion and an indirect cost portion, the item should be listed in two separate lines.

- Cannot exceed 20% of the total OHA grant funds.
- For operating costs not directly associated with the program.
- For costs associated with the general overhead operation of your organization.
- Examples include, but not limited to:
 - Administrative Payroll – Salaries & Fringe Benefits
 - Rent – Office Lease
 - Rent – Equipment (e.g., copier)
 - Accounting/Payroll Services
 - IT/Data Services
 - Professional Services – Legal, Audit, etc.
 - Insurance – General Liability, Auto, etc.
 - Utilities – Telephone & Internet, Electricity, Water, etc.

See Attachment K. Reference Guide to Direct and Indirect Costs.

Disallowed Costs

OHA grant funds may not be used to support Disallowed Costs.

Review the chart summarizing Allowed Costs and Disallowed Costs before you submit your budget. *See Attachment J. Reference Guide to Disallowed Costs.*

Budget Adjustments

OHA reserves the right to modify application budgets during contracting. If OHA finds twenty percent (20%) or more of line-item costs are disallowed, the application will be deemed ineligible. If OHA finds disallowed line-item costs less than twenty percent (20%) of the total budget, and the grant is awarded, the budget will be modified during contracting to remove the disallowed costs.

2. Budget Justification (0-5 points)

Scoring Elements

- *The budget justification provides a narrative that describes the breakdown of how all costs are calculated for each entry in the line-item budget, for every year of the project. The budget justification includes a basis for estimated costs, such as equipment, personnel, and travel. Vendor quotes for equipment over \$5,000 are provided. (0-5 points)*
- *The budget justification describes expenditures well align with the project activities and deliverables. (0-2 points)*

Instructions

Complete and upload a narrative budget justification. See Attachment F. Budget & Budget Justification Form and Attachment G. Sample- Budget & Budget Justification Form.

The budget justification should narratively describe how each line-item cost was calculated and includes a short explanation of why it is necessary to the project. Each line-item cost should be broken down to justify the annual expense.

Example:

For each personnel position provide their percentage of full-time equivalent, number of hours and the hourly rate assigned to that position for the year, i.e., a 0.5 FTE position - \$25/hr. x 80 hours per month x 12 months of the year. For travel costs, each trip should be broken down by airfare, hotel, parking, taxi, and mileage. For contractual services, service contract and/or agreements are required to be submitted to OHA prior to service payment.

If you have any questions regarding the allowability of a cost item in your budget, contact the Grants Program at [**grantsinfo@oha.org**](mailto:grantsinfo@oha.org).

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SECTION V. APPLICATION SUBMISSION

A. Submission Information

The grant application system, the OHA Grants Portal, can be accessed through the Grants Program page of the OHA website at <http://www.oha.org/grants>.

1. All applicants shall first create an account in the Grants Portal. Required information to create an account includes the organization's legal name and EIN/Tax identification number.
2. A response is required for **each** item. If the item does not apply to your proposal or if no information is available, answer "not applicable" or "N/A". Do not leave any items blank. Failure to answer any of the items will restrict your ability to submit.
3. Required forms or supporting documents must be uploaded with each relevant section of the application. Uploads have size limits. To ensure sufficient space for all uploads it is recommended to use black/white, compressed, low resolution, text quality documents.
4. Application questions have character limits. Character count includes all letters, numbers, symbols, blank spaces, and diacritical marks. The OHA Grants Portal accepts diacritical marks, 'okina and kahakō, please use where appropriate.

B. Additional Materials and Documentation

Upon request from OHA, each applicant shall submit any additional materials and documentation reasonably required by OHA in its review of the applications.

C. Solicitation Amendments

OHA reserves the right to amend this solicitation at any time prior to the closing date for the final revised applications. Amendments will be posted to the OHA Grants webpage at <http://www.oha.org/grants>.

D. Cancellation of Solicitation

The solicitation may be canceled and any or all applications may be rejected in whole or in part, when it is determined to be in the best interest of OHA.

E. Rejection of Applications

OHA reserves the right to consider only those applications submitted in accordance with all requirements set forth in this solicitation and comply with the service specifications. An application offering any other set of terms and conditions contradictory to those included in this solicitation may be rejected without further notice.

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SECTION VI. APPLICATION EVALUATION

This section explains how the applications will be evaluated and provides the specific evaluation criteria and the points assigned to each criterion. The evaluation of applications shall be conducted comprehensively, fairly, and impartially. An evaluation committee of designated Grant Application Evaluators shall review and evaluate all applications that are complete and meet eligibility requirements. The evaluation committee will be comprised of community members with experience in and knowledge of the solicitation subject matter.

- A. Application Criterion & Scoring System.** Each application may be awarded up to 100 points as specified below:

Criterion & Components	Maximum Points
Criterion 1: Project Proposal	65
1. Project Service Design	20
2. Project Service Delivery	20
3. Project Alignment with Mana i Maui Ola Strategic Plan	5
4. Scope of Services	10
5. Performance Measurement Table	10
Criterion 2: Organizational Capacity	10
1. Organizational Description, Chart, & Functions	5
2. Fiscal Oversight	5
Criterion 3: Experience	15
1. Experience in Proposed Services	5
2. Native Hawaiian Percentage of Client/ Participant Base	10
Criterion 4: Budget & Budget Justification	10
1. Line-Item Budget	5
2. Budget Justification	5

The following evaluation framework shall be used by Grant Application Evaluators during scoring:

Exceeds Expectation	All application requirements are met, and several are exceeded, application response clearly and effectively articulates project and is exemplary
Meets Expectation	All application requirements are met and application response clearly articulates project
Good	Most application requirements are met and/or application response reasonably articulates project
Fair	A few application requirements are met and/or application response somewhat articulates project
Poor	Most application requirements are not met and/or application response poorly articulates project

B. Recommendation for Award

The grant recommendation process includes the consideration of applications voted to award by a majority of the evaluation committee and the prioritization of applications based on the highest scores in the scoring matrix. Upon review of the scoring matrix, the OHA Administration may include the following considerations in its recommendation for award to the Board of Trustees: 1) Applicant's past OHA grant performance; 2) Gaps in service to Native Hawaiian communities; and 3) Geographical distribution of grant funds to Native Hawaiian communities. Based on the foregoing, OHA Administration shall issue final recommendations to the Board of Trustees with budget modifications and/or recommendation adjustments in accordance with grant funding amounts.

C. Approval

The Grants Program will send award recommendations, via memo, matrix, Action Item, and/or supplemental documentation, to the Administration Executive for approval. Upon Administration approval, the Grants Program will transmit an Action Item for signatures and submit the Action Item to the Committee on Resource Management for review and approval. Upon Committee review and approval, the Action Item will be submitted to the Board of Trustees for final ratification.

D. Notice of Award

Upon Board of Trustees ratification of the Action Item, the Grants Program will send email notifications of award and non-award to applicants via the OHA Grants Portal and publish results on the OHA website.

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SECTION VII. OHA AWARD ADMINISTRATION

This section details the type of funding instrument, reporting requirements for the grant, compensation, and the method of payment.

A. Grant Contract

All awards will be issued via a grant contract with OHA. The grant contract arising out of this solicitation is subject to the review of OHA Corporation Counsel as to form, to OHA Administration Executive final approval, and to all further approvals, as required by statute, regulation, rule, order, or other directive. **No work is to be undertaken by the grantee prior to the execution of the Grant Contract and grant commencement date. OHA is not liable for any costs incurred prior to the start date in the grant contract.**

Budget Adjustments. OHA reserves the right to modify budgets during contracting.

The Grant Contract includes a detailed noncompliance policy and the required general conditions. Special conditions may also be imposed contractually by OHA, as deemed necessary.

B. Reporting Requirements for Project and Fiscal Data

An initial payment of 25% of the awarded grant amount for Administrative Costs and an initial payment of 25% of the awarded grant amount for the Emergency Financial Assistance Fund distributions shall be made upon execution of the grant contract and required documents.

Grantee shall be required to complete quarterly Performance Progress Reports and Invoices on the OHA Grants Portal and upload appropriate reports on the OHA Grants Portal. Grantee reports shall consist of statements by the grantee relating to the work by the grantee that was accomplished during the reporting period. Quarterly Reports shall include a description of services provided; Administrative Cost expenditures incurred; and invoice amount. Subsequent Administrative Cost reimbursements will be delayed if reporting on the initial payment has not been submitted and verified complete and accurate by OHA.

Grantees shall also be required to complete Funds Distribution Progress Reports and Invoices on the OHA Grants Portal, with timing based on a 50% depletion of the Emergency Financial Assistance Fund advance. Funds Distribution Progress Reports and Invoices shall include a Funds Distribution Report with beneficiary name, island, category of assistance, amount of assistance, and date of payment transmission; Funds Distribution expenditure report; and invoice amount. Subsequent Emergency Financial Assistance Funds advances will be delayed if reporting on the initial payment has not been submitted and verified complete and accurate by the OHA.

Additional reports include bi-annual Performance Measurement Table report, Annual Data Reports, and a Final Report on the impact of the project on Native Hawaiians. Timely compliance with reporting requirements is required to continue to receive funding under the award.

Quarterly Reports shall be submitted to OHA by the end of the month following the last day of each quarter during the term of the Contract. The grantee shall submit reports relating to the work accomplished during the specific performance and reporting period. Grantee contract performance is based on submission of complete and accurate reports. The grantee shall, within two (2) months from the end of the Time of Performance for Programmatic Services, or within two (2) months from the expenditure of all funds under this Contract, submit the Final Report to OHA via the Grants Portal.

Refer to the Example Reporting Table on the next page.

The following is an **example** of the reporting schedule that will be in the final Contract for the specific grantee with an example start date of July 1, 2024:

Report Components	Period of Performance Year 1	Due Date
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Cost Expenditure Report 	July 1, 2024 – September 30, 2024	October 31, 2024
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	October 1, 2024 – December 31, 2024	January 31, 2025
<ul style="list-style-type: none"> • Performance Measurement Table 	July 1, 2024 – December 31, 2024	January 31, 2025
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	January 1, 2025 – March 31, 2025	April 30, 2025
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	April 1, 2025 – June 30, 2025	July 31, 2025
<ul style="list-style-type: none"> • Performance Measurement Table 	January 1, 2025– June 30, 2025	July 31, 2025
<ul style="list-style-type: none"> • Annual Data Report 	July1, 2025– June 30, 2025	July 31, 2025

Report Components	Period of Performance Year 2	Due Date
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	July 1, 2025 – September 30, 2025	October 31, 2025
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	October 1, 2025 – December 31, 2025	January 31, 2026
<ul style="list-style-type: none"> • Performance Measurement Table 	July 1, 2025 – December 31, 2025	January 31, 2026
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	January 1, 2026 – March 31, 2026	April 30, 2026
<ul style="list-style-type: none"> • Performance Progress Report & Invoice • Administrative Costs Expenditure Report 	April 1, 2026 – June 30, 2026	July 31, 2026
<ul style="list-style-type: none"> • Performance Measurement Table 	January 1, 2026 – June 30, 2026	July 31, 2026
<ul style="list-style-type: none"> • Annual Data Report 	July1, 2026 – June 30, 2026	July 31, 2026
<ul style="list-style-type: none"> • Final Report 	July 1, 2026 – June 30, 2026	August 31, 2026

Fund Distribution Report Components	2 Year Period of Performance	Due Date
<ul style="list-style-type: none"> • Funds Distribution Progress Report and Invoice 1 • Funds Distribution Report • Funds Distribution Expenditure Report 	Invoice for EFA Advance 1	Upon 50% depletion of EFA Fund advances
<ul style="list-style-type: none"> • Funds Distribution Progress Report and Invoice 2 • Funds Distribution Report • Funds Distribution Expenditure Report 	Invoice for EFA Advance 2	Upon 50% depletion of EFA Fund advances
<ul style="list-style-type: none"> • Funds Distribution Progress Report and Invoice 3 • Funds Distribution Report • Funds Distribution Expenditure Report 	Invoice for EFA Advance 3	Upon 50% depletion of EFA Fund advances
<ul style="list-style-type: none"> • Funds Distribution Progress Report and Invoice 4 • Funds Distribution Report • Funds Distribution Expenditure Report 	Invoice for EFA Advance 4	Upon 50% depletion of EFA Fund
<ul style="list-style-type: none"> • Funds Distribution Progress Report and Invoice 5 • Funds Distribution Report • Funds Distribution Expenditure Report 	Invoice for EFA Advance 5	Upon 50% depletion of EFA Fund
<ul style="list-style-type: none"> • Funds Distribution Progress Report and Invoice 6 • Funds Distribution Report • Funds Distribution Expenditure Report 	Invoice for EFA Advance 6	Upon 50% depletion of EFA Fund
<ul style="list-style-type: none"> • Final Funds Distribution Progress Report • Final Funds Distribution Report • Final Funds Distribution Expenditure Report 	Final Funds Distribution Progress Report	Upon 100% depletion of EFA Fund or July 31st 2026.

When deemed necessary, OHA shall conduct compliance review monitoring to evaluate performance. Monitoring activities shall include review of conformance with grant contract requirements and may include interviews with staff and/or participants, participant surveys, review of project/participant files, accounting practices, case-record keeping, including invoice and document testing and internal control supports.

C. Compensation & Method of Payment

1. Automated Clearing House (ACH) Payments

If awarded, grant payments to the grantee shall be completed via automatic ACH payments. Grantee will be required to complete OHA's ACH setup process to receive payments via direct deposit.

2. Compensation

An initial payment of 25% of the awarded grant amount for Administrative Costs and an initial payment of 25% of the awarded grant amount for the Emergency Financial Assistance Fund distributions shall be made upon execution of the grant contract and the submission of the grantee's W-9 form, the initial invoice, ACH direct deposit form, current Certificate of Liability Insurance, and Grantee press release announcing the award.

Subsequent Administrative Cost payments shall be made to the applicant in quarterly disbursements, upon submission by the applicant, and approval by OHA, of Performance Progress Reports and Invoices, Administrative Cost Expenditure Reports, and certification of Native Hawaiian Ancestry, if applicable.

Subsequent Emergency Financial Assistance Fund distribution advance payments shall be made to the applicant based upon 50% depletion of the fund, upon submission by the applicant, and approval by OHA, of Funds Distribution Progress Reports and Invoices, Funds Distribution Reports, and Funds Distribution Expenditure Report.

OHA shall retain up to ten percent (10%) of the Administrative Cost amount awarded for a final payment.

3. Method of Payment

The method of payment for Administrative Costs will be cost reimbursement. The cost reimbursement will provide for payment of allowable incurred costs, to the extent prescribed in the grant contract.

Advances of emergency financial assistance fund distributions can be requested based on 50% depletion of fund. Detailed funds distribution reporting is required before an advance payment is approved and disbursed.

Section VIII. Attachments

1. Attachment A. Authorized Signatory Form
2. Attachment B. Sample - IRS Letter of Determination
3. Attachment C. Sample - HCE Certificate of Vendor Compliance
4. Attachment D. Performance Measurement Table
5. Attachment E. Budget Category Table
6. Attachment F. Budget & Budget Justification Form
7. Attachment G. Sample - Budget & Budget Justification Form
8. Attachment H. Matching Funds Confirmation Form
9. Attachment I. Partner Organization Certification Form for Matching Funds
10. Attachment J. Reference Guide to Disallowed Costs
11. Attachment K. Reference Guide to Direct and Indirect Costs



Attachment A. Authorized Signatory Form

Organization:			
	<i>Legal Entity Name (ex. H&B Foundation, Inc. dba Nā Mele Hawai'i)</i>		
Address:			
	<i>Street Address</i>	<i>City, State</i>	<i>Zip</i>
	<i>Mailing Address (if different from Street Address)</i>	<i>City, State</i>	<i>Zip</i>


The authorized signatory below certifies that they have legal power delegated by an organization's governing body (such as the Board of Directors) to *sign and submit the OHA Grant Application* and that the organization's governing body will review the application prior to submission.

Authorized Signatory Signature – Grant Application	Authorized Signatory (Type or Print Name)
Title of Authorized Signatory	Date of Authorization
Email Address of Authorized Signatory	

The authorized signatory below certifies that they have legal power delegated by an organization's governing body (such as the Board of Directors) to *sign and submit the OHA Grant Contract* and that the organization's governing body will review the contract prior to submission. If awarded, this individual(s) name(s) will be included as the signatory in the grant contract.

Authorized Signatory Signature – Grant Contract	Authorized Signatory (Type or Print Name)
Title of Authorized Signatory	Date of Authorization
Email Address of Authorized Signatory	

Attachment B. Sample – IRS Letter of Determination

INTERNAL REVENUE SERVICE P. O. BOX 2508 CINCINNATI, OH 45201	DEPARTMENT OF THE TREASURY
Date: DEC 18 2010	Employer Identification Number: 12-1234567
Organization Name	DLN: 600328003
Org. Address	Contact Person: Kimo Kealoha ID# 31518
City, State Zipcode	Contact Telephone Number: (877) 888-8888
	Accounting Period Ending: December 31
	Public Charity Status: 170(b)(1)(A)(vi)
	Form 990 Required: Yes
	Effective Date of Exemption: February 22, 2010
	Contribution Deductibility: Yes
	Addendum Applies: No
Dear Applicant:	
<p>We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.</p> <p>Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.</p> <p>Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.</p>	
Sincerely, 	
Robert Choi Director, Exempt Organizations Rulings and Agreements	
Letter 947 (DO/CG)	

Attachment C. Sample – HCE Certificate of Vendor Compliance (CVC)



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

Vendor Name: ORGANIZATION NAME

DBA/Trade Name: ORGANIZATION NAME

Issue Date: 09/10/2016

Status: Compliant

Hawaii Tax#: W12345678-01

FEIN/SSN#: XX-XXX1234

UI#: No record

DCCA FILE#: 11499

**This certificate must be current
within three (3) months of this
application deadline.**

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
	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
Pending	The entity is compliant with DLIR requirement
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

Attachment D. Performance Measurement Table

Organization: _____
 Project: _____

All numbers should reflect actual expected outputs and outcomes to be achieved by the project per year. Numbers should be unduplicated throughout the entire grant period. A Performance Measurement Table (PMT) Report Form is required for each island geographic service area proposed for this project.

Outputs	Year 1 Target	Year 2 Target
1. MANDATORY. Total number of newly served participants in the project		
2. MANDATORY. Number of newly served Native Hawaiian participants in the project		
OHA Definition: A newly served participant is a first-time project participant who has not previously received services under this OHA project funding. Newly served participants shall NOT include individuals that have only enrolled, registered, or inquired but have not received project services. These targets are unduplicated, indicating that each participant is counted ONLY ONCE , no matter how many activities or direct services the participant receives during the entire project period. A participant who attends multiple activities or receives services throughout the project shall be counted and reported no more than one time.		
Project Definition:		
Project Data Collection:		
3. MANDATORY. Total number of participants who complete the project		
4. MANDATORY. Number of Native Hawaiian participants who complete the project		
OHA Definition: A participant who completes the project per the project definition. These targets are unduplicated, indicating that each participant is counted ONLY ONCE , no matter how many activities or direct services the participant completes during the entire project period. A participant who attends multiple activities or receives services throughout the project shall be counted and reported no more than one time.		
Project Definition:		
Project Data Collection:		

Outputs	Year 1 Target	Year 2 Target
5. MANDATORY. Deliverable A: Total dollar amount of Emergency Financial Assistance distributed		
A. MANDATORY. Number of Native Hawaiians who request Emergency Financial Assistance		
B. MANDATORY. Number of Native Hawaiian who complete intake and were deemed eligible to receive Emergency Financial Assistance		
C. MANDATORY. Number of Native Hawaiians who received Emergency Financial Assistance		
OHA Definition: Completed deliverables generally include goods or services that have resulted from the OHA funded project, such as, number of workshops, amount of funds distributed to Native Hawaiians, number of capital improvement projects completed, etc. Enter the target number to complete the mandatory deliverables for each project year.		
Project Definition:		
Project Data Collection:		
6. MANDATORY. Deliverable B: Number of referrals provided		
A. MANDATORY. Total number of participants who receive referrals		
B. MANDATORY. Number of Native Hawaiian participants who receives referrals		
Project Definition:		
Project Data Collection:		
7. MANDATORY. Deliverable C: Number of financial literacy services provided		
A. MANDATORY. Total number of participants who complete the financial literacy services		
B. MANDATORY. Number of Native Hawaiian participants who complete the financial literacy services		
Project Definition:		
Project Data Collection:		
8. MANDATORY. Number of partners/collaborators		
OHA Definition: The number of partners/collaborators who contribute to the success of the project. Target numbers should be unduplicated.		
Project Data Collection: The number of partners/collaborators shall be documented through...		

Outcomes	Year 1 Target	Year 2 Target
1. OHA Strategic Outcome. Number of Native Hawaiian ‘ohana members who are resource stable (financial, subsistence, other) (7.3)		
OHA Definition: Outcomes are the benefits that a project is designed to deliver. They represent the difference/impact, in measurable/quantifiable terms, made by the outputs (e.g., knowledge transferred, and behaviors changed). Outcomes define changes that have taken place because of the proposed project. The project must address and measure OHA Strategic Outcome 7.3.		
Project Definition:		
Project Data Collection:		



Attachment E. Budget Category Table

The budget demonstrates that the applicant has a complete, accurate, and justified budget that aligns with and supports the proposed service delivery and/or activities. **Budget Forms shall be complete and accurate.** The budget shall include all project expenses, even those costs not being requested from OHA. The budget shall detail calculations for each budget item to demonstrate that costs are reasonable. The budget shall provide adequate information to justify that costs are relevant to proposed service and/or activity. Justifications shall explain the appropriateness and relevance of project costs to the anticipated service and/or activities and planned outputs. If you do not know what category to use, please contact the OHA Grants department at grantsinfo@oha.org.

PERSONNEL - Salaries

Description: Costs of Employees Salaries and Wages.

Justification: Identify key project staff positions. For each staff person, provide: position title, time commitment to the project as a percentage or full-time equivalent, and annual salary calculation.

PERSONNEL - Other Costs

Description: Costs of Employees (Federal and State requirements) which may include payroll taxes, assessments and fringe benefits.

Justification: List all components of fringe benefits and provide a breakdown of the amounts and percentages (FICA, unemployment insurance, health insurance, retirement, etc.) in relation to salaries and wages.

CONTRACTUAL SERVICES - Administrative

Description: Costs of all contracts for professional services or consultant services necessary for the project that are a part of the organizational functions (e.g. payroll processing, audit, accounting, hardware/software maintenance).

Justification: Explain why these services are being contracted. Include prorata amounts based on FTE or staff ratios. Service contracts and/or agreements are required.

CONTRACTUAL SERVICES - Programmatic

Description: Costs of all contracts for professional services or consultant services that are not regularly part of the organization's staff and necessary for project implementation (e.g. kumu, cultural practitioners, specialists, repair/maintenance).

Justification: Explain why these services are being contracted. Services must be documented in the Scope of Services. Include type of service, fee for service and time commitment to the project as applicable. Service contracts and/or agreements are required to be submitted to OHA prior to service payment.

DISTRIBUTIONS

Description: Amount allocated to direct payments (e.g. match savings programs, scholarships, emergency financial assistance, Charter School funds).

Justification: Describe eligibility criteria for payments and what direct payments are for. Supporting documents confirming eligibility are required.

EQUIPMENT - Lease/Rental

Description: Cost of equipment lease or rental as related to the proposed project services (e.g. van, back hoe, printer)

Justification: Provide computations, price quotes, narrative description, and a justification for each cost under this category. Include prorata amount if the equipment is shared and not used exclusively for the project.

EQUIPMENT - Purchase

Description: "Equipment" means an article including items of personal property, as distinguished from real property, having a useful life of more than one year and an acquisition cost of \$500 or more per unit. *Note: Equipment purchased with OHA grant funding must continue to be used to benefit the Native Hawaiian community after the term of the OHA grant.

Justification: For each type of equipment requested, provide a description of the item and its relevance to the project, the cost per unit and the number of units.

FACILITIES - Lease/Rental

Description: Costs may include lease/rental of office space or other project-related facility costs.

Justification: Provide computations, price quotes, narrative description, and a justification for each cost under this category. Include prorata amount if this is a shared cost.

FACILITIES - Utilities

Description: Costs may include utilities such as water, sewer, electricity and/or telephone/internet services.

Justification: Provide computations, price quotes, narrative description, and a justification for each cost under this category. Include prorata amount if this is a shared cost.

OTHER EXPENSES - Honorarium

Description: Payment made for services for which fees are not traditionally required (e.g. guest speaker at a workshop to cover time and/or travel).

Justification: Provide computations, narrative description, and a justification for each cost under this category.

OTHER EXPENSES - Insurance

Description: Cost of insurance required as related to provision of proposed services, which may include general liability, automobile and worker's compensation.

Justification: For each type of insurance requested, provide a description of the coverage, cost, prorata share and necessity as applicable to provision of proposed services.

OTHER EXPENSES - Mileage

Description: Travel allowance based on staff use of private vehicles for project-related activities.

Justification: Provide computations based on miles, rate, months and FTE, and a narrative description for cost under this category.

OTHER EXPENSES - Other Costs

Description: Enter all other costs not included in any other category.

Justification: Provide computations, a narrative description and a justification for each cost under this category.

OTHER EXPENSES - Postage, Freight, Delivery

Description: Costs of mailing, shipping or delivery as related to the project.

Justification: Provide computations, a narrative description and a justification for each cost under this category.

OTHER EXPENSES - Publication & Printing

Description: Costs may include items such as project outreach materials, client forms, or other project related educational materials.

Justification: Provide computations, a narrative description, and a justification for each cost under this category.

OTHER EXPENSES - Staff Training

Description: Costs may include tuition, stipends, registration fees and other staff development related expenses.

Justification: Provide computations, a narrative description and a justification for each cost under this category.

OTHER EXPENSES - Supplies

Description: Include costs of administrative supplies and equipment (other than that included under the Equipment category) related to service delivery.

Justification: Specify general supplies costs and units. Show computations and provide other information that supports the amount requested.

PROGRAM ACTIVITIES

Description: Cost of items, supplies and project services directly related to the delivery of services to participants.

Justification: Provide computations (cost and units), a narrative description and a justification for each cost under this category.

TRAVEL AND TRANSPORTATION

Description: Travel is for In State Travel Only. Costs of project-related travel by applicant employees, which may include airfare, vehicle rental, mileage, or lodging. Cost for transportation for participants to project-related services, which may include bus rental. Grant funds do not cover participant travel.

Justification: For each trip, show the total number of travelers, travel destination, and purpose of trip as it relates to proposed project. Provide computations, price quote, narrative description and a justification for each cost under this category.

Attachment F. Budget and Budget Justification Form

YEAR 1

Cost Type (Check one per Line Item)		BUDGET CATEGORY - Item	Requested OHA Funds Budget	Matching Funds	Other Funds (if any)	Description & Justification
DIRECT	INDIRECT					
PERSONNEL - Salaries						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
PERSONNEL - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Administrative						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Programmatic						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
DISTRIBUTIONS						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Lease/Rental						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Purchase						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
FACILITIES - Lease/Rental						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
FACILITIES - Utilities						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Honorarium						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Insurance						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Mileage						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Postage, Freight, Delivery						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Publication & Printing						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	

OTHER EXPENSES- Repair & Maintenance						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Staff Training						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Supplies						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
PROGRAM ACTIVITIES						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
TRAVEL AND TRANSPORTATION						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
REQUESTED OHA FUNDS BUDGET:			\$ -			
CASH MATCH FUNDS:			\$ -	#DIV/0!	% of Matching Funds	
Other Funds:			\$ -			
YEAR 1 Total Project Cost:			\$ -			

Attachment F. Budget and Budget Justification Form

YEAR 2

Cost Type (Check one per Line Item)						
DIRECT	INDIRECT	BUDGET CATEGORY - Item	Requested OHA Funds Budget	Matching Funds	Other Funds (if any)	Description & Justification
PERSONNEL - Salaries						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
PERSONNEL - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Administrative						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Programmatic						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
DISTRIBUTIONS						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Lease/Rental						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Purchase						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
FACILITIES - Lease/Rental						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
FACILITIES - Utilities						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Honorarium						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Insurance						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Mileage						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Postage, Freight, Delivery						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Publication & Printing						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	

OTHER EXPENSES- Repair & Maintenance						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Staff Training						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Supplies						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
PROGRAM ACTIVITIES						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
TRAVEL AND TRANSPORTATION						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
REQUESTED OHA FUNDS BUDGET:			\$ -			
CASH MATCH FUNDS:			\$ -	#DIV/0!	% of Matching Funds	
Other Funds:			\$ -			
YEAR 2 Total Project Cost:			\$ -			

Attachment F. Budget and Budget Justification Form

YEAR 3

Cost Type (Check one per Line Item)		BUDGET CATEGORY - Item	Requested OHA Funds Budget	Matching Funds	Other Funds (if any)	Description & Justification
DIRECT	INDIRECT					
PERSONNEL - Salaries						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
PERSONNEL - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Administrative						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Programmatic						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
DISTRIBUTIONS						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Lease/Rental						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Purchase						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
FACILITIES - Lease/Rental						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
FACILITIES - Utilities						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Honorarium						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Insurance						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Mileage						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Postage, Freight, Delivery						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Publication & Printing						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	

OTHER EXPENSES- Repair & Maintenance						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Staff Training						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Supplies						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
PROGRAM ACTIVITIES						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
TRAVEL AND TRANSPORTATION						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
		REQUESTED OHA FUNDS BUDGET:	\$ -			
		MATCHING FUNDS	\$ -	#DIV/0!	% of Matching Funds	
		Other Funds:	\$ -			
		YEAR 3 Total Project Cost:	\$ -			

Attachment G. Sample— Budget and Budget Justification Form
YEAR XX

Cost Type (Check one per Line Item)						
DIRECT	INDIRECT	BUDGET CATEGORY - Item	Requested OHA Funds Budget	Matching Funds	Other Funds (if any)	Description & Justification
PERSONNEL - Salaries						
X		Kumu/Cultural Expert	\$ 27,500.00	\$ 10,000.00	\$ 2,500.00	1.0 FTE, \$40,000/year to design, prepare, coordinate and teach cultural workshops 13x/month for 10 months.
X		Project Manager	\$ 5,000.00	\$ -	\$ -	0.1 FTE, \$50,000/year to manage administrative tasks throughout the duration of the year.
			\$ -	\$ -	\$ -	
PERSONNEL - Other Costs						
X		Fringe Benefits	\$ 2,000.00	\$ 500.00	\$ -	Taxes - Kumu and Project Mgr \$1,200 Medical - Kumu and Project Mgr \$1,300
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Administrative						
	X	Account Services	\$ 3,600.00	\$ -	\$ -	Accounting and Payroll services for year. (\$300/month x 12 months)
			\$ -	\$ -	\$ -	
CONTRACTUAL SERVICES - Programmatic						
X		Kumu Assistant	\$ 5,000.00	\$ -	\$ -	Assist Kumu with workshops - 20 workshops x \$250/workshop
			\$ -	\$ -	\$ -	
DISTRIBUTIONS						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
EQUIPMENT - Lease/Rental						
X		Copy Machine	\$ 1,000.00	\$ 1,000.00	\$ -	Pro rata share of copy machine costs for copying or curriculum and handouts for workshops.
			\$ -	\$ -	\$ -	
EQUIPMENT - Purchase						
X		Computer, software, and accessories	\$ 1,500.00	\$ -	\$ -	Laptop for project activities \$1,000 Laptop warranty \$150 Laptop bag \$50 Word Processing Software \$300
			\$ -	\$ -	\$ -	
FACILITIES - Lease/Rental						
	X	Office Lease	\$ 10,000.00	\$ 20,000.00	\$ -	Pro rata share of lease of office space for project administration & activities \$2,500/month x 12 mos
			\$ -	\$ -	\$ -	
FACILITIES - Utilities						
	X	Telephone and Internet Services	\$ 1,000.00	\$ 2,000.00	\$ -	Pro rata share of telephone and utilities
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Honorarium						
X		Kupuna - Guest Speakers	\$ 2,000.00	\$ -	\$ -	Kupuna guest speakers at workshops to share 'ike lā'au lapa'au - \$100 x 2 speakers x 10 workshops
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Insurance						
	X	General Liability	\$ 1,500.00	\$ -	\$ -	Pro rata share of required annual insurance premium
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Mileage						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Other Costs						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Postage, Freight, Delivery						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	

OTHER EXPENSES - Publication & Printing						
X		Curriculum Packets	\$ 5,000.00	\$ 625.00	\$ -	One Curriculum packet for each participant \$56.25 x 100 participants.
			\$ -	\$ -	\$ -	
OTHER EXPENSES- Repair & Maintenance						
		Maintenance of Commercial Dehydrator Machine	\$ 1,500.00	\$ -	\$ -	Annual maintenance of commercial dehydrator
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Staff Training						
			\$ -	\$ -	\$ -	
			\$ -	\$ -	\$ -	
OTHER EXPENSES - Supplies						
	X	Office Supplies	\$ 1,000.00	\$ -	\$ -	Paper \$750 Pens, Paper Clips, Post-its, Tape, Staples, and other office supplies \$250
			\$ -	\$ -	\$ -	
PROGRAM ACTIVITIES						
X		Tool sets for participants	\$ 7,500.00	\$ -	\$ -	One tool set for each participant \$75 x 100 participants in Year 1
X		Lapa'au Starter Kits	\$ 20,000.00	\$ -	\$ -	Lapa'au kits for participants that complete the program in Year 1, kit includes bowl, chopper, strainer, steamer, knife, muslin material, five different plant starters, other lapa'au supplies \$200 x 100 participants in Year 1
X		Workshop Supplies	\$ 1,500.00	\$ -	\$ -	PPE \$700, Disposable gloves \$200, Storage containers \$500, Trash bags \$100
TRAVEL AND TRANSPORTATION						
X		Staff travel for 4-day Maui workshop	\$ 1,700.00	\$ -	\$ -	Airfare \$200 x 2 staff = \$400, Car Rental \$300, Lodging x 1 room- 4 nights at \$250/night = \$1000. NOTE: Airfare max at \$200/ roundtrip. Car Rental max at \$150/day, Lodging max at \$300/night.
X		Staff travel for 4-day Kauai workshop	\$ 1,700.00	\$ -	\$ -	Airfare \$200 x 2 staff = \$400, Car Rental \$300, Lodging x 1 room- 4 nights at \$250/night = \$1000. NOTE: Airfare max at \$200/ roundtrip. Car Rental max at \$150/day, Lodging max at \$300/night.
REQUESTED OHA FUNDS BUDGET:			\$ 100,000.00			
MATCHING FUNDS			\$ 34,125.00	34%	% of Matching Funds	
Other Funds:				\$2,500.00		
Total Project Cost :				\$136,625.00		



Attachment I. Partner Organization Certification Form for Matching Funds

If the applicant organization will receive matching funds from one or more partner organization, each organizations' Board President and Chief Executive Officer/Executive Director is required to sign and submit a *Partner Organization Certification Form for Matching Funds*, approving and committing to the partnership with, and provision of matching funds to, the applicant organization for the grant term.

As of _____, the partner organization listed below agrees to commit to a
(Date of form submission)
partnership with _____ for the purpose of the _____
(Applicant) (Grant Project Name)
project, if the applicant organization is awarded. The commitment shall be for the entire grant term specified in the final grant contract with the Office of Hawaiian Affairs.

Furthermore, the partner organization has agreed to commit \$ _____
(Matching Funds)
in matching funds specifically designated for this grant project.

PARTNER ORGANIZATION INFORMATION

Organization Name: _____
Mailing Address: _____
Point of Contact: _____
Phone Number: _____
Email Address: _____

Board President Name: (Partner Organization)	_____	Board President Signature: (Partner Organization)	_____
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Chief Executive Officer or Executive Director Name: (Partner Organization)	_____	Chief Executive Officer or Executive Director Signature: (Partner Organization)	_____
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Attachment J. Reference Guide to Disallowed Costs

OHA reserves the right not to fund any budget expenses it deems inappropriate, unreasonable, or unallowable. OHA grant funds may not be used to support costs incurred prior to the grant start date or not related to the grant. In addition, in general, OHA does not allow the following:

- Food/Meals
- Gratuities
- Makana (gifts)
- International or Out-of-State travel
- Per diem
- Prizes/Awards
- Purchase of land or buildings
- Construction or capital improvements
- Purchase of motorized vehicles which includes boats and golf carts
- Purchase of alcohol
- Promotional materials and items
- Entertainment
- Indirect Costs. This category may be used only when the applicant currently has an indirect cost rate approved by a State department or Federal agency contributing matching funding for this project.

In-state travel and all transportation costs must be justified and reasonable. Travelers and travel must be deemed necessary for the purposes of the grant. Transportation costs (i.e., airfare, ground transportation, accommodations) to facilitate project services and/or activities must comply with all applicable, federal, state and county COVID-19 related orders. OHA will not be responsible for implications and/or impacts of grantee travel within the state related to COVID-19, civil or community unrest or jurisdictional matters. Grant funds do not cover participant travel.

Equipment purchased with OHA grant funding must be justified and continued to be used to benefit the Native Hawaiian community after the term of the grant.



Attachment K. Reference Guide to Direct and Indirect Costs

	COST TYPES	
	<u>Direct</u>	<u>Indirect</u>
Personnel		
Program Manager *	X	
Executive Director *		X
CEO *		X
Payroll Manager		X
Administrative Assistant		X
Accounting Staff (salaried on contractual)		X
Farm Manager	X	
Teacher	X	
Cultural Specialist	X	
Fringe Benefits (dependent on if the original cost is Direct or Indirect)	X	X
Other Expenses		
Rent Office Lease		X
Rent for Workshop Venue	X	
Utilities		X
Office Supplies		X
Supplies for Workshops	X	
Farm Equipment Lease	X	
Insurance		X
IT Data Services		X
Legal Fees		X
Travel	X	
Data Reporting		X
Copier Lease		X
Printing costs for workshop handouts	X	
Purchased Equipment for use in your project	X	
Repair costs associated with purchased equipment in above line	X	

* Generally labeled as an indirect cost unless the position has direct contact with project participants (i.e. developing the curriculum for a workshop, teaching a class, providing legal advice, etc.)

INDIRECT COST RESTRICTION

- Cannot exceed 20% of the total OHA grants funds.
- For operating costs not directly associated with the program.
- For costs associated with the general overhead operation of your organization.
- Examples include, but not limited to:
 - Administrative Payroll – Salaries & Fringe Benefits
 - Rent – Office Lease
 - Rent – Equipment (e.g. copier)
 - Accounting/Payroll Services
 - IT/Data Services
 - Professional Services – Legal, Audit, etc.
 - Insurance – General Liability, Auto, etc.
 - Utilities – Telephone & Internet, Electricity, Water, etc.