

Huliau Time of Change

Planning, without culture and tradition, yields only half-truths about native people.

**Ka Ho'okele O Na Ho'oilina 'Ōiwi
Steersmen for the Canoe
of Inherited Legacies**

- Trust Assets & Investment Data Gathering
- Traditions, Customs, Practices, Beliefs & Values Information Gathering

**Ho'owaiwai
Enrich & Build Community
Economic Capacity**

COLLABORATION

Play a role and contribute assets, as prudent and socially responsible investors

- Native Hawaiian Communities, Agencies & Organizations
- Elected Officials, Commissions & Boards
- Educational Institutions & Unions

Community Outreach Plan

- CDFI Outreach Development
- Strategic Realignment Investment Planning Workshop
- Community Empowerment Bank

**Ho'omana
Empowerment**

- Stewards of the future

Kuleana Waiwai Like Project Mission

Exploring opportunities to manage our Native Hawaiian Trust assets in a manner that empowers our beneficiary community, provides competitive returns & communicates Hawaiian values.

ACCOMPLISHMENTS

1999 - Dept. of Hawaiian Homes grants \$50,000 for community development financial institution

2000 - City & County of Honolulu grants \$50,000 to Native Hawaiian Advisory Council for the purpose of community education on SRI

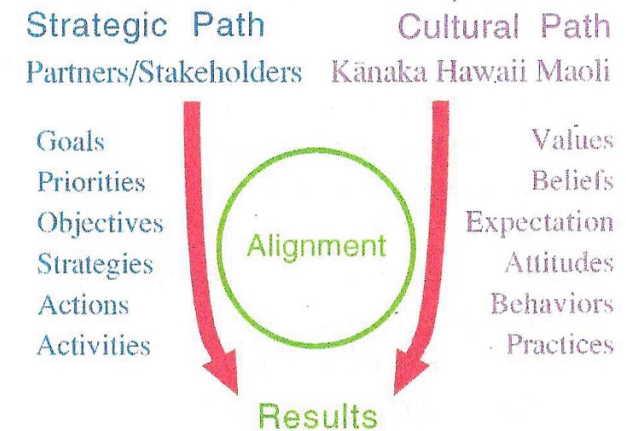
2001 - committed to double funding to \$100,000

February 2001
Responsible Markets and Native Hawaiian Advisory Council host three-day 'Aha Ho'opuka Pono **Hawaii Responsible Investment Summit** at Hawaii State Capitol

April 2001
Hawaii State Legislature passes resolution encouraging, and requesting a report on, socially responsible investment

May 2001
'Aha Ho'okele community outreach program held at Asian Development Bank 34th Annual Meeting of the Board of Governors

Kuleana Waiwai Like Strategic Realignment Plan



**Land & Natural Resources
Economic Independence
Self-Reliance
Full Human Potential**

This project is intended to assist in leading us from a position of economic dependency to economic independence.

First Phase: "Dependence" - government agencies, financial institutions and multi-national corporations control and limit our ability to manage our trust assets.

Second Phase: "Collaboration" - working together on an investment realignment strategy through advisory task forces & community outreach.

Third Phase: "Independence" - building our community capacity in asset management to economic independence.

INDEPENDENCE

- 1839 - Hawaiian Declaration of Rights
- 1840 - Hawai'i Constitution
- 1843 - Recognition – Anglo-Franco Proclamation
Britain & France recognize Hawai'i's independence
- 1852 - Hawai'i Constitution
- 1854 - Proclamation of Neutrality
- 1859 - Queen Emma's Hospital
- 1864 - Hawai'i Constitution
- 1877 - Lunalilo Home (for aged Hawaiians)
- 1881 - Queen Kapi'olani Maternity Home
- 1884 - Kamehameha Schools Bishop Estate
- 1887 - Hawai'i Constitution (bayonet)
- 1893 - Hawai'i Constitution (draft)

DEPENDENCE

PARTNERS/STAKEHOLDERS:

Government Agencies

- ALL government laws, rules & regulations
- ALL government economic/social programs

Financial Institutions

- maintain & control cash & assets
- make rules & decisions

Multi-National Corporations

- partners & shareholders
- make rules & decisions

COLLABORATION

Play a role and contribute assets,
as prudent and socially responsible investors

PARTNERS/STAKEHOLDERS:

- Strategic Realignment through
Socially Responsible Investment (SRI).
- contribute assets & negotiate rules

ECONOMIC INDEPENDENCE

Stewards of the Future

Kingdom of Hawai'i
Treaties, Agreements & Conventions,
Civil & Penal Codes, Session Laws, Hawaiian
& Ali'i Trusts, Inherent & Vested Rights

Control of Assets

HULI'AU

Time of Change

Ka Ho'okele O Nā Ho'oilina 'Ōiwi
Steersmen For The Canoe of Inherited Legacies

Government,
Financial
Institutions,
Multi-national
Corporations

Kanaka
Maoli

Ho'owaiwai

To Enrich & Build Community Economic Capacity

Government,
Financial
Institutions,
Multi-national
Corporations

Kanaka Maoli
Beneficiaries

Ho'omana

Empowerment

Economic Independence

1893-Act of War against Hawaiian Kingdom

- 1893 - Provisional (Puppet) Government
- 1894 - Republic of Hawaii Constitution
- 1898 - Ku'e Anti-Annexation Petition, Treaty Fails
- 1900 - Organic Act for Territory of Hawai'i
- 1909 - Queen Lili'uokalani's Childrens Center
- 1921 - Hawaiian Homes Commission Act
- 1945 - United Nations / Decolonization Process
Non-Self governing Territories / Article 73

Limited Capacity to Manage Assets

Nā 'Ōiwi o Hawai'i

- Native Tenant Rights (land tenure)
- 1959 - Statehood "Plebiscite" - Admissions Act
Department of Hawaiian Home Land (DHHL)
- 1978 - Constitutional Convention
Office of Hawaiian Affairs (OHA)
- 1993 - U.S. Public Law 103-150
"Apology Law"

Maturing Capacity to Manage Assets

Educational Outreach Program:

Financial Literacy Training

- Financial, Investment & Estate Planning
- Building Equity
- Home and Stock Ownership

Socially Responsible Investment Initiative

- Mission-Based Asset Management
- Fiduciary Responsibility
- Prudent Investor Rule

Community Development Financial Institution

- Community Outreach Plan
- CDFI Outreach Development
- Strategic Realignment Investment
Planning Workshop

High Capacity to Manage Assets

Manage and Control Assets

- Financial Institutions
- Multi-National Corporations
- Hawaiian Trusts and Foundations