



# 2020 ANNUAL REPORT



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# YEAR IN REVIEW



Aloha Donors & Community,

In more than a century of serving the community, Aloha United Way (AUW) has never seen a year quite like we saw in 2020. We are grateful for your unwavering support that allowed us to rise to the moment as the COVID-19 pandemic began to change our lives early last year.

Because of the unusual circumstances that affected AUW and our partner agencies in 2020, we have incorporated vital statistics into this report to show how our grantee partner agencies adapted to the pandemic. Our partner agencies were indeed an inspiration, as they found creative solutions to support their clients during immense community crises. We have also included a story that illustrates how our 211 information and referral specialists have been (and are still) on the front lines every day, assisting vulnerable individuals and groups in need of comfort, relief, and vital information.

We increased our 211 staff fivefold and expanded operations from weekdays (40 hours per week) to seven days per week with 105 hours of coverage to meet the state's continuing demands. We remain Hawai'i's most thorough and reliable resource and "the first call" for those seeking food, looking for answers to health-related questions, and searching for funding for rent, mortgage, and utilities.

In 2020, your partnerships allowed us to invest over \$44 million into the community. We also responded in the following ways:

- Provided information and referrals for 173,832 users of AUW's 211 Helpline Services
- Helped to keep thousands of Hawai'i residents from eviction through four rent relief programs
- Distributed \$1.7 million to AUW impact area Safety Net and ALICE grantees
- Supported almost 350 partner agencies with vital funding throughout the year

2020 was a year of profound community trauma. It was also a year of unprecedented togetherness, cooperation, and generosity. In moments of dire circumstances, we showed our true colors, as did you. This critical work, however, is far from over. The ripple effects of this pandemic will be felt for years.

Thank you for all that you have done to ensure that we maintain our stride and keep moving forward together. Now is the time to rebuild our communities stronger than they were before. Let's continue to advance our collective health, education, financial stability, and overall well-being so that Hawai'i can become stronger, more inclusive, and more sustainable than ever.

Mahalo,

A handwritten signature in black ink that reads "John Fink". The signature is written in a cursive, flowing style.

John Fink  
President & CEO

# ALOHA UNITED WAY'S 211 HELPLINE GOES ABOVE AND BEYOND

211 service calls increased dramatically when the COVID-19 pandemic arrived in Hawai'i. A UW responded by hiring additional 211 Specialists and expanding hours of operation to meet the demand. In 2020, the helpline received 173,832 assistance requests.

When Amy began working as a Specialist for the AUW 211 Helpline, she knew she was providing a service for people in need. What she didn't realize was how much she would be positively impacted by the people who called. One morning, she received a call from a woman named Lea, who was reaching out on behalf of an older neighborhood friend who lived alone and needed support. Amy referred Lea to food delivery programs and local community centers with services that would help her older friend receive necessary support

"When people call 211, we listen for what they say they need, but also what they might not be saying." Sometimes Amy uncovers a need for rental assistance, child care or legal help. But this time, what Amy really heard from Lea was how much she cared for her friend's health and well-being.

"In just this one call ... Lea gave me something that I didn't know I needed. She gave me hope," said Amy. "She reminded me that in Hawai'i, we look out for each other. Sometimes strangers become friends, and eventually family." Amy provided Lea with referrals for several nonprofit agencies that would provide meal delivery and companionship for her friend.

**2.1.1**

## HAWAI'I'S ONLY COMPREHENSIVE, COMMUNITY INFORMATION AND REFERRAL HELPLINE.

211 provides a unique statewide service, responses to calls, texts, emails, and live chats, 7 days per week from 7:00am-10:00 pm (an increase of 60 hours/week from pre-COVID weekday hours). Online 211 resources are accessible 24 hours a day, 7 days a week at [auw211.org](http://auw211.org).

- 1,300+ agencies, 4,000+ programs
- Access to on-demand interpreter services with 240+ languages for callers that speak little to no English





# AUW 211 IN 2020

## COVID-19 RESPONSE

211 is Hawai'i's only comprehensive, public health information and referral helpline. 211 provides resources to the community, with a focus on providing access for individuals in rural and undeserved areas and/or with limited technological access.

## HOUSING/SHELTER

In 2020, 211 experienced an increase of 187% in calls for **Housing and Shelter services**. This included inquiries for affordable housing, emergency shelters or other places to live, rental/mortgage assistance, and other housing-related services.

## HEALTHCARE / HEALTH ASSISTANCE

Another significant number of 211 requests were for general **Healthcare/Health Assistance** and COVID-19-related health services. These calls represented an increase of **526%** (over 4,424 contacts) in calls from the previous year.

With a meteoric rise in unemployment and the loss of employer-sponsored health insurance, a record number of individuals contacted 211 for assistance with:

- Health insurance
- Medical expense assistance
- Other vital services

Additionally, requests for COVID-19 testing sites, vaccinations, personal protective equipment (PPE), contact tracing information, nursing homes, adult care, health services and health insurance comprised a significant amount of the call volume.

## KŪPUNA CALL CENTER

In cooperation with the Hawai'i State Department of Health's Executive Office on Aging, the City and County of Honolulu's Elderly Affairs Division, and St. Francis Healthcare System of Hawai'i, Aloha United Way's 211 helpline established the first and only statewide COVID-19 vaccination referral system specifically for seniors. Prioritizing this population was crucial. The added services provided the opportunity for seniors to schedule vaccination appointments and obtain transportation assistance to get to health care sites as needed.



ALICE funding is intended to effect systems-level change in order to support upward financial mobility for lower-income families and individuals in Hawai'i. Key components of this initiative include program performance evaluation, shared metrics, capacity building, and collaboration.

**The three funding categories are:**

- A. Increase earning potential and/or reduce household expenses
- B. Improve access to benefits and community resources
- C. Support development of financial capability and soft skills

## **THE FOLLOWING PARTNER AGENCIES WERE AWARDED THREE-YEAR GRANTS FROM THE ALICE® FUND FOR 2019, 2020, AND 2021.\***

### **Council for Native Hawaiian Advancement**

Increase Earning Potential Program - Establishes an institute as a pipeline to middle-skill careers that do not require post-secondary degrees. Serves people in different career tracks.

### **Feed the Hunger Foundation**

Asset Building Through Food Security - Increases economic vitality and food security through loans and networks of support for food entrepreneurs. Provides business loans and technical assistance to increase financial acumen and operational capabilities.

### **Goodwill Industries of Hawaii, Inc.**

Career Pathways Program - Partners with UH community colleges and vocational training providers to support ALICE clients to access post-secondary education, job readiness training, financial literacy, job placement, job retention services, and tax assistance.

### **Hawaii Children's Action Network/Hawai'i Appleseed Center for Law and Economic Justice**

ALICE Policy Hui - A group of nonprofits building a unified voice for Hawaii's ALICE population through education and advocacy for policy development and systems level change.

### **Hawai'i HomeOwnership Center**

Financial Capabilities and Soft Skills - Offers financial literacy workshops and coaching sessions for individuals and groups. Includes incentives to encourage money management skills to reduce debt and build assets.

### **Hawaiian Community Assets Inc.**

Financial Opportunity Centers - Establishes centers in Honolulu and Waianae to provide bundled services to ALICE families over 3 years. Public and private partnership services include financial coaching, career and small business training, access to public benefits, match savings accounts, and loans.

### **Honolulu Habitat for Humanity**

Affordable Home Ownership in Waimanalo - Changes lives by providing families access to affordable housing, works with community volunteers to construct homes, and offer ongoing financial literacy support.

### **Kokua Kalihi Valley Comprehensive Family Services**

Strengthening Resilience of ALICE Elders and Caregivers in Kalihi - Trains ALICE clients from Kalihi as in-home respite care providers and certified nursing assistants. Hires and mentors trainees to continue increasing both career and financial capability skills.

### **Parents and Children Together**

Family and Economic Development Center - Leads discourse in the community on upstream and downstream effects of poverty. Partners with cross-sector employers to upskill ALICE employees. Develops referral networks among employers.

### **Waikiki Community Center**

Senior Employment Project - Partners with businesses to create an employment agency focused on job skills training and employment placement for individuals age 50+.

\*ALICE grantees used their 2020 funding to rapidly retool their efforts to meet immediate community needs that emerged as a result of the Coronavirus pandemic. Examples of this: meal delivery services, employment resource services, virtual case management for families.

## ALICE IMPACT AREAS

Aloha United Way works collectively with partners to take action to improve individual and systemic economic, health, and social conditions, and reduce inequalities for ALICE households.

As a backbone organization operating in a Collective Impact framework, AUW is a leader in funding programs, developing resources, and bringing together diverse stakeholders to take collective action to improve systemic inequalities in the following **ALICE Impact Areas**:

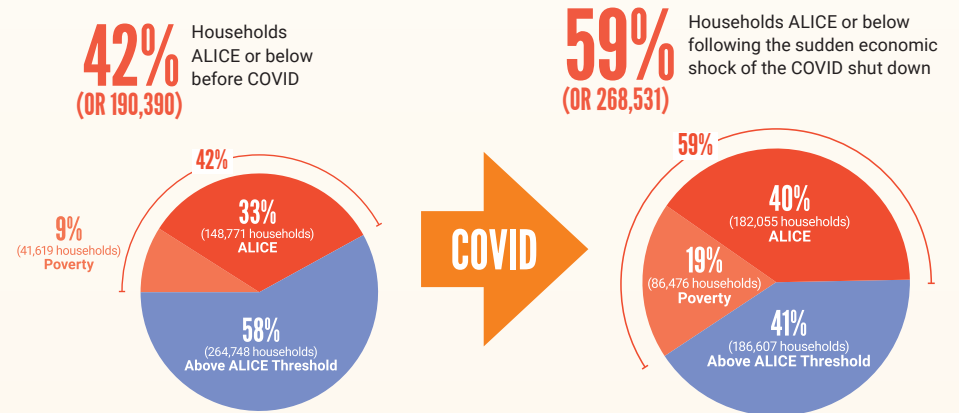
- Quality & Accessible Health Care Services
- Safe & Affordable Housing
- Improving Nutrition & Decreasing Food Insecurity
- Access to Technology & Digital Equity
- Financial Stability & Savings
- Quality Childcare & Educational Opportunities
- Continuing Education & Career Advancement

## ALICE HOUSEHOLD % PER COUNTY IN 2020, PRE-COVID-19 PANDEMIC

Hawai'i	71,565	48%
Honolulu	308,208	40%
Kaua'i	22,524	44%
Maui	52,794	42%

ALICE lives in every town and neighborhood across Hawai'i. ALICE exists in every ethnicity. They are our friends, family, and people we rely on every day. It takes just one crisis — loss of employment for a short period, an unexpected health emergency or car repair, an increase in monthly rent — to put these families and individuals at even greater risk of long-term problems or loss of housing.

## IMPACT OF THE COVID ECONOMIC SHOCK:



State unemployment benefits and CARES Act funds are keeping most these household afloat for now. However, with uncertainty around the trajectory of our economic recovery and the availability of funds to continue this support, the future for these households is uncertain.

Unemployment forecasts range from **15% to 20%** unemployment for 2020, which means that as many as:

**35,000** ADDITIONAL HOUSEHOLDS WILL HAVE FALLEN INTO ALICE STATUS OR BELOW BY THE END OF THE YEAR



# ALICE® PARTNER AGENCIES RESPONDED TO COVID-19

The rapid spread of COVID-19 has exposed critical shortcomings in our economy and in our healthcare and education systems. In the midst of this crisis, the ALICE partner agencies, their staff, and the communities they serve were profoundly impacted. Hawai'i's most vulnerable households have required more assistance than ever, and ALICE grantees rose to meet those needs with flexibility and care. Each ALICE partner agency has a story to share about how the pandemic affected their work and the communities they serve. Here are two examples:



## HONOLULU HABITAT FOR HUMANITY

### How they were impacted:

ReStore, Honolulu Habitat for Humanity's nonprofit home improvement store and donation center, was closed for six weeks. It was reopened only after safety measures were in place. During the closure, crucial elements were reduced: scheduled time that was allotted for projects, access to building materials, and the ability for volunteers to go out to build sites.

### How they adjusted:

Honolulu Habitat for Humanity restructured its build program to reduce construction timelines, using a blend of contracted and volunteer labor. It also created a revolving fund to manage multiple builds using grant funds. Three homes were completed in 2020, and three more are scheduled for construction.



## HAWAI'I HOMEOWNERSHIP CENTER

### How they were impacted:

Hawai'i HomeOwnership Center's mission of providing in-person classes to educate and inform first-time homeowners in Hawai'i was hindered, as these programs were canceled due to the pandemic.

### How they adjusted:

All in-person sessions transitioned to virtual options: group sessions transformed to webinars, and counseling sessions were conducted through video conferencing and phone meetings. The Rental Counseling and Foreclosure Counseling program was also created and added to the roster of services provided to community members. One surprising result from program delivery changes was a significant increase in program participation.



# SAFETY NET GRANTEES

Each year, Aloha United Way provides Safety Net funding to agencies working to provide basic human needs and support people experiencing crisis. In 2020, AUW invested \$750,000 into 27 agencies that are working in the following five areas of need:

## 1 Disaster/Crisis

Provides a broad range of assistance for individuals and families experiencing crisis with a goal of returning the household to stability. The category includes medical care, mental health services, substance abuse treatment, family violence services, and community disaster response.

## 2 Rent/Utility

Provides rent (or mortgage) and utility financial assistance. Agencies may pay rent, security deposit, mortgage, and utility expenses to landlords or providers on behalf of eligible clients.

## 3 Food

Provides access to food pantries, food banks, food delivery services and served meals programs.

## 4 Shelter

Provides housing and related support services including emergency, transitional, and permanent housing.

## 5 Two-year Grants

Supports startup or pilot programs; programs/services with a higher degree of complexity; initiatives with a greater number of stakeholders or partners; initiatives that require substantial time planning; and new programs that are projected to be financially self-sustaining after the initial two years.

## NON-PROFIT PARTNERS

Aloha Harvest

Aloha Medical Mission

American National Red Cross

Catholic Charities Hawai'i

Domestic Violence Action Center

Family Promise of Hawaii

Gregory House Programs

Hale Kipa Inc.

Helping Hands Hawaii

IHS, The Institute for Human Services, Inc.

Kokua Kalihi Valley Comprehensive Family Services

Lanakila Pacific

Mental Health Kokua

Project Vision Hawaii

Residential Youth Services & Empowerment dba RYSE

St. Francis Healthcare Foundation of Hawaii

Susannah Wesley Community Center

The Mediation Center of the Pacific, Inc.

The Salvation Army Hawaiian & Pacific Islands Division (Oahu)

United States Veterans Initiative Hawaii (U.S. Vets)

Waianae District Comprehensive Health and Hospital Board, Inc

Waikiki Community Center

Waikiki Health

Waimanalo Health Center

Women in Need (WIN)

YMCA of Honolulu

YWCA O'ahu

# BOARD OF DIRECTORS 2020

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EVP, Market and Product  
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**Andrew Sutton**  
Director, Strategic Accounts  
CVS Health

**Scott Viola**  
Operations Manager  
Nordic PCL Construction, Inc.

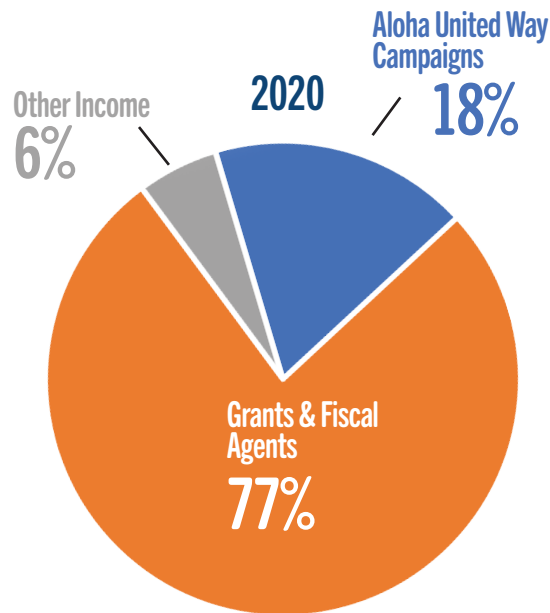


# FINANCIAL SUMMARY

For the Years Ending December 31, 2020 and 2019

## FUNDS RAISED

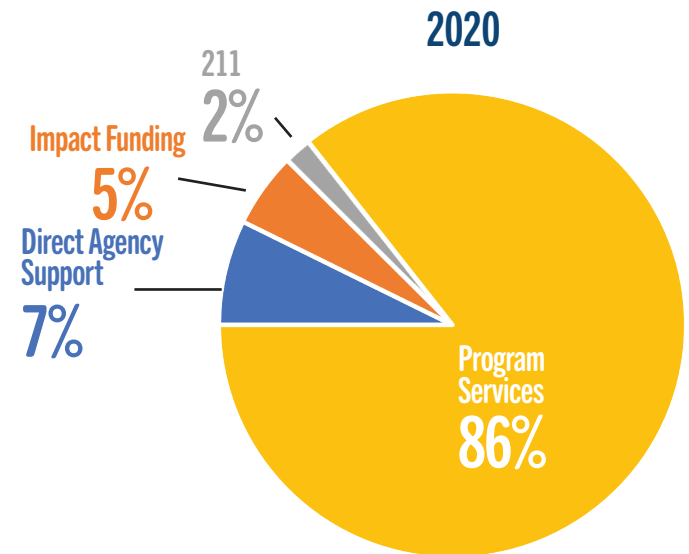
	2020	2019
Aloha United Way campaigns	\$ 8,048,104	\$ 8,487,799
Grants & fiscal agent <sup>1</sup>	34,852,670	6,305,349
Other income	2,523,540	2,678,748
<b>Total Funds Raised</b>	<b>\$ 45,424,314</b>	<b>\$ 17,471,896</b>



## PROGRAMS & SUPPORT

	2020	2019
Donor designations	\$ 3,027,885	\$ 3,777,218
Impact Area allocations	2,150,941	2,523,550
Program services <sup>1</sup>	36,373,826	8,120,593
Fundraising	1,557,583	2,133,779
Administration	1,504,071	1,194,628
Pledge loss & miscellaneous	475,530	470,932
<b>Total Programs &amp; Support</b>	<b>\$ 45,089,836</b>	<b>\$ 18,220,700</b>

	2020
Direct Agency Support	\$ 3,027,885
Impact Funding	2,150,941
211	804,662
Program Services	35,569,164
<b>Total</b>	<b>\$ 41,552,652</b>



### Note 1:

In 2020, Aloha United Way (AUW) administered COVID-19 related rent, mortgage, and utility assistance programs for Hawai'i, supported by Federal CARES Act funds with the State of Hawaii and the City & County of Honolulu, and a third Department of Hawaiian Home Lands (DHHL) Covid-19 Emergency Rental Assistance Program. Combined, AUW's 2020 program budget includes ~\$27 million paid out in government funded COVID-19 assistance programs.

In 2020, AUW was awarded a Continuum of Care (CoC) grant from U.S. Department of Housing and Urban Development (HUD), Permanent Supportive Housing, totalling \$5,418,356, approximately \$3,596,065 of which was expended and earned in 2020.

In 2019, AUW was awarded 3 CoC grants from HUD for Permanent Supportive Housing, CoC Planning, and Homeless Management Information System, totalling \$6,103,479, approximately \$3,745,196 of which was expended and earned in 2019.

### Note 2:

AUW's Form 990 and audited Financial Statements are available upon request.

### Note 3:

In 2020, AUW's chief administrative personnel were John Fink, President and CEO; Suzanne Skjold, COO; Norm Baker, COO and Interim President and CEO. In 2019, AUW's chief administrative personnel were Cindy Adams, President & CEO and Norm Baker, COO.

# COLLECTIVE IMPACT

Aloha United Way supports nearly 350 non-profit partner agencies and works closely with community leaders in public and private sectors to collaboratively tackle the most pressing issues facing our community. We humbly thank everyone who partners with Aloha United Way – whether through in-kind donations, volunteering and/or financial gifts – for your support and generosity in making Hawai'i better for everyone. Together, we make the greatest impact.

## SPECIAL THANKS TO THE FOLLOWING DONORS IN 2020

### GRANTS, FOUNDATIONS & TRUSTS

Atherton Family Foundation  
Anna B Lindemann Fund at the  
Hawai'i Community Foundation  
Bank of Hawaii Foundation  
BOH: Seymour Terry Trust  
Central Pacific Bank  
Corporation for National and Community  
Service (AmeriCorps VISTA)  
Corinne M Tosaki Trust  
CVS  
Hawaii State Department  
of Human Services  
The Emergency Food and Shelter National  
Board Program  
Ellen M. Koenig Memorial Fund at the  
Hawai'i Community Foundation  
Hawai'i Community Foundation  
Hawaii State Department of Health  
Harold K.L. Castle Foundation  
Housing and Urban Development  
Ivena M. Ziegenhein Fund at the  
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Marie Kohli Fund at the Hawai'i  
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Servco Foundation  
Target Foundation  
The Harry and Jeanette  
Weinberg Foundation  
U.S. Veteran Affairs  
Watumull Foundation  
William G. Irwin Charity Foundation

### TOCQUEVILLE SOCIETY \$10,000 OR MORE

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Alan and Joanne Arizumi  
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Anna Ono  
Arnold and Thuy Martines  
Avalon Development Company  
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Bjorn Marsen and Maigee Chang  
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Blenn and Ruth Fujimoto  
Bob and Lori Harrison

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# COLLECTIVE IMPACT

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The Donald and Iris Kim Foundation  
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Carole Suzui  
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Carson and Meghan Schultz  
Cary Koike  
Cary Kondo  
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Casey Tollman  
Chang Ohana  
Cheryl Yoshida  
Cheston Hughes

# COLLECTIVE IMPACT

## LEADERSHIP DONORS continued

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Cisco Liquido  
Clarence Gomes Jr.  
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Conrad Higa  
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David Herndon  
David Ige  
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Davin Kubo  
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Tammi Oyadomari-Chun  
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Taylor Lee  
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Tina Porrás-Jones  
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## GIFTS IN-KIND

Barnes & Noble  
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Hawaiian Air  
PetSmart  
Philips North America  
Scholastic  
Tamura Super Market

# ĀNUENUE LEGACY SOCIETY

Would you like to create a lasting legacy while planning for your future and that of your loved ones? A planned gift to Aloha United Way can provide critical, ongoing support to our poverty-fighting initiatives. Join us to help struggling Hawai'i residents create brighter futures for themselves and their families for generations to come.

## FIRST, WHAT IS A PLANNED GIFT?

A planned gift can be as simple as naming Aloha United Way as a beneficiary in your will, trust, retirement plan, life insurance policy or other financial accounts. Planned gifts are added to our Endowment Fund, a permanent capital reserve that supports our work today, tomorrow and for generations to come. When you make a planned gift to AUW, you become a member of our **Ānuenuē Legacy Society**.

## WHAT ARE SOME GIFT OPTIONS?

- Retirement Accounts including IRAs
- Life Insurance
- Wills & Trusts (bequest)
- Stock and Real Estate - using appreciated property to fund a planned gift
- Life Estate (valuable property you use during lifetime with arrangements to give to charity upon death)
- Charitable Gift Annuity (CGA) (income producing)
- Charitable Remainder Trust (CRT) (income producing)
- Charitable Lead Trust (CLT)
- Donor Advised Fund (DAF)

## WHAT DOES A PLANNED GIFT OFFER?

- A legacy that will impact generations to come
- A way to honor someone else's life and name into the future
- Potential for lesser tax burdens for family
- Potential estate tax savings

For your free, no-obligation, ESTATE PLANNING WORKBOOK, please contact **Ellen Kazama** at (808) 543-2223 or email [ekazama@auw.org](mailto:ekazama@auw.org).

## ĀNUENUE LEGACY SOCIETY

Rainbows may be a daily occurrence in Hawai'i, but each one is special, bringing beauty into the lives of all touched by it. As a member of the Ānuenuē Legacy Society, you will ensure that your generosity continues to make a positive impact for generations to come. You will also have the opportunity to attend special behind-the-scenes events at Aloha United Way and to connect with others who have chosen to make a planned gift.

## ĀNUENUE LEGACY SOCIETY DONORS

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Renee Arakaki  
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Michael and Trudie China  
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