

State of Hawaii
Department of Hawaiian Home Lands

June 17 - 18, 2025

TO: Chair Kali Watson and Members of the Hawaiian Homes Commission

FROM: Debra Aliviado, Modernization Project Manager

SUBJECT: Approval of Fiscal Year 2026 Department of Hawaiian Home Lands (DHHL)
Budget to support the DHHL System Modernization initiative

RECOMMENDED MOTION/ ACTION

- (1) That the Hawaiian Homes Commission approve \$1,145,000 from trust account number T905-25 to support the Department of Hawaiian Home Lands System Modernization Initiative; and
- (2) Authorize the Chairman to shift funding between budget line items in the overall department budget between budget line items, not to exceed \$500,000.

BACKGROUND

In 2019, the DHHL launched the beginning of a systems modernization initiative with the implementation of Salesforce, a customer relationship management (CRM) platform. The intended goal was to eventually convert APPX, the main database files which holds customer information and other software applications utilized by different divisions like file management, billing, payments, maps, etc. over a five-year plan. There were two primary reasons for starting this work, 1) the shared drives which holds files, folders, and other critical information was reaching storage capacity and would cease to accept new files, etc. and 2) to seek software applications that could be integrated into Salesforce to house everything into a single entity. The starting point for this work was the implementation of the Contact Center, then the Awards section, and Contested Cases were implemented into Salesforce. This assisted staff with a case management system whereby different staff members could access case information, upload files, enter notes, etc. This Salesforce integration was supposed to add more divisions to Salesforce, however, there was a change in direction in previous administrations and a lack of funding, so the work stopped.

Prior to 2019, the department attempted to modernize the systems, however, after the due diligence was completed, the cost was exorbitant at the time at \$10 million.

Today, the department is committed to a full system conversion and would like to proceed to move the department off an aging and antiquated system to a modernized system conducive to the twenty-first (21st) century.

In early 2024, the Salesforce team and consultants hosted Discovery sessions with the DHHL Administrators and staff to gather information about the challenges related to the different systems in addition to how the systems could work better for them. There were three recurring themes mentioned in every session. These themes described as pain points included 1) Land Inventory, 2) Case Management and 3) Self-Service options.

After the discovery sessions, the Salesforce team and the consultants did their due diligence to find solutions to their pain points. The following are the recommendations:

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Addressing the Pain Points

Theme	Solution	Product
Land Inventory	Single consolidated land database and other related data	Salesforce Service Cloud as the configurable relational database and automation platform
Land Inventory	ArcGIS interaction and integration with land related data	Salesforce Maps– ArcGIS Esri connector
Land Inventory Self Service Case Management	Files / Documents Integration with data, searchable files viewed in the context of land or other records/data	DocuSign CLM Salesforce “plugin” to relate files to records and AmazonTextract OCR for searchable documents
Land Inventory Self Service Case Management	Online self-service for all stakeholder groups to submit and view leases, loans, cases, payments, etc...	Salesforce Experience Cloud self service portal + Chargent (Salesforce “plug in” prebuilt connector to payment gateways)
Land Inventory Self Service	Integration capability e.g. Oracle Fusion, Utility Star, Batch Printer, etc...	Salesforce Service Cloud is API enabled
Land Inventory Self Service Case Management	Case Management for customer requests, R&M, and self-service Knowledge repository for internal staff use and public use (where relevant)	Salesforce Service Cloud– robust case management and knowledge functionality at scale such as routing to vendors, AI bots, etc...
Land Inventory Case Management	Proactive Notifications for emergency management, newsletters, etc...	Salesforce Marketing Cloud– marketing automation tool integrated with Salesforce Service Cloud for personalized SMS, email, etc...

Full system Migration:

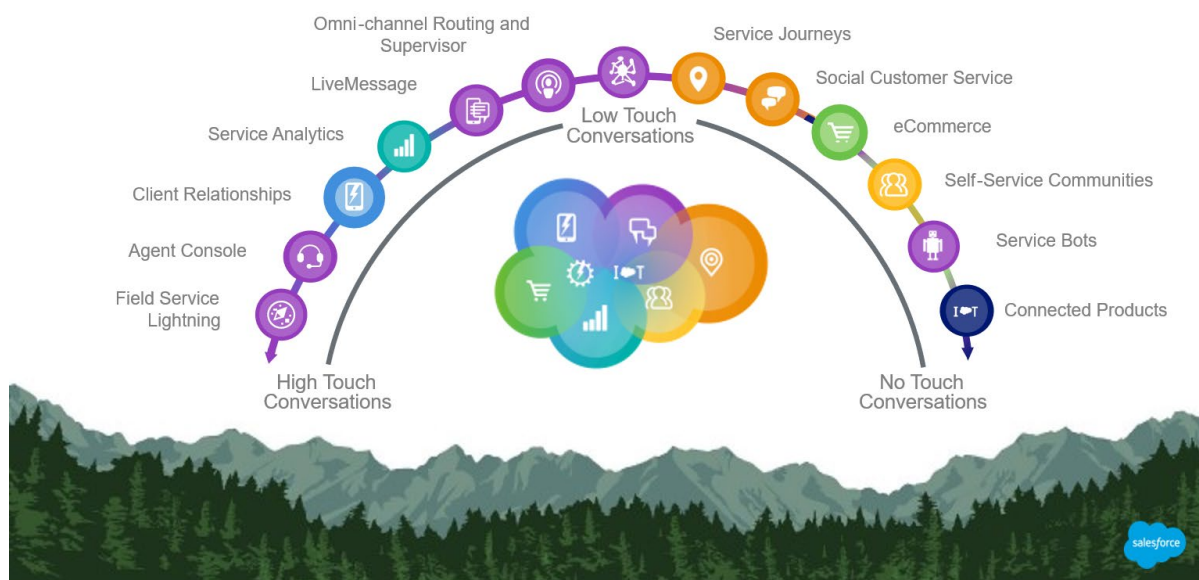
The following are some of the advantages to a full system migration. There are more features and benefits associated with the different applications, but these are the large categories the Salesforce team is working toward based on the pain points.

1. Replace systems that are separate and don’t talk to each other creating burdensome and time-consuming manual processes. Integrating Salesforce and other applications that talk to each other will eliminate these manual processes,
2. Data mining and cleansing correcting data errors and avoiding bottlenecks in the data process. This work will prepare records for migration into Salesforce for full migration.

3. Provide staff the ability to dedicate time to critical and more important tasks while other tasks like processing contact information requests, online applications, etc. are accomplished via the modernization efforts.
4. Provide beneficiaries access to lessee and application information via a public portal.
5. Provide enhanced searchable information of customer files via an intelligent repository feature. This will reduce the time spent by staff and beneficiaries searching for files.
6. Protecting data in the cloud utilizing enhanced security features imbedded in Salesforce and software applications.
7. Offer an online bill-payment option which increases speed for receivables and revenue deposits while reducing manual payment processes. This service should have a positive impact to delinquent accounts and focus collection efforts on recurring high-risk accounts.
8. Provide multiple and flexible options for beneficiaries to engage with the DHHL.
9. Provide integrated access to land inventory through ArcGIS maps.
10. Incorporate AI, Chatbot, Google and other technology as applicable.
11. Expand and enhance customer engagement with the department through multiple access points which will continue in-person engagement for those who choose this form of engagement. The Salesforce integration will now provide a public portal to accommodate self-service options, SMS text messaging, mobile accessibility and more.

Below describes the access touch points from a high touch engagement to a no touch, self-service option.

Deliver Service Conversations Across Every Channel



Consultant Experience:

The department is working with consultants with extensive experience in full system migration and integration of software applications within the State of Hawai'i and internationally. The consultants worked with other State agencies and private sector companies in Hawai'i such as:

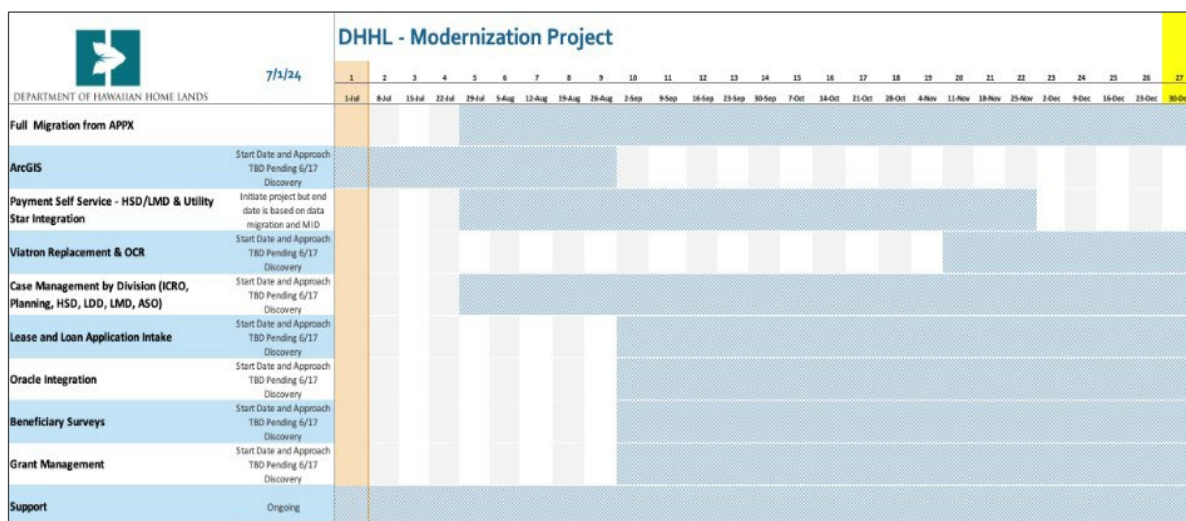
- Department of Hawaiian Home Lands (DHHL)
- Department of Consumer and Commerce Affairs (DCCA)
- Department of Agriculture (DOA)
- Department of Health (DOH)
- Department of Education (DOE)
- Department of Labor and Industrial Relations (DLIR)
- Department of Business Economic Development and Tourism (DBEDT)
- Public Utilities Commission (PUC)
- Ethics Commission
- Enterprise Technology
- OHA
- Servco
- Kamehameha Schools
- University of Hawaii
- Hawaii Pacific University
- HMSA
- St. Francis Hospital
 - And more

Salesforce Roadmap 2024:

The Salesforce team and consultants would like to start the work toward full migration on July 1, 2024. Here is the initial roadmap from July 2024 to December 2024.

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Initial Draft Roadmap



2024 Project Recap Report – Salesforce Buildout

Overview

In 2024, significant progress was made in modernizing and digitizing key business processes through a coordinated Salesforce buildout across the departments. These initiatives were aimed at improving service delivery, enhancing user self-service capabilities, and reducing reliance on manual processes.

Budget Allocation:

The budget will support the following areas:

- APPX migration to Salesforce.
- Public Portal for beneficiaries to access information.
- Land inventory search via ArcGIS maps
- Records management
- On-line Bill Payment and bill invoicing for residential and commercial customers and invoicing.

2025 Budget Request - Salesforce			
Services & Applications	Number	Annual Renewal Cost	Implementation Cost (One time Cost)
SF Licenses & APPX Migration	100 licenses	\$ 267,184.00	\$ 585,000.00
Service Experience Cloud - Public Portal	100 public users		\$ 360,000.00
Maps	20 licenses	\$ 15,360.00	\$ 180,000.00
Records Management	40 licenses	\$ 79,029.00	\$ 556,000.00
Billing & Payments	500 transactions	\$ 1,280.00	\$ 614,000.00
		\$ 362,853.00	\$ 2,295,000.00
Subtotal: Annual Renewal Cost + Implementation			\$ 2,657,853.00

FY25 System Modernization Project List Completed

#	Project / Enhancement	Description	Outcome / Benefit
1	Paper Lease Process	Transitioned lease workflows from paper to digital using Salesforce custom automation and forms.	Reduced processing time; eliminated paper tracking.
2	Payment Self-Service Portal	Launched a Salesforce Experience portal for clients to manage and view payments securely.	Decreased staff workload; improved transparency for clients.
3	Loan Application Intake	Online loan intake system with automated routing, validations, and document handling.	Improved data quality and reduced turnaround time.
4	Lease Application Intake	Digitized lease intake with eligibility logic, form guidance, and automation.	Standardized the process and reduced manual input errors.
5	Online New Application Intake	Online New Application intake system with automated routing, validations, and document handling.	Improved data quality and reduced turnaround time
6	Self-Service Document Access	Enabled clients to securely access uploaded and generated files through a Salesforce-based portal.	Reduced manual requests for document retrieval.
7	Utility Star Integration	API integration with Utility Star to synchronize utility data with Salesforce Accounts	Enabled real-time access to utility data
8	DocuSign Buildout for Viatron Migration	Scanned and indexed physical records into Salesforce using document management tools.	Improved accessibility, audit readiness, and eliminated physical storage reliance
9	ArcGIS – Salesforce Map Integration	Integrated GIS data from ArcGIS with Salesforce to enable map-based views	Improved visibility of geography.

The projected date of implementation is July 2025.

FY26 Salesforce Project

Fiscal Year 2026, the department advanced its digital transformation strategy by enhancing key systems and services through the Salesforce platform. These efforts are focused on improving user accessibility, internal workflow automation, and better service delivery for beneficiaries.

Budget Allocation:

The budget will support the following areas:

- Records Management
- Government Cloud
- Building Permit
- Enforcement Unit Enhancement
- Housing Branch Enhancement
- Artificial Intelligence Agent Assistance
- Loans Automation
- Etravel online process

	2026 Budget Request- Salesforce Modernization	
Service & Applications	Implementation Cost (One Time Cost)	Description
Records Management	\$105,000.00	Digital File Conversion
Government Cloud	\$20,000.00	Security
Building Permit	\$60,000.00	DHHL Beneficiary Permit Process
Enforce Unit Enhancement	\$30,000.00	EU process
Housing Enhancement	\$60,000.00	Housing process
AI Agent to assist Beneficiaries	\$60,000.00	Assist beneficiaries navigate on line portal/customer service/tech support
Loans: Automation for various loans categories	\$50,000.00	Assist beneficiaries in loan qualification
Loans: Automated Underwriting	\$135,000.00	Automated system to assist beneficiaries with loans
Etravel	\$135,000.00	On line travel expense process
Standard support	\$90,000.00	Salesforce Technical/professional support – Non Modernization
Modernization Support	\$400,000.00	Salesforce Technical/professional support - Modernization
Total	\$1,145,000.00	

FY26 System Modernization Project List To Be Completed:

#	Project / Enhancement	Description	Outcome / Benefit
1	Digital File Conversion	Scanned and indexed physical records into Salesforce using document management tools.	Improved accessibility, audit readiness, and eliminated physical storage reliance.
2	In-House Building Permit System	Developed a digital system to manage permit applications, reviews, and approvals within Salesforce.	Increased transparency and internal control; reduced external tool dependency.
3	Enforcement Unit Enhancement	Implemented case management tools with mobile access, alerts, and geolocation features for inspections and investigations.	Improved field efficiency, real-time updates, and compliance tracking.
4	Housing Enhancement	Added automation and tools for awards processing, eligibility checks, maintenance, and communications.	Streamlined workflows and improved client satisfaction.
5	IA Agent for Beneficiaries	Integrated an AI-powered digital assistant using Salesforce Einstein to guide beneficiaries through applications and other various DHHL services.	Reduced support calls and enhanced self-service capabilities.
6	Loans Automation & Underwriting	Built automated workflows for loan intake, scoring, review, and disbursement within Salesforce.	Faster approvals, increased consistency, and ensured compliance.
7	E-Travel Module	Launched a digital system to manage travel requests, approvals, and reimbursements.	Simplified tracking, reduced manual work, and improved budget oversight.

The projected date of completion is in the 3 quarter of FY26.

RECOMMENDATION

DHHL staff respectfully requests approval of the recommended motion as stated above.

