

House District 46
Senate District 22

THE TWENTY-EIGHTH LEGISLATURE
APPLICATION FOR GRANTS
CHAPTER 42F, HAWAII REVISED STATUTES

Log No:

For Legislature's Use Only

Type of Grant Request:

GRANT REQUEST - OPERATING

GRANT REQUEST - CAPITAL

"Grant" means an award of state funds by the legislature, by an appropriation to a specified recipient, to support the activities of the recipient and permit the community to benefit from those activities.

"Recipient" means any organization or person receiving a grant.

STATE DEPARTMENT OR AGENCY RELATED TO THIS REQUEST (LEAVE BLANK IF UNKNOWN):

STATE PROGRAM I.D. NO. (LEAVE BLANK IF UNKNOWN):

1. APPLICANT INFORMATION:

Legal Name of Requesting Organization or Individual:
ORI Anuenue Hale Inc.

Dbas:

Street Address: 64-1488 Kamehameha Highway, Wahiawa, HI 96786

Mailing Address: 64-1488 Kamehameha Highway, Wahiawa, HI 96786

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name SUSANNA F. CHEUNG

Title President and CEO

Phone # 808-621-1988

Fax # 808-621-5191

E-mail anuenuehale@hawaii.rr.com

3. TYPE OF BUSINESS ENTITY:

- NON PROFIT CORPORATION INCORPORATED IN HAWAII
- FOR PROFIT CORPORATION INCORPORATED IN HAWAII
- LIMITED LIABILITY COMPANY
- OTHER
- SOLE PROPRIETORSHIP/INDIVIDUAL

6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:

COMMUNITY-BASED WELLNESS PROGRAM FOR SENIORS AND PERSONS WITH DISABILITIES

4. FEDERAL TAX ID #: [REDACTED]

5. STATE TAX ID #: [REDACTED]

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2016: \$ 350,000

8. STATUS OF SERVICE DESCRIBED IN THIS REQUEST:

- NEW SERVICE (PRESENTLY DOES NOT EXIST)
- EXISTING SERVICE (PRESENTLY IN OPERATION)

SPECIFY THE AMOUNT BY SOURCES OF FUNDS AVAILABLE AT THE TIME OF THIS REQUEST:

STATE \$ 350,000

FEDERAL \$ _____

COUNTY \$ _____

PRIVATE/OTHER \$ 10,000

TYPE NAME & TITLE OF AUTHORIZED REPRESENTATIVE:

[REDACTED]

SUSANNA F. CHEUNG, PRESIDENT AND CEO
NAME & TITLE

JANUARY 29, 2015
DATE SIGNED



RECEIVED
1-29-15

Application for Grants

If any item is not applicable to the request, the applicant should enter "not applicable".

I. Background and Summary

This section shall clearly and concisely summarize and highlight the contents of the request in such a way as to provide the State Legislature with a broad understanding of the request. Please include the following:

1. A brief description of the applicant's background;

ORI Anuenue Hale Inc, which was founded by Susanna F. Cheung, was established in 1993 as a private, not-for-profit corporation located in Central Oahu. Its primary mission is to promote the general welfare of the elderly, the disabled and the economically disadvantaged. It also assists in providing relief to the poor and needy by offering programs in education, and vocational training, which enables them to break through barriers inhibiting their potential for self-sufficiency.

ORI Anuenue Hale currently provides health and wellness programs, therapeutic and social activities, housing and supportive services for the elderly and the disabled. Education, job skills training, employment and supportive services are also offered to the economically and socially disadvantaged.

The agency's Wellness Center at its Wahiawa location offers Adult Day Care services as well as health and wellness activities for the elderly and severely disabled. ORI Anuenue Hale Inc. also offers an affordable ADA recreational facility within its 40-acre grounds for the usage of the elderly, the severely disabled and the economically disadvantaged. Operational funds are being sought for maintaining these facilities and implementing program services for the elderly, the disabled and the disadvantaged in our community.

ORI Anuenue Hale's programs and facilities help to restore or maintain, to the fullest extent possible, the capacity of the elderly and the severely disabled to maintain a quality of life in the community and minimize the need for premature institutionalization.

2. The goals and objectives related to the request;

The goal of this request is to obtain funds necessary to continue operating ORI Anuenue Hale's ADA wellness and recreational facilities as well as provide

supportive services for the elderly, the severely disabled and the disadvantaged. ORI Anuenue Hale offers supportive services that help the elderly, the severely disabled and the disadvantaged maintain independent, meaningful and dignified lives in their own homes and communities for as long as possible. The program also helps the target group avoid or delay costly institutional placement.

The following are program measures which support this overall goal:

- a. Prolong the time during which the person with special needs can choose to remain in the community by assisting the family caregiver to secure help or obtain relief with caregiving tasks.
- b. Increase the level and quality of care and services for the elderly, an underserved, rapidly growing population in our community.
- c. Support the family caregiver's efforts in a way that improves their quality of life and that of their care recipient.

3. The public purpose and need to be served;

The public purpose of this grant-in-aid request is to provide supportive services to the elderly, the disabled and the disadvantaged in our community which could include health and wellness programs; day care services; health education/training and/or monitoring; recreational, therapeutic and social activities; transportation service; outreach and caregiver training and support. The provision of these services is part of a continuum of quality, integrated care for caregivers and care recipients. ORI Anuenue Hale's facilities and programs promote the general welfare and quality of life of individuals with special needs.

The reauthorization of the Older Americans Act in November 2000 acknowledged the need to "support family caregiving activities and services." "While family caregivers enhance the quality of life for their elderly family members, the costs to caregivers can be significant. Family caregiving can also be a source of considerable stress and subsequent detrimental results for both the caregiver and the care receiver." Therefore, service interventions that meet the caregiver's immediate needs can enhance the quality of life for care recipients as well as caregivers." This is according to recent reports on the needs of the aging population and family caregivers from the Elderly Affairs Division.

Currently, the elderly population is growing at a dramatic rate. Between the years 1990 to 2000, there was an increase of 28.5% in the population, aged 65 years and older, in Hawaii alone. Between 2000 to 2010, there was a 12.4% increase or 150,102 more in the total population count of Hawaii. According to

the United States Administration on Aging (AOA), the rate of increase is anticipated to be higher between the years 2010 and 2030 when the baby boom generation reaches age 65.

By 2030, the 65 years and older group will be 20% of the population, which is more than double of what it was in 2000. Minorities will make up 25.4% of the elder population by 2030. Of the elderly population, approximately 7.4% will be below the poverty level.

In addition, of the many studies done on the aging population in our nation, they have found that:

- **Health Education/Training:** Older adults will benefit from access to a range of preventive health care services such as health education, self-care maintenance, community-based health screenings, and counseling.
- **Recreational/Social Activities and Exercise:** This will help to improve and maintain the physical and mental well-being of older adults and the disabled.
- **Transportation:** Our community needs to address the mobility needs of an aging population. This is often a major barrier for seniors. Dial-a-ride or door-to-door transportation is greatly needed, especially in rural communities where public transportation is limited.
- **Workforce Development:** Older adults and the disabled may need or want to remain in the workforce but they need formal job training and retraining programs as well as supportive services to help.
- **Civic Engagement/Volunteer Opportunities** – Seniors need to have various opportunities to remain engaged in our community.

Compounded with the impact of a slowed economy and constrained finance market, services for the elderly and the disabled continue to be needed for the benefit of, not just the target group, but also their family caregivers.

4. Describe the target population to be served; and

The target population includes the elderly, 62 years and above, severely disabled adults, as well as the economically and socially disadvantaged in the community.

According to the Bureau of the Census definition, severely disabled adults include those who: "(a) used a wheelchair, a cane, crutches, or a walker for 6 months or longer, (b) are unable to perform or needed help to perform one or more of the functional activities (seeing, hearing, speaking, lifting/carrying, using stairs, walking, or grasping small objects), (c) are unable to perform or needed help to

perform one or more ADLs (Activity of Daily Living), which includes getting around inside the home, getting in or out of bed or a chair, bathing, dressing, eating, and toileting, (d) are unable to perform or needed help to perform one or more IADLs (Instrumental Activity of Daily Living), which includes going outside the home, keeping track of money and bills, preparing meals, doing light housework, taking prescription medicines in the right amount at the right time, and using the telephone, (e) had one or more specified conditions: mental retardation or another developmental disability, or Alzheimer's disease, (f) had any other mental or emotional condition that seriously interfered with everyday activities, (g) had a condition that limited the ability to work around the house or made it difficult to remain employed. Finally, persons who are under 65 years of age and who are covered by Medicare or receive SSDI are considered to have a severe disability."

ORI Anuenue Hale's target groups are already presumed low to moderate income by the federal government and have limited financial means to afford programs and services that they need.

These groups are generally known to have chronic illnesses and will benefit from health maintenance support services, for instance, to keep them living in the community. Caregivers for these individuals often need respite services as a relief from caregiving. Services that motivate their care recipients to socialize, to keep mentally and physically fit, and to live a quality of life, are needed.

5. Describe the geographic coverage.

Utilization of the services will come primarily from residents in the facility's neighboring communities of Central Oahu and the North Shore, and possibly parts of the fastest growing community of Ewa (Campbell area). However, the agency will not limit providing supportive services to anyone eligible.

The following are information obtained from the Center on the Family 2003 Community Profiles, which show the demographics of the agency's targeted areas of services.

Target Areas to be Served	Total Population	Population Ages 21-64 with disabilities	% of persons 65 & older living in poverty	% of Persons 65 & older with disability	% of Persons 65 & older living alone
Leilehua (Wahiawa)	41,608	16.6%	9.9%	47.2%	16.9%
Waialua	12,435	17.7%	18.0%	40.2%	14.5%
Kahuku	17,877	16.0%	10.5%	43.8%	15.5%
Waipahu	51,458	22.0%	12.1%	50.7%	8.0%
Mililani	45,123	10.2%	3.2%	41.5%	13.0%

Campbell	43,637	18.7%	8.3%	47.2%	9.2%
Pearl City	48,861	14.7%	4.4%	37.6%	10.9%

A demographic analysis of the areas likely to be served by the agency, indicates that their number of adults with disabilities tend to be higher than the state average or within a percent difference from the state average of 17.7%. The Honolulu county percentage of adults with disabilities is a percent less, at 16.8%. In comparison to the above numbers, with the exception of Mililani and Pearl City, there are a significant number of adults with disabilities in these areas.

There are also a significant number of seniors with disability and living alone in these areas. Elderly dependence in the Honolulu county is the highest among the counties with 16.3%. Historically, the communities surrounding ORI Anuenue Hale has had high percentages of persons falling below the federally defined poverty level.

II. Service Summary and Outcomes

The Service Summary shall include a detailed discussion of the applicant's approach to the request. The applicant shall clearly and concisely specify the results, outcomes, and measures of effectiveness from this request. The applicant shall:

1. Describe the scope of work, tasks and responsibilities;

The request is for operational grant-in-aid, which will enable ORI Anuenue Hale Inc. to continue to develop and maintain its current continuum of supportive services and activities for members of the target group to help them remain independent and avoid or delay costly institutional placement.

Target Group

- a. Elderly individuals, 62 years and above;
- b. Severely disabled adults, defined as persons who are under 65 years of age and who are covered by Medicare or receive Social Security Disability Insurance (SSDI);
- c. The economically and socially disadvantaged in the community

Tasks / Activities

- Disseminate information about programs and services (i.e., Wellness Classes, Recreational/Social Activities, Education/Training opportunities, etc.) to stakeholders such as members of the target groups, other agencies, building apartment managers and associations
- Offer health and wellness program activities
- Conduct outreach activities
- Advertise, as needed and upon funding availability

- Implement program activities and services
- Hire staff or professional services, as needed, and provide orientation and training as necessary
- Follow up on program inquiries and decide on applications for services.

Responsibilities

- Ensure that participants receive quality care and supportive services.
- Ensure that activities enhance the quality of life of participants and those who may indirectly benefit from these activities.

Outcomes

- Information dissemination about programs and services: 20 unduplicated number of contacts
- Health and Wellness Program: Minimum of 240 sessions per year
- Target number of unduplicated persons served: 50 seniors and/or severely disabled adults
- Outreach activities: 2 activities per year Minimum: 20 participants
- Enhanced health and quality of life for the elderly and severely disabled

Measures of effectiveness

- Survey questionnaire for program participants to obtain input for improvement and to gauge the participants' overall satisfaction for the services at ORI Anuenue Hale Inc.

Program activities and support services provided by ORI Anuenue Hale's Elder Care Program will cater to the needs of seniors, 62 years and above, and adults with severe disabilities. The Elder Care program will help to address the health, social, recreational, and resource needs of the elderly and disabled in our community. Our goal will be to help this special needs group improve and maintain a healthy lifestyle and to maximize their quality of life.

By addressing the problems and needs of our growing aged and disabled population, we are strengthening our community.

ORI Anuenue Hale's Health and Wellness program activities will include:

1. Wellness Sessions – activities that promote health and well-being of older adults and the disabled. Tai Chi, Chi Kung, Yoga, Meditation, Hand / Brain Exercises, etc.
2. Education / Training – classes that teach seniors about health maintenance and illness prevention, keeping a healthy lifestyle, good nutrition, resources in the community, self-care, etc. (example: Health Talks, Cooking/Nutrition Class, health screenings, lectures, etc.)

3. Recreation/Social Activities – Computer Classes, Mah Jong, Line Dancing, Bon Dance, Arts and Crafts, Cultural Dances, Travel Planning, Group Outings/Excursions

Programs will be marketed to the target group through outreach activities, dissemination of flyers, tours of the program, advertising and word of mouth.

2. Provide a projected annual timeline for accomplishing the results or outcomes of the service;

Services will begin upon approval/release of funding.

Month 1	Program starts and any Subrecipient Agreements completed
Month 1 to 12	Ongoing Program Implementation
Month 12	Program evaluation

3. Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results; and

ORI Anuenue Hale will document the participants' attendance and keep basic information on file documenting the participants' eligibility for services. Periodic reports as required will be prepared which track usage and progress towards target goal numbers and address any problems/challenges which may affect meeting target goal.

Outreach and marketing strategies to increase the number of users from the target groups will include public service announcements, flyer dissemination, outreach through fairs/special events and/or tours of the facility, paid advertising, etc.

4. List the measure(s) of effectiveness that will be reported to the State agency through which grant funds are appropriated (the expending agency). The measure(s) will provide a standard and objective way for the State to assess the program's achievement or accomplishment. Please note that if the level of appropriation differs from the amount included in this application that the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.

Periodic reports as required will be submitted to the State Agency which provides an update on the program and tracks the numbers served. Service provider progress reports will address any problems/challenges which may affect meeting the target goal.

Outcomes

- Information dissemination about programs and services: 20 unduplicated number of contacts
- Health and Wellness Sessions (including education/training, recreation/social activities): Minimum of 240 sessions per year
- Target number of unduplicated persons served: 50 seniors and/or severely disabled adults
- Outreach activities: 2 activities per year Minimum: 15 participants
- Enhanced health and quality of life for the elderly and severely disabled

III. Financial

Budget

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.

Please see attached budget. Request for funds will cover personnel costs, insurance, professional / contractual services (professional and payroll) costs, supplies, audit fees, advertising, transportation, maintenance, a motor vehicle purchase, and other ancillary costs such as utilities, security, custodial services, telecommunications, etc.

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2016.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$ 87,500	\$ 87,500	\$ 87,500	\$ 87,500	\$ 350,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2016.

ORI Anuenue Hale will continue with fundraising efforts and solicitations for funding from private and public sources including foundations and charitable organizations.

We are seeking funding from:

- a. State Grant-In-Aid
- b. Friends of Hawaii Charities
- c. Oahu Visitor Industry Charity Walk
- d. Private foundations

4. The applicant shall provide a listing of all state and federal tax credits it has been granted within the prior three years. Additionally, the applicant shall provide a

listing of all state and federal tax credits they have applied for or anticipate applying for pertaining to any capital project, if applicable.

Not applicable

5. The applicant shall provide a listing of all government contracts and grants it has been and will be receiving for program funding.

We currently do not have any government contracts or grants for the Elder Care program. Our last approved operational grant-in-aid funding for the Elder Care Program started January 2013 and ended in June 2014. Between July 2008 to December 2012, we did not receive any operational grant-in-aid for the Elder Care program.

ORI Anuenue Hale also received an operational grant-in-aid for the periods of October 2012 to September 2014 from the Hawaii State Department of Transportation, for the specific purpose of assisting ORI in providing transportation services to meet the needs of persons with disabilities seeking to obtain and/or maintain employment.

We were not approved for any other transportation operational or capital assistance grant funds thereafter.

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2014.

The balance of unrestricted current assets for ORI Anuenue Hale as of December 31, 2014, was \$ 1,170,448.78.

IV. Experience and Capability

A. Necessary Skills and Experience

The applicant shall demonstrate that it has the necessary skills, abilities, knowledge of, and experience relating to the request. State your experience and appropriateness for providing the service proposed in this application. The applicant shall also provide a listing of verifiable experience of related projects or contracts for the most recent three years that are pertinent to the request.

ORI Anuenue Hale's experience includes over a decade of providing health and wellness programs, outreach services and recreational/social activities for the elderly. In the past, 500+ to 1,000+ seniors per year benefitted from the various outreach and wellness programs offered by ORI Anuenue Hale

Inc. Over 13,000 individuals with special needs benefited from the various program services offered by ORI Anuenue Hale Inc. since its inception in 1993.

In addition, it also has had over two decades of experience providing vocational training, employment and supportive services to people with intellectual disabilities and the economically disadvantaged, including the unemployed and underemployed.

ORI Anuenue Hale has the experience coordinating program services for people with special needs. Collaborative relationships with other human services agencies, community partners / organizations and resources, are maintained as an integral part of the coordination process to help meet the needs of program participants.

ORI Anuenue Hale is part of a network of agencies serving people with special needs, which can provide referrals and resources for program participants. The Department of Health, Developmental Disabilities Division and Case Management Units are community partners providing case management and support services to adults with developmental disabilities. The Department of Human Services is another community partner providing financial assistance and support to low income individuals, particularly those who receive Medicaid and other welfare assistance.

Community association memberships such as the Wahiawa Community and Business Association and Hawaii Chinese Chinese Civic Association are business connections which will help the agency in expanding its community resources and links.

ORI Anuenue Hale will continue to network and cultivate its relationship with various businesses, community associations, governmental and service providers. It will continue to utilize its current network of business and professional associations in order to share financial and human resources. ORI Anuenue Hale is able to access as a valuable resource a centralized administrative, marketing, accounting and management team, which enables the agency to minimize program costs and allow the program to devote funds more to direct service.

The following pertinent contract experience and satisfactory provision of elder care services are listed below:

- 1. Elder Care Services (Executive Office on Aging) – April 2013 to June 2014**

B. Facilities

The applicant shall provide a description of its facilities and demonstrate its adequacy in relation to the request. If facilities are not presently available, describe plans to secure facilities.

ORI Anuenue Hale's facilities are located at 64-1488 Kamehameha Highway in Wahiawa, which is adjacent to Helemano Plantation. Adult day care services for seniors and the severely disabled as well as wellness classes and recreational and social activities are provided at ORI Anuenue Hale's Wellness Center. The Wellness Center is wheelchair-accessible and has met Adult Day Care licensing with the state Department of Human Services, which includes satisfactory inspection by the city and state for compliance with fire, building, sanitation, health and safety codes. It has several multi-purpose rooms decorated and furnished with chairs, tables, and basic audio-visual equipment. The Center has karaoke equipment, a large TV, DVD/VCR, microphone and projection screens for use in training / lectures as well as recreational activities. There is sufficient space for floor and standing exercises (i.e., Tai Chi, Chi Kung, meditation, yoga, stretching, etc.). The Center also has several small and large meeting rooms for group activities, a Beauty Salon, ample ADA toilets, and kitchenette.

Bathing and toilet facilities have grab bars and are wheelchair-accessible. Emergency call buttons have been placed in each toilet stall and in the shower room in case the program participant needs assistance. Aisleways and doorways meet the physical requirements for accessibility. There are exterior ramps to enter the facility and wide sidewalks / exterior walkways.

ORI Anuenue Hale also has a recreational facility equipped for overnight camping experience. The campground is ADA, wheelchair-accessible with wide walkways. There are small and large meeting rooms for group activities.

V. Personnel: Project Organization and Staffing

A. Proposed Staffing, Staff Qualifications, Supervision and Training

The applicant shall describe the proposed staffing pattern and proposed service capacity appropriate for the viability of the request. The applicant shall provide the qualifications and experience of personnel for the request and shall describe its ability to supervise, train and provide administrative direction relative to the request.

ORI Anuenue Hale has an experienced executive management team to oversee and administer the quality of its programs. Many of ORI Anuenue Hale's employees have been with the agency for several years and key employees have worked with the agency between 10 to 30+ years. The management team is well trained under the leadership of its founder and current president and CEO, Susanna F. Cheung.

Mrs. Cheung has over 35 years of management experience as founder and chief executive officer of private, non-profit organizations serving multiple groups with special needs. Her educational background includes a master's degree in Special Education at the University of Hawaii, a Certificate in Rehabilitation Administration from the University of San Francisco and a Certificate in Education from the Grantham teacher Training College in Hong Kong. Her Bachelor's degree was in Home Economics.

She also has extensive experience in establishing excellent partnership between the public and private sector. Mrs. Cheung previously worked for 15 years as Program Director for another non-profit organization in Hawaii serving persons with mental retardation / developmental disability, doing direct care supervision, program planning and implementation.

Prior to her professional experience in the field of human service, Mrs. Cheung was a Language instructor for 2 years with the Department of Education, Adult Education, and had 5 years prior experience as an administrator for a public service facility in Hong Kong.

The Program Director will coordinate the marketing, documentation / recordkeeping and planning. Professional services / consultants, when volunteers are not available, as well as program aides will also be necessary through this grant in order to implement the various therapeutic and rehabilitative activities at the Center.

B. Organization Chart

The applicant shall illustrate the position of each staff and line of responsibility/supervision. If the request is part of a large, multi-purpose organization, include an organization chart that illustrates the placement of this request.

Attached is an Organization Chart. Below are a description of the line of responsibility and supervision of each staff position for the Elder Care Program.

PRESIDENT AND CEO

Oversees the overall operation and programs the agency provides to the community.

PROGRAM DIRECTOR

Coordinates program activities, services and reporting and documentation requirements for the Elder Care Program. Ensures program compliance, trains staff, works with the recreation and program activity staff / volunteers in program implementation, supervises instruction, and collaborates with other resources for program support and funding. The Program Director is directly supervised by the agency President and CEO.

PROGRAM AIDES

Assists with various tasks required to operate the program including responding to inquiries, documentation and implementation of various program activities, including center-based daily activities and hands-on care of the elderly and disabled. May assist with administrative tasks including answering phones, responding to inquiries, disseminating flyers and other information, and providing logistical and administrative support to the program staff. May also assist in providing direct care/assistance and transportation to the seniors and disabled in a variety of community settings, including the home setting. The Program Director supervises all program staff for the Elder Care Program.

CONTRACT – PROFESSIONALS

Instructors / consultants will be hired on a contractual hourly or flat rate fee basis to conduct, teach, coordinate or assist with the various program activities (i.e., Tai Chi, Chi Kung, Yoga, Computer or High Tech for Seniors, Physician or Medical Professional Health Talks, Cooking Lessons, etc.). They work directly with the program participants as scheduled. The Program Director supervises the contracted professionals in their implementation of elder care program activities.

VOLUNTEERS

Assist in the implementation of recreation, social and therapeutic activities. Assist with monitoring and supervision of program participants. Volunteers are supervised by the Program Director.

C. Compensation

The applicant shall provide the annual salaries paid by the applicant to the three highest paid officers, directors, or employees of the organization by position.

The three highest paid employees of the organization by position are:

	<u>Employee Name</u>	<u>Annual Salaries</u>	<u>Position</u>
1.	Susanna F. Cheung	\$ 61,800.00	President & CEO
2.	Leslie Fok	\$ 52,244.56	Contracting
3.	Melba Martinez	\$ 47,205.84	Bookkeeper

VI. Other

A. Litigation

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgement. If applicable, please explain.

Not applicable.

B. Licensure or Accreditation

The applicant shall specify any special qualifications, including but not limited to licensure or accreditation that the applicant possesses relevant to this request.

ORI Anuenue Hale Inc. has been operating an Adult Day Care Program for seniors and adults with disabilities since 2009.

C. Federal and County Grants

The applicant shall separately specify the amount of federal and county grants awarded since July 1, 2014.

ORI Anuenue Hale received an operational grant-in-aid for the periods of October 2012 to September 2014 from the Hawaii State Department of Transportation, for the specific purpose of assisting ORI in providing transportation services to meet the needs of persons with disabilities seeking to obtain and/or maintain employment. It is a federal grant administered by the state Department of

Transportation. The amount of the grant from October 2012 to September 2013, was \$ 37,016. The amount of the grant from August 2013 to September 2014 was \$ 37,800.

We were not approved for any other transportation operational or capital assistance grant funds thereafter.

D. Private Educational Institutions

The applicant shall specify whether the grant will be used to support or benefit a sectarian or non-sectarian private educational institution. Please see Article X, Section 1, of the State Constitution for the relevance of this question.

Not applicable.

E. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2015-16 the activity funded by the grant if the grant of this application is:

- (1) Received by the applicant for fiscal year 2015-16, but
- (2) Not received by the applicant thereafter.

ORI Anuenue Hale Inc. will comply with this requirement as needed.

The agency will also continue to seek other sources of funding to maintain its continuum of services to the community. If it is unable to successfully sustain its services, the agency will look into reduction of services, as necessary.

F. Certificate of Good Standing (If the Applicant is an Organization)

If the applicant is an organization, the applicant shall submit one (1) copy of a certificate of good standing from the Director of Commerce and Consumer Affairs that is dated no earlier than December 1, 2014.

Please see attached Certificate of Good Standing for ORI Anuenue Hale Inc. dated January 16, 2015.

BUDGET REQUEST BY SOURCE OF FUNDS
(Period: July 1, 2015 to June 30, 2016)

Applicant: _____ ORI-Anuenue Hale, Inc.

BUDGET CATEGORIES	Total State Funds Requested (a)	(b)	(c)	(d)
A. PERSONNEL COST				
1. Salaries	77,930			
2. Payroll Taxes & Assessments	7,832			
3. Fringe Benefits	14,307			
TOTAL PERSONNEL COST	100,069			
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island				
2. Insurance	10,000			
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				
6. Supplies	18,500			
7. Telecommunication	1,625			
8. Utilities	20,616			
9. Custodial Services	21,467			
10. Security Services	7,418			
11. Ground Maintenance				
12. Repairs and Maintenance	5,000			
13. Audit	3,200			
14. Contract Services - Professional	119,350			
15. Contract Services - Payroll	750			
16. Administrative Support				
17. Advertising	3,500			
18. Transportation	10,505			
19				
20				
TOTAL OTHER CURRENT EXPENSES	221,931			
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES	28,000			
E. CAPITAL				
TOTAL (A+B+C+D+E)	350,000			
SOURCES OF FUNDING		Budget Prepared By: <i>Melba D. Martinez</i>		
(a) Total State Funds Requested	350,000	Melba D. Martinez	622-3929	
(b) Local Charities	10,000	Name (Please type or print)		Phone
© Other In-Kind Resources		Signature of Authorized Official		
(d)		[Redacted Signature]		Date
TOTAL BUDGET	360,000	Name and Title (Please type or print)		1-28-15

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2015 to June 30, 2016

Applicant: ORI Anuenue Hale Inc.

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Program Director	0.4	\$67,654.44	40%	\$ 27,062.00
Program Aide / Driver	0.5	\$32,136.00	50%	\$ 16,068.00
Program Aide / Receptionist	0.5	\$21,600.00	50%	\$ 10,800.00
Wellness Program Aide	0.5	\$24,000.00	50%	\$ 12,000.00
Wellness Program Aide	0.5	\$24,000.00	50%	\$ 12,000.00
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
TOTAL:				77,930.00
JUSTIFICATION/COMMENTS:				

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2015 to June 30, 2016

Applicant: ORI Anuenue Hale Inc.

POSITION TITLE CONSULTANT SERVICES	FULL TIME EQUIVALENT	ANNUAL FEE A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Instructor & Consultant: Cooking / Dance / Crafts / Rec & Leisure	\$ 67.73 x 624 hrs.	\$42,264.00	100%	\$ 42,264.00
Instructor & Consultant: Yoga / Chi-Kung, Rec & Leisure Coord	\$ 67.73 x 650 hrs.	\$44,025.00	100%	\$ 44,025.00
Instructor & Consultant: Music / Singing / Rec. & Leisure	\$ 600.00 / month	\$7,200.00	100%	\$ 7,200.00
Instructor & Consultant: Tai Chi, Computer, Rec & Leisure	\$ 40.00 x 104 hours	\$4,160.00	100%	\$ 4,160.00
Instructor & Consultant: Medical	\$ 203.19 / hr.		1 hr / month	\$ 2,438.00
Other Consultants / Speakers (including Health, Legal, Educ.)				\$ 19,263.00
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
TOTAL:				119,350.00
JUSTIFICATION/COMMENTS:				
Consultants / Instructors provide direct services to seniors and the disabled providing instruction / knowledge on their field of exper				

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2015 to June 30, 2016

Applicant: ORI Anuenue Hale Inc.

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS:				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
Mini-Van (6- to 8- passenger)	1.00	\$28,000.00	\$ 28,000.00	\$ 28,000.00
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:	1		\$ 28,000.00	\$ 28,000.00
JUSTIFICATION/COMMENTS: To be used for transporting seniors and the disabled to community activities.				

GOVERNMENT CONTRACTS AND/OR GRANTS

Applicant: ORI ANUENUE HALE INC.

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S. / State / Haw / Hon / Kau / Mau)	CONTRACT VALUE
1.	Transportation Grant (FTA) Job Access for Disabled	8/01/13 – 9/30/14	Hawaii Dept. of Transportation	State	\$ 37,800.00
2.	Elder Care Program Services (GIA)	1/29/13 – 6/30/14	Executive Office on Aging	State	\$ 288,060.00
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
				TOTAL	\$ 325,860.00

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS PURSUANT TO
CHAPTER 42F, HAWAII REVISIED STATUTES**

The undersigned authorized representative of the applicant certifies the following:

- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant is awarded;
 - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
 - c) Agrees not to use state funds for entertainment or lobbying activities; and
 - d) Allows the state agency to which funds for the grant were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant.
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is incorporated under the laws of the State; and
 - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided.
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is determined and designated to be a non-profit organization by the Internal Revenue Service; and
 - b) Has a governing board whose members have no material conflict of interest and serve without compensation.

Pursuant to Section 42F-103, Hawaii Revised Statutes, for grants used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant was awarded and disposes of the land in fee simple or by lease, the organization shall negotiate with the expending agency for a lump sum or installment repayment to the State of the amount of the grant used for the acquisition of the land.

Further, the undersigned authorized representative certifies that this statement is true and correct to the best of the applicant's knowledge.

ORI Anuenue Hale Inc.
(Typed Name of Individual or Organization)


(Signature) January 29, 2015
(Date)


(Typed Name) President and CEO
(Title)

Board of Directors



ORI ANUENUE HALE INC.

WELLNESS CENTER

VOCATIONAL TRAINING

- CONTRACT SERVICES
- FOOD PREP & SERVICE
- AQUACULTURE
- AGRICULTURE
- CAREGIVER
- CUSTODIAL / JANITORIAL
- MESS ATTENDANT
- OTHER INDUSTRY SERVICES

ELDER CARE PROGRAM

- HEALTH & WELLNESS PROGRAM
- ADULT DAY CARE / DAY HEALTH
- FAMILY CAREGIVER TRAINING,
RELIEF & SUPPORT SERVICES
- SENIOR OUTREACH SERVICES

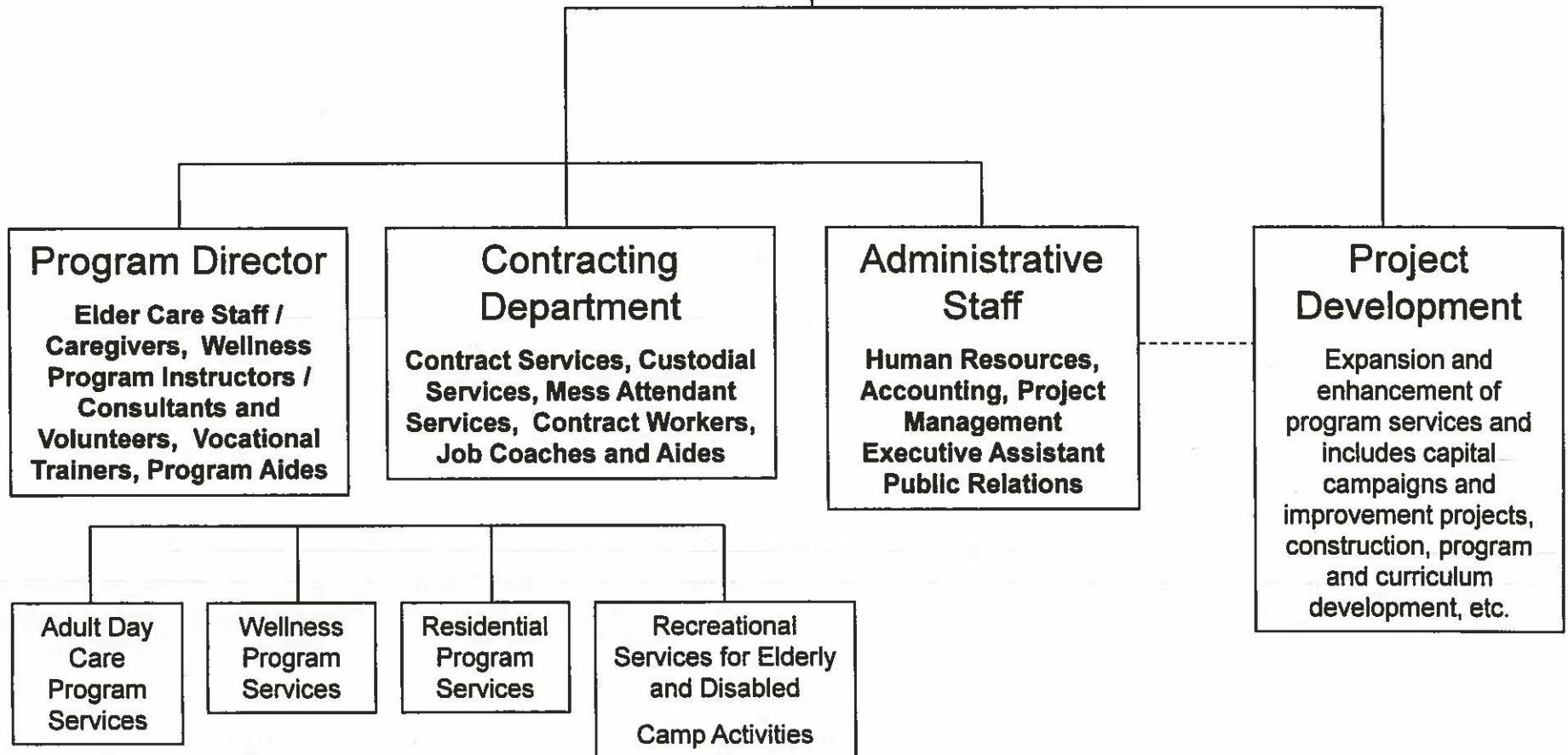
CAMP  808

- CAMP RECREATION
- CAMP 808 PAVILION
- CAMP 808 REC CENTER
- ANTHURIUM HALE
- LAUAE LODGE
- CABINS



Board of Directors

President & CEO





Department of Commerce and Consumer Affairs

CERTIFICATE OF GOOD STANDING

I, the undersigned Director of Commerce and Consumer Affairs of the State of Hawaii, do hereby certify that

ORI ANUENUE HALE, INC.

was incorporated under the laws of Hawaii on 12/17/1993 ; that it is an existing nonprofit corporation; and that, as far as the records of this Department reveal, has complied with all of the provisions of the Hawaii Nonprofit Corporations Act, regulating domestic nonprofit corporations.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the seal of the Department of Commerce and Consumer Affairs, at Honolulu, Hawaii.

Dated: January 16, 2015

Interim Director of Commerce and Consumer Affairs

