

**THE THIRTIETH LEGISLATURE  
APPLICATION FOR GRANTS  
CHAPTER 42F, HAWAII REVISED STATUTES**

Type of Grant Request:

Operating                       Capital

Legal Name of Requesting Organization or Individual:    Db:                      Home Health by Hale Makua  
Hale Makua Health Services

Amount of State Funds Requested: \$ 450,000.00

Brief Description of Request (Please attach word document to back of page if extra space is needed):

Home Healthy by Hale Makua respectfully requests capital funds for improvements to their over 50 year old building that houses their operations. These improvements will create a safer environment for patients, caregivers and staff that aims to develop the space into a hub for Hale Makua's growing Home and Community Based Services programs. In-home services is the most affordable option for families, the state and for taxpayers and are critical to the overall health and well-being of our rapidly growing aging population. These funds will enable Home Health by Hale Makua to increase +

Amount of Other Funds Available:

State:            \$ 0  
Federal:        \$ 0  
County:        \$ 0  
Private/Other: \$ 6,500.00

Total amount of State Grants Received in the Past 5 Fiscal Years:

\$ 5,632,686.94

Unrestricted Assets:

\$ 10,224,847.00

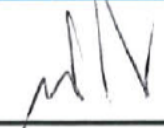
New Service (Presently Does Not Exist):     Existing Service (Presently in Operation):

Type of Business Entity:  
 501(C)(3) Non Profit Corporation  
 Other Non Profit  
 Other

Mailing Address:  
472 Kaulana Street  
City:                      State:                      Zip:  
Kahului                      HI                      96732

Contact Person for Matters Involving this Application Wesley Lo	
Name: Wesley Lo	Title: CEO
Email: WesL@halemakua.org	Phone: 808.871.9217

Federal Tax ID#: <span style="background-color: black; color: black;">XXXXXXXXXX</span>	State Tax ID# <span style="background-color: black; color: black;">XXXXXXXXXX</span>
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\_\_\_\_\_  
Authorized Signature                      Wesley Lo, CEO                      \_\_\_\_\_                      01/19/2022  
Name and Title                      Date Signed

Continuation of brief description of request:

their capacity of services and staff to provide care to homebound patients on Maui.



**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:** Hale Makua Health Services

**Issue Date:** 01/05/2022

**Status:** Compliant

Hawaii Tax#: W014039445201  
New Hawaii Tax#: GE-1247440896-01  
FEIN/SSN#: XX-XXX0460  
UI#: XXXXXX0020  
DCCA FILE#:

**Status of Compliance for this Vendor on Issue date:**

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	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 compliance
Pending	A status determination has not yet been made
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

## Application Submittal Checklist

*The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.*

- 1) Certificate of Good Standing (If the Applicant is an Organization)
- 2) Declaration Statement
- 3) Verify that grant shall be used for a public purpose
- 4) Background and Summary
- 5) Service Summary and Outcomes
- 6) Budget
  - a) Budget request by source of funds ([Link](#))
  - b) Personnel salaries and wages ([Link](#))
  - c) Equipment and motor vehicles ([Link](#))
  - d) Capital project details ([Link](#))
  - e) Government contracts, grants, and grants in aid ([Link](#))
- 7) Experience and Capability
- 8) Personnel: Project Organization and Staffing



WESLEY LO, CEO

01/10/2022

AUTHORIZED SIGNATURE

PRINT NAME AND TITLE

DATE



## Application for Grants

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

### **I. Certification – Please attach immediately after cover page**

#### **1. 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, 2021.

See attached Certificate of Good Standing.

#### **2. Declaration Statement**

The applicant shall submit a declaration statement affirming its compliance with [Section 42F-103, Hawaii Revised Statutes](#).

See attached signed Declaration Statement.

#### **3. Public Purpose**

The applicant shall specify whether the grant will be used for a public purpose pursuant to [Section 42F-102, Hawaii Revised Statutes](#).

Public purpose of the grant:

- Improved efficiency and quality of skilled care provided by specialized staff within homes, thereby preventing premature institutionalization, unnecessary/inappropriate hospitalizations and avoiding readmittance to a skilled nursing facility or hospital (the most expensive places for care). Thus, improved home health services will result in decreasing overall cost of care.

Services to be supported by the grant:

- Home Health services including skilled nursing (defined as high intensity care that can include services like intravenous injections, catheters, feeding tubes and other specialized needs that can only be given by a registered nurse or doctor), occupational therapy, physical therapy, speech therapy, social work.

Target audience impacted:

- Elderly or frail adults, usually aged 65 years and older that are primarily homebound and require short-term skilled care and / or high intensity rehabilitation.

## **II. 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;

### Hale Makua Health Services

Hale Makua Health Services (HMHS) was established by the Maui community in 1946, shortly after World War II, to care for frail, vulnerable elders who needed 24-hour care and support, and who had no family to care for them or resources to provide the care. From its humble beginning over 75 years ago, HMHS has grown from a single 24-bed residential home to two nursing homes with rehab centers, a home health care agency, an adult day health center (adult day health operations are temporarily suspended due to COVID-19 pandemic), and an adult residential care home. Our mission, "to improve the well-being of those in our care through compassionate personalized health services, in our home and yours" reflects our commitment to providing quality care with competence and compassion to Maui's frail elders and disabled individuals of all ages throughout the continuum of healthcare services that the organization provides, both residing at their home (community-dwelling) and those living in nursing facilities.

HMHS' two nursing homes include attached rehab centers, which have a total of 344 federally and state licensed beds for providing skilled and intermediate nursing care services, including in-patient and out-patient physical, occupational and speech therapy. HMHS is the largest long-term care provider on the island of Maui, serving about 750 individuals annually and discharging over 50% of individuals served back to their own home. The only other nursing home provider in Maui is Kula Hospital with 104 beds.

The Adult Day Health Center is the only licensed Adult Day Health program on the island of Maui and provides day care services and an exercise program for clients during the day, caring for about 75 seniors annually. Currently, this service has been temporarily shut down due to its location within our skilled nursing facility and COVID-19 restrictions.

In 2013, HMHS converted a wing of the Wailuku nursing home that had been closed due to a severe decline in census to a licensed Adult Residential Care Home for up to 22 residents. The care home provides care for individuals who need supervision and some assistance with activities of daily living. The care home serves about 25 individuals annually, including respite care from three to 30 days.

In preparation for the rapidly growing aging population, coined the "silver tsunami," Hale Makua has led a collaborative group of key Maui organizations to progress workforce development efforts throughout the county. This collective group convenes

monthly and focuses on building Maui's nursing workforce to address the current shortage of Licensed Practical Nurses (LPNs) and in anticipation of the growing need for more nurses (CNAs, LPNs and RNs). As such, HMHS has created a nursing workforce development program which includes a Nurse Aide Training and Apprenticeship Programs, a LPN Pathway in partnership with the University of Hawai'i Maui College (UHMC), and LPN and RN Residency Programs. Most recently, HMHS and UHMC have built virtual education and training modules for Community Health Workers (CHW) to fill the gaps in care experienced by many families with elderly loved ones. The training enables these individuals to support families, providers and individuals with care navigation, assistance in activities of daily living and other respite care needs.

### Home Health by Hale Makua

Home Health by Hale Makua services those community-dwelling patients who are homebound as well as those who are discharged from Hale Makua's two nursing homes. Home Health by Hale Makua is a CHAP-accredited home health care agency, providing skilled nursing and therapy (physical, occupational and speech) services in the comfort of clients' homes. Today, about 300 individuals are served annually through home health.

#### 2. The goals and objectives related to the request;

- Provide a safe, accessible and efficient space for home health clients, caregivers, families and staff.
  - o The current building is over 50 years old and needs an electrical and plumbing upgrade for safety and efficiency.
- Increased usable space by renovating interior floorplan of current building
  - o With improvements, home health services will be able to use all 2,000 square feet of interior area and include appropriate storage solutions for the increase in necessary personal protective equipment (PPE). Currently, about 1,700 square feet is a usable space for services.
- Better accessibility to care for patients and families who require 24/7 support
  - o Improvements will enable a space for clients, families and caregivers to comfortably visit when necessary. Currently the space constraints make it usable primarily for administrative offices only.
- Improved retention and recruitment for home health staff including therapists, home health aides, nursing, social workers, administrative
  - o Today, there are already dire staffing shortages throughout the healthcare industry. Looking into the future, most of the job growth will be in home care, which is projected to add just over a million new jobs (46% growth) within the next decade. *(Source: U.S. Bureau of Labor Statistics (BLS), Employment Projections Program (EPP). 2019. Employment Projections: 2018-28, National Employment Matrix – Occupation. Analysis by PHI – September 17, 2019)*

- Overall cost savings for insurance plans, taxpayers, State of Hawai'i and families/ individuals for in-home care versus care within an institution
  - o The average cost to care for an individual per day at the hospital is \$1,500 versus an estimated \$350 – 800 at a nursing home and an average of \$250 - \$300 per visit for home health.

3. The public purpose and need to be served.

The public purpose for this grant is improved efficiency and quality of skilled care provided by specialized staff within homes, thereby preventing premature institutionalization, unnecessary / inappropriate hospitalizations and avoiding readmittance to a skilled nursing facility or hospital (the most expensive places for care). Thus, improved home health services will result in decreasing overall cost of care.

Major Drivers of Home Health Care:

- o Population and Growth in the age segment
- o IOM Triple Aim
  1. Improve patient experience (most patients prefer home to facility care)
  2. Improve health of population (elderly population is largest and growing)
  3. Reducing per capita cost through Medicare programming
    - Medicare Hospital Value Based Purchasing (HVBP)
    - Hospital Readmission Reduction Program (HRRP)

4. Describe the target population to be served.

Target population to be served will be elderly or frail adults, usually aged 65 years or more that are primarily homebound and require short-term skilled care and/ or high intensity rehabilitation. There are many high-risk and the most expensive patients that are frequently visiting the emergency room instead of receiving routine check-ups or regular medical care.

Population trends are rapidly increasing the need and scope of services for home health care. Most people enrolled in Medicare today have three or more chronic conditions (65 percent), half live below the poverty line, and nearly one-third (31 percent) have cognitive or mental impairment. Additionally, the growth in size of this population by comparing the numbers of Americans aged 65 years and older in 2002



(35.5 million) and 2012 (43.1 million). Estimates for 2040 are that some 80 million Americans will be age 65 years and older and about 29 million of those individuals will have some degree of disability. Meanwhile, the number of Americans ages 85 years and older is projected to grow from 5.9 million to about 14.1 million in 2040. (Source: U.S. National Library of Medicine National Institute of Health, *The Future of Home Health Care, A Strategic Framework for Optimizing Value*)

In 2017, 15,200 community-dwelling (defined as people who do not live in an institution or other group-living facility) adults aged 65 and older in Hawai'i had difficulty caring for themselves (Source: *Hawai'i Business Magazine, Our Kūpuna, Our Kuleana: Senior Care Crisis in Hawai'i via UH Center on the Family*). This number has increased, and acuity of illness has worsened since the onset of the COVID-19 pandemic brought on a decrease in regular doctor visits and annual wellness visits.

5. Describe the geographic coverage.

Home Health by Hale Makua serves all geographic locations on Maui Island.

### **III. 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;
  - A. Acquisition of bids for installation of new electrical services and recommendation of a contractor to complete project
    - i. Maintenance Director with approval by CEO
  - B. Remove all furnishings, remove cabinets and wall, ceiling coverings to framing as needed
    - ii. Maintenance Staff with supervision my Maintenance Director
  - C. Acquisition of bids to replace water lines as needed and recommend a contractor to complete project
    - iii. Maintenance Director with approval by CEO
  - D. Acquisition of bids for installation of new fiber data internet service and phone systems as needed and recommendation to complete project
    - iv. IT Director with approval by CEO
  - E. Painting, drywall and flooring completion
    - v. Maintenance Staff with supervision my Maintenance Director
  - F. Acquisition of bids for landscape upgrades to improve water drainage away from building and recommendation to complete project
    - vi. Maintenance Director with approval by CEO

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

Once grant funds are released and contract executed, beginning of work demolition and renovations will take approximately 6 months.

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

Home Health by Hale Makua plans for evaluating this request include continuing to closely measure census, improvement of health outcomes, length of stay, efficiency of the operations, staffing recruitment and retention and cost of care. The organization has analytic software and dashboard data in place to measure the impact of this request. In addition, the electrical portion of the renovation will be conducted through a licensed electrician under a county permit.

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, the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.

Home Health by Hale Makua will submit quarterly financial and capital project progress reports to the state department assigned to interface with the project. Variances from budget and timeframe will be communicated clearly and in a timely manner. The measures of effectiveness to the state will be measured by the organizations' ability to

- Complete the renovation project within the six-month timeframe, adding increased usable interior space
- Improved health outcomes and increases census for Home Health clients
- Increased staff efficiency, recruitment and retention
- Improved satisfaction ratings from families, caregivers and clients
- Overall cost savings of care for high-risk clients

#### IV. Financial

##### **Budget**

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
  - a. Budget request by source of funds (Link)
  - b. Personnel salaries and wages (Link)
  - c. Equipment and motor vehicles (Link)
  - d. Capital project details (Link)

e. Government contracts, grants, and grants in aid (Link)

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2023.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$225,000.00	\$225,000.00	\$0.00	\$0.00	\$450,000.00

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2023.

- HMHS Fundraisers: \$150,000
- Maui County DHHC for Physician Services: \$100,000
- Various Private Foundations: \$250,000
- Hawaii Community Foundation for Adult Day Health: \$40,000

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 as HMHS is a 501(c)3 organization.

5. The applicant shall provide a listing of all federal, state, and county government contracts, grants, and grants in aid it has been granted within the prior three years and will be receiving for fiscal year 2023 for program funding.

- Maui County CDBG for Hale Makua Kahului Fire Alarm System in FY19: \$212,000
- Maui County CDBG for Hale Makua Wailuku Fire Alarm System in FY19: \$52,026
- Maui County CDBG for Hale Makua Wailuku Facility Rehab in FY19: \$65,750
- State Capital GIA for Wander Guard System in FY19: \$175,000
- Maui County for Physician Services in FY19: \$100,000
- State Operational GIA for Under and Uninsured in FY20: \$285,000
- State Capital GIA for Master Planning in FY20: \$200,000
- Maui County for Master Planning in FY20: \$200,000
- Maui County CDBG for Boiler Upgrade in FY20: \$250,000
- Maui County OED for Community Outreach and Survey: \$49,500
- Maui County for Physician Services in FY20: \$100,000
- State DLIR Workforce Development in FY20: \$60,000
- Maui County for Physician Services in FY21: \$100,000
- State DLIR for Workforce Development in FY21: \$60,000
- Maui County for Master Planning in FY21: \$200,000

- Maui County CARES for Healthcare in FY21: \$2,319,000
- Maui County CDBG for Elevator Upgrade in FY21: \$228,000
- Maui County CDBG for Freezer Upgrade in FY21: \$187,000
- Maui County for Physician Services in FY21: \$100,000
- Maui County for Lanai Adult Day Health in FY21: \$350,000
- Maui County for Physicians Services in FY23: \$100,000
- Maui County ARPA for Workforce Development in FY23: \$2,500,000

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2021.

Financial Statements as of December 31, 2021, have not yet been finalized but as of November 30, 2021 HMHS's unrestricted current assets is approximately \$10,224,847 and at November 30, 2020 the balance was approximately \$9,892,921.

## **V. Experience and Capability**

### **1. 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.

Hale Makua Health Services (HMHS) is well equipped and staffed with over 450 employees to provide healthcare services for the frail elderly and disabled. The organization has been providing care for the elderly in the Maui community since 1946.

HMHS owns and operates two of the three nursing homes on Maui. The only other nursing home on Maui is at Kula Hospital, which is a critical access hospital. HMHS' nursing homes and rehab centers are both located in Central Maui. In addition, HMHS has operated a CHAP accredited home health care agency that provides home-bound individuals with skilled nursing and therapy for over 45 years, a state licensed adult day health center for over 25 years, and most recently opened a state licensed adult residential care home in 2013.

HMHS has been working for the past five years with Maui Memorial Medical Center and Kula Hospital to address the current and future needs of Maui's aging population. In collaborating with Maui's hospitals, the organizations have improved local capacity and coordination of care, allowed the organizations to work collaboratively to tackle other challenges in the current healthcare delivery system, as well as explored strategies to strengthen the continuum of care from acute to the post-acute settings on Maui, as well as actively manage the waitlist.

For many years HMHS has worked with Maui Economic Opportunity to provide transportation for nursing home residents and homebound clients. Because of this collaboration long-term care residents can go to dialysis appointments three times per week, and community-dwelling clients receive transportation from their homes to the Adult Day Health Center in Kahului.

HMHS has been collaborating with the University of Hawaii Maui College for the past two years to create a Licensed Practical Nurse (LPN) program that provides on-site clinical training at Hale Makua Wailuku. The goal of the training is to create an LPN nursing tract for students which will hopefully help alleviate the organization's shortage of LPNs. We are now beginning our third cohort of LPN students and have expanded our Nursing Workforce Development program to include LPN and RN residencies, as well as a CNA Apprenticeship.

In addition to the care services HMHS provides, the organization houses a highly skilled and experienced maintenance team. With 12 full time staff servicing the two nursing facilities, adult day health and home health, this team will take the lead on all demolition, construction and renovation of the home health facilities, funded by this grant.

## **2. 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.

Hale Makua Health Services (HMHS) operates two nursing homes with attached rehab centers, one in Kahului, Maui with 254 SNF/ICF beds and the other in Wailuku with 90 beds. These nursing home beds comprise seventy-five percent (75%) of all long-term care beds on Maui. Home Health by Hale Makua occupies 2,000 square feet of the Wailuku location.

## **VI. Personnel: Project Organization and Staffing**

### **1. 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.

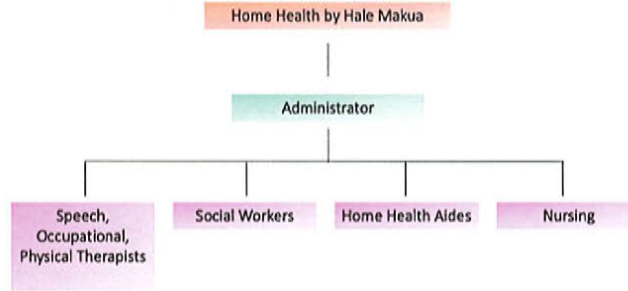
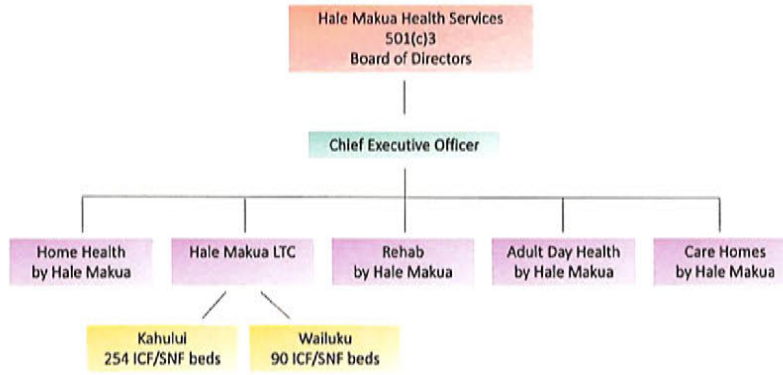
In addition to over 75 years of experience running nursing homes on Maui, HMHS has a team of highly qualified staff who will be responsible for implementing this request:

- The CEO, Wesley Lo, will be responsible for providing oversight for this project. He has over 18 years of experience in the healthcare industry on Maui. Most recently he served as the CEO of Maui Memorial Medical Center and led the transition of the public hospital to a partnership with Kaiser Permanente.
- Vice President, Kirsten Szabo, will be responsible for assisting the Chief Financial Officer with managing the financial aspects of the project including oversight for financial assessments, billing and fiscal reporting; and will be responsible for quarterly reports to the State. She has over 24 years of business and finance experience with 16 years in the healthcare industry.
- HMHS Director of Communications & Development, Ashley Takitani Leahey, will be responsible for detailed project management and grant coordination. She has over a decade of experience in working with varying non-profit organizations on Maui.
- HMHS Director of Maintenance, Mark Souza, will be the construction project manager with over 30 years' experience with Hale Makua with capital project management as well as daily maintenance supervision of twelve full-time staff.
- Home Health Administrator, Jill Shinno, brings 36 years of nursing experience including home care, ambulatory care, hospital care and quality for health plan and organizations. An APRN since 1995 and RN since 1985.
- Home Health by Hale Makua Team - Once admitted as a home health patient, an interdisciplinary team comprised of nursing staff, therapists and clinicians. In total, Home Health by Hale Makua employs six administrative positions, nine clinical positions and nine specialized therapists to provide care.

## **2. Organization Chart**

The applicant shall illustrate the position of each member of 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.





### 3. Compensation

The applicant shall provide an annual salary range paid by the applicant to the three highest paid officers, directors, or employees of the organization by position title, not employee name.

Administrator: \$162,019

Chief Human Resources Officer: \$134,415

Assistant Administrator: \$130,000

## VII. Other

### 1. 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.

To the best of our knowledge, there is no pending litigation to which Hale Makua Health Services is a party, including any outstanding judgements.

## **2. 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.

Home Health by Hale Makua is CHAP Accredited and in compliance with federal and state survey regulations.

Both Hale Makua Health Services' nursing homes in Kahului and Wailuku are federally and state licensed and surveyed for licensure and compliance with federal and state long-term care facility regulations annually.

## **3. 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.

## **4. Future Sustainability Plan**

The applicant shall provide a plan for sustaining after fiscal year 2022-23 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2022-23, but
- (b) Not received by the applicant thereafter.

If funding to renovate the location providing home health care services for those who need in-home care is received in fiscal year 2022 - 23, but not in future years, Hale Makua will be able to continue cost effective services to clients.

Without the grant of this funding opportunity, Home Health by Hale Makua would not be able to meet the demand to grow their services and care for these homebound individuals. This would result in an increase in hospitalizations, institutionalized care and urgent care visits to facilities that are already spread thin and lacking appropriate capacity and bed space. Overall, the cost of care for these individuals would increase for families, taxpayers, the State of Hawai'i and for their insurance plans.

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

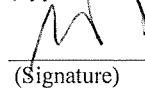
The undersigned authorized representative of the applicant certifies the following:

- 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.

Hale Makua Health Services  
(Typed Name of Individual or Organization)

  
(Signature)

01/10/2022  
(Date)

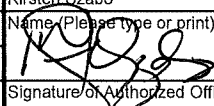
Wesley Lo  
(Typed Name)

CEO  
(Title)

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2022 to June 30, 2023

Applicant: Hale Makua Health Services

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
A. PERSONNEL COST				
1. Salaries				5,000
2. Payroll Taxes & Assessments				388
3. Fringe Benefits				1,112
TOTAL PERSONNEL COST				6,500
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island				
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				
6. Supplies				
7. Telecommunication				
8. Utilities				
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TOTAL OTHER CURRENT EXPENSES				
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL	450,000			
<b>TOTAL (A+B+C+D+E)</b>	<b>450,000</b>			<b>6,500</b>
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	450,000	Kirsten Szabo 808.873.6620		
(b) Total Federal Funds Requested		Name (Please type or print) Phone		
(c) Total County Funds Requested				
(d) Total Private/Other Funds Requested	6,500	Signature of Authorized Official Date		
<b>TOTAL BUDGET</b>	<b>456,500</b>	Kirsten Szabo Vice President 1/19/22		
		Name and Title (Please type or print)		



### BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2022 to June 30, 2023

Applicant: Hale Makua Health Services

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
N/A - request is capital funds for infrastructure development			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:			\$ -	

JUSTIFICATION/COMMENTS:

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
N/A - request is capital funds for infrastructure development			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:			\$ -	

JUSTIFICATION/COMMENTS:



## BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2022 to June 30, 2023

Applicant:    Hale Makua Health Services   

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2020-2021	FY: 2021-2022	FY:2022-2023	FY:2022-2023	FY:2023-2024	FY:2024-2025
PLANS						
LAND ACQUISITION			-			
DESIGN			15,000.00			
CONSTRUCTION			385,000.00			
EQUIPMENT			50,000.00			
<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>450,000.00</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>JUSTIFICATION/COMMENTS:</b>						
Construction is to create a central hub that will serve as a space for all home and community based service teams to perform administrative work, training, and collaborate on how to best serve the needs of shared clients.						

**GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID**

Applicant: Hale Makua Health Services

Contracts Total: 3,925,000

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)</b>	<b>CONTRACT VALUE</b>
1	Master Planning FY21	6/14/21-6/30/22	DHHC	Maui County	200,000
2	Physician Services	7/1/20-6/30/23	DHHC	Maui County	200,000
3	Elevator Upgrade	11/10/21-11/10/22	CDBG	Maui County	228,000
4	Freezer Upgrade	11/11/21-11/11/22	CDBG	Maui County	187,000
5	Lanai Adult Day Health	06/30/21-12/31/22	OED	Maui County	350,000
6	Master Planning	Contract Pending	Grant in Aid- DLIR	State of Hawaii	200,000
7	Workforce Development, Pathways Sustainabil	4/1/21-3/31/22	DLIR	State of Hawaii	60,000
8	ARPA for Workforce Development	Contract Pending	Department of Finance	Maui County	2,500,000
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