

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

Type of Grant Request:



Operating



Capital

Legal Name of Requesting Organization or Individual: Dbā:
Hale Mahaolu

Amount of State Funds Requested: \$ 297,843.00

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

As a pillar affordable housing and elderly care organization serving Maui County, Hale Mahaolu employs a truly comprehensive approach to directly address Maui County's affordable housing crisis and independent living crises faced by many of our friends and neighbors.

Hale Mahaolu's essential wrap around services are designed to directly address and support Maui County's most vulnerable populations in the areas of independent living, nutrition and hungry relief, and homeownership. Wrap around services include affordable certified Personal Care, Meals, and Housing Counseling Programs that greatly extend the reach far beyond the affordable housing communities managed by Hale Mahaolu. It is through the wrap around community programs that our team is able to reach the broader Maui County community and create positive county-wide impact.

Affordable housing, food insecurity, proper nutrition, and kūpuna (elderly) care have all been identified by our team as high-priority community needs that require proper intervention to meaningfully address these needs.

Amount of Other Funds Available:

State: \$ 297,843
Federal: \$ 0
County: \$ 150,000
Private/Other: \$ 89,353

Total amount of State Grants Received in the Past 5

Fiscal Years:

\$ 100,000

Unrestricted Assets:

\$ 15,038,058

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:

200 Hina Avenue

City:

Kahului

State:

HI

Zip:

96732

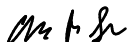
Contact Person for Matters Involving this Application

Name:
Anders Lyons

Title:
Executive Director

Email:
alyons@halemahaolu.org

Phone:
808-872'4100



Anders Lyons (Jan 17, 2025 08:14 HST)

Anders Lyons

January 17, 2025

Authorized Signature

Name and Title

Date Signed






State Grant in aid 2025 Hale Mahaolu

Final Audit Report

2025-01-17

Created:	2025-01-17
By:	JoAnn Inamasu (jinamasu@halemahaolu.org)
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"State Grant in aid 2025 Hale Mahaolu" History

-  Document created by JoAnn Inamasu (jinamasu@halemahaolu.org)
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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. Hawaii Compliance Express Certificate (If the Applicant is an Organization)

If the applicant is an organization, the applicant shall submit one (1) copy of a Hawaii Compliance Express Certificate from the Comptroller of the Department of Accounting and General Services that is dated no earlier than December 1, 2024.

See Attached Certificate of Vendor Compliance dated 01/09/2025

2. Declaration Statement

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

Hale Mahaolu, a 501(c)(3) nonprofit organization, is in compliance with Section 42F-103, Hawaii Revised Statutes.

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](#).

Pursuant to Section 42F-102, Hawaii Revised Statutes, all funding requested via this grant application will be used for public purposes, supporting affordable housing and essential services for Maui County's very low to moderate income kūpuna population, families, and individuals.

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 Mahaolu, a Hawai'i-based 501(c)(3) non-profit corporation, was organized in 1967 and has served as a sponsor, developer, owner, and manager of 19 different properties (approximately 1,300 units) for Maui County including the islands of Moloka'i and Lana'i. As a pillar social services organization, the corporation's purpose is to develop and manage safe, sanitary, decent housing as well as provide supportive services for very low to moderate income seniors, families, and individuals in Maui County. Our objective is to provide rental housing, related facilities, and supportive services specially designed to meet the physical, social, and psychological needs of our residents and to contribute to their health, security, happiness, and usefulness in an independent living setting.

As an organization that believes in upholding the dignity of the residents we serve, Hale Mahaolu breaks the mold of preconceived notions of what a very low to moderate income housing complex should look like. Our properties are clean, manicured, and very well maintained. Additionally, Hale Mahaolu does more than create housing – we create communities. Our housing sites include community halls which serve as gathering places for social interaction, activities, workshops and more. Our Housing Site Managers work closely with the residents to plan events that can be enjoyed by all. Hale Mahaolu is committed to meeting the needs of the Maui community today and tomorrow.

In addition to providing very low to moderate income housing to Maui's most vulnerable populations, Hale Mahaolu cares for kūpuna throughout Maui County through affordable rental housing, caring senior day care services, nutritious homestyle meals served and/or delivered daily, inclusive recreational activities, compassionate personal care services, and homeownership and housing counseling services for island families.

2. The goals and objectives related to the request;

The primary goal of Hale Mahaolu's kūpuna and 'ohana programs is to provide affordable housing and wrap around independent living services to Maui County's most vulnerable populations - very low to moderate income seniors, disabled adults, and ALICE (asset limited, income constrained, employed) families struggling to make ends meet. Hale Mahaolu's housing communities provide affordable housing options for individuals, families, seniors, and disabled throughout Maui County. Senior housing sites provide residents with the flexibility of independent living and the security of community housing. Family sites are situated near schools and grocery stores, providing convenient housing locations for our families.

Hale Mahaolu's wrap around services directly support Maui's seniors and families. Each program is designed to strengthen our communities through subsidized personal care services, balanced meal deliveries to seniors and disabled residents, and HUD-approved homeownership and housing counseling services for Maui's ALICE

population. For the purpose of this request, the goals and objectives of the core programs outlined in this proposal are as follows –

Personal Care Program

Goal(s): To prevent premature or inappropriate institutionalization of frail elderly and disabled or chronically ill adults ages 18 years and older; to prevent or remedy abuse or neglect; to promote their self-sufficiency, dignity; and to help them achieve, restore, or maintain quality of independent lifestyles and self-direction.

Objective(s): To provide personal care services, to subsidize the hourly cost of personal care services for kūpuna and disabled adults; to address our waitlist for personal care services.

Meals Program

Goal(s): To help kūpuna and the disabled population maintain an independent lifestyle; and address the nutritional needs of kūpuna and the disabled.

Objective(s): To provide nutritious meals to kūpuna and the disabled population, to support Maui County's Meals on Wheels program.

HUD-certified Housing Counseling Program

Goal(s): To educate first-time homebuyers to understand the home buying and mortgage loan processes, mortgage delinquency and default counseling, rental counseling, and disaster preparedness and long-term disaster recovery.

Objective(s): To provide basic financial literacy and homebuyer education to first time home buyers, mortgage delinquency and default counseling to struggling homeowners, rental counseling, and disaster preparedness and long-term disaster recovery to fire survivors.

3. The public purpose and need to be served;

Hale Mahaolu's essential wrap around services are designed to directly address and support Maui County's most vulnerable populations in the areas of independent living, nutrition and hungry relief, and homeownership. Wrap around services include affordable certified Personal Care, Meals, and Housing Counseling Programs that greatly extend the reach far beyond the affordable housing communities managed by Hale Mahaolu. It is through the wrap around community programs that our team is able to reach the broader Maui County community and create positive county-wide impact.

Affordable housing, food insecurity, proper nutrition, and kūpuna (elderly) care have all been identified by our team as high-priority community needs that require proper intervention to meaningfully address these needs.

4. Describe the target population to be served; and

2024 census data shows that the total adult population in Maui County is 129,494, and of these, 31,837 are seniors, indicating that nearly 24.6% of the adult population is aged 65 or older. Essential wrap around services outlined in this proposal are designed to meet the needs of our kūpuna, disabled, chronically ill, and/or very low to moderate income families residing in Maui County.

5. Describe the geographic coverage.

As a pillar social services organization focused on elderly care, and affordable housing organization for seniors and families, our geographic coverage includes the islands of Maui, Moloka'i, and Lana'i. Our affordable senior housing sites are located in Lāhainā, Wailuku, Kahului, Kīhei, Pukalani, Makawao, Lānai City, and Kaunakakai, along with our family housing in Lāhainā, Kahului, and Pukalani.

Our wrap around services including our affordable Personal Care, our Meals, and our Housing Counseling Programs greatly extend our reach and broaden our sphere of influence far beyond our affordable housing communities. It is through our wrap around community programs that our team is able to reach the broader Maui County community and create county-wide impact.

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;

As a pillar affordable housing and elderly care organization serving Maui County, Hale Mahaolu employs a truly comprehensive approach to directly address Maui County's affordable housing crisis and independent living crises faced by many of our friends and neighbors.

Hale Mahaolu's provides affordable housing and wrap around independent living services to Maui County's most vulnerable populations - very low to moderate income seniors and families. Our programs are designed to address essential community needs including affordable housing, food insecurities, nutritional needs, compassionate kūpuna (elderly) care, and uplifting educational programs focused on financial literacy and homeownership. Our team of dedicated professionals strive to directly address Maui County's most pressing issues with aloha and compassion for all that they serve.

Our Affordable Housing Program for very low to moderate income kūpuna and families currently provides approximately 1,300 units upon 19 properties throughout Maui County including units on Molokaʻi and Lanaʻi. Our communities are designed to meet the physical, social, and psychological needs of our residents and to contribute to their health, security, happiness, and usefulness in independent living settings. Nutritious meals, social activities designed to engage our senior's minds and spirits, recreational activities to keep our residents healthy, and social programs that keep our residents connected to one another.

Personal Care Program

Since 1985, our Personal Care Program has been serving Maui County's frail elderly and disabled and/or chronically ill adults. Personal care services including home bathing, procedures like bowl and bladder care, medication reminders, home management services such as cleaning and simple meal prep, and in-home respite, providing temporary relief for primary caregivers are all conducted with a sense of aloha and a caring touch. Our team coordinates programs which offer homemaker services as well as personal care assistance for individuals residing in Maui County.

Program management for the Personal Care Program will be conducted by the Director of Personal Care for the duration of the one (1) year under this grant. Certified Nurses Aide's will provide personal care services to kūpuna, or disabled patients outlined in each client's individualized care plan. Examples of care services include:

- Personal hygiene and grooming
- Assistance with bowel and bladder care needs
- Assistance with ambulation
- Assistance with transfers
- Assistance with medications that are ordinarily self-administered as ordered by the client's physicians
- Assistance with wound care and respiratory care
- Assistance with feeding, nutrition, meal preparation, and other dietary activities
- Assistance with exercise, positioning, and range of motion to maintain and/or strengthen muscle tone, and prevent contractures, decubitus ulcers, and or deterioration
- Taking and recording vital signs, including blood pressure
- Maintaining environment

HUD-Approved Housing Counseling

Since 1989, Hale Mahaolu has served as a HUD-Approved Housing Counseling Agency for the State of Hawai'i. Our HUD-Certified Housing Counselors provide individualized, tuition-free financial counseling sessions and group education classes on topics such as financial literacy, financial life skills, mortgage counseling, rental counseling, fraud and

scam counseling, and long-term disaster recovery counseling. The courses and corresponding curricula follow National Industry Standards for Homeownership Education and Counseling which is a set of guidelines that promote quality homeownership and counseling services. The Homebuyer Education Completion Certificate and Pre-Purchase Counseling are required by many first-time homebuyer loans and down payment assistance programs.

Program management for the UHD-Approved Housing Counseling will be conducted by the Director of Homeownership and Housing Counseling for the duration of the one (1) year under this grant. Housing Counselors will provide counseling services to clients in all areas of the program. Program subjects covered include:

- Financial Management
- The Homebuying Process
- Homeownership
- Avoiding Foreclosure
- Tenancy
- Fair Housing
- Rights for persons with disabilities
- Renters Rights
- Credit Rating

Meals Program

Since 1990, Hale Mahaolu has worked diligently to address the nutritional needs of Maui County's elderly and disabled populations through our Meals Program. The need for affordable, nutritious, and delicious meals have growth exponentially since 1990, with our culinary team preparing over 1,200 meals per day, seven days a week. In addition to congregate housing meal preparation, additional meals prepared at Hale Mahaolu are delivered to Maui County's elderly and disabled population daily via Meals on Wheels, ensuring that each of our clients receives well-balanced nutritious meals.

Program management will be conducted by Director of Meals Program.

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

Hale Mahaolu will deliver the wrap around services outlined in this proposal from July 1, 2025 – June 30, 2026. Based on the availability of funding, Hale Mahaolu is prepared to adjust its program delivery timeline for accomplishing the results of its wrap around services.

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

Hale Mahaolu prides itself on not only delivering quality results from its core services but maintaining proper and complete records outlining progress toward stated goals, adjustment made to program delivery to ensure the highest quality of services being delivered to clients, budget vs actual financial reports, and other pertinent data used to measure program's impact. Each program director is responsible for maintaining accurate and up-to-date data that is used for reporting purposes to government departments (Executive Office on Aging), funders, and to the general public.

Additionally, Hale Mahaolu staff conduct the following quality assurance and evaluation activities:

- Care plans for each client to ensure individualized service
 - Direct and frequent communication between program staff and clients to ensure that concerns are addressed promptly and documented
 - Periodic assessments, reassessments, and/or revisions to client's individualized care plans
 - Administration of client satisfaction questionnaires on an annual basis
 - Accurate count of the number of meals, classes, interventions, etc. provided to clients
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.

Personal Care Program

- A minimum of 14,000 hours serving elderly and disabled individuals in need of personal care services in Maui County
- 90% satisfaction rating
- 90% of clients receiving personal care services have maintained the quality of independent lifestyle with dignity
- 100% of clients served remain free from harm during the period that personal care is provided
- 90% of primary caregivers will express their satisfaction with respite they receive during personal care services

HUD-approved Housing Counseling

- Offer two 3-hour Homebuyer Education classes twice per month
- Provide individual counseling services to 150 current and potential homebuyers, renters, kūpuna, and residents of Maui County
- Develop homeownership action plans for 50 residents of Maui County

- 50 households will receive rental counseling
- 40 household will receive mortgage delinquency / default counseling

Meals Program

- 1,200 nutritious meals served per day to very low to moderate income Maui County residents
- Provide home delivery services to mobility challenged individuals
- Replace aging and nonfunctioning kitchen equipment needed to prepare nutritious meals to Maui County residents

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 2026.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$75,000	\$75,000	\$75,000	\$72,843	\$297,843

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2026.
 1. U.S. Department of Housing and Urban Development
 2. County of Maui
 3. Hawaii Community Foundation
 4. Fred Baldwin Memorial Foundation
 5. Strong Foundation
 6. Maui Strong Fund, Hawaii Community Foundation
 7. Atherton Family Foundation
 8. Bank of Hawaii Foundation
 9. Cooke Foundation, Ltd.
 10. AARP Community Challenge Grant

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.

Hale Mahaolu has not received state or federal tax credits within the prior three years (2022, 2023, and 2024). Hale Mahaolu does not have any pending state or federal tax credits as of the submission of this application.

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 2026 for program funding.

2024

- State of Hawaii Grant-in-aid, Personal Care Subsidy Program
- County of Maui, Housing and Human Concerns, Homeownership and Housing Counseling Program

2023

- County of Maui Department of Housing and Human Concerns Grant, Personal Care Subsidy Program
- County of Maui, Housing and Human Concerns, Homeownership and Housing Counseling Program

2022

- County of Maui Department of Housing and Human Concerns Grant, Personal Care Subsidy Program
- County of Maui, Housing and Human Concerns, Homeownership and Housing Counseling Program

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2024.

Estimated at \$15,038,058. Actual unrestricted current assets balance for year ending December 31, 2024, will be available mid 2025.

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.

As a pillar affordable housing and kūpuna care organization serving Maui County since 1967, Hale Mahaolu employs a truly comprehensive approach to meaningfully address Maui County's affordable housing, food insecurity, and independent living crises faced by many of our friends and neighbors. Our team is comprised of seasoned veterans in the areas of affordable housing, independent living, healthcare, homeownership, charitable organizations, and culinary and nutritional experts with decades of professional experience.

Hale Mahaolu strives to support Maui County residents by offering an array of services to help them maintain an independent lifestyle. In 1990, Hale Mahaolu addressed the nutritional needs of the elderly and disabled by creating the organization's first meal program in its newly constructed kitchen facility. Since then, the demand for this service has grown substantially and our staff continues to serve clients over 1,200 nutritious, well-balanced meals daily delivered right to their dining tables.

Hale Mahaolu's Personal Care Program has been serving Maui County's frail elderly and disabled and/or chronically ill adults since 1985. Hale Mahaolu coordinates programs which offer homemaker services as well as personal care assistance for individuals residing in Maui County. The goal of these programs is to assist individuals in maintaining an independent lifestyle in their own home and prevent premature or unnecessary institutionalization.

Since 1989, Hale Mahaolu has been a HUD-Approved Comprehensive Housing Counseling Agency servicing the entire State of Hawaii with a primary focus on Maui County (Maui, Lanai, and Molokai) residents. HUD Certified Housing Counselors offer counseling services and workshops at no charge. There is a fee to attend the 8-hour Homebuyer Educational course.

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 Mahaolu provides its wraparound services for very low to moderate income kūpuna, disabled residents, and families of Maui County at nineteen (19) housing communities in Lāhainā, Wailuku, Kahului, Kīhei, Pukalani, Makawao, Lānai City, and Kaunakakai.

Lāhainā – ‘Eono, Komohana Hale, Lāhainā Surf, Crossroads
Wailuku – ‘Ekolu, Lokelani Hale
Kahului – Kahului Lani, Akahi, ‘Ekolu, ‘Elua, ‘Elima, Luana Gardens, Huliau
Kīhei – ‘Ehiku
Pukalani – ‘Ewalu, Kulamalu Hale
Makawao – ‘Eha
Lānai City – Hale Kupuna O Lānai
Kaunakakai – Home Pumehana

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.

Personal Care Program

Position Title	Qualifications	Duties and Responsibilities
Program Director	<ul style="list-style-type: none">• BA, Social Work• CPR Certified• Extensive Management Experience• Experience working with various cultural backgrounds	<ul style="list-style-type: none">• Administers Personal Care Program• Manages client case files• Interfaces with Physicians regarding client care• Amends care plans as needed• Data management• Program budget administration• Administers client subsidy requests• Prepares and administers reporting to partner agencies• Directs and supervises Program Manager

Program Manager	<ul style="list-style-type: none"> • Experience in health care industry • CPR Certified • Experience working with various cultural backgrounds 	<ul style="list-style-type: none"> • Performs client interviews • Register personal care attendants • Basic office duties • Collect client subsidies requests • Attend CMCP/IDT Meetings • Assist with annual client verifications and updates
Program Supervisor	<ul style="list-style-type: none"> • Registered Nurse Practitioner with current Hawaii State License • CPR Certified • MSN Degree • Experience in acute, long-term geriatric care 	<ul style="list-style-type: none"> • Provides medical consulting services • Conducts joint initial and annual home visits
Personal Care Attendants	<ul style="list-style-type: none"> • Certified Nurse Aide • CPR Certified • Experience with in-home health care 	<ul style="list-style-type: none"> • Perform in-home health care as outlined in client case files • Maintaining a sanitary home environment • Escort service to clinics, Physician's offices, pharmacies, and other health related trips

HUD-approved Housing Counseling

Position Title	Qualifications	Duties and Responsibilities
Program Director	<ul style="list-style-type: none"> • HUD Housing Counseling Certification • Professional Experience in related industry • Management Experience 	<ul style="list-style-type: none"> • Provides leadership for program • Leads Homebuyer Education classes and workshops • Leads employee training

		<ul style="list-style-type: none"> • Organizes and monitors program goals • Ensures program compliance with government regulations • Manages reporting • Client and partner outreach •
HUD-certified Housing Counselors (1 FTE and .50 FTE)	<ul style="list-style-type: none"> • HUD Housing Counseling certification • Experience in related industry 	<ul style="list-style-type: none"> • Performs client intake through CMS • Conducts Homebuyer Education classes • Manages client's casework • Conducts all counseling services • Assists clients in developing personal budgets and establishing financial goals. • Conducts quarterly reporting • Assists clients while securing mortgages
Intake Specialist (1 FTE)	<ul style="list-style-type: none"> • Customer Service • Client intake experience 	<ul style="list-style-type: none"> • Receives initial calls and triage if necessary • Scheduling • Maintain client case files and mandatory documents • Conducts post-purchase follow-up

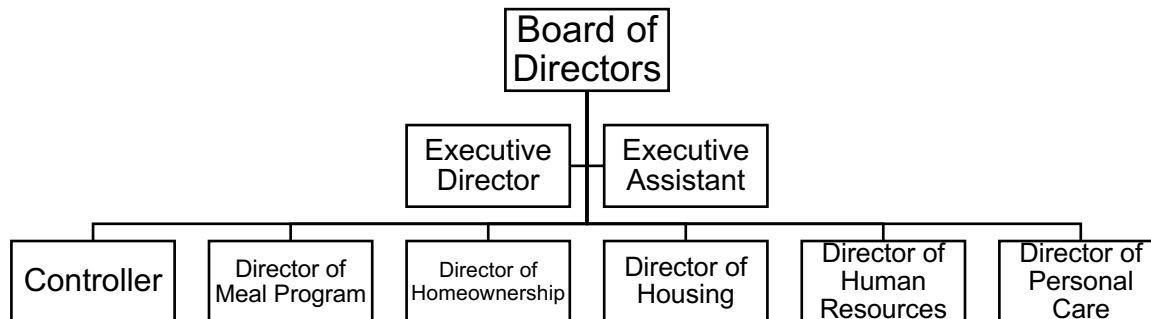
Meals Program

Position Title	Qualifications	Duties and Responsibilities
Program Director	<ul style="list-style-type: none"> • Executive Chef 	<ul style="list-style-type: none"> • Provides leadership for program

	<ul style="list-style-type: none"> • (former) Culinary Arts Teacher • Food Service/Kitchen Management Experience 	<ul style="list-style-type: none"> • Creates nutritious menu • Manages kitchen staff • Responsible for budgeting, purchasing, human relations, and business management • Responsible for program reporting requirements – Federal, State, County, and other partners
Kitchen Staff	<ul style="list-style-type: none"> • High school diploma or equivalent • Experience working in commercial kitchen • Thorough knowledge of food safety procedures • Excellent organizational, time management and multitasking abilities • Ability to lift up to 50 pounds • Capacity to work in a fast-paced environment 	<ul style="list-style-type: none"> • Food preparation for subsequent use by the Chef • Storing proteins, produce, and ingredients in accordance to prescribed food safety regulations • Assist with monitoring of inventory • Assist with deliveries receiving • Maintaining clean workspace, equipment, and food storage areas in accordance with food safety regulations
Drivers	<ul style="list-style-type: none"> • State of Hawaii Driver's License • Clean driving abstract • Automobile Insurance • Access to automobile 	<ul style="list-style-type: none"> • Responsible for timely delivery of meals to kūpuna and disabled residents across the Island of Maui • Serve as the face of the Meals Program to clients • Interface with clients during the delivery of hot meals

2. 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.



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.

Hale Mahaolu's top three (3) officers, directors, or employees receive the following annual salaries –

Executive Director – \$231,648

Controller – \$158,045

Human Resources Director – \$143,958

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.

Hale Mahaolu is not currently involved with any pending litigation to which they are a party of.

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.

Hale Mahaolu possesses the following licensures and accreditations –

- Home Care Agency Certification, State of Hawai'i
- Approved Comprehensive Housing Counseling Agency, United States Housing & Urban Development (HUD)

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.

In accordance with Article X, Section 1, of the State Constitution, no grant funding will be used to support or benefit a sectarian or no-sectarian private education institution.

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2026 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2026, but
- (b) Not received by the applicant thereafter.

To ensure long-term sustainability of the mission-critical wrap around services after fiscal year 2026, our team has developed the following sustainability plan to continue to provide these services should these programs not receive grant-in-aid funding from the State of Hawai'i beyond fiscal year 2026.

Funding Partnership Expansion - To ensure that the appropriate level of funding is secured to fulfill the wrap around services program's financial obligations and eventually expand the program activities beyond the grant period, Hale Mahaolu Directors will continue to network to establish mutually beneficial partnerships with private foundations, grant making agencies, corporate sponsorship programs and individual donors. As funding opportunities arise, the Hale Mahaolu will submit funding requests in the form of grant proposals, donation solicitations, and corporate sponsorship requests letters.

Program Reach Adjustments - Based upon the level of funding our team is able to secure to fund the wrap around services beyond FY2026, Hale Mahaolu Directors will

adjust the number of Maui County residents that each wrap around service can serve per annum. Our goal is to raise sufficient extramural funding so that our team members will never need to turn away members of our target audiences due to funding limitations.

**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; and
- 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.
- 4) The use of grant-in-aid funding complies with all provisions of the Constitution of the State of Hawaii (for example, pursuant to Article X, section 1, of the Constitution, the State cannot provide "... public funds ... for the support or benefit of any sectarian or nonsectarian private educational institution...").

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 Mahaolu

(Typed Name of Individual or Organization)



Anders Lyons (Jan 17, 2025 08:14 HST)

(Signature)

Anders Lyons

(Date)

Executive Director

(Typed Name)

(Title)






Page 5 GIA Hale Mahaolu

Final Audit Report

2025-01-17

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
"Page 5 GIA Hale Mahaolu" History

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BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2024 to June 30, 2025

Applicant: Hale Mahaolu

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	297,843	0	116,000	0
2. Payroll Taxes & Assessments	0	0	0	0
3. Fringe Benefits	0		34,000	89,353
TOTAL PERSONNEL COST	297,843	0	150,000	0
B. OTHER CURRENT EXPENSES				0
1. Airfare, Inter-Island	0	0	0	
2. Insurance	0	0	0	0
3. Lease/Rental of Equipment	0	0	0	0
4. Lease/Rental of Space	0	0	0	0
5. Staff Training	0	0	0	0
6. Supplies	0	0	0	0
7. Telecommunication	0	0	0	0
8. Utilities	0	0	0	0
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES				
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	297,843		150,000	89,353
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	297,843	Anders Lyons 808-872-4100		
(b) Total Federal Funds Requested	0	Name (Please type or print) Phone		
(c) Total County Funds Requested	150,000	 <small>Anders Lyons (Jan 17, 2025 08:14 HST)</small>		
(d) Total Private/Other Funds Requested	89,353	Signature of Authorized Official Date		
TOTAL BUDGET	537,196	Anders Lyons, Executive Director Name and Title (Please type or print)		






Proposal budget

Final Audit Report

2025-01-17

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BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2024 to June 30, 2025

Applicant: Hale Mahaolu

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Program Director - Personal Care Program	1	\$70,000.00	25	\$ 17,500.00
Program Manager - Personal Care Program	0.5	\$26,000.00	25.00%	\$ 6,500.00
Program Supervisor - Personal Care Program	0.1	\$10,000.00	25.00%	\$ 2,500.00
Personal Care Attendant 1	0.2	\$26,000.00	100.00%	\$ 26,000.00
Personal Care Attendant 2	0.2	\$26,000.00	100.00%	\$ 26,000.00
Program Director - HUD-Approved Housing Counseling	1	\$90,170.00	40.00%	\$ 36,068.00
HUD-certified Housing Counselor - 1 FTE	1	\$64,000.00	35.00%	\$ 22,400.00
HUD-certified Housing Counselor - .50 FTE	0.37	\$15,000.00	30.00%	\$ 4,500.00
Intake Specialist	1	\$52,250.00	30.00%	\$ 15,675.00
Program Director - Meals Program	1	\$89,000.00	25.00%	\$ 22,250.00
Kitchen Staff 1	1	\$51,787.00	100.00%	\$ 51,787.00
Kitchen Staff 2	1	\$51,787.00	100.00%	\$ 51,787.00
Driver 1	0.1	\$24,793.00	30.00%	\$ 7,437.90
Driver 2	0.1	\$24,793.00	30.00%	\$ 7,437.90
TOTAL:				297,842.80
JUSTIFICATION/COMMENTS: All Salaries amounts listed above were derived from actual time commitments by each employee listed above during FY2024. Program Directors provide all direction for programs under their direction. Program manager and supervisor for the Personal Care Program provides direct management and supervision of personal care attendants. HUD-certified Housing Counselors provide housing counseling services to clients. Intake specialist conducts intake duties. Kitchen staff 1 and 2 provides meal prep duties. Drivers 1 and 2 provide delivery services to clients across Maui County.				

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2024 to June 30, 2025

Applicant: Hale Mahaolu

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
N/A			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS: N/A				
				0

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
N/A			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS: N/A				
				0

BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2024 to June 30, 2025

Applicant: Hale Mahaolu

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: 2022-2023	FY: 2023-2024	FY:2024-2025	FY:2024-2025	FY:2025-2026	FY:2026-2027
PLANS	0	0	0	0	0	0
LAND ACQUISITION	0		0	0	0	0
DESIGN		0	0	0	0	0
CONSTRUCTION	0	0	0	0	0	
EQUIPMENT		0	0	0	0	0
TOTAL:	0	0	0	0	0	0
JUSTIFICATION/COMMENTS N/A						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: Hale Mahaolu

Contracts Total: 440,000

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	Housing Counseling (Pending)	7/1/2024-6/30/2025	CoM-DHHC	Maui County	190,000
2	Personal Care Subsidy Program Grant	7/1/2024-6/30/2025	Dept of Housing and Human Concerns	Maui County	150,000
3	Personal Care Subsidy Program Grant	7/1/2024-6/30/2025	Hawaii State Legislature	State	100,000
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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 (DCCA).

Vendor Name: **HALE MAHAOLU**

DBA/Trade Name: **HALE MAHAOLU (Attn: Grant Chun)**

Issue Date: **01/09/2025**

Status: **Compliant**

Hawaii Tax#: 40399534-01

New Hawaii Tax#:

FEIN/SSN#: XX-XXX3109

UI#: XXXXXX5516

DCCA FILE#: 15181

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) Hawaii Compliance Express Certificate (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


Anders Lyons (Jan 17, 2025 10:26 HST)

Anders Lyons, Executive Director

January 17, 2025

AUTHORIZED SIGNATURE

PRINT NAME AND TITLE

DATE






<https://www.capitol.hawaii.gov/sessions/session2025/Docs/GIA/2025> GIA Checklist

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