

## 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



AUTHORIZED SIGNATURE

Anders Lyons  
PRINT NAME AND TITLE

1/22/2026

DATE



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: Anders Lyons)

**Issue Date:** 01/21/2026

**Status:** **Compliant**

Hawaii Tax#: [REDACTED]

New Hawaii Tax#:

FEIN/SSN#: [REDACTED]

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                 |

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

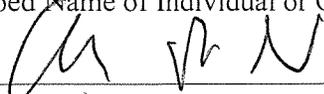
The undersigned authorized representative of the applicant certifies the following:

- 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; 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)

  
(Signature)

1/22/2026  
(Date)

Anders Lyons  
(Typed Name)

Executive Director  
(Title)

## 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, 2025.

See Attached Certificate of Vendor Compliance dated January 21, 2026

#### **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 17 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 housing sites are strategically located near schools and grocery stores, providing convenient housing locations for our kūpuna and families.

Hale Mahaolu’s wrap around services directly support Maui’s seniors and families. Each program is strategically designed to strengthen our communities and support kūpuna to age-in-place 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 financial resources to subsidize hourly costs for personal care services for Maui County's kūpuna and disabled adults; to address the pre-existing county 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, Maui Adult Day Care Centers', and HIDEOE Free or Reduced Lunch programs.

### **HUD-certified Housing Counseling Program**

Goal(s): To educate first-time homebuyers on core homeownership concepts such as 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 strives to meaningfully support Maui County residents by offering a wide array of social services that helps kūpuna and local families maintain their independence for as long as possible. Since 1990, Hale Mahaolu has addressed the nutritional needs of the kūpuna (elderly) and disabled populations by creating the organization's Meals Program currently situated in Kahului, Maui. Since its inception, the demand for its Meals Program has grown substantially and our staff continues to serve clients nutritious well-balanced meals delivered right to their dining tables.

Food insecurity or the lack of access to enough food for an active, healthy life, remains one of Hawai'i's most pressing societal issues. Food insecurity reflects more than a simple shortage of food; it reveals the financial trade-offs and systemic inequalities that prevent island residents from meeting basic needs such as housing, healthcare, and transportation. According to a recent statewide study on food insecurity, 41% of Maui County's population (67,000 individuals) faces food insecurity issues. (The State of Food Insecurity in Hawai'i, 2024-25, Hawai'i Foodbank, Maui Foodbank, Hawaii Foodbank – Kauai, and The Food Basket). We are truly proud of our 36-year commitment to addressing food insecurity issues throughout Maui County.

In addition to its meals program for Maui County kūpuna residents, Hale Mahaolu's Kitchen also prepares lunches for popular Maui County's kūpuna programs such as Meals on Wheels, Maui Adult Day Care Center and HIDEOE free and reduced lunch services during scheduled school breaks. Limited only by our current physical capacity limitations, Hale Mahaolu helps to meet the food insecurity needs of Maui County's vulnerable populations by producing over 550,000 hot, nutritious meals annually.

4. Describe the target population to be served; and

#### **Kūpuna Population**

2025 census data shows that the total adult population in Maui County is **164,007** according to World Population Review, and of these, **31,837** are seniors, indicating that nearly **19.4%** of the adult population are ages 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.

#### **Homeownership & Housing Counseling**

The program's target population consists of all of Maui County (Maui, Lāna'i, and Moloka'i). Counseling services are available to individuals of all income levels. Most recently, the majority of our program participants have fallen within 40%–75% of the median income level. Over the past few years however, there has been an increase in mortgage delinquencies in clients who fall within the 75% – 100%+ of the median income category. At times, counselors have worked with new homeowners finding themselves facing a credit crunch after moving into their new home. Counselors work to prevent this becoming a trend in new homeowners.

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 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 17 properties throughout Maui County including units on Moloka'i and Lana'i. 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 bowel 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

Hale Mahaolu's Personal Care Subsidy Program provides clients who do not qualify for Medicaid and cannot afford to pay the high cost of a caregiver, assistance in sharing that cost for 4 hours of care per day, 7 days a week. Subsidies allow this "gap group" of elderly and disabled individuals to keep their independence and live with dignity surrounded by those they love in their own home.

### **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 grown exponentially since 1990, with our culinary team preparing over 1,600 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.

1. 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, 2026 – June 30, 2027. 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.

2. 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
3. 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**

- 1,600 nutritious meals served per day to very low to moderate income Maui County residents
- Provide home delivery services to mobility challenged individuals

## **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 2027.

| Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Total Grant |
|-----------|-----------|-----------|-----------|-------------|
| \$71,495  | \$71,495  | \$71,495  | \$71,495  | \$285,980   |

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2027.

1. U.S. Department of Housing and Urban Development
2. County of Maui
3. Joseph and Vera Long Foundation
4. Hawaii Community Foundation
5. Fred Baldwin Memorial Foundation
6. Strong Foundation
7. Maui Strong Fund, Hawaii Community Foundation
8. Atherton Family Foundation
9. Bank of Hawaii Foundation
10. Cooke Foundation, Ltd.
11. 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 (2024, 2025, and 2026). 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 2027 for program funding.

2026

- State of Hawaii ACT310
- State of Hawaii Grant-in-aid, Wraparound Services for Maui County
- County of Maui - Dept of Human Concerns, 2 years funding FY 25 & 26 Subsidy Program
- Maui County Office on Aging Personal Care Contract – FY26 Kūpuna Care Program

2025

- State of Hawaii Grant-in-aid, Personal Care Subsidy Program
- County of Maui, Housing and Human Concerns, Homeownership and Housing Counseling Program
- CDRI Center for Dementia Respite Innovation – Dept of Health & Human Services – ACL Year 2

2024

- 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
- CDRI Center for Dementia Respite Innovation – Dept of Health & Human Services – ACL Year 1

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2025.

\$144,899,795

## **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 1,600 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 seventeen (17) housing communities in Lāhainā, Wailuku, Kahului, Kīhei, Pukalani, Makawao, Lānai City, and Kaunakakai.

Lāhainā – ‘Eono, Komohana Hale, Lāhainā Surf

Wailuku – ‘Ekolu, Lokelani Hale

Kahului – Kahului Lani, Akahi, ‘Ekolu, ‘Elua, ‘Elima, Luana Gardens

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**

| <b>Position Title</b> | <b>Qualifications</b>   | <b>Duties and Responsibilities</b>  |
|-----------------------|---|---|
| Program Director      | <ul style="list-style-type: none"> <li>• BS, Psychology &amp; Communications</li> <li>• QSP, Qualified Service Provider</li> <li>• First Responder</li> <li>• CPR/AED Certified</li> <li>• Extensive Management Experience</li> <li>• Experience working with various cultural backgrounds</li> </ul> | <ul style="list-style-type: none"> <li>• Administers Personal Care Program</li> <li>• Manages client case files</li> <li>• Interfaces with Physicians regarding client care</li> <li>• Amends care plans as needed</li> <li>• Data management</li> <li>• Program budget administration</li> <li>• Administers client subsidy requests</li> <li>• Prepares and administers reporting to partner agencies</li> <li>• Directs and supervises Program Specialist &amp; Assistant</li> </ul> |
| Program Specialist    | <ul style="list-style-type: none"> <li>• Experience in health care industry</li> <li>• CPR Certified</li> <li>• Experience working with various cultural backgrounds</li> </ul>   | <ul style="list-style-type: none"> <li>• Performs client interviews</li> <li>• Basic office duties</li> <li>• Collect client subsidies requests</li> <li>• Assist with annual client verifications and updates; home visits and re-assessments</li> </ul>   |
| Program Assistant     | <ul style="list-style-type: none"> <li>• CPR Certified</li> <li>• Experience with in-home health care</li> </ul>  | <ul style="list-style-type: none"> <li>• Maintain client case files</li> <li>• Assist with client reports, communication, office</li> </ul>   |

**HUD-approved Housing Counseling**

| <b>Position Title</b>                                | <b>Qualifications</b>  | <b>Duties and Responsibilities</b>  |
|--|--|---|
| Program Director                                     | <ul style="list-style-type: none"> <li>• HUD Housing Counseling Certification</li> <li>• Professional Experience in related industry</li> <li>• Management Experience</li> </ul> | <ul style="list-style-type: none"> <li>• Provides leadership for program</li> <li>• Leads Homebuyer Education classes and workshops</li> <li>• Leads employee training</li> <li>• Organizes and monitors program goals</li> <li>• Ensures program compliance with government regulations</li> <li>• Manages reporting</li> <li>• Client and partner outreach</li> <li>•</li> </ul>                              |
| Financial Housing Counselor II                       | <ul style="list-style-type: none"> <li>• HUD Housing Counseling certification</li> <li>• Experience in related industry</li> </ul>   | <ul style="list-style-type: none"> <li>• Performs client intake through CMS</li> <li>• Conducts Homebuyer Education classes</li> <li>• Manages client's casework</li> <li>• Conducts all counseling services</li> <li>• Assists clients in developing personal budgets and establishing financial goals.</li> <li>• Conducts quarterly reporting</li> <li>• Assists clients while securing mortgages</li> </ul> |
| HUD-certified Housing Counselors (1 FTE and .50 FTE) | <ul style="list-style-type: none"> <li>• HUD Housing Counseling certification</li> <li>• Experience in related industry</li> </ul>   | <ul style="list-style-type: none"> <li>• Performs client intake through CMS</li> <li>• Conducts Homebuyer Education classes</li> <li>• Manages client's</li> </ul>  |

|                               |  |   |
|-------------------------------|--|---|
|                               |  | <p>casework</p> <ul style="list-style-type: none"> <li>• Conducts all counseling services</li> <li>• Assists clients in developing personal budgets and establishing financial goals.</li> <li>• Conducts quarterly reporting</li> <li>• Assists clients while securing mortgages</li> </ul>                        |
| Community Resource Specialist | <ul style="list-style-type: none"> <li>• Bachelors degree in social work, gerontology, or related field</li> </ul> | <ul style="list-style-type: none"> <li>• Identifies gaps in services</li> <li>• Networks and establishes cooperative relationships with other community agencies</li> <li>• Periodically reviews HM's program effectiveness and measure consumer satisfaction</li> <li>• Provides administrative support</li> </ul> |
| Intake Specialist (1 FTE)     | <ul style="list-style-type: none"> <li>• Customer Service</li> <li>• Client intake experience</li> </ul>           | <ul style="list-style-type: none"> <li>• Receives initial calls and triage if necessary</li> <li>• Scheduling</li> <li>• Maintain client case files and mandatory documents</li> <li>• Conducts post-purchase follow-up</li> </ul>  |

**Meals Program**

| <b>Position Title</b> | <b>Qualifications</b>  | <b>Duties and Responsibilities</b>   |
|-----------------------|--|--|
| Program Director      | <ul style="list-style-type: none"> <li>• Executive Chef</li> <li>• (former) Culinary Arts Teacher</li> <li>• Food Service/Kitchen</li> </ul> | <ul style="list-style-type: none"> <li>• Provides leadership for program</li> <li>• Creates nutritious menu</li> </ul> |

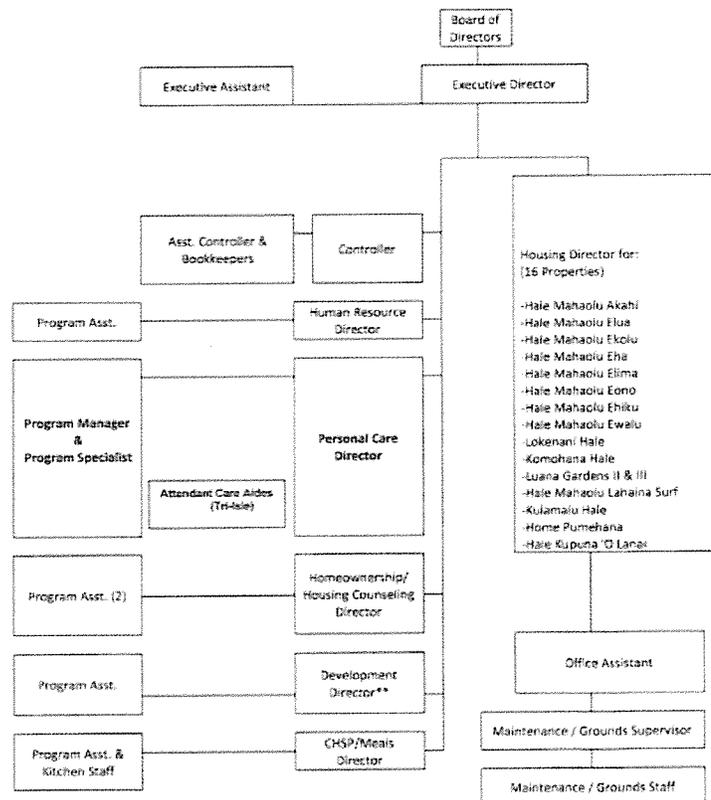
|                   |  |   |
|-------------------|--|---|
|                   | <p>Management Experience</p>   | <ul style="list-style-type: none"> <li>• Manages kitchen staff</li> <li>• Responsible for budgeting, purchasing, human relations, and business management</li> <li>• Responsible for program reporting requirements – Federal, State, County, and other partners</li> </ul>   |
| Program Assistant | <ul style="list-style-type: none"> <li>• Associates degree or higher preferred</li> <li>• Non-profit Organization Experience in areas of grant reporting, program scheduling, and compliance</li> </ul>  | <ul style="list-style-type: none"> <li>• Data Base Management</li> <li>• Grant Reporting</li> <li>• Program Compliance</li> <li>• Scheduling</li> </ul>   |
| Kitchen Staff     | <ul style="list-style-type: none"> <li>• High school diploma or equivalent</li> <li>• Experience working in commercial kitchen</li> <li>• Thorough knowledge of food safety procedures</li> <li>• Excellent organizational, time management and multitasking abilities</li> <li>• Ability to lift up to 50 pounds</li> <li>• Capacity to work in a fast-paced environment</li> </ul> | <ul style="list-style-type: none"> <li>• Food preparation for subsequent use by the Chef</li> <li>• Storing proteins, produce, and ingredients in accordance to prescribed food safety regulations</li> <li>• Assist with monitoring of inventory</li> <li>• Assist with deliveries receiving</li> <li>• Maintaining clean workspace, equipment, and food storage areas in accordance with food safety regulations</li> </ul> |
| Drivers           | <ul style="list-style-type: none"> <li>• State of Hawaii Driver's License</li> <li>• Clean driving abstract</li> <li>• Automobile Insurance</li> <li>• Access to automobile</li> </ul>   | <ul style="list-style-type: none"> <li>• Responsible for timely delivery of meals to kūpuna and disabled residents across the Island of Maui</li> <li>• Serve as the face of the Meals Program to</li> </ul>  |

|  |  |  |
|--|--|--|
|  |  | <p>clients</p> <ul style="list-style-type: none"> <li>• Interface with clients during the delivery of hot meals</li> </ul> |
|--|--|--|

## 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.

Hale Mahaolu Organizational Flow Chart



### **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.

Executive Director - \$225,205

Controller - \$147,020

Human Resources Director - \$137,557

## **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 2027 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2027, but

(b) Not received by the applicant thereafter.

To ensure long-term sustainability of the mission-critical wrap around services after fiscal year 2027, 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 2027.

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 FY2027, 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.

### **Cost Effectiveness**

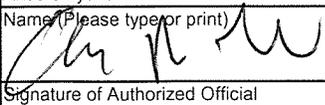
Hale Mahaolu's Homeownership & Housing Counseling Program is designed to be a cost-effective program serving Maui County residents. Individualized one-to-one counseling services are provided tuition-free to Maui County residents with convenient virtual/online Homebuyer Education classes offered at a nominal rate of \$75.00 charge **per household**. This fee covers a percentage of the cost for specific program materials. Prior to receiving the Homebuyer Education certificate, each household must complete an individualized pre-purchase counseling session. This allows counselors to explain each aspect of the class to the household in greater depth and allows counselors to tailor the information shared to the client's current financial and homebuying situation.

The Director of the Personal Care Program continuously researches innovative and potentially more cost-effective best practices being introduced and implemented on a national scale that could reduce the per patient cost. Should beta testing illustrate a notable cost savings, the new model will be implemented by our team.

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2026 to June 30, 2027

Applicant: Hale Mahaolu's Wraparound Services Program

| 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                             | 101,451                         |  |                                  |   |
| 2. Payroll Taxes & Assessments          | 9,770                           |  |                                  |   |
| 3. Fringe Benefits                      | 24,876                          |  |                                  |   |
| TOTAL PERSONNEL COST                    | <b>136,097</b>                  |  |                                  |   |
| B. OTHER CURRENT EXPENSES               |                                 |  |                                  |   |
| 1. Airfare, Inter-Island                | 312                             |  |                                  |   |
| 2. Insurance                            | 3,658                           |  |                                  |   |
| 3. Lease/Rental of Equipment            | 0                               |  |                                  |   |
| 4. Lease/Rental of Space                | 1,000                           |  |                                  |   |
| 5. Staff Training                       | 0                               |  |                                  |   |
| 6. Supplies                             | 1,200                           |  |                                  |   |
| 7. Telecommunication                    | 500                             |  |                                  |   |
| 8. Utilities                            | 600                             |  |                                  |   |
| 9. Contractual Services                 | 6,000                           |  |                                  |   |
| 10. Administration                      | 2,800                           |  |                                  |   |
| 11. Car Rental                          | 200                             |  |                                  |   |
| 12. Subsistence/Per Diem                | 200                             |  |                                  |   |
| 13. Subsidies to Client                 | 117,838                         |  |                                  |   |
| 14. Kitchen Supplies                    | 15,575                          |  |                                  |   |
| 15                                      |                                 |  |                                  |   |
| 16                                      |                                 |  |                                  |   |
| 17                                      |                                 |  |                                  |   |
| 18                                      |                                 |  |                                  |   |
| 19                                      |                                 |  |                                  |   |
| 20                                      |                                 |  |                                  |   |
| TOTAL OTHER CURRENT EXPENSES            | <b>149,883</b>                  |  |                                  |   |
| C. EQUIPMENT PURCHASES                  |                                 |  |                                  |   |
| D. MOTOR VEHICLE PURCHASES              |                                 |  |                                  |   |
| E. CAPITAL                              |                                 |  |                                  |   |
| <b>TOTAL (A+B+C+D+E)</b>                | <b>285,980</b>                  |  |                                  |   |
| <b>SOURCES OF FUNDING</b>               |                                 | Budget Prepared By:  |                                  |   |
| (a) Total State Funds Requested         | 285,980                         | Anders Lyons   | 808-872,4100                     |   |
| (b) Total Federal Funds Requested       | 0                               | Name (Please type or print)  | Phone                            |   |
| (c) Total County Funds Requested        | 0                               |  | 1/22/2026                        |   |
| (d) Total Private/Other Funds Requested | 0                               | Signature of Authorized Official   | Date                             |   |
| <b>TOTAL BUDGET</b>                     | <b>285,980</b>                  | Anders F. Lyons, Executive Director  |                                  |   |
|   |                                 | Name and Title (Please type or print)  |                                  |   |

## BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2024 to June 30, 2025

Applicant: HALE MAHAOLU

| POSITION TITLE   | FULL TIME EQUIVALENT | ANNUAL SALARY<br>A | % OF TIME ALLOCATED TO GRANT REQUEST<br>B | TOTAL STATE FUNDS REQUESTED<br>(A x B) |
|--|----------------------|--------------------|---|--|
| Program Director - Housing Counseling Program              | 1                    | \$93,306.42        | 12.86%                                    | \$ 12,000.00                           |
| Financial Housing Counselor - Housing Counseling Program   | 1                    | \$71,760.00        | 20.90%                                    | \$ 15,000.00                           |
| Housing Counselor II - Housing Counseling Program          | 0.5                  | \$17,141.80        | 60.00%                                    | 10,285.08                              |
| Community Resource Specialist - Housing Counseling Program | 0.75                 | \$63,960.00        | 23.45%                                    | \$ 15,000.00                           |
| Housing Counselor 1B - Housing Counseling Program          | 1                    | \$61,360.00        | 7.26%                                     | \$ 4,641.00                            |
| Intake Specialist - Housing Counseling Program             | 1                    | \$61,058.40        | 24.57%                                    | \$ 15,000.00                           |
| Program Assistant - Meals Program                          | 0.5                  | \$25,000.00        | 100.00%                                   | \$ 25,000.00                           |
| Program Director - Personal Care Subsidy Program           | 1                    | \$82,000.00        | 3.00%                                     | \$ 2,460.00                            |
| Program Specialist - Personal Care Subsidy Program         | 0.5                  | \$26,000.00        | 7.50%                                     | \$ 1,950.00                            |
| Program Assistant - Personal Care Subsidy Program          | 0.5                  | \$26,000.00        | 40.00%                                    | \$ 10,400.00                           |
|  |                      |                    |   | \$ -                                   |
|  |                      |                    |   | \$ -                                   |
|  |                      |                    |   | \$ -                                   |
|  |                      |                    |   | \$ -                                   |
| <b>TOTAL:</b>  |                      |                    |   | <b>\$ 101,451.00</b>                   |

**JUSTIFICATION/COMMENTS:** All positions listed above provide direct services for the Personal Care Program, Meals Program and/or the Housing Counseling Program respectively. The half-time Assistant position is a new position created to provide organizational and data base assistance to the Meals Program Director as well as other duties as assigned.

# BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2026 to June 30, 2027

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                                    | 0             |
| DESIGN                    | 0  | 0             | 0                     | 0                                | 0                                    | 0             |
| CONSTRUCTION              | 0  | 0             | 0                     | 0                                | 0                                    | 0             |
| EQUIPMENT                 | 0  | 0             | 0                     | 0                                | 0                                    | 0             |
| <b>TOTAL:</b>             | <b>0</b>                                     | <b>0</b>      | <b>0</b>              | <b>0</b>                         | <b>0</b>                             | <b>0</b>      |
| JUSTIFICATION/COMMENT N/A |  |               |                       |                                  |                                      |               |

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

Applicant: Hale Mahaolu

Contracts Total: 670,000

|    | <b>CONTRACT DESCRIPTION</b>         | <b>EFFECTIVE DATES</b> | <b>AGENCY</b>            | <b>GOVERNMENT ENTITY<br/>(U.S./State/Hawaii/<br/>Honolulu/ Kauai/<br/>Maui County)</b> | <b>CONTRACT VALUE</b> |
|----|-------------------------------------|------------------------|--------------------------|--|-----------------------|
| 1  | Housing Counseling (Pending)        | FY2026                 | County of Maui           | Maui County  | 170,000               |
| 2  | Personal Care Subsidy Program Grant | FY2026                 | Department of Health     | State  |                       |
| 3  | Personal Care Subsidy Program Grant | FY2026                 | Office on Aging          | Maui County  |                       |
| 4  | State of Hawaii Act310              | 01/01/2026-12/31/26    | Hawaii State Legislature | State  | 300,000               |
| 5  |                                     | 7/1/2025-6/30/26       | Hawaii State Legislature | State  | 200,000               |
| 6  |                                     |                        |                          |  |                       |
| 7  |                                     |                        |                          |  |                       |
| 8  |                                     |                        |                          |  |                       |
| 9  |                                     |                        |                          |  |                       |
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| 30 |                                     |                        |                          |  |                       |