

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



A handwritten signature in black ink, appearing to read 'Wesley Lo', is written over a horizontal line.

AUTHORIZED SIGNATURE

Wesley Lo, Chief Executive Officer

PRINT NAME AND TITLE

1/21/2026

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 Makua Health Services**

Issue Date: **12/29/2025**

Status: **Compliant**

Hawaii Tax#: [REDACTED]
New Hawaii Tax#: [REDACTED]
FEIN/SSN#: [REDACTED]
UI#: XXXXXX0020
DCCA FILE#:

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

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

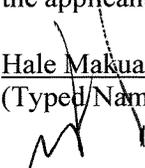
The undersigned authorized representative of the applicant certifies the following:

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


(Signature)

1/16/26
(Date)

Wesley Lo
(Typed Name)

Chief Executive Officer
(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.

2. Declaration Statement

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

See attached Declaration Statement.

3. Public Purpose

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

If awarded, this grant will be used for a public purpose pursuant to Section 42F-102, Hawaii Revised Statutes, as Hale Makua serves the public interest by addressing critical healthcare access barriers for Maui’s kupuna population, reducing preventable hospital readmissions and improving health outcomes for vulnerable elders through essential care coordination services.

II. Background and Summary

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

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

Hale Makua Health Services is a private, non-profit 501(c)(3) corporation, established in 1946 to provide a home for elders who had no one to care for them or means to pay for care. It is one of Maui’s largest non-government employers with over 450 employees providing post-acute care for over 1,000 individuals on Maui annually. The organization operates a comprehensive continuum of healthcare programs including two nursing

homes and rehabilitation centers specializing in inpatient and outpatient physical, occupational, and speech therapies; a home health care agency; and adult day health center; an adult residential care home; and a care management program. This integrated care model positions Hale Makua uniquely to coordinate seamless transitions across care settings and provide wraparound support to Maui's most vulnerable kupuna.

2. The goals and objectives related to the request;

The primary goal of this funding request is to sustain and expand Hale Makua's care management services for Maui's vulnerable kupuna population, ensuring continuity of care for existing patients while expanding capacity to serve additional kupuna and community members in need on Maui.

Sustainability and Growth Objectives:

- Serve a minimum of 120 active patients per quarter across all service lines on Maui
- Expand capacity to serve at least 150 active patients per quarter by end of FY 2027
- Ensure at least 85% of patients discharged from skilled nursing facilities receive supportive telephonic outreach within 48 hours of discharge to home
- Provide medical evaluation by Kālele's Advanced Practice Provider within 5 days of referral or facility discharge for all PCP Bridge patients
- Screen 100% of PCP Bridge, Community Health Integration, and Principal Illness Navigation patients for social needs
- Successfully connect at least 80% of patients with identified social needs to appropriate community resources and support services
- Maintain Net Promoter Score of 85 or above, reflecting sustained high satisfaction
- Maintain 30-day hospital readmission rate at or below 10% for patients engaged with care navigation services
- Develop and implement sustainable funding model combining fee-for-service billing, grants, and partnerships
- Continue providing pro bono services to uninsured and underinsured kupuna

3. The public purpose and need to be served;

Maui County faces a severe healthcare access crisis that disproportionately impacts its kupuna population, creating an urgent public need that Hale Makua's care management program directly addresses. According to the 2025 Hawaii Physician Workforce Assessment Project, Maui has one of the largest physician shortages in Hawaii at 41%, including a complete absence of geriatricians (100% shortage), while simultaneously having a high concentration of older adults with chronic healthcare needs.

The Access to Care Hawaii Report (2022), referenced at the March 2025 State Health Planning and Development Agency meeting, documented the scope of this crisis

through public testimony. Maui residents report being unable to get appointments or even reach anyone by phone due to provider shortages, being directed to urgent care rather than receiving primary care, experiencing rushed appointments, and facing rising costs. Particularly troubling are reports of inequitable care and lack of cultural competency affecting kupuna, Native Hawaiians and Pacific Islanders, and those on Med-QUEST and Medicare.

Post-discharge and general access to care is severely limited on Maui. Without these services, post-discharge follow-up is often delayed 2 weeks or more, even for those with an established PCP. For those without a PCP, follow-up care including critical medication reconciliation may be delayed months, home health and other support services cannot be started without PCP oversight, and medication errors or untimely follow up can lead to disruptive and expensive rehospitalizations.

Hale Makua's care management program serves the essential public purpose of bridging critical gaps that neither primary care practices, health plans, nor other community organizations can adequately address by providing: (1) timely access to care especially post-discharge from institutional settings, (2) comprehensive care coordination focusing on social factors impacting health delivered by medical practitioners and culturally competent Community Health Workers, and (3) a prevention-focused approach that reduces costly hospitalizations while improving quality of life.

In Hawaiian culture, caring for kupuna is a fundamental responsibility and privilege. Hale Makua honors this value while addressing a critical public need, ensuring Maui's most vulnerable elders receive the timely, culturally appropriate medical and social support necessary to live safely and healthfully in their communities.

Recent Federal Funding Cuts Exacerbate the Crisis:

- **SNAP (Food Assistance):** HR1 significantly reduces SNAP funding, affecting patients struggling with food insecurity
- **Housing Programs:** Voucher and housing assistance programs impacted, making safe discharge planning more difficult for vulnerable kupuna
- **Medicaid:** Significant cuts with millions expected to lose coverage nationwide, increasing the uninsured and underinsured population
- **Medicare:** Cuts and Medicare Advantage plan reductions increasing out-of-pocket costs for seniors

Without dedicated care management services, Maui's kupuna face dangerous gaps in post-discharge care, medication management, and access to social services at a time when federal safety net programs are being drastically reduced. Hale Makua's program is critical infrastructure that prevents vulnerable elders from falling through widening cracks in the healthcare system.

4. Describe the target population to be served; and

Hale Makua’s program serves kupuna and other adults on Maui who have limited access to care with significant social and medical factors impacting their health. Approximately 70% have Medicare as primary insurance, 20% have Medicaid, and the remaining are uninsured or underinsured (served pro bono). Nearly 100% of patients served have significant social needs across multiple domains including food insecurity, housing instability, transportation barriers, financial insecurity, and social isolation.

5. Describe the geographic coverage.

The primary coverage area for services is the island of Maui, where support is provided in-person within the home/community, skilled nursing facilities, hospitals, and other community locations, as well as telephonically or via video conference depending on the kupuna and their caregiver's preference and needs.

Telephonic and video conferencing support can also be provided for kupuna on Molokai and Lanai. This Grant-In-Aid funding will allow Hale Makua to sustain and expand these services on Maui while building the infrastructure and sustainability model that could support future expansion to other islands as additional funding becomes available.

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;

Hale Makua Health Services, through its care management program, will provide comprehensive care management and social support services to vulnerable kupuna and other adults on Maui through five integrated service lines, with capacity expansion to serve additional community members during Fiscal Year 2027.

SERVICE LINE 1: OUTREACH SERVICES

- Conduct telephonic follow-up within 48 hours of discharge from hospital or skilled nursing facility
- Verify patient safety and assess for medical concerns requiring immediate attention
- Confirm medication availability and patient understanding of medication regimen
- Verify delivery and proper setup of durable medical equipment
- Confirm scheduling and patient understanding of follow-up appointments
- Document all outreach contacts in electronic medical record

Delivered by: Community Health Workers (CHWs)

SERVICE LINE 2: PCP BRIDGE SERVICES

- Provide telehealth or in-person medical visits with Advanced Practice Provider within 5 days of referral or institutional discharge
- Perform comprehensive medical evaluation and medication reconciliation
- Order necessary home health services, durable medical equipment, laboratory tests, and imaging studies
- Screen all patients for social determinants of health across key domains
- Create individualized care plans addressing both medical and social needs
- Facilitate care transitions to established primary care providers when appropriate

Delivered by: Advanced Practice Provider in conjunction with CHW

SERVICE LINE 3: COMMUNITY HEALTH INTEGRATION (CHI)

- Deploy CHWs to provide ongoing support for patients with complex social needs
- Connect patients to community resources including food banks, meal programs, housing assistance
- Assist with benefit applications (SNAP, housing vouchers, Medicaid, Medicare Savings Programs)
- Provide health education and medication adherence support
- Serve as patient advocates with healthcare providers and social services agencies
- Provide family and caregiver support

Delivered by: CHW with supervision by Clinical Operations Manager and care plan oversight by APP

SERVICE LINE 4: PRINCIPAL ILLNESS NAVIGATION (PIN)

- Deliver comprehensive support for patients managing serious or complex chronic illnesses
- Coordinate multidisciplinary care across multiple providers and care settings
- Facilitate advance care planning and goals of care discussions
- Provide emotional support to patients and caregivers managing serious illness
- Address social barriers impacting disease management and treatment adherence

Delivered by: CHW in collaboration with Advanced Practice Provider

SERVICE LINE 5: COMMUNITY-BASED PALLIATIVE CARE ASSESSMENT

- Assess patients for palliative care benefit eligibility based on serious illness criteria
- Educate patients and families about palliative care services and benefits
- Coordinate referrals to appropriate palliative care providers
- Facilitate advanced care planning conversations

Delivered by: Advanced Practice Provider with support from CHW

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

Quarter 1 (July 1 - September 30, 2026):

- Continue operations on Maui serving minimum 120 active patients
- Enhance EMR system capabilities for quality monitoring and reporting
- Strengthen partnerships with Maui Memorial Medical Center, skilled nursing facilities, and community organizations
- Produce Quarter 1 outcomes report

Quarter 2 (October 1 - December 31, 2026):

- Expand to 130-140 active patients
- Strengthen fee-for-service billing with Medicare, Medicaid, and commercial payers
- Develop value-based contracting proposals for health plans
- Produce Quarter 2 outcomes report

Quarter 3 (January 1 - March 31, 2027):

- Expand to 140-150 active patients
- Pursue foundation grants and philanthropic partnerships
- Develop data dashboards for real-time quality monitoring
- Produce Quarter 3 outcomes report

Quarter 4 (April 1 - June 30, 2027):

- Achieve target of 150+ active patients
- Finalize sustainability plan with diversified revenue sources
- Assess feasibility and funding for future expansion to other islands
- Produce comprehensive annual outcomes report

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 Makua's care management program uses a comprehensive quality assurance and continuous improvement framework combining real-time monitoring, regular evaluation, and data-driven decision-making.

Real-Time Monitoring Systems:

- EMR dashboard tracking timeliness of outreach, appointments, and resource connections
- Real-time hospital readmission rate monitoring
- Automated patient satisfaction surveys (Net Promoter Score)

Quality Assurance Mechanisms:

- Weekly to bi-weekly case review meetings with entire care team
 - Regular chart audits and documentation review
 - Direct observation and shadowing of CHWs by Clinical Operations Manager
 - Monthly outcome monitoring and analysis
 - Quarterly continuous quality improvement meetings
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.

The following measures will be reported quarterly to the expending agency:

Process Measures:

1. Total active patients per quarter by service line and island
Target: Minimum 120 Q1, scaling to minimum 150 by Q4
2. Percentage of hospital or SNF discharge patients receiving outreach within 48 hours
Target: 85%
3. Percentage of PCP Bridge, CHI, or PIN patients seen within 5 business days
Target: 100%
4. Percentage of PCP bridge, community health integration, and principle illness navigation patients screened for social needs
Target: 100%
5. Percentage successfully connected to resources
TARGET: Minimum 80%

Outcome Measures:

6. Net Promoter Score
Target: Maintain 85 or above
7. 30-day all-cause hospital readmission rate
Target: At or below 10% (vs 18.3% baseline)
8. Client demographics reporting
Target: 100% data collection (age, insurance, language, race/ethnicity, island)

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
\$87,500	\$87,500	\$87,500	\$87,500	\$350,000

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

To date, Hale Makua is seeking a \$200,000 State Grant-in-Aid Award to support the operational needs of opening an Adult Day Health program on the island of Molokai.

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.

Tax Credits Granted Within Prior Three Years:

Hale Makua Health Services received Employee Retention Credits (ERC) in 2025:

- August 2025: \$2,867,243
- December 2025: \$2,906,249

Tax Credits Applied for or Anticipated (Capital Projects):

Not applicable.

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.

<u>Funding Source</u>	<u>Amount</u>
ARPA - Workforce Development	\$2,500,000
CDBG - Roofing & Electrical Panels	\$500,000
DHHC - Physician Services	\$200,000
DOM - Fire Doors	\$200,000
Earmark CDS - Bed Replacement	\$1,800,000
HRSA - Design of Rehab Facility	\$3,000,000
OED - Eldercare Pathways	\$47,000
OED - Workforce Development	13,000
State DLIR - Workforce Development	\$25,000
State GIA - Home Health	\$450,000
State GIA - Molokai ADH CIP	\$150,000
State GIA - Rehab Center CIP	\$800,000

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

As of December 31, 2025, our unaudited unrestricted current assets are \$14,600,000.

V. Experience and Capability

1. Necessary Skills and Experience

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

Hale Makua Health Services has 80 years of experience providing comprehensive healthcare services to Maui’s frail elderly and disabled population. With over 450 employees, the organization operates a fully integrated continuum of care including two skilled nursing facilities, a CHAP accredited home health agency (48 years), and Adult Day Health program (28 years), and an adult residential care home. Annually, Hale Makua serves over 750 individuals through skilled nursing and rehabilitation, 400 through home health, and 75 kupuna through the island’s only Adult Day Health program.

Hale Makua has eight years of experience collaborating with Maui Memorial Medical Center and Kula Hospital to improve care coordination and strengthen the continuum

from acute to post-acute settings. The organization maintains longstanding partnerships with the University of Hawaii Maui College for nursing workforce development.

Since June 2022, Hale Makua has successfully operated a comprehensive care management program serving vulnerable kupuna on Maui, managing post-discharge care coordination for hundreds of patients and reducing 30-day readmission rates from 18.3% to 8.61%. The program provides comprehensive medical evaluation and management, performs medication reconciliation, manages complex chronic conditions including diabetes, heart failure, COPD, and dementia, screens 100% of patients for social needs, and successfully connects patients to food assistance, housing programs, and transportation services with culturally competent support in multiple languages. The program achieved a Net Promoter score of 98.

The care navigation team includes an Advanced Practice Provider (Joyce Della, DNP, APRN) with extensive geriatric care and post-acute management experience, a Clinical Operations Manager (Erin Salez, LCSW) with expertise in care coordination and resource connection, and culturally competent Community Health Workers with multilingual capabilities.

Hale Makua successfully managed a \$2.5M federal ARPA grant for care transitions program development from June 2022 through October 2025, serving over 300 patients and achieving all grant objectives. The program currently maintains an active caseload of 50 patients with establish EMR and quality monitoring infrastructure and a proven track record of meeting performance targets.

2. Facilities

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

Hale Makua operates two nursing homes that include rehabilitation services: one in Kahului with 254 beds and the other in Wailuku with 90 beds. These nursing home beds comprise 75% of all long-term care beds on Maui. Home Health by Hale Makua occupies 2,000 square feet of the Wailuku location.

VI. Personnel: Project Organization and Staffing

1. Proposed Staffing, Staff Qualifications, Supervision and Training

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

Hale Makua has a team of highly qualified staff responsible for implementing this request. CEO Wesley Lo (19 years of healthcare experience on Maui, former CEO of

Maui Memorial Medical Center) provides project oversight. CFO Suanne Morikuni (20 years of healthcare finance experience) manages financial aspects. VP of Strategy Bethany Geiger provides administrative support and implementation oversight.

The care management program staffing includes:

- Advanced Practice Provider – Joyce Della, DNP, APRN (1.0FTE): Licensed APRN in Hawaii; provides medical evaluation, diagnosis, treatment, medication reconciliation, and clinical supervision
- Clinical Operations Manager – Erin Salez, LCSW (1.0FTE): Licensed Clinical Social Worker; oversees daily operations, supervises staff, manages partnerships, analyzes outcomes, and leads quality improvement
- Patient Care Coordinator (1.0 FTE): Manages referrals, scheduling, insurance verification, billing support, and quality tracking
- Community Health Workers: 3.0 FTE conduct post-discharge outreach, assess social determinants of health, navigate resources, assist with benefit applications, and provide health education and advocacy

The staffing pattern supports service capacity of minimum 120 active patients per quarter on Maui.

Hale Makua provides comprehensive training through new employee orientation, monthly team meetings with case-based learning, quarterly trainings on chronic disease management and community resources, and annual protocol reviews. All staff receive direct supervision from qualified clinical and operational leadership with established reporting structures ensuring accountability and quality service delivery.

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.

See attached Organization 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.

Chief of Staff - \$180,000
Administrator - \$169,950
Administrator - \$162,318

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.

Not applicable.

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 Makua Health Services:

- Licensed healthcare facilities operating under State of Hawaii Department of Health regulations
- Medicare and Medicaid certified provider
- National Provider Identifier (NPI): 1861089906
- Healthcare provider organization registered with National Plan and Provider Enumeration System (NPPES)

Staff Licensure:

- Advanced Practice Provider: Hawaii APRN License #APRN-3133, NPI: 85-2931322
- Clinical Operations Manager: Hawaii Licensed Clinical Social Worker (LCSW)

3. Private Educational Institutions

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

Not applicable.

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2027 the activity funded by the grant if the grant of this application is:

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

Hale Makua has developed a comprehensive multi-faceted sustainability strategy to ensure continuity of care management services beyond Fiscal Year 2027. Hale Makua is actively implementing the following sustainability initiatives:

Revenue Diversification Strategy

1. Fee-for-Service Billing and Payer Contracting:

Hale Makua has established billing infrastructure and is actively submitting claims to Medicare, Medicaid, and commercial payers for covered services (PCP Bridge visits, Chronic Care Management, Transitional Care Management). However, insurance reimbursement alone cannot sustain the comprehensive model, as many critical services remain uncovered: outreach services, support provided to caregivers, services for uninsured patients, etc.

- Optimize billing processes and maximize revenue from billable services
- Negotiate value-based contracts with payers based on demonstrated ROI (53% readmission reduction)
- Pursue alternative payment models with Medicare Advantage and Medicaid managed care
- Projected Fee-for-Service Revenue: \$100,000-\$150,000 annually by end of FY 2027

2. Grant Diversification:

- Federal: CMS Innovation Center models, HRSA care coordination programs, ACL aging services
- State: DOH chronic disease management, Executive Office on Aging programs
- County: Maui County grants-in-aid
- Foundation: Hawaii Community Foundation, Atherton, Cooke, Castle, McInerney, national foundations
- Projected Foundation/Grant Revenue: \$150,000-\$250,000 annually

3. Strategic Partnerships and Contracts:

- Hospital Partnerships: Contracts with Maui Memorial Medical Center for post-discharge services
- Health Plan Integration: Partnership with Kaiser, HMSA, UnitedHealthcare
- County Services: Contracts with Maui County Office on Aging
- Projected Partnership Revenue: \$100,000-\$200,000 annually

4. Philanthropic Support:

- Individual giving and donor cultivation programs through Hale Makua Foundation
- Corporate partnerships and sponsorships
- Projected Philanthropic Support: \$50,000-\$100,000 annually

Sustainability Projections

Projected Revenue Mix by FY 2028 (Post-GIA Funding):

- Fee-for-Service Billing: \$150,000-\$200,000 (20-25%)
- Payer Contracts/Value-Based: \$100,000-\$150,000 (15-20%)
- Foundation Grants: \$150,000-\$250,000 (20-30%)
- Hospital/Health System Contracts: \$100,000-\$200,000 (15-25%)
- County/State Grants: \$75,000-\$150,000 (10-15%)
- Philanthropic Support: \$50,000-\$100,000 (5-10%)

Total Projected Revenue: \$625,000-\$1,050,000

Hale Makua's sustainability plan is realistic and multi-faceted, combining maximized revenue from payers and value-based contracts, diversified funding across grants and partnerships, efficient operations while maintaining quality, and advocacy for policy changes. By the end of FY 2027, we project achieving 60-75% cost recovery through diversified revenue sources, with the remaining gap addressed through ongoing grants, philanthropy, and Hale Makua's organizational commitment to serving Maui's kupuna. We are confident in our ability to sustain operations beyond FY 2027 based on demonstrated impact, strong partnerships, growing revenue streams, and deep commitment to serving Hawaii's kupuna with excellence.

(b) Not received by the applicant thereafter.

If this grant is not received by Hale Makua after fiscal year 2027, the organization will continue implementing the same comprehensive sustainability strategy to ensure continuity of care management services through diversified revenue sources.

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2026 to June 30, 2027

Applicant: Hale Makua Health Services

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
A. PERSONNEL COST				
1. Salaries				
2. Payroll Taxes & Assessments				
3. Fringe Benefits				
TOTAL PERSONNEL COST				
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island				
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				
6. Supplies				
7. Telecommunication				
8. Utilities				
9. Contracted Services	350,000	0	0	0
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
TOTAL OTHER CURRENT EXPENSES	350,000			
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	350,000			
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	350,000	Natasha Tome 808.873.6620		
(b) Total Federal Funds Requested	0	Name (Please type or print) Phone		
(c) Total County Funds Requested	0	Signature of Authorized Official Date		
(d) Total Private/Other Funds Requested	0			
TOTAL BUDGET	350,000	Wesley Lo, CEO Name and Title (Please type or print)		

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2026 to June 30, 2027

Applicant: Hale Makua Health Services

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Not applicable.				\$ -
				\$ -
				\$ -
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				\$ -
TOTAL:				
JUSTIFICATION/COMMENTS:				

BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2026 to June 30, 2027

Applicant: Hale Makua Health Services

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY:2024-2025	FY:2025-2026	FY:2026-2027	FY:2026-2027	FY:2027-2028	FY:2028-2029
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
TOTAL:	0	0	0	0	0	0
JUSTIFICATION/COMMENTS: Not applicable. This is not a capital improvement project request.						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: Hale Makua Health Services

Contracts Total: 4,150,000

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	Physicians Services	7/1/24-6/30/26	DHHC	Maui County	200,000
2	Congressional Earmark	9/1/22-8/31/26	OFAM/DGMO/HSB	Federal	3,000,000
3	Molokai Adult Day Health - CIP	7/1/24-6/30/26	GIA	State	150,000
4	Design Dev for Rehab Center - CIP	9/1/25-8/31/26	GIA	State	800,000
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27		10		Application for Grants	

HALE MAKUA HEALTH SERVICES

