

CENTRAL OFFICE
200 Hina Ave.
Kahului, 96732-1800
872-4100/872-4120
TDD# (800) 545-1833,
EXT. 432

AKAHI
300 W. Wakea Ave.
Kahului, 96732
877-0544

ELUA
200 Hina Ave.
Kahului, 96732-1800
872-4180

EKOLU
717 Makaala Dr.
Wailuku, 96793
242-4377

EHA
1057 Makawao Ave.
Makawao, 96768
573-1647

ELIMA
11 Mahaolu St.
Kahului, 96732
893-0002

EONO
810 Kelaweia St.
Lahaina, 96761
661-5957

EHIKU
56 Ehiku St.
Kihei, 96753
891-8588

HOME PUMEHANA
P.O. Box 100
Molokai, 96748
553-5788

**HALE KUPUNA
O LANAI**
P.O. Box 630418
Lanai City, 96763
565-6615

LAHAINA SURF
1037 Wainee St.
Lahaina, 96761
661-3771

LOKENANI HALE
1889 Loke St.
Wailuku, 96793
243-9272

LUANA GARDENS
615 W. Papa Ave.
Kahului, 96732
871-9009

KOMOHANA HALE
120 Leoleo St.
Lahaina, 96761
661-5957

HOUSING DEVLPMNT.
200 Hina Ave.
Kahului, 96732-1800
872-4100/872-4108

**CHSP/MEALS
PROGRAM**
200 Hina Ave.
Kahului, 96732-1800
872-4170

PERSONAL CARE
11 Mahaolu St.
Kahului, 96732
873-0521

**HOMEOWNERSHIP/
HOUSING
COUNSELING**
200 Hina Ave.
Kahului, 96732-1800
242-4377

Hale Mahaolu
HOME OF PLEASANT LIVING

January 31, 2012

State Capitol, Rm. 208
Honolulu, Hawaii 96813
Attn: Mr. Rod Becker

SUBJECT: Grant-in-Aid (GIA) Application

Dear Mr. Becker:

Enclosed for your processing and handling is an ORIGINAL GIA application requesting \$2,000,000.00 on behalf of Hale Mahaolu to develop affordable rental housing and support facilities for elderly in Maui County.

Should you have question regarding our request please contact Robyne Nishida Nakao at (808) 872-4108 or myself at (808) 872-4100.

Sincerely,


Roy K. Katsuda
Executive Director

RKK/rtnn



House District 12

Senate District 7

THE TWENTY-SEVENTH LEGISLATURE
APPLICATION FOR GRANTS & SUBSIDIES
CHAPTER 42F, HAWAII REVISED STATUTES

Log No:

For Legislature's Use Only

Type of Grant or Subsidy Request:

GRANT REQUEST - OPERATING

GRANT REQUEST - CAPITAL

SUBSIDY REQUEST

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

"Subsidy" means an award of state funds by the legislature, by an appropriation to a recipient specified in the appropriation, to reduce the costs incurred by the organization or individual in providing a service available to some or all members of the public.

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

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

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

1. APPLICANT INFORMATION:

Legal Name of Requesting Organization or Individual:

HALE MAHAOLU

Dbas:

HALE MAHAOLU EWALU

Street Address:

'Ohia Ku Street, Pukalani

Mailing Address:

200 Hina Avenue

Kahului, Hawaii 96732

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name ROBYNE T. NISHIDA NAKAO

Title Deputy Executive Director // Development Director

Phone # (808) 872-4108

Fax # (808) 872-4120

e-mail Robyne@halemahaolu.org

3. TYPE OF BUSINESS ENTITY:

- NON PROFIT CORPORATION
- FOR PROFIT CORPORATION
- LIMITED LIABILITY COMPANY
- SOLE PROPRIETORSHIP/INDIVIDUAL

6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:

AFFORDABLE RENTAL HOUSING AND SUPPORT FACILITIES FOR THE ELDERLY

4. FEDERAL TAX ID #:

5. STATE TAX ID #:

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2014: \$ 2,000,000.00

8. STATUS OF SERVICE DESCRIBED IN THIS REQUEST:

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

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

STATE \$ -0-

FEDERAL \$ -0-

COUNTY \$ 2,000,000.00

PRIVATE/OTHER \$ -0-

TYPE NAME & TITLE:

ROY K. KATSUDA, EXECUTIVE DIRECTOR
NAME & TITLE

1/31/2013
DATE SIGNED

Application for Grants and Subsidies

I. Background and Summary

1. Applicant's Background

Hale Mahaolu, a private non-profit corporation, was organized in 1967 and has experiences as sponsor, developer, owner and manager of 14 properties (approximately 1,000 units) in Maui County (including the islands of Molokai and Lanai). The corporation's purpose is to develop and manage safe, sanitary, decent housing as well as supportive services for very low to moderate income elderly and families in the State of Hawaii.

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 longer living.

The many services that Hale Mahaolu provides to the elders of the community, are done directly and through partnerships (Rental Housing, Meals, Recreation activities, Housing Counseling, Personal Care, etc.) and are an invaluable resource to the community. An example of this effort is the construction of an additional building on our Elima site that houses the Maui Adult Day Care Center operations. With the addition of this building, Hale Mahaolu has played a pivotal role in ensuring that the well-being of the elderly residents in its community is maintained. All of this enables our elders to remain independent and to age in place in familiar surroundings.

Another example of Hale Mahaolu's effort to provide quality support services to the community is through its commercial kitchen at the Elua complex. Hale Mahaolu has helped to enhance the current meal services to the elderly with nutritionally balanced, dietetic meals and currently prepares about 500 meals per day. Hale Mahaolu continues to receive inquiries from various County, State, and private agencies for the provision of meals for their programs and has incorporated new technologies in the food prep industry in its kitchen expansion to accommodate the increased demand.

Hale Mahaolu has also been a HUD-Approved Housing Counseling Agency for the State of Hawaii since October 1988.

Since 1985 Hale Mahaolu has a Personal Care program which serves clients on Maui, Molokai and Lanai. The Personal Care program provides cost effective quality assistance with the Activities of Daily Living (ADL) to the frail elderly in areas such as: bathing, cooking, cleaning, personal hygiene, and shopping.

2. Goals and Objectives

Our goal is to develop an **affordable rental housing campus for the elderly** in Kulamalu Commercial Subdivision as well as the supportive amenities to enable the elderly to age in place and to promote a healthy lifestyle. The objective of the project is to provide affordable housing for the elderly, related supportive services and a place dedicated for senior activities in one community location. The Ewalu and Upcountry residents will enjoy a centralized location of senior services and activities thereby creating a convenient and functional facility all of which will help to avoid premature placement into a costly nursing home.

3. Public purposed and need to be served

2010-2014 Consolidated Plan, County of Maui

- Goal Objective Outcome, Promoted decent affordable housing, Special Needs affordable housing (includes elderly), Construct rental housing for special needs populations. (Page 19)
- Priority Needs Housing Tables, Table II – 3, Priority Housing Need Type “Renter, Elderly”, with income between 0 – 50% AMGI classified as a **“High”** priority. Unmet need estimated at 235 housing units. (Page 25)
- “The lower the income the greater the housing problem.” (Page 27)
- “Housing affordability is a problem. Nearly one-third (32%) of Hawaii’s households were cost-burdened, with housing cost that exceed 30% of their income” 35% of that amount represent renters who were cost burdened. (Page 28)
- Hawaii has seen significant growth in the elderly population (persons 65 years and older) between 2000 and 2007, approximately 2.2%. Over the past two decades majority of the growth in the elderly population occurred in the City and County of Honolulu. Projections indicate that by year 2015 the elderly population in the City and County of Honolulu will decrease. The elderly populations in the Counties of Hawaii and Maui will see **increases** from 13% and 9% respectively to 14% and 11% respectively. (page 32)
- Table IV – 6, Housing Demand for Elderly Households, Forecast for 2030 by County: A demand of 2,070 rental housing units is forecasted by year 2030. (page 34)
- D. Barriers to Affordable Housing – Lack of Resources to Develop Affordable Housing; “Without adequate resources, thousands of needed affordable housing units will not be built. Building affordable to extremely-low and low-income <housing> is very expensive, particularly in the State.” (Page 56)

“Gap financing is critical to develop new, affordable rental units.” (Page 56)

Hawaii Housing Planning Study, 2011

- Approximately 18% (241,984 persons) of the State of Hawaii's population of 1.36 million residents are 62 years of age or older. It is estimated that within the next two years, an additional 35,376 Hawaii residents will become 62 years of age. (Page 39)
- It is projected by year 2030, more than one-quarter of Hawaii population will be 62 years of age or older. (Page 39)
- Hawaii Department of Business, Economic Development and Tourism (DBEDT) predict 22,000 new rental housing units (Statewide) with amenities designed to serve elderly households will be needed by 2030. (Page 39)
- Specifically for the County of Maui, DBEDT projects 673 new rental housing units with amenities designed to serve elderly households will be needed by 2030. (Page 40, Table 21)
- Housing Demand Survey, 2011 and Hawaii Housing Model, 2011 projected that 3,205 housing units are need for elderly households in the State of Hawaii to eliminate pent-up demand and accommodate new elderly (aging-up) households between 2012 and 2016. (Page 30)
- Of the 3,205 housing units needed for elderly identified by the Housing Demand Survey, 2011 and Hawaii Housing Model, 2011, approximately two-thirds (2,092 units) are needed for low- and moderate (under 80% AMGI) elderly households. (Page 30, Table 13)
- Specifically for the County of Maui, the Housing Demand Survey, 2011 and Hawaii Housing Model, 2011, projects 134 rental housing units will needed for elderly households between 2012 and 2016. (Page 30)

4. Target population to be served

The target market for the proposed project is the **elderly, 62 years of age or older, who meet the very-low income guidelines (50 – 60% of median income)** established by the U.S. Department of HUD and are capable of achieving an independent living status with little or no supportive services. The 2010 Demographic Profile¹ estimates 4,230 individuals 62 years of age and over reside in the Pukalani/Makawao, and Kula districts, with 8.5% and 8.7% respectively, with household income below the poverty level².

The number of elderly individuals this fully developed project is anticipated to serve approximately 250 unduplicated elderly individuals at any given time.

¹ American FactFinder Community Facts, Zip Code 96768 and 96790

² American FactFinder Community Facts, Zip Code 96768 and 96790, 2007-2011 American Community Survey 5-Year Estimate

5. Geographic coverage

The subject 3.93 acres of vacant undeveloped land are located approximately 2,000 feet to the South of the “Five Trees” intersection (Kula Highway – Haleakala Highway intersection). Presently the subject site is undeveloped and was formerly pasture land. The property is covered with various grasses, low-lying bushes, and the fringes of the former pineapple fields have a few tree specimens (i.e. koa-haole, eucalyptus and Christmas berry). The property moderately slopes from 1,814 feet to 1,766 feet above sea level.

The site is designated by Flood Insurance Rate Map as Zone C, and area of minimal flooding.

II. Service Summary and Outcomes

1. Scope of Work, tasks and responsibilities

Hale Mahaolu is seeking a grant-in-aid to develop a senior affordable rental housing campus, Hale Mahaolu Ewalu at the Kulamalu Town Center Subdivision. The proposed development scheme will consist of a senior center (including administrative offices, laundry facilities, beauty salon), an adult day care center, maintenance shop, approximately 60 affordable rental housing units - approximately 58 – 1 bedroom/1bathroom affordable rental units and approximately 2 – 2 bedroom/1 bathroom affordable rental units for elderly whose income is at or below 80% AMGI, and one 3 bedroom manager’s residence.

Hale Mahaolu Ewalu will be the second affordable rental housing campus in the Upcountry area for the elderly. The objective of the project is to provide affordable housing to the elderly and to also provide related supportive services (i.e. lunch program, Kaunoa activities, etc.) and a place dedicated for senior activities in one community location. Supportive services which will allow the elderly to age in place, keeping them with familiar surroundings and avoiding premature placement into a nursing home.

2. Projected Timeline

<p>1. Work with development team to finalize a set of design plans, have all zoning issues and exemptions in place (District Boundary Amendment, Special Use Permit, Building Permit, County Planning Dept., County Council, Planning Commission, etc.), subdivide parcel, burial</p>	<p>January 2013 – August 2013</p>
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council	
2. Apply & Secure Construction funds for the project	January 2013 – September 2013
3. Invite contractors to submit a proposal to construct project.	January 2014
4. Select a contractor, conduct redesign, value engineering	February – March 2014
5. Secure Building and other application permits	October – November 2013
6. Start of Construction	April – May 2014
7. Complete Construction	December 2015

3. Quality Assurance and Evaluation

The issuance of a Certificate of Occupancy from the County of Maui will be an indicator that the facilities constructed have been completed according to the standards established by the County of Maui and that the structures can be occupied allowing the project to open.

Once construction has been completed Hale Mahaolu will be required to do cost certifications for certain funding sources (i.e. Dept. of HUD, Dept. of Agriculture, HCDCH, etc.) by a Certified Public Account to demonstrate that their particular contributions to the Ewalu project were expended appropriately.

III. Financial

Budget

- 1. Budget Forms – See attached
- 2. Anticipated quarterly funding requests for fiscal year 2014

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
		\$1,000,000.00	\$1,000,000.00	\$2,000,000.00

3. Sources of funding seeking for fiscal year 2014:

4. State and Federal Tax Credits

A. All State and Federal tax credits granted within the prior three years:

Low Income Housing Tax Credits (allocated via HHFDC):
 Hale Mahaolu Ehiku Phase II Project:
 Section 1602 Tax Exchange Program \$700,000 (Federal)
 Federal Low Income Housing Tax Credit \$300,000
 Hawaii State Housing Tax Credit \$500,000

B. All State and Federal tax credits applied for or anticipate applying for pertaining to any capital project, if applicable.

Low Income Housing Tax Credits
Hale Mahaolu Ewalu
Federal Low Income Housing Tax Credit \$1,500,000
Hawaii State Housing Tax Credit \$750,000

IV. Experience and Capability

A. Necessary Skills and Experience

Hale Mahaolu was incorporated in 1967 and over the last 45 years has developed and/or managed 14 affordable and/or low income housing projects in Maui County (including Molokai & Lanai). All properties are monitored by the U.S. Department of Housing and Urban Development, U.S. Department of Agriculture – Rural Development, or the State Housing Authority for compliance. All are in good physical and fiscal condition with the estimated wait period for entry at all sites currently averaging 12-24 months. Listed below are the affordable housing sites under the control and management of Hale Mahaolu:

Project Name: Hale Mahaolu Akahi
Address: 300 West Wakea Avenue, Kahului, Hawaii 96732
Occupancy Start: April, 1969
Number of Units: 111
Financing: HUD Section 202 Direct Loan

Project Name: Hale Mahaolu Elua
Address: 200 Hina Avenue, Kahului, Hawaii 96732
Occupancy Start: September, 1976
Number of Units: 180
Financing: HUD Section 202 Direct Loan

Project Name: Hale Mahaolu Lahaina Surf
Address: 1037 Waine'e Street, Lahaina, Hawaii 96761
Occupancy Start: November, 1972
Number of Units: 112
Financing: HUD Section 236

Project Name: Home Pumehana
Address: Kolapa Place, Kaunakakai, Molokai, Hawaii 96748
Occupancy Start: September, 1976, May 1999
Number of Units: 80, 5
Financing: HUD Section 202

Project Name: Luana Gardens II
Address: 615 West Papa Avenue, Kahului, Hawaii 96732
Occupancy Start: June, 1983
Number of Units: 60
Financing: FmHA Section 515

Project Name: Luana Gardens III
Address: 711 Kamehameha Avenue, Kahului, Hawaii 96732
Occupancy Start: July, 1983
Number of Units: 62
Financing: FmHA Section 515

Project Name: Komohana Hale
Address: 120 Leoleo Street, Lahaina, Hawaii 96761
Occupancy Start: June, 1991
Number of Units: 20
Financing: County of Maui

Project Name: Kahului Town Terrace
Address: 170 Ho'ohana Street, Kahului, Hawaii 96732
Managed: January, 1992 through July, 2007
Number of Units: 72
Financing: WDCI, Inc. (a subsidiary of A & B Hawaii, Inc.), Low Income Housing Tax Credits
Assistance: State Rental Assistance Program

Project Name: Hale Mahaolu Ekolu
Address: 717 Maka'ala Drive, Wailuku, Hawaii 96793
Occupancy Start: November, 1992
Number of Units: 42
Financing: HUD Section 202 Direct Loan

Project Name: Hale Mahaolu Eha
Address: 1057 Makawao Avenue, Makawao, Hawaii 96768
Occupancy Start: June, 1995
Number of Units: 40
Financing: Section 202 Capital Advance (HUD)

Project Name: Hale Mahaolu Elima
Address: 11 Mahaolu Street, Kahului, Hawaii 96732
Occupancy Start: February 1998
Number of Units: 61
Financing: Section 202 Capital Advance

Project Name: Hale Kupuna 'O Lanai
Address: 1144 Ilima Avenue, Lanai City, Hawaii 96763
Occupancy Start: August 1998
Number of Units: 24
Financing: USDA-RD Section 515 Loan

Project Name: Hale Mahaolu Eono
Address: 810 Kelaweia Street, Lahaina, Hawaii 96761
Occupancy Start: April 2003
Number of Units: 30
Financing: USDA-RD Section 515 Loan &
Sec. 202 Capital Advance (HUD)

Project Name: Hale Mahaolu Eono (5)
Address: 810 Kelaweia Street, Lahaina, Hawaii 96761
Occupancy Start: Estimated June 2004 – Currently under construction
Number of Units: 5
Financing: Sec. 202 Capital Advance (HUD)

Project Name: Hale Mahaolu Ehiku
Address: 56 Ehiku Street, Kihei, Hawaii 96753
Occupancy Start: July 2007
Number of Units: 115
Financing: USDA-RD Section 515 Loan, Low Income Housing Tax Credits, Low Income Housing Tax Credits 1602 Program, U.S. Department of HUD Section 202, Harry and Jeanette Weinberg Foundation, Grant-in-Aid Hawaii State Legislature, U.S. Department of HUD – Special Purpose Grant, U.S. Department of HUD – HOME Program, County of Maui In-Lieu funding, Private Foundations.

Project Name: Lokenani Hale
Address: 1889 Loke Street, Wailuku, Hawaii 96793
Managed: August 1, 2009
Number of Units: 61
Financing: Low Income Housing Tax Credits and Hawaii Housing Finance and Development Corporation (HHFDC) Rental Housing Trust Fund (Perm Financing), (HHFDC) Dwelling Unit Revolving Fund (Interim Financing).

B. Facilities

Hale Mahaolu is seeking a grant-in-aid to develop a senior affordable rental housing campus, Hale Mahaolu Ewalu at the Kulamalu Town Center Subdivision. The proposed development scheme will consist of a senior center (including

administrative offices, laundry facilities, beauty salon), an adult day care center, maintenance shop, approximately 60 affordable rental housing units - approximately 58 – 1 bedroom/1bathroom affordable rental units and approximately 2 – 2 bedroom/1 bathroom affordable rental units for elderly whose income is at or below 80% AMGI, and one 3 bedroom manager's residence.

Kulamalu LLC has obtained/developed most of the entitlement, environmental clearances for this master planned community. Hale Mahaolu will be requesting exemptions from permitting and planning requirements specific to this affordable housing project through the 201H process. Hale Mahaolu hopes to obtain 201H approval in August 2013.

The planning of this newest affordable rental housing campus for the elderly is in its early stages.

Hale Mahaolu Ewalu will be the second affordable rental housing campus in the Upcountry area for the elderly. The objective of the project is to provide affordable housing to the elderly and to also provide related supportive services (i.e. lunch program, Kaunoa activities, etc.) and a place dedicated for senior activities in one community location. Supportive services which will allow the elderly to age in place, keeping them with familiar surroundings and avoiding premature placement into a nursing home.

The Senior Center would provide an area for residents and other community groups to socialize and participate in recreational, cultural, and/or educational activities.

The Adult Day Care Center (ADCC) would provide assistance to Upcountry and Ewalu residents who require supportive services to achieve independent living status or respite care for spouses who may be caring for a frail partner. The ADCC prevents the frail elderly from premature placement into a nursing home, and allows the elderly to age in place as long as possible.

The proposed construction consists of concrete slab flooring, wood siding with insulation between party walls and wood framing clad with a gypsum board interior. Exterior opening include windows and doors compatible with the accessibility requirements. Interior finishes and cabinetry are of simple design with durability and ease of maintenance and also compatible with the accessibility and American National Standards Institute (A.N.S.I.) requirements.

Each typical unit is composed of a combined living room/dining room, kitchen, one bedroom, and one bathroom and are fully accessible, within the guidelines of HUD and UFAS, to meet the needs of the elderly as well as mobility impaired (handicapped).

This complex is designed to best suit the elderly and to enable them to age in place without relocating them from their familiar surroundings. Although Section 504 of the Rehabilitation Act of 1973 requires at least five percent of the units be accessible for persons with physical disabilities, all units will be designed to meet the accessibility requirements. For example, each unit will be located on an accessible route from the public and common areas, units are designed to include the appropriate turn around space for wheel chairs, all units will have "U" shaped pulls or accessible levers installed, roll in showers, etc. In doing so, visitability and universal design features will be incorporated into the project which will benefit people of all ages and abilities. The housing needs of the residents, as they age in place, shall be accommodated. This is both cost effective from a construction standpoint and also from a long-term perspective.

The Senior Center would provide an area for residents and other community groups to socialize and participate in recreational and/or educational activities.

The proposed complex will utilize the most economical methods of construction as well as the most economical materials, equipment, and hardware within acceptable quality standards. Modest designs will also be incorporated to minimize construction costs.

It is Hale Mahaolu's intention to design this housing complex within the current HUD design cost standards. Should this structure require any special amenities that would be unapproved by HUD under these standards, Hale Mahaolu will fund any incremental cost above the development cost limit to this complex.

The project is located within close walking distance to grocery stores, drug stores, doctor's offices, restaurants, churches, parks, etc. Maui County is expanding its Maui Bus transportation system and residents could drive, catch rides from neighbors, family, & friends. Shuttle buses will also be available to residents through Maui Economic Opportunity, Inc. (MEO) and Maui Bus. Most Hale Mahaolu properties have MEO designated drop-off and pick-up points and MEO is prepared to do the same for the Ewalu project.

The Ewalu campus is located within growing community. It is likely that as this community continues to mature, the Ewalu residents will have a variety of grocery stores, drug stores, doctor's offices, parks, restaurants, school, etc. to patronize. Presently Longs Drugs store is within walking distance of the project, a popular farmer's market is held every Saturday adjacent to the project site and Kaiser Permanente is planned to build a clinic across the project site.

See attached proposed site plan, and front elevation sketches. Subject to change.

V. Personnel : Project Organization and Staffing

A. Proposed Staffing, Staff Qualifications, Supervision and Training

Hale Mahaolu's development operations are presently staffed by one part-time program assistant, one full-time Development Director both under the supervision of the organization's Executive Director. This level of staffing is sufficient to coordinate and oversee the development of this affordable housing project.

As Executive Director for over 30 years Roy Katsuda has overseen the development & management of Hale Mahaolu's 14 properties in Maui County. He has gained the experience, developed ties to the community, and has the vision that has contributed to Hale Mahaolu's successes which has put Hale Mahaolu at the forefront of affordable housing.

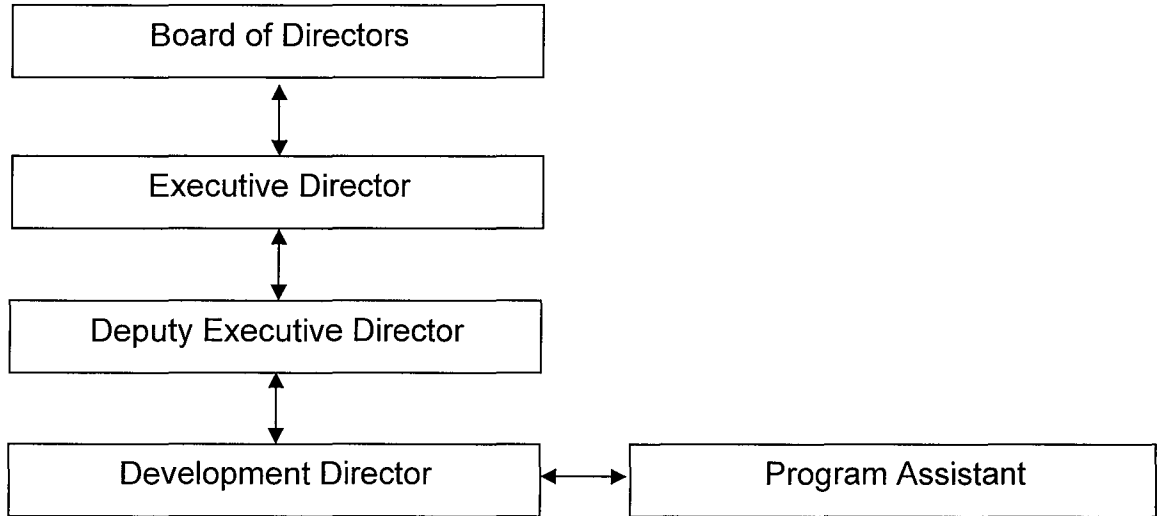
As Deputy Executive Director and Development Director, Robyne Nishida Nakao manages Hale Mahaolu's development activities. She works directly with the Executive Director, Hale Mahaolu's management staff, the development team, consultants, government agencies and other community members from a project's conceptual phase through initial occupancy. Some of Robyne's development tasks include grant writing, grant reporting, financial closings, and construction oversight among the various other aspects of development work. Some of Robyne's project management tasks include overseeing tenant eligibility processing, set-up of tenant records, facilitate public/tenant relations, set-up of initial accounting and bookkeeping or project accounts, etc.

Specific Duties and Responsibilities

The Development Director is responsible for coordinating, overseeing and implementing the required documents for submittal to the various funding agencies for the development of affordable/low income rental housing projects and works under the direct supervision of the Executive Director. The Development Director assists the Executive Director in coordinating the Development Team, acts as the Project Coordinator overseeing development and construction of the project, reviews the drawings, specifications and submittals, attends development meetings, communicates with respective funding agencies and Development Team members, coordinates and oversees the fiscal arrangements which includes review of the request of disbursements and invoices, coordinates and assists the set up of proper accounting procedures and reports, and upon completion of the project coordinates and assists with initial occupancy.

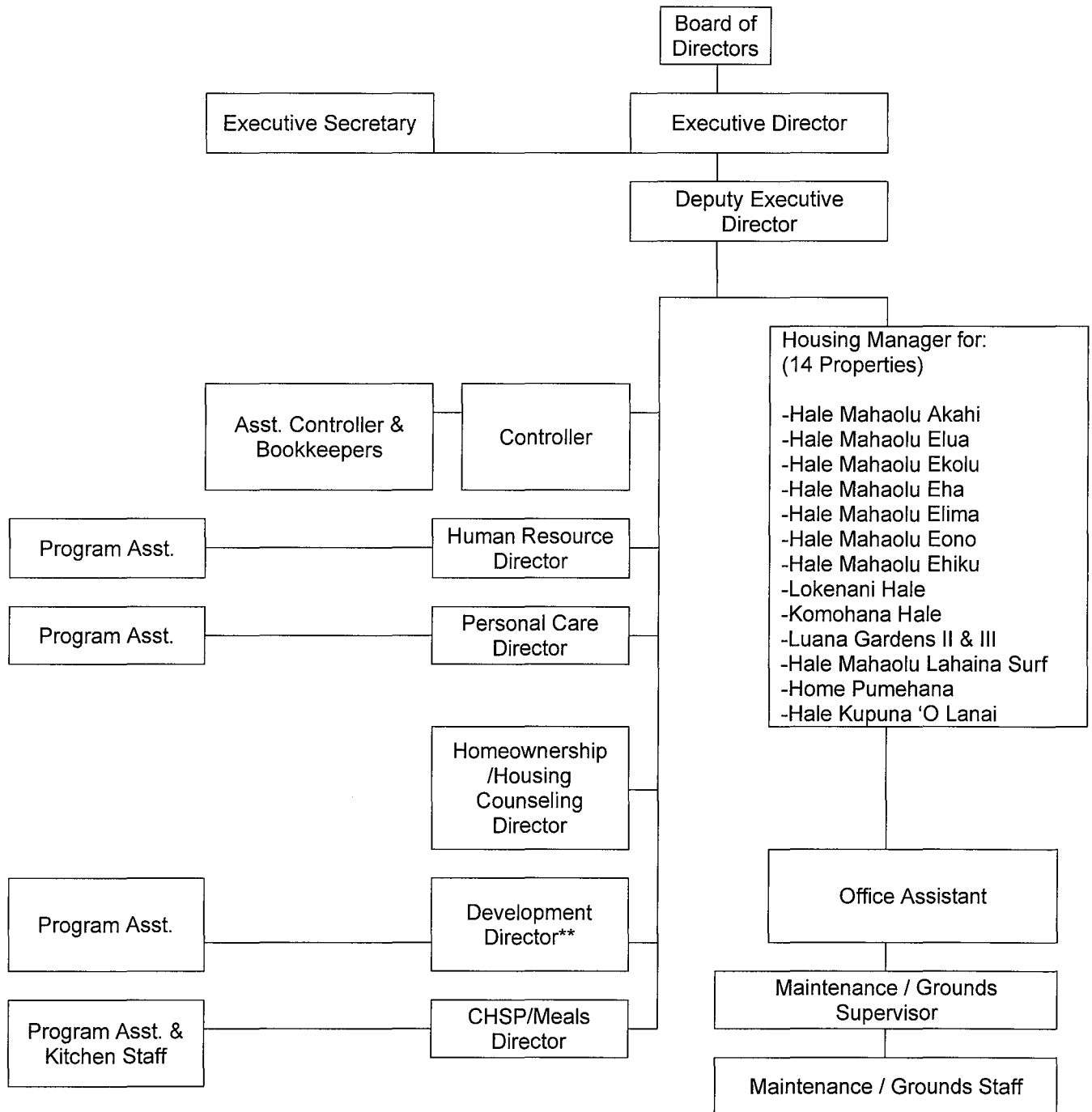
B. Organization Chart

1. Development Program



2. Organization Chart – Wide

Organizational Flow Chart

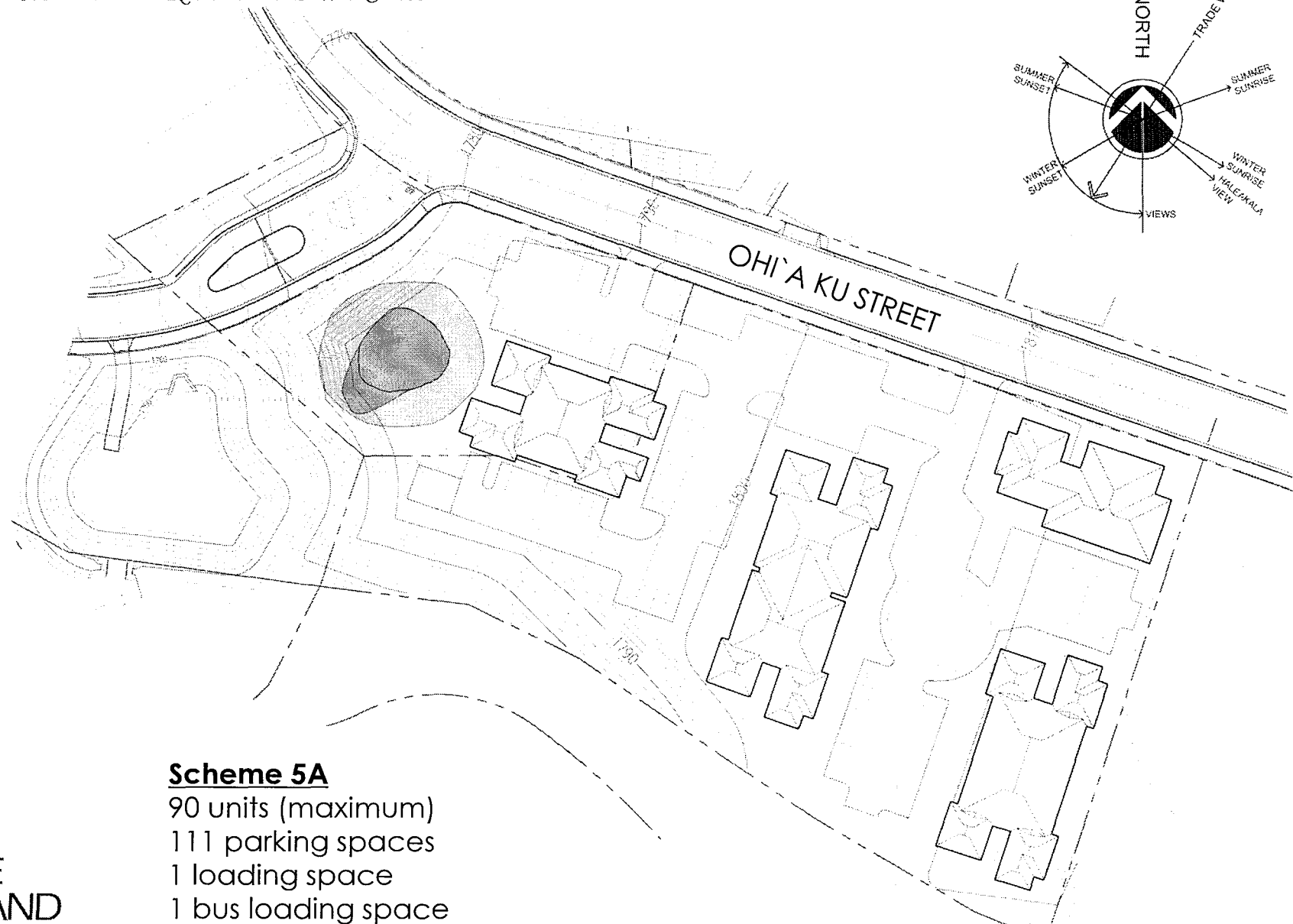


VI. Other

A. Litigation – Not Applicable

B. Licensure or Accreditation – Not Applicable

Hale Mahaolu at Kulamafu Town Center



- Scheme 5A**
- 90 units (maximum)
- 111 parking spaces
- 1 loading space
- 1 bus loading space
- No Adult Day Care Center

**RIECKE
SUNNLAND
ARCHITECTS
LTD. KONO**

**PRELIMINARY DESIGN
SUBJECT TO CHANGE**

Hale Mahaolu at Kulamafu Town Center



RIECKE
SUNNLAND
ARCHITECTS
LTD. KONO

**PRELIMINARY DESIGN
SUBJECT TO CHANGE**

Hale Mahaolu at Kulanalu Town Center



RIECKE
SUNNLAND
ARCHITECTS, LTD. KONO

**PRELIMINARY DESIGN
SUBJECT TO CHANGE**

BUDGET REQUEST BY SOURCE OF FUNDS
(Period: July 1, 2013 to June 30, 2014)

Applicant: HALE MAHAOLU

BUDGET CATEGORIES	Total State Funds Requested (a)	County of Maui AHF (b)	Low Income Housing Tax Credit (c)	Various Other Sources (d)
A. PERSONNEL COST				
1. Salaries	0			
2. Payroll Taxes & Assessments	0			
3. Fringe Benefits	0			
TOTAL PERSONNEL COST	0			
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island	0			
2. Insurance				
3. Lease/Rental of Equipment	0			
4. Lease/Rental of Space	0			
5. Staff Training	0			
6. Supplies	0			
7. Telecommunication	0			
8. Utilities	0			
9 Land		1,500,000		
10 New Construction - Building	2,000,000		13,535,000	3,575,000
11 Contingency			250,000	100,000
12 Building Permits			15,000	5,000
13 Water // Sewer Source Fees				400,000
14 Architect // Engineering // Arch Monitor			650,000	150,000
15 Interim Cost - Const. / Note Interest			900,000	100,000
16 Financing Fees - Title/Title Legal			50,000	5,000
17 Soft Cost (Mkt Study, Good Faith, etc)			200,000	50,000
18 Syndication Cost (LIHTC)				25,000
19 Developer's Fees/Project Mgmt			1,200,000	300,000
20 Project Reserves				350,000
TOTAL OTHER CURRENT EXPENSES	2,000,000	1,500,000	16,800,000	5,060,000
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	2,000,000	1,500,000	16,800,000	5,060,000
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	2,000,000	Robyne T. Nishida Nakao	(808) 872-4108	
(b) County of Maui - AHF	1,500,000			Phone
(c) Low Income Housing Tax Credits	16,800,000			1/31/2013
(d) Various Other Sources	5,060,000			Date
TOTAL BUDGET	25,360,000	Roy K. Katsuda, Executive Director Name and Title (Please type or print)		

BUDGET JUSTIFICATION PERSONNEL - SALARIES AND WAGES

Applicant: HALE MAHAOLU

Period: July 1, 2013 to June 30, 2014

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

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Applicant: HALE MAHAOLU

Period: July 1, 2013 to June 30, 2014

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
			\$ -	
NOT APPLICABLE			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS:				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ -	
NOT APPLICABLE			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS:				

**BUDGET JUSTIFICATION
CAPITAL PROJECT DETAILS**

Applicant: HALE MAHAOLU

Period: July 1, 2013 to June 30, 2014

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: 2011-2012	FY: 2012-2013	FY:2013-2014	FY:2013-2014	FY:2014-2015	FY:2015-2016
PLANS (OTHER DEVELOPMENT EXPENSE)	-0-	-0-	-0-	5,950,000	TBD	TBD
LAND ACQUISITION	-0-	2,000,000	-0-	1,500,000	TBD	TBD
DESIGN	-0-	-0-	-0-	800,000	TBD	TBD
CONSTRUCTION	-0-	-0-	2,000,000	17,110,000	TBD	TBD
EQUIPMENT	-0-	-0-	-0-	-0-	TBD	TBD
TOTAL:	-0-	2,000,000	2,000,000	25,360,000	TBD	TBD
JUSTIFICATION/COMMENTS:						

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

The undersigned authorized representative of the applicant certifies the following:

- 1) The applicant meets and will comply with all of the following standards for the award of grants and subsidies 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 or subsidy 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 or subsidy 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 or subsidy.
- 2) 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 or subsidy is awarded shall be conducted or provided.
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is determined and designated to be a non-profit organization by the Internal Revenue Service; and
 - b) Has a governing board whose members have no material conflict of interest and serve without compensation.

Pursuant to Section 42F-103, Hawaii Revised Statutes, for grants or subsidies used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant or subsidy 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 or subsidy 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)



1/31/2013

(Date)

Roy K. Katsuda

(Typed Name)

Executive Director

(Title)