

House District \_\_\_\_\_

Senate District \_\_\_\_\_

THE TWENTY-SIXTH LEGISLATURE  
HAWAII STATE 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:

Dbn: KAWAI FOUNDATION INC

Street Address: 66 437 KAMEHAMEHA HWY #101B

Mailing Address: HALEIWA, HAWAII 96712

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name CHARLES TORIGOE \_\_\_\_\_

Title OPERATIONS MANAGER \_\_\_\_\_

Phone # (808) 392-3860 \_\_\_\_\_

Fax # \_\_\_\_\_

e-mail cktorigoe@hotmail.com \_\_\_\_\_

3. TYPE OF BUSINESS ENTITY:

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

6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:

INSTITUTE A RENTAL ASSISTANCE PROGRAM.

4. FEDERAL TAX ID #: \_\_\_\_\_

5. STATE TAX ID #: \_\_\_\_\_

7. AMOUNT OF STATE FUNDS REQUESTED:

FY 2012-2013: \$ 100,000 \_\_\_\_\_

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 \$ \_\_\_\_\_

FEDERAL \$ \_\_\_\_\_

COUNTY \$ \_\_\_\_\_

PRIVATE/OTHER \$ \_\_\_\_\_

TYPE NAME & TITLE OF AUTHORIZED REPRESENTATIVE:

ALICE K NAMAKAEHA-FIFI TA EXECUTIVE DIRECTOR  
NAME & TITLE

1/31/13  
DATE SIGNED

**DECLARATION STATEMENT  
APPLICANTS FOR GRANTS AND SUBSIDIES  
CHAPTER 42F, HAWAI'I REVISED STATUTES**

The undersigned authorized representative of the applicant acknowledges that said applicant meets and will comply with all of the following standards for the award of grants and subsidies pursuant to section 42F-103, Hawai'i Revised Statutes:

- (1) 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;
- (2) Comply 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;
- (3) Agree not to use state funds for entertainment or lobbying activities; and
- (4) Allow 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.

In addition, a grant or subsidy may be made to an organization only if the organization:

- (1) Is incorporated under the laws of the State; and
- (2) 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.

Further, a grant or subsidy may be awarded to a non-profit organization only if the organization:

- (1) Has been determined and designated to be a non-profit organization by the Internal Revenue Service; and
- (2) Has a governing board whose members have no material conflict of interest and serve without compensation.

For a grant or subsidy 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.

KAWAI FOUNDATION INC

\_\_\_\_\_  
(Typed Name of Individual or Organization)



\_\_\_\_\_  
1/31/13

(Date)

\_\_\_\_\_  
ALICE K. NAMAKAEHA-FIFITA

(Typed Name)

\_\_\_\_\_  
EXECUTIVE DIRECTOR

(Title)

## BUDGET REQUEST BY SOURCE OF FUNDS

(Period: July 1, 2012 to June 30, 2013)

App

KAWAI FOUNDATION INC

BUDGET CATEGORIES	Total State Funds Requested (a)	Federal CDBG/Home (b)	Other Grants (c)	Fundraising In-Kind Donations (d)
A. PERSONNEL COST				
1. Salaries		125,359		
2. Payroll Taxes & Assessments		10,034		
3. Fringe Benefits		19,928		
TOTAL PERSONNEL COST		<b>155,321</b>		
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island				
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space		20,000		5,000
5. Staff Training			1,500	2,500
6. Supplies				2,400
7. Telecommunication			3,000	50
8. Utilities			2,400	600
9. Rent Subsidy (80%)	80,000	80,000	76,000	6,400
10. Rent Deposit (20%)	20,000	20,000	24,000	1,600
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES	<b>100,000</b>	<b>120,000</b>	<b>106,900</b>	<b>18,550</b>
C. EQUIPMENT PURCHASES		10,000	15,000	
D. MOTOR VEHICLE PURCHASES			40,000	
E. CAPITAL				
<b>TOTAL (A+B+C+D+E)</b>	<b>100,000</b>	<b>285,321</b>	<b>161,900</b>	<b>18,550</b>
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	100,000	Charles Torigoe <span style="float: right;">392-3860</span>		
(b)		Name (Please type or print) <span style="float: right;">Phone</span>		
(c)				
(d)		Signature of Authorized Official <span style="float: right;">Date</span>		
<b>TOTAL BUDGET</b>	<b>100,000</b>	Alice K. Namakaeha-Fifita - Executive Director		
		Name and Title (Please type or print)		

## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Applicant:       KAWAI FOUNDATION      

Period: July 1, 2013 to June 30, 2014

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

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

## BUDGET JUSTIFICATION PERSONNEL - SALARIES AND WAGES

Applicant: \_\_\_KAWAI FOUNDATION INC

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)
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
<b>TOTAL:</b>				
<b>JUSTIFICATION/COMMENTS:</b>				

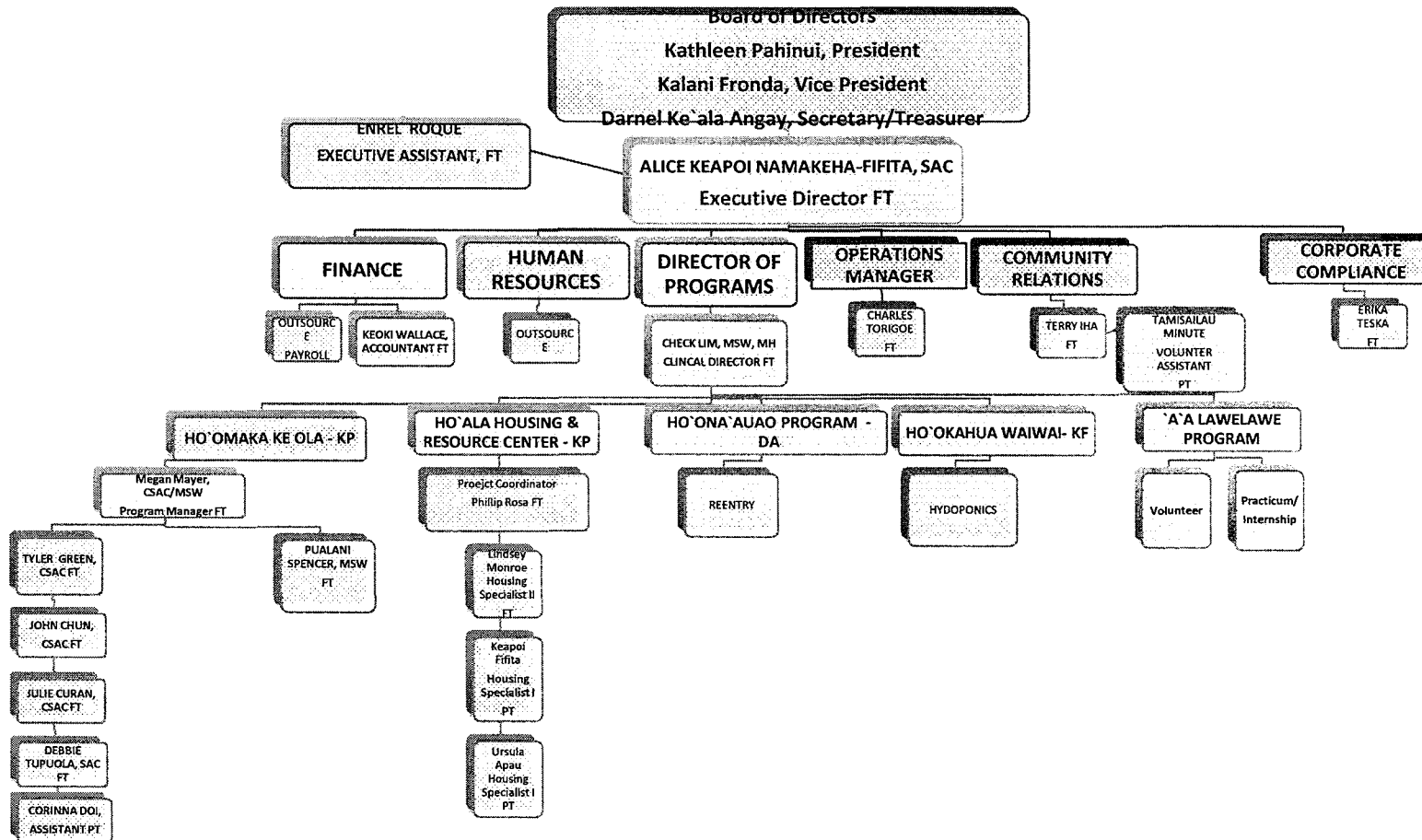
## BUDGET JUSTIFICATION CAPITAL PROJECT DETAILS

Applicant: KAWAI FOUNDATION INC

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	OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2010-2011	FY: 2011-2012	FY:2012-2013	FY:2012-2013	FY:2013-2014	FY:2014-2015
PLANS					100000	
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
<b>TOTAL:</b>					100,000	
<b>JUSTIFICATION/COMMENTS:</b>						
INSTITUTE A RENTAL ASSISTANCE PROGRAM						

Nā'Ala I KaHo'ōikaika



# Application for Grants and Subsidies

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

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## I. 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. Include the following:

- 1 A brief description of the applicant's background: We are a nonprofit corporation primed to address substance abuse primarily within the Native Hawaiian community. However, we also recognize that many substance abusers are homeless or are at risk of becoming homeless. We feel therefore, that we must include a housing component in our program. We have experts who will guide us in this effort and also assist us in becoming self-sufficient.
- 2 The goals and objectives related to the request: Our goals and objectives then, are to institute a rental assistance program which will eventually sustain us through ownership of rental units.
- 3 State the public purpose and need to be served: Anticipating that we will impact the homeless population by targeting substance abuse, we will improve the lives of families that are willing program participants. The client collaborates with the Certified Substance Abuse Counselor (CSAC) to develop an Individualized Treatment Plan that identifies strengths and needs with plan of action to achieve outcomes. The CSAC meets face to face with client from assessment, initial and updated treatment planning, crisis intervention and substance abuse education. Ho'omaka Ke Ola (our program) uses Cognitive Behavior Therapy and Hawaiian culture to address addiction and will integrate activities such as skill building and process groups, recreational therapy, family/couple counseling, substance abuse assessment, case management, activity therapies expressive therapies, occupational therapy, referral, family education, other drug addiction information, health and nutrition counseling during individual counseling.
- 4 Describe the target population to be served: Native Hawaiians have the highest rates of chronic diseases (cancer, diabetes, etc.). However, a chronic disease known to Native Hawaiians is alcohol and substance abuse. Native Hawaiians in prison have a highest incident rate of using and being arrested for drugs and many will need services when released. Regardless, Native Hawaiians who reside in the Central Oahu areas do not have access to a treatment center that provides evidenced based therapy and Hawaiian culture. Hawaiians who reside in these areas make up 13.14% of the population (Haleiwa 382 (9%); Waiialua 195 (5.0%);



Wahiawa 2898 (16.26); Mililani 1312 (4.75%); Waipahu 5052 (13.22%); Hauula 1386 (33.41%); Laie 1806 (29.46); Kahuku 883 (33.78%); and Mokuleia 44 (2.43%) with a total of 13,960 (13.14%) Native Hawaiians out a of a population area of 106,207.

- 5 Describe the geographic coverage: We are currently based in Haleiwa; however our program will initially focus on Wahiawa where we have experienced forty-one Native Hawaiian families who suffer from some form of substance abuse. We also expect to serve families residing on the North-shore and Leeward communities as well.

## II. 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: N/A
2. Provide a projected annual timeline for accomplishing the results or outcomes of the service: N/A
3. Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results: Our target is to increase housing subsidies by seven families each quarter as they transition from their training programs and into the mainstream of society. In order for these families to stabilize, they will require safe affordable housing which will be accomplished through a rent subsidy program not otherwise available to them. We anticipate a subsidy of \$1,000 per family each month. In addition there are families who may be able to afford the monthly rent but lack a security deposit which we see a need to fund. See Performance Measures: Outputs & Outcomes in question 4. We will monitor monthly and quarterly; make improvements with key personnel.
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.

<b>PERFORMANCE MEASURES</b>	2013-2014	2014 - 2015
<b>1. Outputs for rental assistance</b>	21	28

The number of Native Hawaiian individual and families assessed for rental services NH Individuals •NH families	15	20
Total number of Native Hawaiian individual and families enrolled in rental program with Individual Service Plans •NH Individuals •NH families	15	20
The number of Native Hawaiian individual and families who completed individualized counseling	15	20
The number of Native Hawaiian individual and families who completed financial literacy education	15	20
<b>1. Outcomes</b>		
The number of Native Hawaiian individual and families who attained rental housing •NH Individuals •NH families	15	20
The number of Native Hawaiian individual and families who attained rental housing after 90 days •NH Individuals •NH families	10	12
The number of Native Hawaiian individual and families who attained rental housing after 180 days •NH Individuals •NH families	5	8
The number of Native Hawaiian individual and families who attained rental housing after 365 days •NH Individuals •NH families	-	-
The number of Native Hawaiian individual and families who maintained up-to-date rental status •NH Individuals •NH families	12	18
The number of Native Hawaiian renters who are no longer paying 30% of their household towards rental *housing •NH Individuals •NH families	3	7

\*Cost of housing is the sum of monthly rental and utility payments

**III. Financial**

**Budget**

- 1 The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
- 2 The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2013-2014.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$50,000	\$50,000			\$100,000

- 3 The applicant shall provide a listing of all other sources of funding that they are trying to obtain for fiscal year 2013-2014.

ADAD - \$452,000  
 ANA PACIFIC – (Cultural and language preservation) \$100,000  
 Office of Hawaiian Affairs (Substance Abuse/ Housing) - \$500,000  
 Women Fund - \$15,000

- 4 The applicant shall provide a listing of all state and federal tax credits that have 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. N/A

**IV. Experience and Capability**

**A. 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.

We are a new organization. We have experience assisting 41 Native Hawaiian families for transitioning to permanent housing; applying for financial and medical assistance; providing hygiene packages clothing, food and counseling services for employment and substance abuse. There is a need to fill gap in services and we plan to have a one stop center to prevent homelessness. We have personnel who have experience placing families in permanent housing.

We recognize that many substance abusers are homeless or are at risk of becoming homeless. Mr. Torgoe's, Mr. Wallace's and Ms. Teska's finance and real estate background are key personnel; a new partnership with Susan Hahn, a Merrill Lynch Financial Service and other local community stakeholders will guide us in this effort and assist us in becoming self-sufficient. See attachment for resume.

**B. 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. Also describe how the facilities meet ADA requirements, as applicable.

Our current office is at 66 437 Kamehameha Highway #101B, Haleiwa, Hawaii 96712. The proposed new office is at 1034 Kilani Avenue in Wahiawa. The office space is which 1200 sq. at Kilani Business Center and located next to Wahiawa District Court.

Offices are located on the ground floor and accessible by all ADA clients. Entry is at ground level, doors and bathrooms meet minimum requirements. Any other reasonable requirements will be met.

**V. Personnel: Project Organization and Staffing**

**A. 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.

**Charles Torsigoe** has more than 30 years of consulting experience in finance, real estate, and housing. Mr. Torigoe is an expert in financial management and housing projects; specifically in securing funds that improve education for children; renovated impoverished communities and contributed to companies to reach their goals. Mr. Torigoe is knowledgeable of City & County of Honolulu real estate market; HUD and other programs to transition Native Hawaiians to permanent housing while seeking treatment services for addiction.

**Keoki Wallace** is Native Hawaiian and has a dynamic education and work history in financial industry. Mr. Wallace has a Bachelor in Arts: Finance & Accounting from University of Utah. Mr. Wallace has diverse talents and skills in finance and problem solves efficiently; he has a repertoire of strategies that compliment and aligns with Mr. Torigoe's expertise for Kawai Foundation to financially operate independently.

**Erika Teska, MBA** was employed as WIN's Operations and Grants Administrator. Ms. Teska has over 12 years of experience in providing executive support including the maintenance of administrative and procedural processes. She has extensive experience in grants administration including the procurement of funding from federal, state, and local sources and the preparation of proposals, budgets, and fiscal reports. Ms. Teska has advocated for domestic violence victims in family and civil court and has solicited pro bono attorneys for legal service clients. She has implemented human service programs, edited publications, and has facilitated life skills and computer classes. Ms. Teska has a Master's in Business Administration (Minor in Technology), a Bachelor's in Business Administration (Computer Science Information Technology) and Associate of Science Degrees in Medical assisting and Accounting.

**B. 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 organizational chart that illustrates the placement of this request.

See Attachment

**VI. Other**

**A. Litigation**

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgment. If applicable, please explain. N/A

**B. Licensure or Accreditation**

The applicant shall specify any special qualifications, including but not limited to licensure or accreditation that applicant possesses relevant to this request. N/A

## **CHARLES K. TORIGOE**

95-2052 Waikalani Pl. #B404 Mililan I, Hawaii 96789 Tel: (808) 392-3860 email: [cktorigoe@hotmail.com](mailto:cktorigoe@hotmail.com)

**Education:** Post Graduate courses, MBA, Chaminade University  
B. A. Accounting, Chaminade University  
Graduate Saint Louis High School

### **PROFESSIONAL EXPERIENCE**

#### **Construction Coordinator; Business Support Hawaii State Department of Education – Nine Years.**

I had responsibility for 13 schools in the Central School District of the Hawaii Department of Education. My strengths and therefore my major responsibilities are described as follows.

**Financial Consultant:** Assisted elementary, middle and high school principals with analyzing, preparing and adjusting their annual school budgets to reflect their academic plans. Prepared financial reports and alerting schools of financial deadlines in order to prevent lapsing of funds. Liaised with various department branches facilitating training and consultation as necessary for principals and their staff. Audited each school's Administrators Financial Check List function and other department associated accounting practices to include training of school personnel in the preparation of bank reconciliations, journal vouchers and recording and depositing cash receipts in accordance with department financial policies.

**Repairs and Maintenance Project Management:** Consulted with school administrators and custodial staff to establish and prioritize major repairs and maintenance projects; prepared conceptual plans; estimated construction costs, and sought additional funds when required. This had also necessitated interaction with military partners as well as with state legislators, seeking and gaining their support in order to fund various projects. Represented my schools and the DOE at design and construction meetings. Followed up with all work scheduled so as to provide consistent supervision, timely and improved quality workmanship.

**Capital Improvements:** Analyzed school facilities requirements and prepare justification for construction of new buildings that will provide for a safer, healthy learning environment. Prepared complex preliminary schematic plans to site building(s) on the campus and provide a basis for discussion with faculty, parents and community. The health and safety of the students being of primary importance; I was able to secure the largest legislative funding for the Waialua Elementary School library at \$6.5 million.

**Safety Liaison:** Conducted campus inspections; perform walkthroughs with school administrators, custodians and other school personnel to ensure successful fire inspections and emergency procedures. Commended by Honolulu Fire Department inspectors for raising school awareness that subsequently raised the rate of passing annual fire inspections over the last five years. Participated in planning and executing evacuation, lockdown, and school inspection procedures. Initiated school pick-up/drop-off studies. Motivated school personnel to execute safety procedures by providing a sense of responsibility, pride and accountability with administrators and custodial staff.

**Joint Venture Educational Forum (JVEF):** Attended forums and sat on committees that decided how best to administer federal grants to military impacted schools. Informed schools of opportunities, assisted with preparation of grant proposals, evaluated their applications, and ensured funds are used for the intended purpose.

#### **Real Estate Financial Consultant Government and Privately Funded Housing Projects - Eight years**

**Ala Wai Gardens** (A visionary prototype for low income elders): Created financially feasible scenario researching and evaluating all factors from construction costs to quality of life needs: zoning density, interior unit design, transportation, health support services as the residents become less self-sufficient, and necessary project sustainability (because of the uncertainties of continued government subsidies). I arranged for marketing and environmental studies, building contractor, as well as contracting with water treatment engineers and internal energy generation specialists to create a partially self-sustaining building. Interacted with Mayor, City Council members, Planning Department, labor unions and community in an attempt to secure support for this project; however, could not finance this \$40 million development.

**Royal Kunia Apartments:** Audited internal operations and practices, developed financial forecasts, analyzed market to establish a marketing plan and to set rent levels for low income families. Accomplished full rent-up within thirty

days. Employed sound financial practices that increased profitability by \$1 million and enabled this privately funded low-moderate income housing project to continue providing rental housing to small families.

Kaiulani Elderly Housing Development: Performed financial feasibility analysis to determine accuracy and effectiveness of planning, projected costs, design, and impacts of expenses on the operating budget and therefore profitability. Worked extensively with architects and contractors to finalize the design and verify costs.

Consultation provided to Neighborhood Board regarding:

1. Willows Restaurant:

Analyzed zoning; Discovered that front and side yard setbacks were being violated; Parking was inadequate; Loading/unloading stalls were inadequate (blocking driveways & traffic flow); Fencing did not meet the zoning code and is encroaching on public lands; Recommended that the City be notified of the violations.

2. Varsity Theater Site

Researched Zoning; Discussed possible ownership and purchase price (\$10.0 million); Evaluated various land uses in the area; Considered new uses (theater museum with a shopping mall); The City would own the land and seek proposals from developers to develop on a parcel with a long-term lease; Other funds would be sought from the State Historic Preservation Office to preserve the Varsity Theater; The N. B. to seek assistance from the area legislators; Parking would be essential for this area where parking is at a premium; Use of City condemnation process to provide an economic stimulus for this area; Low rents are essential to attract and keep new businesses; Good tie-in to Discover Mo`ili`ili Day; Recommended that the NB No. 8 discuss with the City the possibility of using "Vision " funds to purchase the site from Consolidated Theaters for restoration of the theater and construction of a parking structure and a shopping complex.

3. Bishop Estate Student Housing Proposal at Kalo Place.

This property is bordered by the Humane Society on the Diamond Head end, a homeless shelter on the Makai border, high-rise apartments on the Ewa side and the H-1 Freeway on the Mauka border; The proposed development is zoned for residential use and is less than an acre in size (allows for approximately 6 homes); The proposed use placed more than 200 units on this site without adequate parking (only half the number of required parking stalls were provided); The parcel would have to be re-zoned to medium density apartment in an already dense neighborhood; Mopeds were thought to be the alternative mode of transportation; The structures as designed would obstruct the flow of air to the surrounding neighborhood; This neighborhood is in dire need of a park; Recommended to the N. B. No. 8 that funds be requested using the City's "visioning " process to acquire the land for park use.

4. Stadium Bowl-O-Drome

The lessee of the bowling alley retired, leaving the disposition of the entire building in limbo; In researching the building, I found that one major problem is with asbestos; The Department of Hawaiian Home Lands is the owner of the property and is not inclined to perform the clean-up, which will cost upwards of a million dollars; The neighborhood wanted to keep the bowling alley open especially since the Kapiolani Bowl closed years ago and another social activity would be lost; After renovation, the neighborhood could use the in conjunction with activities at the Stadium Park; I recommended that the N. B. suggest to State legislators that an exchange be made with some other State land in order to provide a community center for this neighborhood.

5. City & County of Honolulu Development Plan

The City, in its urban master plan proposed an urban village that would create "super blocks" in places like McCully-Mo`ili`ili through the condemnation process; The reality of the general make-up of the neighborhoods consists of very small lots that would prove cumbersome to acquire and these small apartments provide us with most of the lower rental units in Honolulu; Rents would escalate with this new concept and also create exclusive neighborhoods that exclude less fortunate residents; Some neighborhoods have such a unique character that residents walk the neighborhood in the early evenings and talk with their neighbors to catch-up on the happenings of the community; The urban village concept would forever eliminate the character of these old neighborhoods. Therefore, I recommended that the N.B. express their objection to this concept.

**Executive Director,  
Honolulu Neighborhood Housing Services, Inc. – Three years  
Mission: to rehabilitate neighborhoods**

Strategic Planning and Budgeting: Collaborated with Board of Directors to develop each year's projects and budgetary needs. I also prepared monthly variance analysis for Board of Directors meetings. This position provided me with training and on-site inner city mainland experience which included underwriting loans for non-profit based projects, plan and create strategic investment in neighborhoods and foster micro-business development. I assisted in creating the Honolulu Junior League's annual "Christmas in April" project by identifying housing repair projects that could be completed in a day. It was a very successful project inspiring contractors and volunteers who gave and homeowners who received a newly rehabilitated home.

Rehabilitated a six unit low income rental complex on Dillingham Boulevard that improved the living conditions of six families. Organized Mayor Wright tenants in preparation for submission of a Hope I application to the US department of HUD. Proposed to the Palama Settlement, a nonprofit, acquisition of a low income housing complex that would provide them with an endowment however, its board of directors did not feel that owning a housing project was in keeping with its mission.

### **Land Development Consultant (Self-Employed) - Three years**

KMPG Peat Marwick: Provided expertise in recommending to the City and County of Honolulu specific models to best utilize its downtown properties for low-moderate income housing. Produced a model for design, cost of construction and operating budget to support debt and operations suited to all downtown locations.

Academy Gardens Limited Equity Cooperative: Trained board members to their areas of responsibility; including how to care for their property, hired management and contractors; and increased cash reserves.

Kahumana Farming Community: Major governmental approvals required close communication, cooperation and specialized knowledge in order to complete this program for the homeless population. Used land valuation and construction cost methodology to determine development feasibility essential for funding that was provided by the City of Honolulu. Assisted in land purchase, prepared proposals, approvals for governmental funding to move and renovate the 14 duplex units. I am informed that this project won a national award from HUD.

### **Operations Manager, I.B, Mortgage, Three years**

Managed retail and wholesale mortgage loan operations for start-up company. I trained underwriters, solicitors, processors, and closers. Prepared all closing documents and calculated Annual Percentage Rates (APRs) and packaged loans for funding. Marketed personalized loan services and products. I Contracted with real estate appraisers and attorneys for services as needed for completion of loan package. Built the volume of this start-up from zero to \$2 million per month, this successful operation was completely under my direction in Hawaii.

### **Deputy Director, Department of Housing and Community Development, City and County of Honolulu – Four years**

Chief Operating Officer: Consolidated the department budget and reviewed and evaluated fiscal policies. Responsible for the Department budget of more the \$1million and indirectly supervised more than eighty (80) personnel in three divisions: Planning, Community Development, and Housing Development. I worked closely with planners and housing division managers to administer the public hearing process followed by of new projects to be funded by Federal Community Development Block Grant Program; oversight of annual funding amounting to \$11 million.

Personnel Management: Directly supervised three division chiefs, a fiscal officer, and administrative services officer who reported to me. Collaborated closely with HGEA during Department re-organization.

Hiring. Wrote position descriptions, advertised and conducted interviews to select branch chiefs, planners, and clerical staff. Counseled employees about their future with the Department. Encouraged employee participation in decision-making process for selecting housing and other community development projects which resulted in increased employee job satisfaction and productivity.

Housing Development: Evaluated City owned properties for potential housing construction (in order to lower cost to affordable housing candidates). A). Coordinated and provided testimony that ultimately enabled new legislation so the Academy Gardens Apartment project could be realized as a Limited Equity Cooperative for seniors. B). Negotiated with land owner, sugar plantation management, ILWU and City officials to purchase and subdivide the Ewa Villages land, rehabilitate the houses and install the infrastructure before selling the homes to the occupants.



Result: The City created the first Limited Equity Cooperative (senior housing) in the state and provided permanent housing for sugar plantation workers after closing of the sugar mill.

**Accounting Manager,  
Hawaiiana Investment Corporation,  
A division of C. Brewer, Inc. – Four years**

Developed Annual Financial Forecasts and annually updated Strategic Plans. Created and performed monthly consolidated variance reports for twenty (20) subsidiaries which were presented at the monthly Corporate Board of Directors meetings; upon arriving on the job, a comprehensive variance report was non-existent. After making the variance report process more efficient, I was able to complete the required reports within a matter of hours after monthly closing. Performed collections and recorded payments for land sales provided by Purchase Money Mortgages and recorded sales of real property according to FASB guidelines. Prepared annual audit packs (20 subsidiaries) for Peat Marwick auditors. Companies included hotels, condominiums, house lots, golf courses, guava orchards, taro and ginger crops, Malaysian shrimp, restaurants and cattle on a ranch in Colorado. Result: Gained real world accounting exposure with a large corporation.

**Certifications:**

- Housing management training for nonprofit organizations
- Commercial real estate development
- Funding resources for economic development
- Underwriting loans to nonprofit sponsored projects
- Strategic investment in neighborhoods
- Micro-business development
- Designing quality in multi-family housing (AIA)

**Community:**

- Catholic Charities Community and Immigrant Services, 1995 to 2001
- Kalihi-Palama Community Council, 1992 to 2004
- Affordable Housing Alliance, 1991 to 1996
- Mc Cully-Mo`ili`ili Neighborhood Board no. 8, 1997 to 2000
- Chaminade University Educational Foundation 1988 to 2001
- Kaimuki Lions Club 2008

**Military Service:**

U.S. Army. Honorable Discharge; National Defense Service medal;  
Rank: Specialist-5, E-5.

# KEOKI WALLACE

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## OBJECTIVE

*To develop, foster and protect an organization's economic, political and social interests in Hawaii.*

## PROVEN ABILITIES

- Dynamic leader with experience directing organizations of 500+ employees
- Passion for and skilled in verbal, written and digital communication
- Able to understand, communicate and work with diverse cultures and languages
- Expert in developing and fostering key personal relationships with local community groups, government entities, industry executives, press representatives and others who can bring notoriety, reputation and revenue to an establishment
- Corporate, partnership, contract and tax law experience including public offerings and non-profits
- In depth knowledge and experience with all aspects of accounting, financial and statistical analysis including statistics, budget, cash flow, forecasting and economic models, analysis of actual results and prediction of future outcomes based on optional scenarios

## EXPERIENCE

### **Director of Public Relations & Entertainment Industry Liaison**

Kahuku, Hawai'i

### **Turtle Bay Resort**

05/06 to 05/12

Came in as part of a team that took Turtle Bay Resort from 32% to 89% average occupancy while simultaneously significantly increasing average room rates and controlling both fixed and variable costs. This was accomplished through the creation and successful implementation of a strategic plan that included minimal capital improvements and heavy marketing and positioning changes. Responsible for department P&L budget and performance as well as individual project ROI. The execution of daily duties required close work with the directors of each department including finance, sales and marketing, housekeeping, food and beverage, property operations and security. Duties included financial and project reports, both written and oral, to owner's representatives and ownership groups. This position also required involvement in government, trade and charitable organizations.

**Owner and Sole Employee**

Hau'ula, Hawai'i

**It's More Than Just Numbers**

07/02 to present

Provide full accounting services, bookkeeping services and tax services for individuals, partnerships, limited liability companies, corporations and non-profit corporations. Provide records and assist CPAs with audits when these entities need certified financial statements. Represent clients in tax matters in front of the Internal Revenue Service. Develop and produce marketing, business and public relations plans as needed. Accounting records are kept using Quickbooks Accountant and tax returns are prepared using both Intuit's Pro Series, Lacerte and Drake's TaxSlayer programs.

**Vice President & General Counsel**

Salt Lake City, Utah

**Summit Ridge**

08/95 to 07/02

Worked with a team of design professionals, architects, golf course architects, land planners, financiers and developers to conceptually design and then obtain government approvals for a 2,300 acre master planned community known as Summit Ridge at Santaquin, Utah. Worked with lawyers, investment bankers, brokers and city officials in order to obtain approval for and fund a \$15,000,000 special improvement district bond to cover the costs of the initial project infrastructure. Applied for and worked with lenders to obtain a \$9,000,000 bridge loan to fund the initial startup costs.

Constantly dealt with image and public relations issues by working with community groups, church groups, business groups, city planners, zoning administrators, city councils and the mayor in order to keep a good working relationship with the city and its population, many of which were against the concept at the beginning but ended up being supporters in the end.

Designed and produced marketing brochures and information packages for investors, developers and end product purchasers. Established and kept databases of information pertaining to potential future purchasers, country club members, vendors and others. Designed and sent emails, direct mailings and brochures to keep people informed about the project's progress.

Kept all limited liability company and related corporate and subsidiary books using Peachtree Complete accounting software.

**Attorney at Law**

San Diego, California

**Various Law Firms**

06/91 to 08/95

Worked for the firms of Lorange & Thompson and Dominguez & Talamante in both Phoenix, AZ and Newport Beach, CA. Dealt with international issues regarding the Pacific Rim as well as the North American Free Trade Agreement (NAFTA). Also responsible for fostering and continuing a personal relationship with one of the major clients of the firm, the Federal Deposit Insurance Corporation (FDIC) and the Resolution Trust Corporation (RTC), which included meals & entertainment with the client, making travel arrangements, developing and producing specialized marketing materials for and direct communications to and with the client. A major portion of my practice was working with real estate development issues, including the expansion of hotels and resorts.

Kept partnership entities (professional corporation) accounting records using Sage software products.

**Department Head/Director of Subsidiary Operations/Managing Officer**  
San Diego, Los Angeles & Irvine, California

**FSLIC & FDIC**  
05/86 to 02/91

Responsible for managing a staff of 500+ that serviced, maintained, and packaged loan packages averaging \$500,000,000 in size received from failed banks and savings and loan associations. Loans included car, business and real estate portfolios. Also responsible for all of the subsidiary corporations (52 of them) that came out of failed banks in the western region. These included, among many other types of companies, ethanol plants, insurance corporations, development companies, mortgage companies and manufacturing companies.

Led the takeover and closing teams for Sun Savings, Carver Savings and other savings and loan associations in Southern California and Arizona. Became responsible for the entire operation once the closing was established through the courts or by Federal Home Loan Bank order. Valued and packaged assets for sale. Worked with loan servicing teams to transfer and sell servicing rights. Directed the work of attorneys, accountants, asset managers and other professionals in order to preserve assets and maximize recoveries.

**Entry Positions**

Various Locations in Utah & California

**Various Companies**

03/80 to 05/86

Sun Savings (Assistant Vice President), San Diego, CA; State Savings (Commercial Loan Officer), Salt Lake City, UT; Huntsman Christianson Corp (Staff Accountant), Park City Utah. Worked on large, multi-lender construction projects, each in excess of \$20,000,000. Analyzed and prepared each draw request for approval. Sent out notices and requests to participating lenders for funding. Kept cost accounting records on each project and constantly analyzed budget v. actual to ensure the projects could be completed with the money allocated. Solicited prospective borrowers, prepared loan write-ups for approval, presented each loan to the loan committee and, when approved, oversaw the closing and funding of each loan. Responsible for the cost accounting and subcontractor accounting and records on the development of two major real estate projects in Park City, Utah, known as Shadow Ridge and Park Station I and II. Used critical path scheduling methods to ensure the completion of the projects during the summer building season.

## OTHER EXPERIENCE

**Served as Chairman of the Board of Directors for:**

- Ko'olauloa Educational Alliance Corporation<sup>i</sup> (2006 to Present)
- Sun Charitable Foundation (1986 to 1989)
- Mountain America Credit Union<sup>ii</sup> (1982 to 1985)

**Professional Committees:**

- Served on the Committee on International Business Law in its Subcommittee on International Banking & Finance of the American Bar Association
- Served on a business development committee for the State of Utah Business Development Office
- Served on the Public Relations Committee for the Oahu Visitors Bureau (OVB)

**Served as in house, General and Tax Counsel at:**

- Healthtram Industries (manufacturing industry)
- Security National Financial Corporation (publically traded, insurance & banking industry)  
Structured, documented and coordinated an acquisition and subsequent down-stream merger with name change back to the upstream company for both tax and licensing benefits
- Isles of the Sea Productions

**Adjunct Professor of Basic Accounting, Business, Finance, Marketing, Communications and Entrepreneurship courses as an adjunct professor at:**

- Brigham Young University of Hawaii
- University of Utah
- Utah Valley State College
- Utah Technical College

**Writing & Photography Experience:**

- Turtle Bay Resort Blog (2006 to 2012)
- Turtle Bay Resort in room weekly newsletter (2010 to 2012)
- North Shore News (feature cover story with picture on Michelle Wie at the SBS open)
- Hawaii Film & Video Magazine (two bylined stories on filming issues in Hawaii)
- Filmed and/or photographed numerous events for publication and promotion
- Compiled and/or edited PR, internal training, and marketing pieces
- Public Relations, Marketing and Business tip blog postings at [blog.itsmorethanjustnumbers.com](http://blog.itsmorethanjustnumbers.com) (2012 to present)

**Other Miscellaneous Experience:**

- Early Morning Seminary Teacher for High School Students at 6am every day, now in my 6<sup>th</sup> year
- Served in the Army National Guard in the 142<sup>nd</sup> Military Intelligence Battalion as an Interrogator for six years
- Wrote a novel called *Insiders*
- Served a full time mission for the Church of Jesus Christ of Latter-day Saints in Northern Italy and Southern Switzerland (1977 to 1979)
- Played the oboe in the Granite Youth Symphony (also gained proficiency in 8 other instruments)

## AWARDS & HONORS

- 2012 Na Po`e Pa`ahana Honorable Mention Award for Manager of the Year
- 2011 Benchmark/Turtle Bay Resort Manager of the Year
- 2010 Benchmark/Turtle Bay Resort Manager of the Quarter
- Santaquin Chamber of Commerce Man of the Year
- Alligator Wrestler Award
- Who's Who Worldwide
- Completed Deseret News Marathon
- Outstanding Young Men of America
- Became youngest realtor in Utah at age 17
- Sterling Scholar Award
- Eagle Scout

## SPECIFIC TECHNICAL SKILLS

- All Microsoft Business Products
- Final Cut Pro
- HTML Webpage creation and maintenance
- All WordPerfect Products
- Act!
- Peachtree Accounting
- QuickBooks Professional Accounting
- Intuit ProSeries
- Lacerte Tax
- Adobe (Photoshop and Acrobat)
- WordPress (blogs and webpages)
- Certified 'Olelo Television Producer, Director, and Photographer
- 10 Key by touch

## LICENSES & PROFESSIONAL ORGANIZATION

Utah Bar Association (inactive license)  
Public Relations Society of America (active member)  
American Marketing Association (active member)  
California Bar Association (active license)

## LANGUAGES

Italian - Fluent  
French - Beginner  
Hawaiian - Beginner

## EDUCATION

Bachelor of Arts/Finance & Accounting  
Interrogation School (96-C)  
Juris Doctor  
Juris Doctor

David Eccles School of Business at the University of Utah  
United States Army - Fort Huachuca  
LaSalle University  
William Howard Taft University

## FOOTNOTES

<sup>1</sup> Ko'olauloa Educational Alliance Corporation is a nonprofit corporation that services Kahuku High School and all its feeder schools from Ka'a'awa to Sunset

<sup>ii</sup> Mountain American Credit Union has \$3,000,000,000 in assets and is the 29<sup>th</sup> largest credit union in the United States

## Career Profile

Responsible and reliable professional with 12+ years experience providing executive level support seeks position focused on performing administrative and customer service duties in support of organizational and executive level goals.

## Core Strengths

- Excellent Customer Service Skills
- Extensive Experience in Grants Administration
- Proactive and Cooperative
- Executive Support
- Document Management
- Operating Systems: Windows, OSX
- Software: Adobe CS5, Microsoft Office, iWork, FileMaker Pro
- Ability to use QuickBooks
- Excellent Communication Skills
- Attention to Detail

## Core Accomplishments

### *Strategy and Planning*

- Developed and implemented human service programs
- Established policies and procedures for supportive services programs in conjunction with staff

### *Print Design*

- Designed graphics and writing content layout for magazine about water safety

### *Management Support:*

- Ensured smooth operations by supporting executive team with multiple projects

### *Data Organization*

- Improved office organization by compiling quarterly budget reports, financial spreadsheets, organizational charts and company data reports

### *Training*

- Successfully trained staff in all office systems, databases, policies and procedures while focusing on minimizing errors and generating superior results

### *Grant Administration*

- Researched and obtained funding from local, city, state, and federal funding for social service programs

## Professional Experience

### **Operations & Grants Administrator**

8/2002 – 6/2012 40hr/week

Women In Need

Waianae, HI

- Handled the tasks of providing executive - level administrative support to the concerned executive managers
- Identified, developed, and maintained grants that fund programs and services
- Researched and acquired funding from local foundations, city, state, and federal agencies
- Developed relationships with private and government agencies
- Prepared proposals and budgets
- Prepared interim and final narrative reports per funder's requirements
- Developed and implemented human services programs, which resulted in increased services to the community
- Maintained detailed administrative and procedural processes that reduced redundancy and improved accuracy and efficiency to achieve organizational objectives
- Improved communication efficiency between staff through implementing and maintaining computer technologies
- Facilitated Basic Life Skills and Compute Classes
- Excelled within deadline-intensive environment, ensuring accurate on-time completion of projects and reports

**Help Desk**

City & County of Honolulu

9/2005 – 3/2006 40hr/week

Honolulu, HI

- Provided help desk support
- Run computer back ups
- Run print jobs
- Collate printed material

**Advocate**

Volunteer Legal Services Hawaii/AmeriCorps

9/2000 – 8/2002 20hr/week

Honolulu, HI

- Provided Intake support
- Interviewed clients
- Maintained Client files
- Participated in community outreaches
- Advocated for domestic violence victims in family and civil court
- Solicited pro bono attorneys on behalf of clients

**Education and Training**

**Masters in Business Administration:** University of Phoenix -- Minor in Technology

**Bachelors in Business Administration:** Hawaii Pacific University – Computer Science Information Technology

**Associates of Science:** Kapiolani Community College – Medical Assisting

**Accounting** California State University Fresno

**Other Activities**

- Volunteer - Oahu Community Correctional Center
- Group Leader/ Lecturer – Happy Science Hawaii
- Editor - Hawaii's Lifeguard & Water Safety Fund Magazine

**REFERENCES:** Available upon request