

House District 12  
Senate District 7

THE TWENTY-EIGHTH LEGISLATURE  
APPLICATION FOR GRANTS  
CHAPTER 42F, HAWAII REVISED STATUTES

Log No:

For Legislature's Use Only

Type of Grant Request:

GRANT REQUEST – OPERATING

GRANT REQUEST – CAPITAL

"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.

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

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 EWALU, INC. and/or HALE MAHAOLU

Dbas: HALE MAHAOLU EWALU SENIOR HOUSING

Street Address: 'Ohia Ku Street, Pukalani

Mailing Address:

200 Hina Avenue  
Kahului, Hawaii 96732

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name ROY K. KATSUDA

Title Executive Director

Phone # (808)-872-4100

Fax # (808)-872-4120

E-mail RKatsuda@halemahaolu.org

3. TYPE OF BUSINESS ENTITY:

- NON PROFIT CORPORATION INCORPORATED IN HAWAII  
 FOR PROFIT CORPORATION INCORPORATED IN HAWAII  
 LIMITED LIABILITY COMPANY  
 OTHER  
 SOLE PROPRIETORSHIP/INDIVIDUAL

6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:

AFFORDABLE RENTAL HOUSING AND SUPPORT FACILITIES FOR THE ELDERLY

4. FEDERAL TAX ID # [REDACTED]

5. STATE TAX ID # [REDACTED]

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2016: \$ 3,500,000

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 \$ 4,000,000  
FEDERAL \$ \_\_\_\_\_  
COUNTY \$ 3,500,000  
PRIVATE/OTHER \$ 1,500,000

TYPE NAME & TITLE OF AUTHORIZED REPRESENTATIVE:

[REDACTED]  
AUTHORIZED SIGNATURE

ROY K. KATSUDA, EXECUTIVE DIRECTOR  
NAME & TITLE

1/29/15  
DATE SIGNED



RECEIVED

1/30/2015  
R. Katsuda

## **Application for Grants and Subsidies**

### **I. Background and Summary**

#### **1. Applicant's Background**

Hale Mahaolu Ewalu, Inc. is a newly formed corporation. 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. Hale Mahaolu will be the sponsoring agency for Hale Mahaolu Ewalu, Inc. and the ensuing affordable senior housing complex (Hale Mahaolu Ewalu).

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, Homemaker/Chore Services etc.) and are invaluable resources 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, providing homeownership/homebuyer education and foreclosure counseling services (especially in the past few years).

Since 1985, Hale Mahaolu's Personal Care program has served 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)
- 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 be 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 Profile<sup>1</sup> estimates 4,230

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<sup>1</sup> American FactFinder Community Facts, Zip Code 96768 and 96790

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 level<sup>2</sup>.

## **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 fringes from former pineapple fields which 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, an 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, and a beauty salon), an adult day care center, a maintenance shop, approximately 60 affordable rental housing units (approximately 58 – 1 bedroom/1 bathroom 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 will allow the elderly to age in place, keeping them with familiar surroundings and avoiding premature placement into a nursing home.

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

**2. Projected Timeline**

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 council	January 2014 – January 2015
2. Apply & Secure Construction funds for the project	January 2014 – November 2015
3. Secure Building and other application permits	January 2015 – October 2015
4. Invite contractors to submit a proposal to construct project.	November 2014
5. Select a contractor, conduct redesign, value engineering	May 2015 – November 2015
6. Start of Construction	January 2016
7. Complete Construction	December 2017

Hale Mahaolu plans to construct the project in two phases:

- Phase I: 36 – 1 bedroom , 2 – 2 bedroom , 1 – 3 bedroom, Senior Center and Adult Day Care Center
- Phase II: 22 (1BR)

**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 Accountant to demonstrate that their particular contributions to the Ewalu project were expended appropriately.

Hale Mahaolu’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. Each housing site and program undergoes periodic reviews to monitor and evaluate the quality and effectiveness of the services that are being provided for the residents and that we are fulfilling our purpose as a corporation.

**4. Measures of Effectiveness**

After issuance of a Certificate of Occupancy from the County of Maui, the occupancy rates of Hale Mahaolu Ewalu will be a constant indicator of its effectiveness. Another basic measure of effectiveness will be servicing those who are at 50 – 60% AMI.

A satisfactory rating of “good” and above from monitoring county, state, federal, and private agencies in meeting compliance standards for safe, sanitary and decent housing will demonstrate Hale Mahaolu Ewalu’s ability to maintain quality services to its target population.

Although harder to measure, the general public’s favorable expectation and acceptance of Hale Mahaolu Ewalu will be an indicator of its wellness and effectiveness within the community.

**III. Financial**

**Budget**

1. **Budget Forms:** See attached
2. **Anticipated quarterly funding requests for fiscal year 2016**

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$0	\$0	\$1,000,000.00	\$2,500,000.00	\$3,500,000.00

3. **Sources of funding seeking for fiscal year 2016:**
  - Hawaii Legislature
  - Federal Home Loan Bank of Seattle (FHLB)
  - The Harry & Jeanette Weinberg Foundation
  - HOME (HUD) – FY 2017
  - Rental Housing Trust Fund (RHTF). LIHTC
  - County of Maui

**4. State and Federal Tax Credits**

- A. **All State and Federal tax credits granted within the prior three years:**
  - Not Applicable
- 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 \$890,000
- Hawaii State Housing Tax Credit \$445,000

**5. Balance of unrestricted current assets as of December 31, 2014**

As of December 31, 2014, Hale Mahaolu Ewalu, Inc., a newly formed nonprofit corporation, had no assets. Hale Mahaolu is the sponsor agency for this development. Its reserves provide operational and maintenance support for 12 existing housing sites. The reserves also provide operational support for Hale Mahaolu’s meal program, housing counseling program, and personal care programs.

**IV. Experience and Capability**

**A. Necessary Skills and Experience**

Hale Mahaolu was incorporated in 1967 and over the last 46 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

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: 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: Phase 1A  
**Address:** 56 Ehiku Street, Kihei, Hawaii 96753  
**Occupancy Start:** July 2007  
**Number of Units:** 34  
**Financing:** USDA-RD Section 515 Loan, Low Income Housing Tax Credits

**Project Name:** Hale Mahaolu Ehiku: Phase 1B  
**Address:** 56 Ehiku Street, Kihei, Hawaii 96753  
**Occupancy Start:** September 2010  
**Number of Units:** 21  
**Financing:** Sec. 202 Capital Advance (HUD), HOME program, FHLB, Dowling Co., Weinberg Foundation, BoH Foundation, Hawaii State Legislature

**Project Name:** Hale Mahaolu Ehiku: Phase II  
**Address:** 56 Ehiku Street, Kihei, Hawaii 96753  
**Occupancy Start:** January 2011  
**Number of Units:** 60  
**Financing:** Low Income Housing Tax Credits, HOME Program, HUD 202, USDA-RD Loan Section 515, USDA-RD Mortgage

**Project Name:** Wailuku Senior Living dba 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, and a beauty salon), an adult day care center, a 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. In July 2014, Hale Mahaolu obtained 201H approval from the County of Maui.

The planning of this newest affordable rental housing campus for the elderly is approximately 99% completed.

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 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 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 a 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 staffed by one part-time Program Assistant, one part-time Development Director, and one full-time Controller 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.

The Executive Director oversees the development & management of Hale Mahaolu's 14 properties in Maui County.

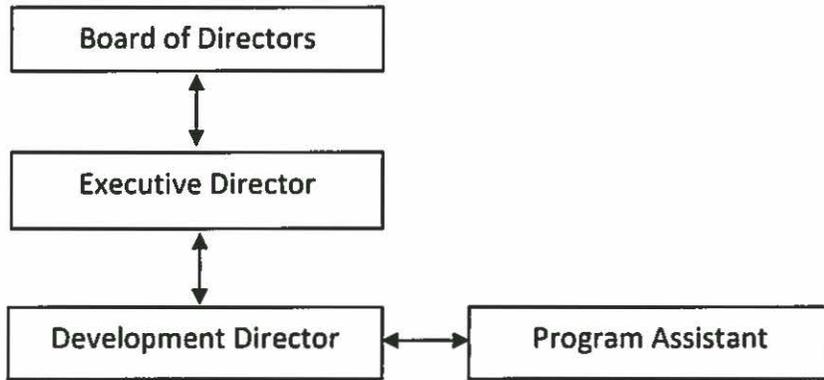
The Development Director works directly with the Executive Director, Hale Mahaolu's management staff, the development team, consultants, government agencies and other community members from a project's conceptual phase through initial occupancy. Some development tasks include grant writing, grant reporting, financial closings, and construction oversight among the various other aspects of development work. The Development Director is also 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.

The Controller coordinates and sets up proper accounting procedures and reports. Upon completion of the project, the Controller also coordinates and assists with initial occupancy with Hale Mahaolu's Housing Management Team. The Controller works with the Development Director to coordinate fiscal arrangements including disbursements and invoices.

The Hale Mahaolu's Housing Management Team will oversee tenant eligibility processing, set-up of tenant records, facilitate public/tenant relations, and set-up of initial accounting and bookkeeping or project accounts, etc.

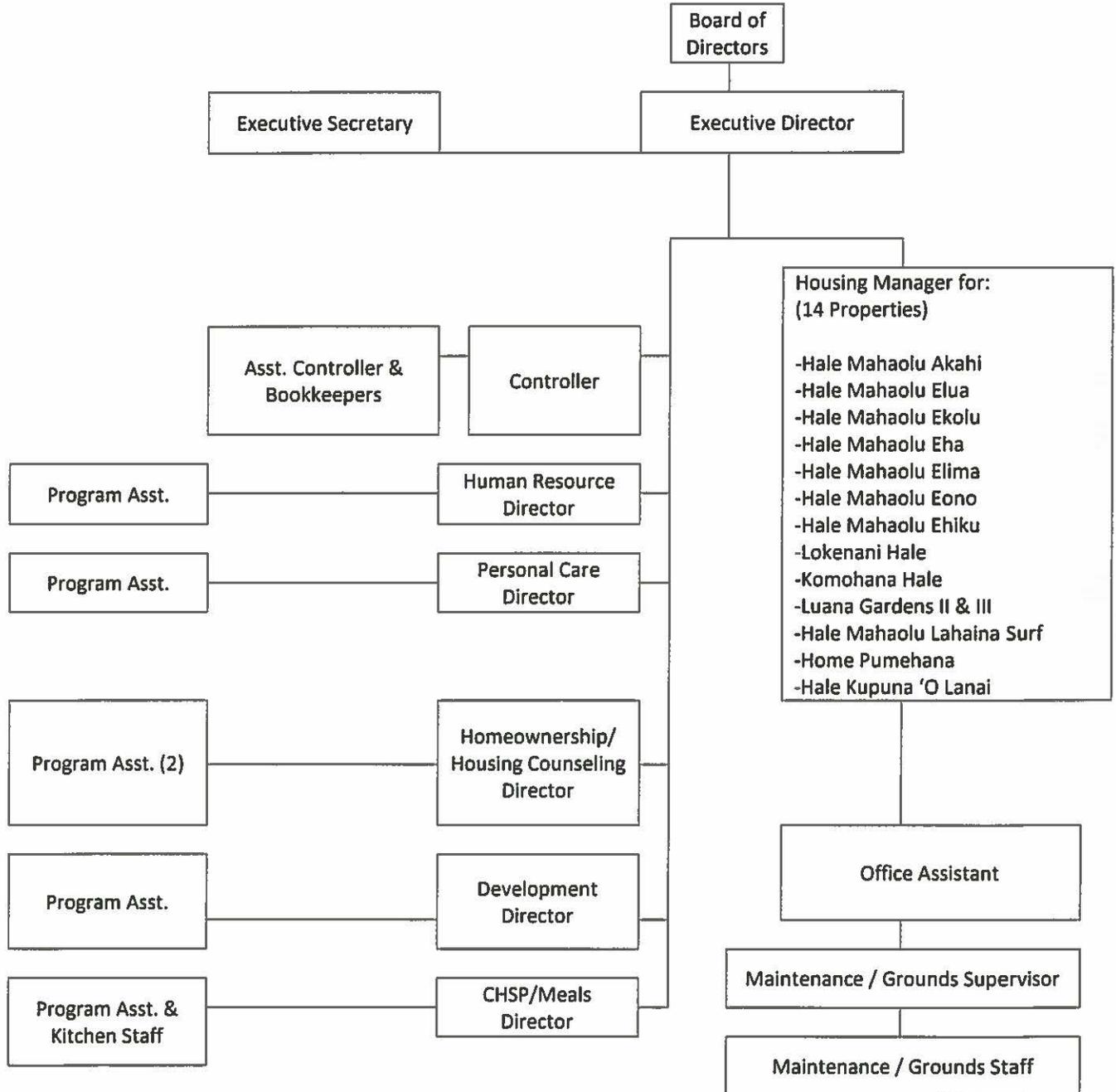
**B. Organization Chart**

**1. Development Program**



**2. Organization Chart – Wide**

**Organizational Flow Chart**



**C. Compensation – Hale Mahaolu Ewalu, Inc. has no employees.**

- Hale Mahaolu:
  1. Executive Director: \$170,000
  2. Meals Director: \$105,000
  3. Controller: \$105,000

**VI. Other**

- A. Litigation: Not Applicable.
- B. Licensure or Accreditation: Not Applicable

**BUDGET REQUEST BY SOURCE OF FUNDS**  
(Period: July 1, 2015 to June 30, 2016)

Applicant: HALE MAHAOLU

<b>BUDGET CATEGORIES</b>	<b>Total State Funds Requesting FY2016 (a)</b>	<b>Total State Funds Awarded FY2015 (b)</b>	<b>County of Maui AHF (c)</b>	<b>Low Income Housing Tax Credit (d)</b>	<b>Various Other Sources (e)</b>
<b>A. PERSONNEL COST</b>					
1. Salaries	0	0			
2. Payroll Taxes & Assessments	0	0			
3. Fringe Benefits	0	0			
<b>TOTAL PERSONNEL COST</b>	<b>0</b>	<b>0</b>			
<b>B. OTHER CURRENT EXPENSES</b>					
1. Airfare, Inter-Island	0	0			
2. Insurance					
3. Lease/Rental of Equipment	0	0			
4. Lease/Rental of Space	0	0			
5. Staff Training	0	0			
6. Supplies	0	0			
7. Telecommunication	0	0			
8. Utilities	0	0			
9 Land			3,500,000		
10 New Construction - Building	3,500,000	4,000,000	1,750,000	5,500,000	7,500,000
11 Contingency			300,000	0	0
12 Building Permits				10,000	15,000
13 Water // Sewer Source Fees			300,000		200,000
14 Architect // Engineering // Arch Monitor			300,000	550,000	350,000
15 Interim Cost - Const. / Note Interest			200,000	600,000	100,000
16 Financing Fees - Title/Title Legal			25,000	30,000	10,000
17 Soft Cost (Mkt Study, Good Faith, etc)			25,000	125,000	75,000
18 Syndication Cost (LIHTC)				25,000	0
19 Developer's Fees/Project Mgmt			50,000	650,000	0
20 Project Reserves			300,000		0
<b>TOTAL OTHER CURRENT EXPENSES</b>	<b>3,500,000</b>	<b>4,000,000</b>	<b>6,750,000</b>	<b>7,490,000</b>	<b>8,250,000</b>
<b>C. EQUIPMENT PURCHASES</b>					
<b>D. MOTOR VEHICLE PURCHASES</b>					
<b>E. CAPITAL</b>					
<b>TOTAL (A+B+C+D+E)</b>	<b>3,500,000</b>	<b>4,000,000</b>	<b>6,750,000</b>	<b>7,490,000</b>	<b>8,250,000</b>
<b>SOURCES OF FUNDING</b>			Budget Prepared By:		
(a) Total State Funds Requested	3,500,000		Roy K. Katsuda (808) 872-4100		
(b) Total State Funds Awarded	4,000,000		Name (Please type or print) Phone		
(c) County of Maui - AHF	6,750,000		Signature of Authorized Official Date		
(d) Low Income Housing Tax Credits	7,490,000			1/29/15	
(e) Various Other Sources	8,250,000				
<b>TOTAL BUDGET</b>	<b>29,990,000</b>		Roy K. Katsuda, Executive Director Name and Title (Please type or print)		



## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Applicant: Hale Mahaolu

Period: July 1, 2015 to June 30, 2016

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

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

**BUDGET JUSTIFICATION  
CAPITAL PROJECT DETAILS**

Applicant: Hale Mahaolu

Period: July 1, 2015 to June 30, 2016

<b>FUNDING AMOUNT REQUESTED</b>						
<b>TOTAL PROJECT COST</b>	<b>ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS</b>		<b>STATE FUNDS APPROVED</b>	<b>STATE FUNDS REQUESTING</b>	<b>ADDITIONAL SOURCES OF FINANCING</b>	
	<b>FY: 2012-2013</b>	<b>FY: 2013-2014</b>	<b>FY:2014-2015</b>	<b>FY:2015-2016</b>	<b>FY:2015-2016</b>	<b>FY:2016-2017</b>
PLANS (OTHER DEVELOPMENT EXPENSE)	\$0	\$0	\$0	\$0	\$1,750,000	\$500,000
LAND ACQUISITION	\$2,000,000	\$1,500,000	\$0	\$0	TBD	TBD
DESIGN	\$0	\$0	\$0	\$0	\$1,500,000	TBD
CONSTRUCTION	\$0	\$0	\$4,000,000	\$3,500,000	\$15,240,000	TBD
EQUIPMENT	\$0	\$0	\$0	\$0		\$0
<b>TOTAL:</b>	<b>\$2,000,000</b>	<b>\$1,500,000</b>	<b>\$4,000,000</b>	<b>\$3,500,000</b>	<b>\$18,490,000</b>	<b>\$500,000</b>
<b>JUSTIFICATION/COMMENTS:</b>						

**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)



(Signature)

01/29/2015

(Date)

Roy K. Katsuda

(Typed Name)

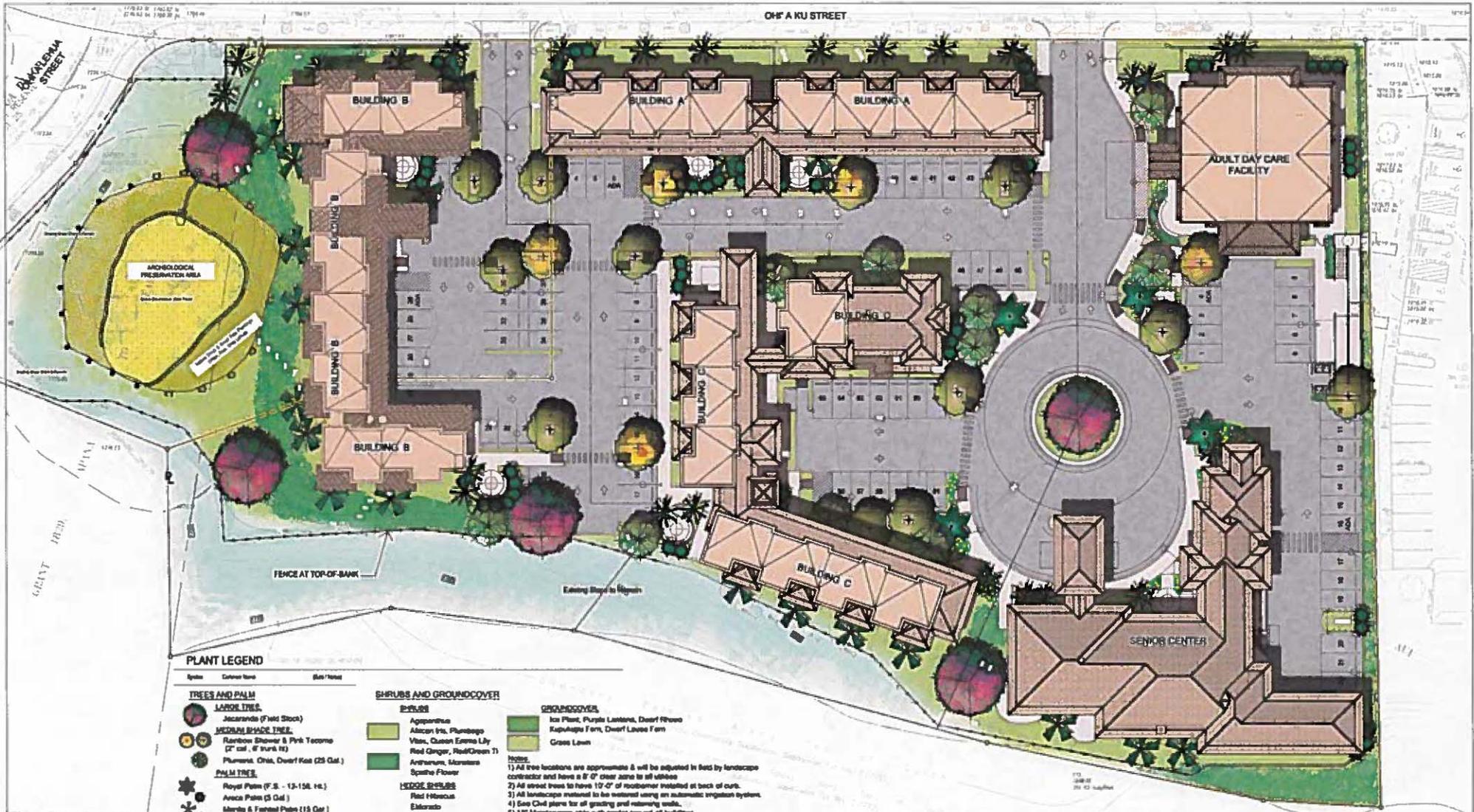
Executive Director

(Title)

# GOVERNMENT CONTRACTS AND/OR GRANTS

Applicant: Hale Mahaolu

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S. / State / Haw / Hon / Kau / Mau )	CONTRACT VALUE
1.	Hale Mahaolu Adult Personal Care Program	7/1/14-6/30/15	Department of Human Services	State of Hawaii	\$210,000 GIA funds not released to date
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
				TOTAL	



**PLANT LEGEND**

Symbol    Common Name    Size/Notes

- TREES AND PALM**
- LOOKING TREES**
    - Jacaranda (Field Stock)
  - SHRUBS/BRUSH TREES**
    - Rainbow Shower & Pink Yucca (2' cal. 6" trunk H)
    - Flameless, Olive, Dwarf Red (25 Gal.)
  - PALM TREES**
    - Royal Palm (F.S. - 15-15L H+)
    - Avoca Palm (5 Gal.)
    - Merita & Fambal Palm (15 Gal.)
    - MacArthur Palm (15 Gal.)

- SHRUBS AND GROUNDCOVERS**
- SHRUBS**
    - Agapanthus
    - Alison Iris, Plumbeo
    - Vibex, Queen Emma Lily
    - Red Ginger, Red/Green T)
    - Anthurium, Maranta
    - Spatha Flower
  - HEDGE SHRUBS**
    - Red Hibiscus
    - Elmoro
    - Hauhepa

- GROUNDCOVERS**
- Ice Plant, Purple Lantern, Dwarf Ficus
  - Kaupo Fern, Dwarf Loose Fern
  - Grass Lawn

- Notes:**
- 1) All tree locations are approximate & will be adjusted in field by landscape contractor and have a 6" or 8" clear zone to all utilities
  - 2) All street trees to have 10'-0" of rootbarrier installed at back of curb.
  - 3) All landscape material to be watered using an automatic irrigation system.
  - 4) See Civil plans for all grading and retaining walls.
  - 5) 18" Maintenance strip with center around all buildings.

TMK: (2) 2-3-008: 027



# Landscape Concept Plan

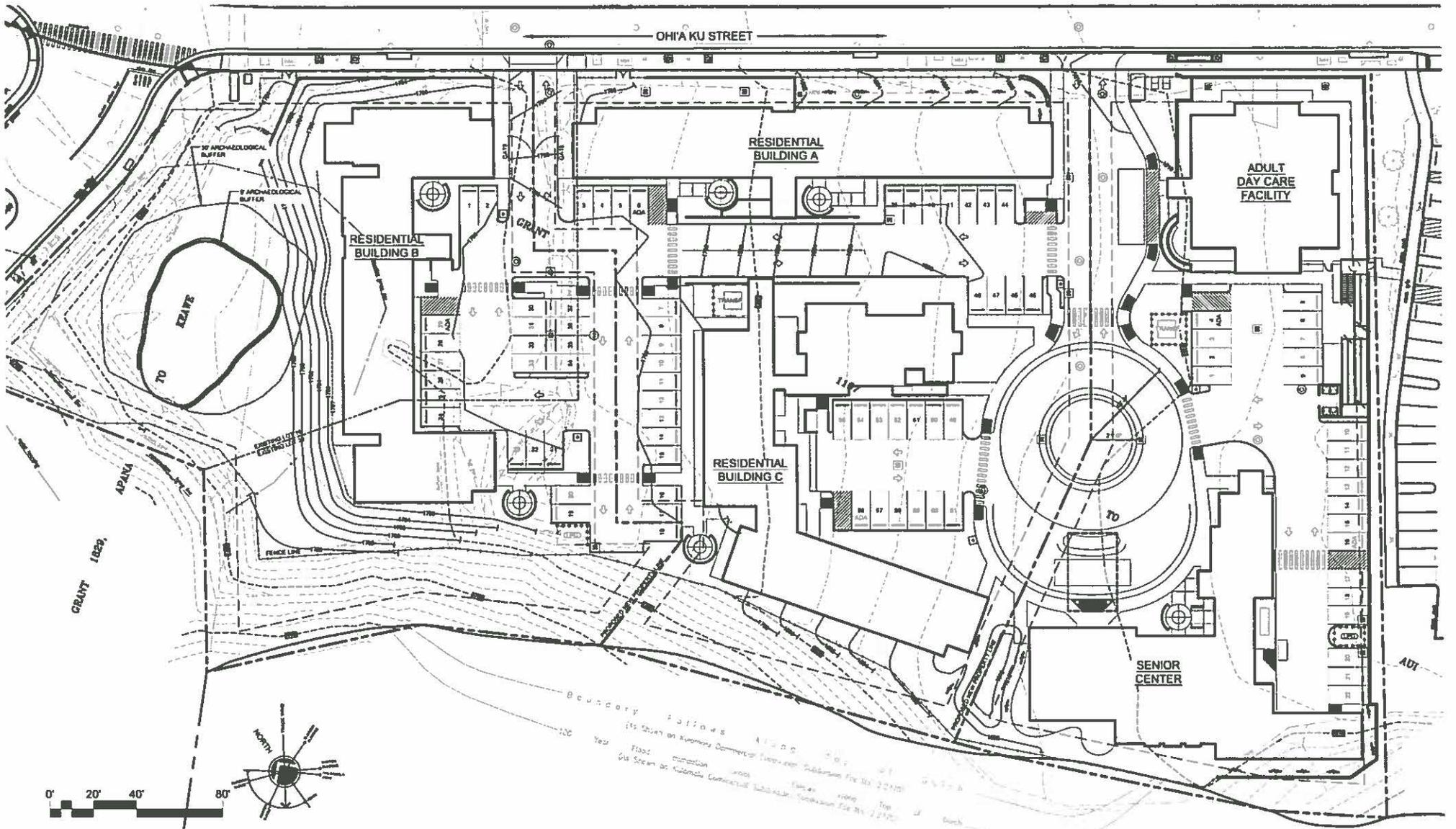
## Hale Mahaolu Ewalu at Kulamalu Town Center

Kula, Maui, Hawaii

SCALE: 1"=20'-0"

PROJECT: 13-027

DATE: 10-14-13

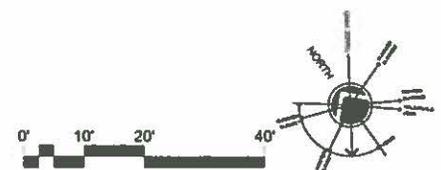
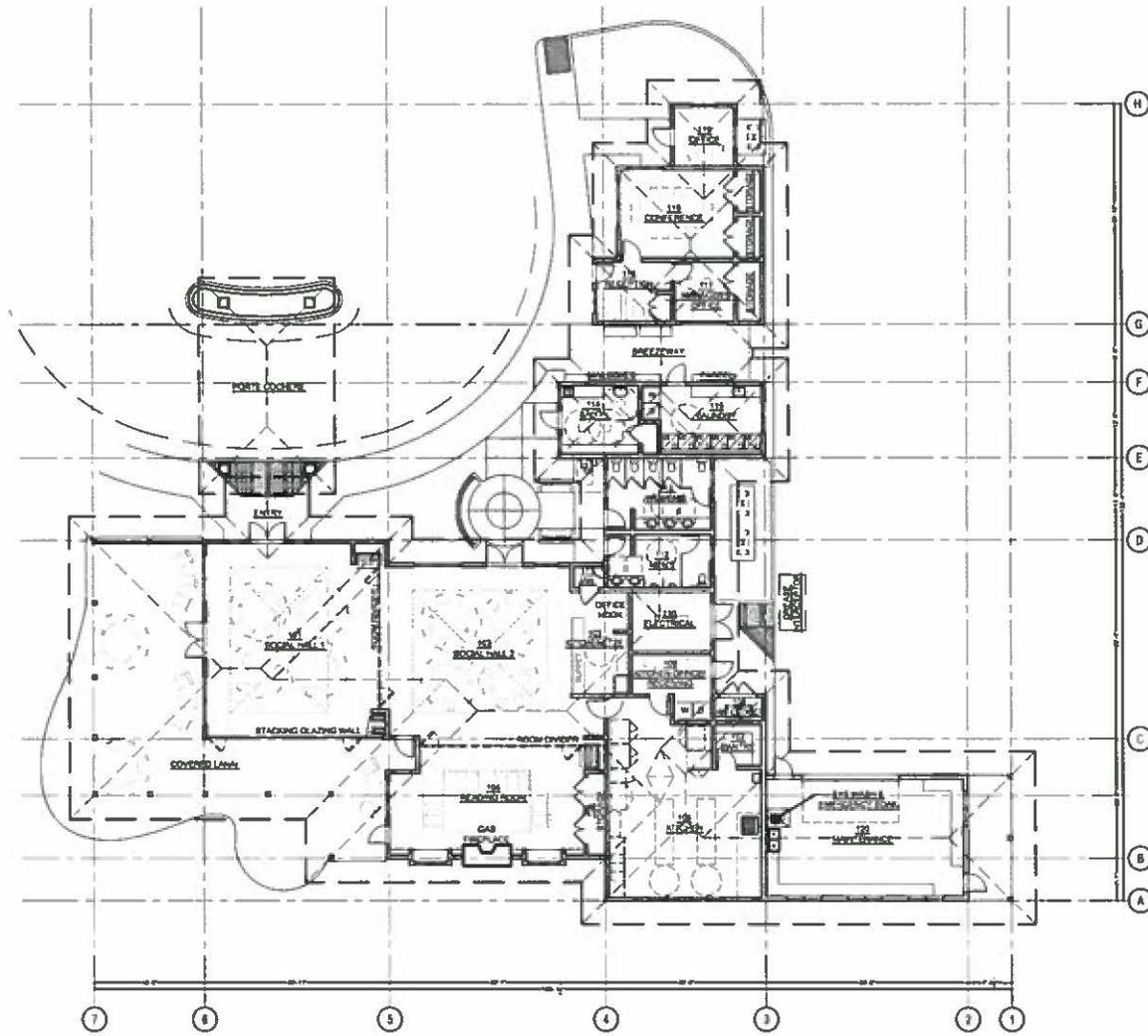


# ARCHITECTURAL SITE PLAN

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KULAMALU  
T.M.K., (2) 2-3-008; 019 & 020

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KONO**  
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LLC

PROJECT NO: 2013-008  
DATE: OCTOBER 2013  
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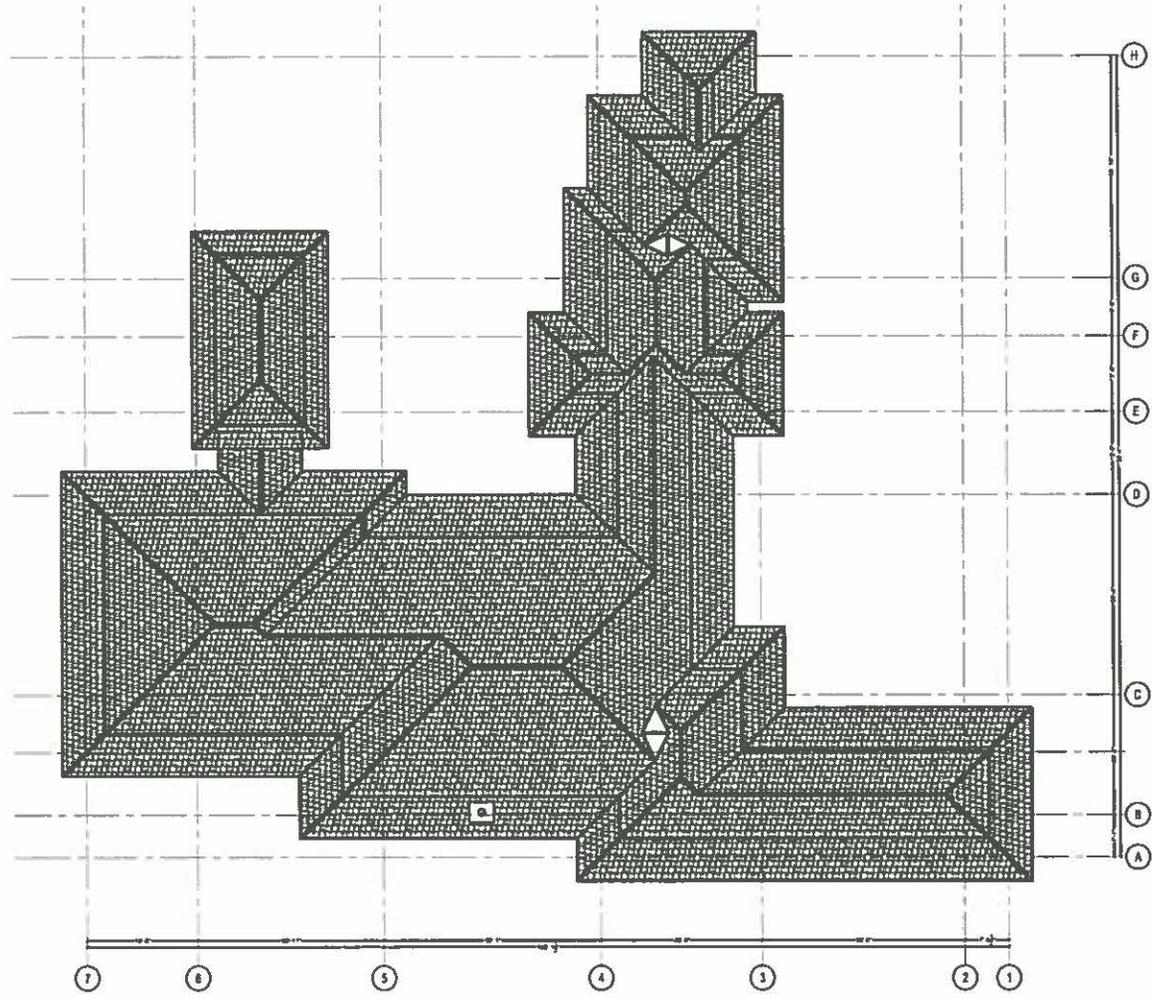
**SENIOR CENTER - FLOOR PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALLU  
 T.M.K., (2) 2-3-088, 019 & 020

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 KONO**

PLAN SET NO. 2012 038  
 DATE OCTOBER 2013

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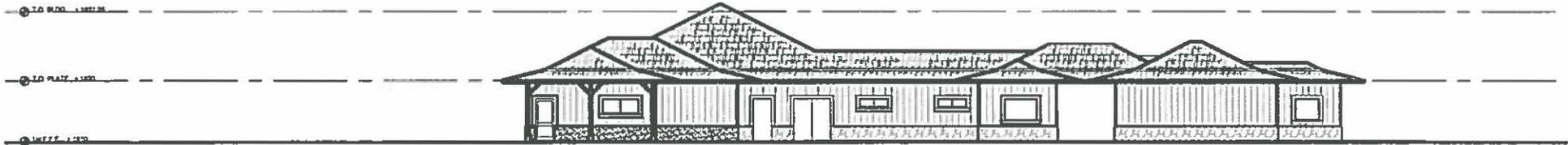
**SENIOR CENTER - ROOF PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALU  
 T.M.K. (2) 2-3-088: 019 & 020

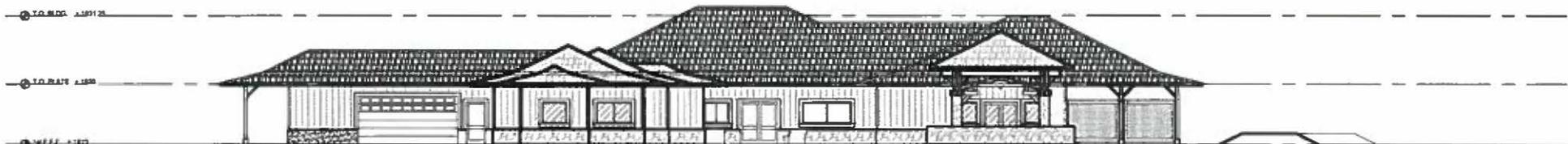
**RIECKE  
 SUNNLAND  
 ARCHITECTS  
 KONO**

PROJECT NO. 2013-006  
 DATE OCTOBER 2013

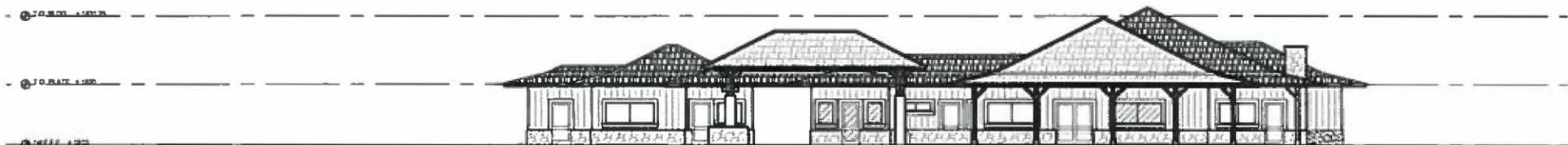
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**EAST EXTERIOR ELEVATION**



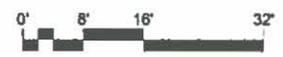
**NORTH EXTERIOR ELEVATION**



**WEST EXTERIOR ELEVATION**



**SOUTH EXTERIOR ELEVATION**

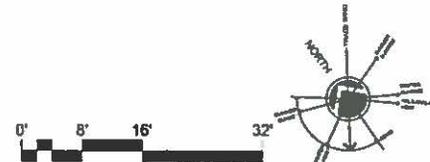
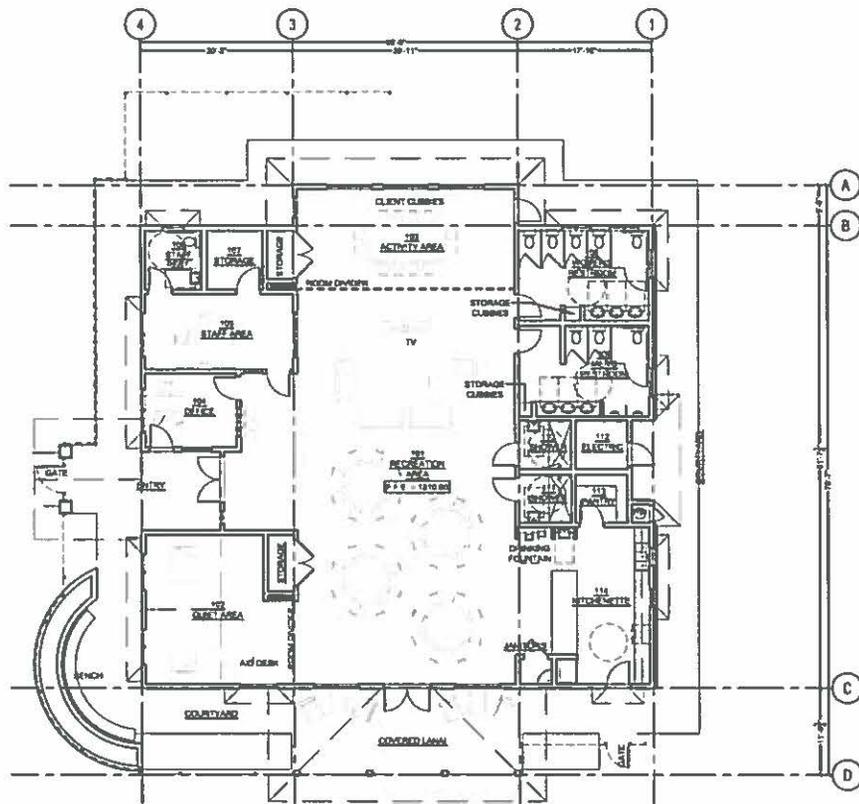


**SENIOR CENTER - EXTERIOR ELEVATIONS**

PROJECT NO: 2014-008  
 DATE: OCTOBER 2013  
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HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KUALAMALI  
 T.M.K. (2)2-3-000, 010 & 020

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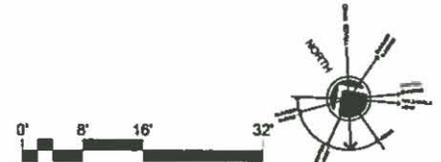
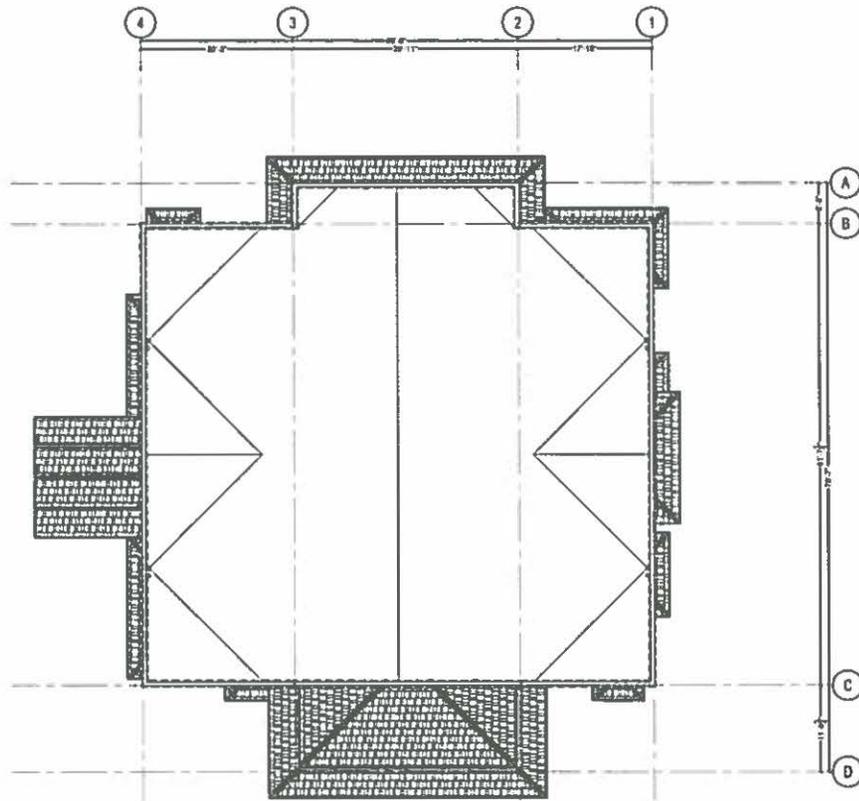
**ADULT DAY CARE - FLOOR PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALLU  
 T.M.L.: (2) 2-3-000: 019 & 020

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 KONO**

PROJECT NO: 2014-005  
 DATE: OCTOBER 2014

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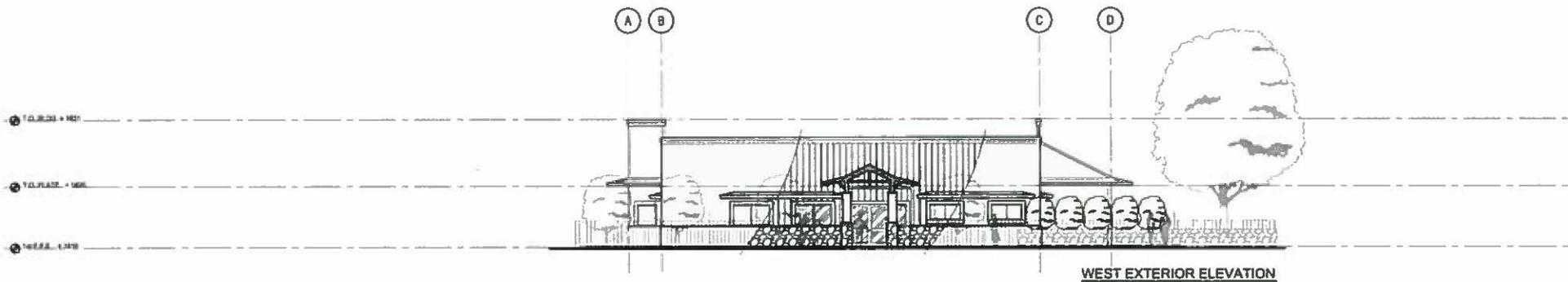


**ADULT DAY CARE - ROOF PLAN**

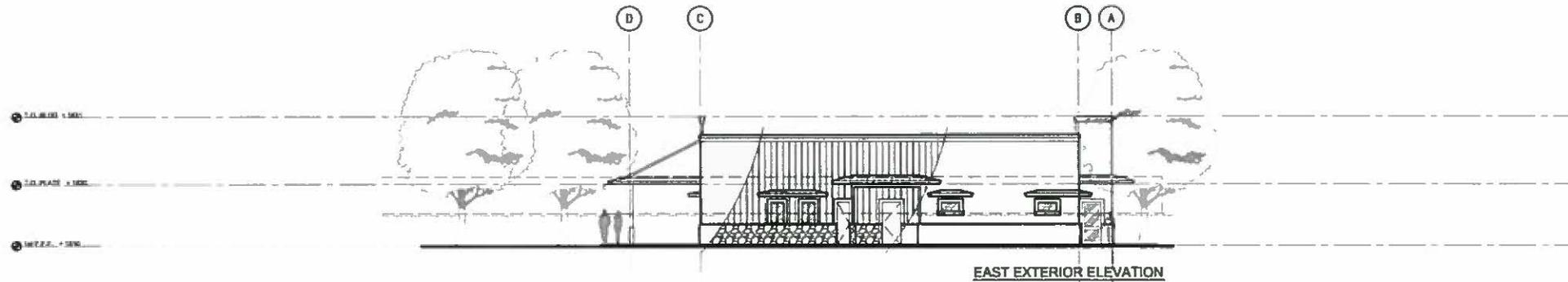
HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALU  
 T.M.K. (2) 2-3-066, 019 & 020

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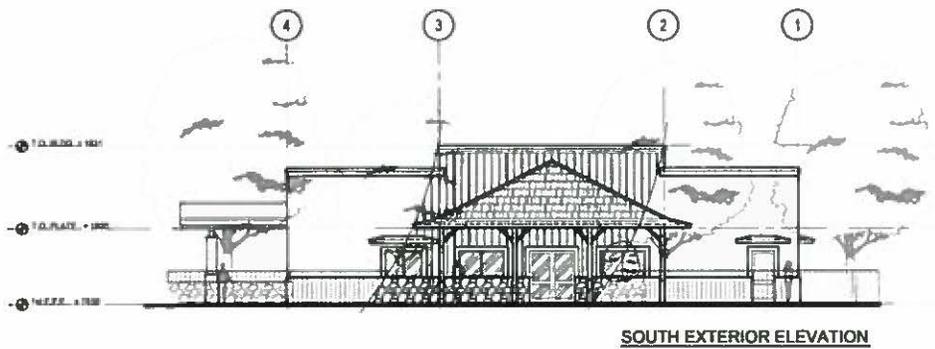
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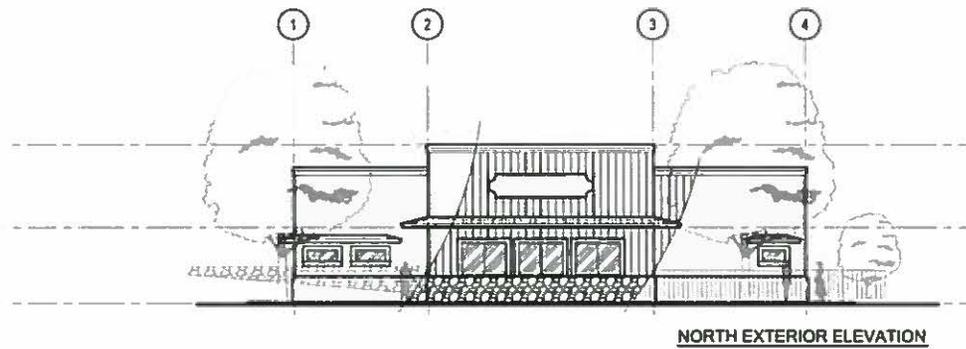
**WEST EXTERIOR ELEVATION**



**EAST EXTERIOR ELEVATION**



**SOUTH EXTERIOR ELEVATION**



**NORTH EXTERIOR ELEVATION**

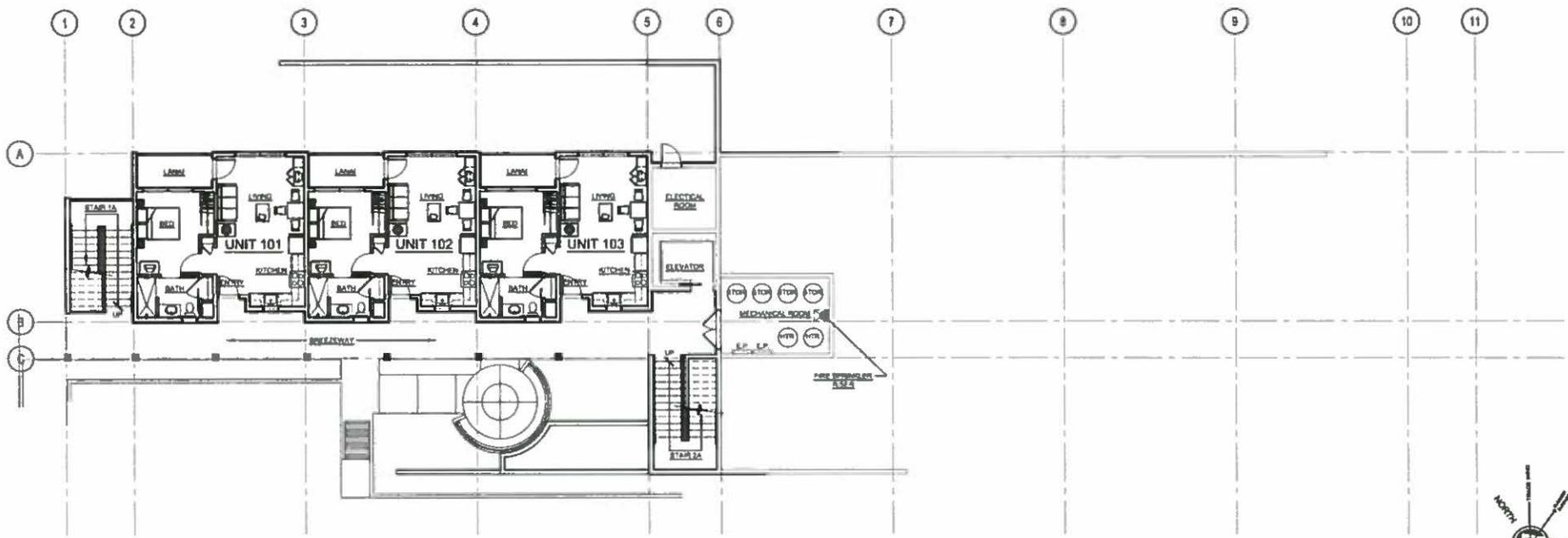


**ADULT DAY CARE - EXTERIOR ELEVATIONS**

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KULAMALU  
T.M.K. (2) 2-3-006: 019 & 020

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PROJECT NO. 2013-008  
DATE: OCTOBER 2013  
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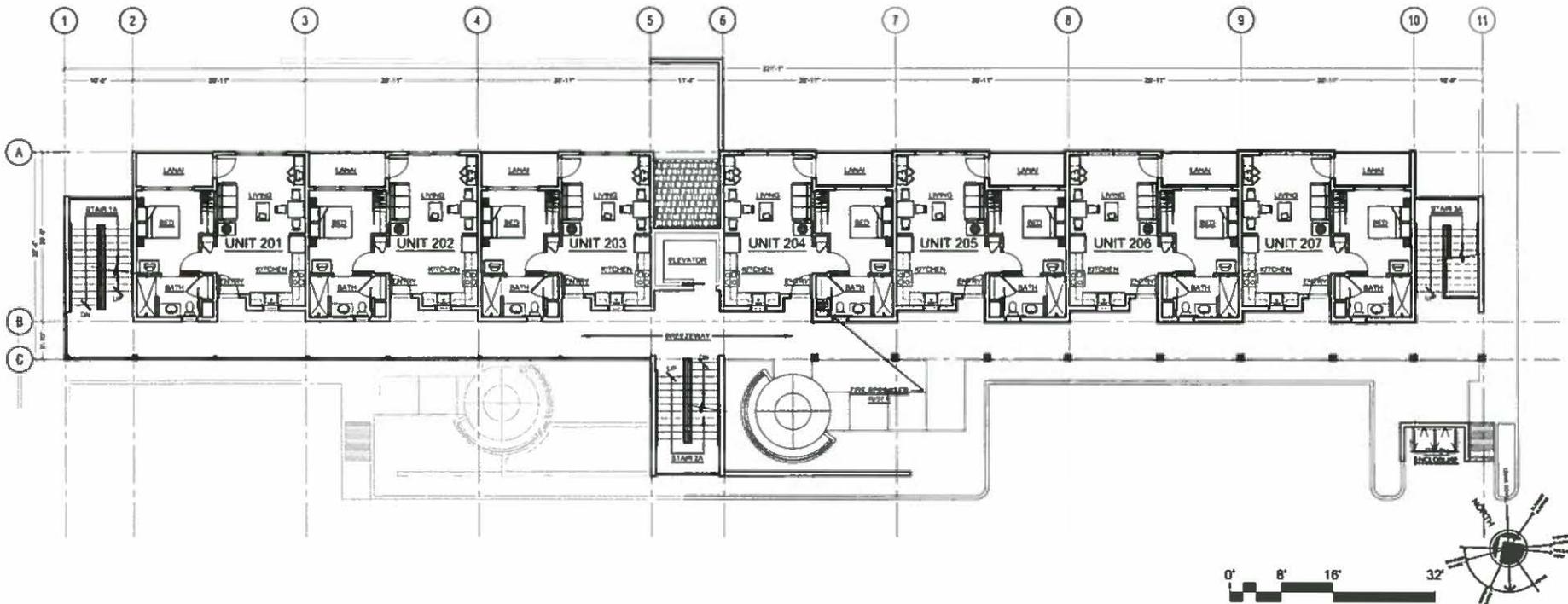
**RESIDENTIAL BUILDING A - 1ST FLOOR PLAN**

RELAY NO: 2013-008  
 DATE: OCTOBER 2013

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KILAMALU  
 T.M.K. (2) 2-3-088, 019 & 020

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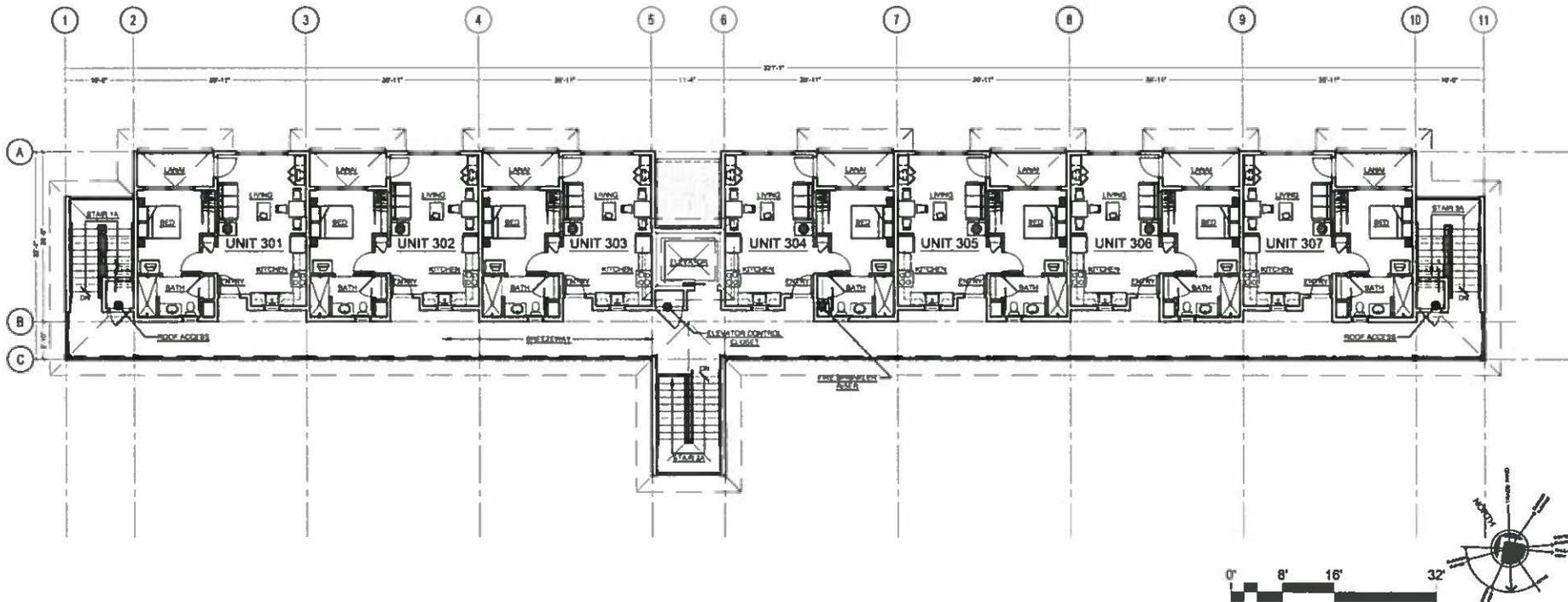
**RESIDENTIAL BUILDING A - 2ND FLOOR PLAN**

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KULAMALU  
T.M.K. (2) 2-3-008: 019 & 020

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PROJECT NO. 2012-008  
DATE: OCTOBER 2013

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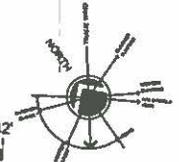
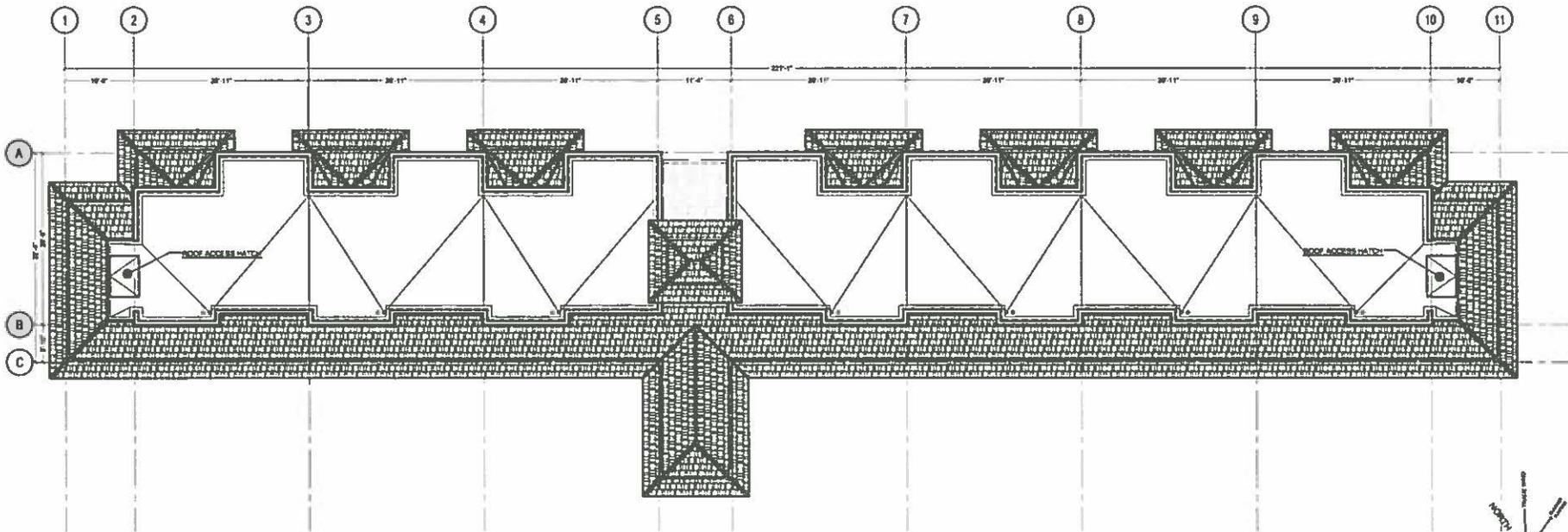


**RESIDENTIAL BUILDING A - 3RD FLOOR PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALU  
 T.M.K. (2) 2-3-066-019 & 020

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 ARCHITECTS  
 L.L.C. KONO**

PROJECT NO. 2013-006  
 DATE OCTOBER 2013  
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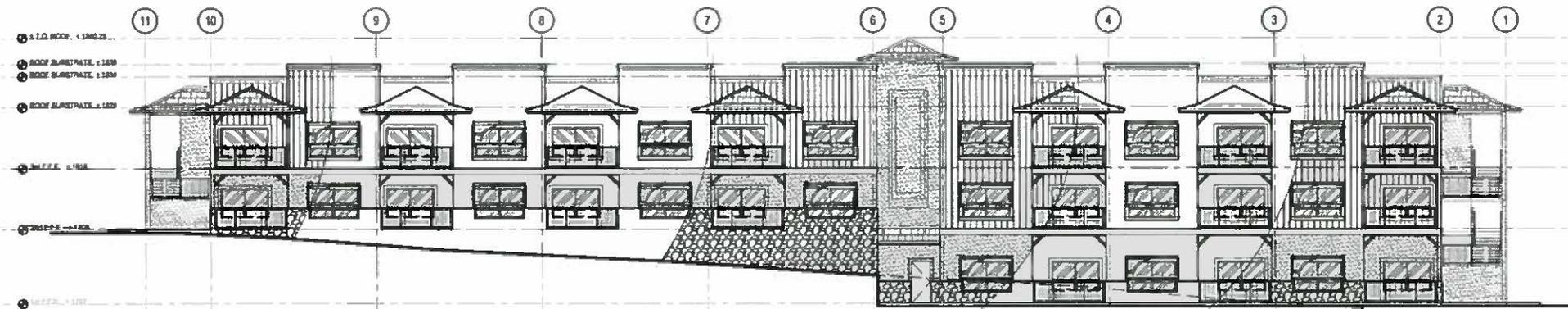


### RESIDENTIAL BUILDING A - ROOF PLAN

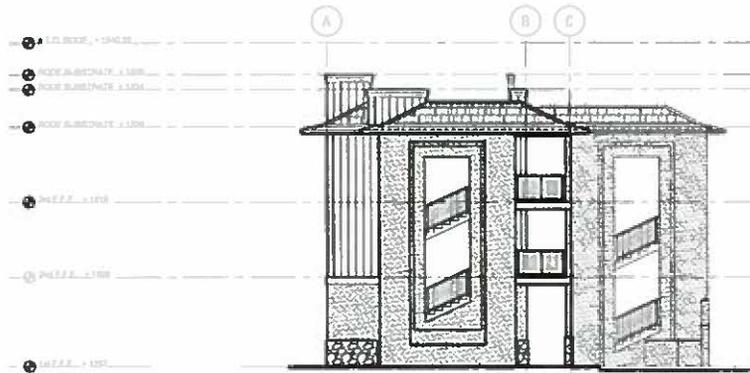
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SENIOR HOUSING AT KULAMALLU  
T.M.K. (7) 2-3-065, 019 & 020

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ARCHITECTS  
KONO

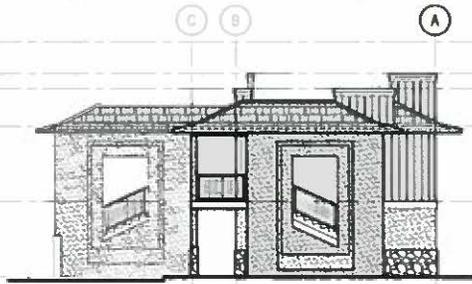
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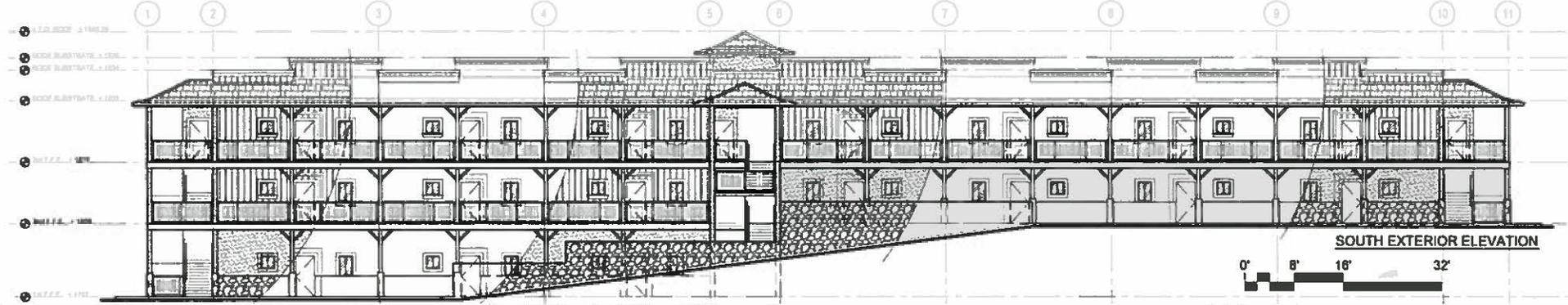
**NORTH EXTERIOR ELEVATION**



**WEST EXTERIOR ELEVATION A**



**EAST EXTERIOR ELEVATION**



**SOUTH EXTERIOR ELEVATION**

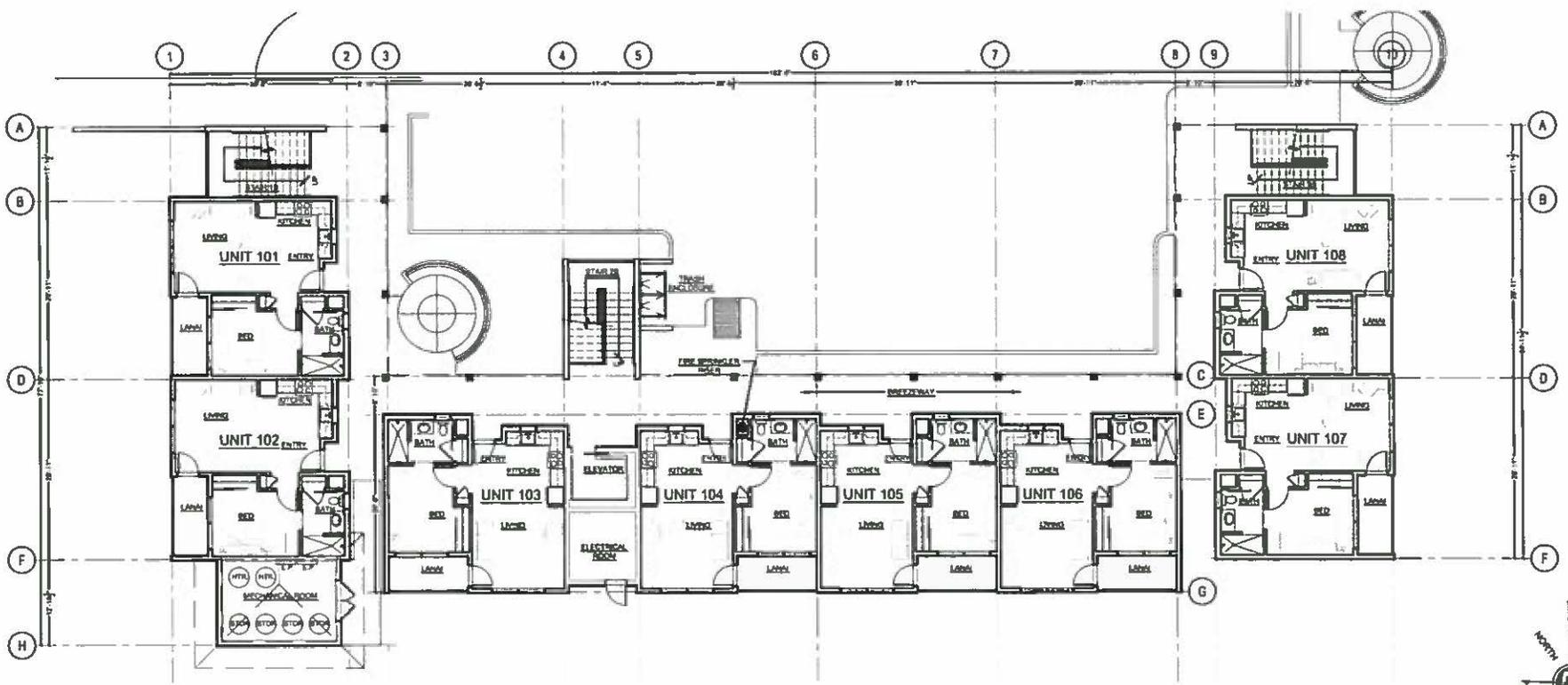


**RESIDENTIAL BUILDING A - EXTERIOR ELEVATIONS**

Project No: 2013-036  
 Date: OCTOBER 2013

HAL MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALU

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 KONO**



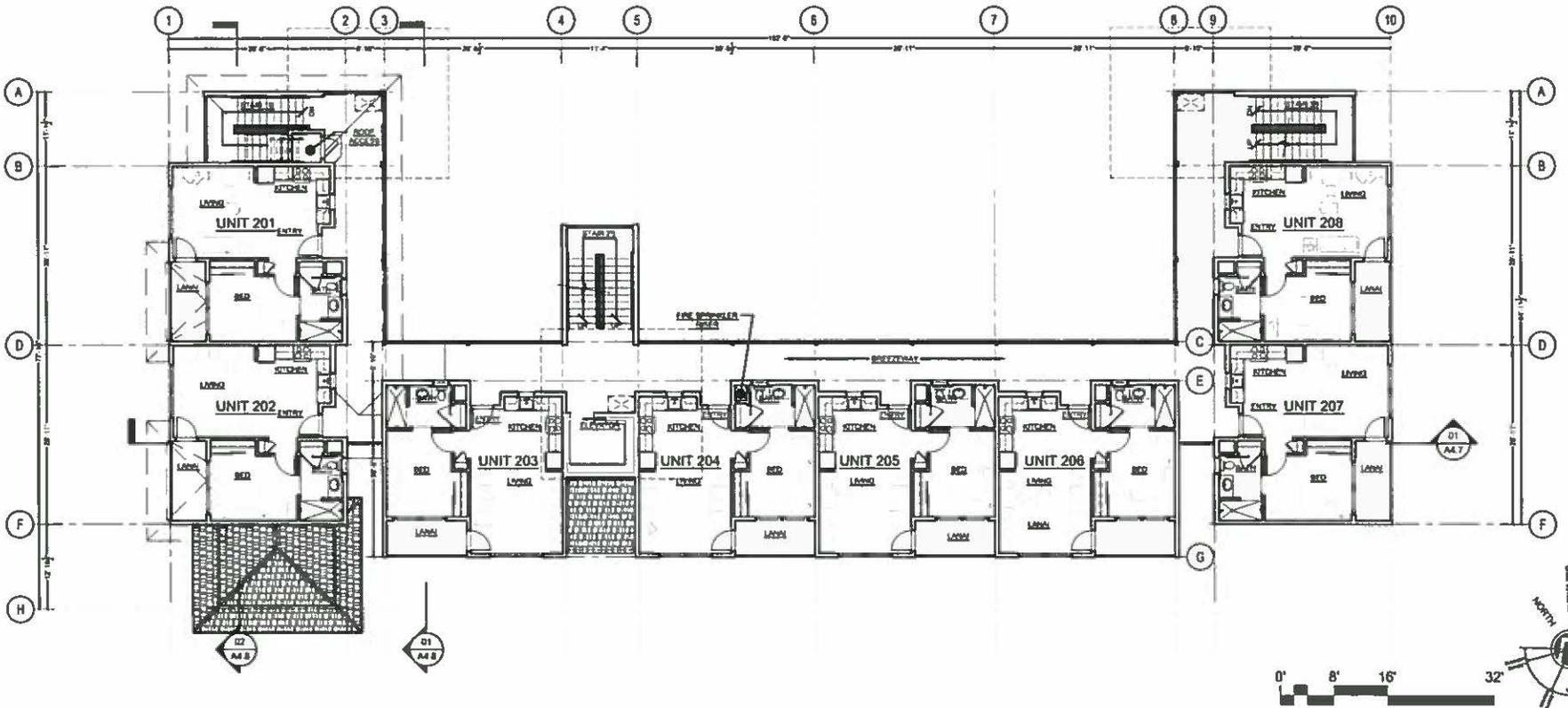
**RESIDENTIAL BUILDING B - 1ST FLOOR PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KILAMALU  
 T.M.A.C. (P) 2-3-066, 019 & 020

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 KONO**

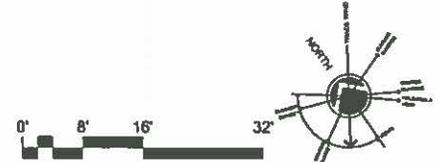
PROJECT NO. 2013 003  
 DATE OCTOBER 2013

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**RESIDENTIAL BUILDING B - 2ND FLOOR PLAN**

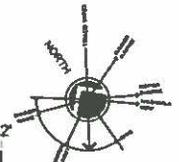
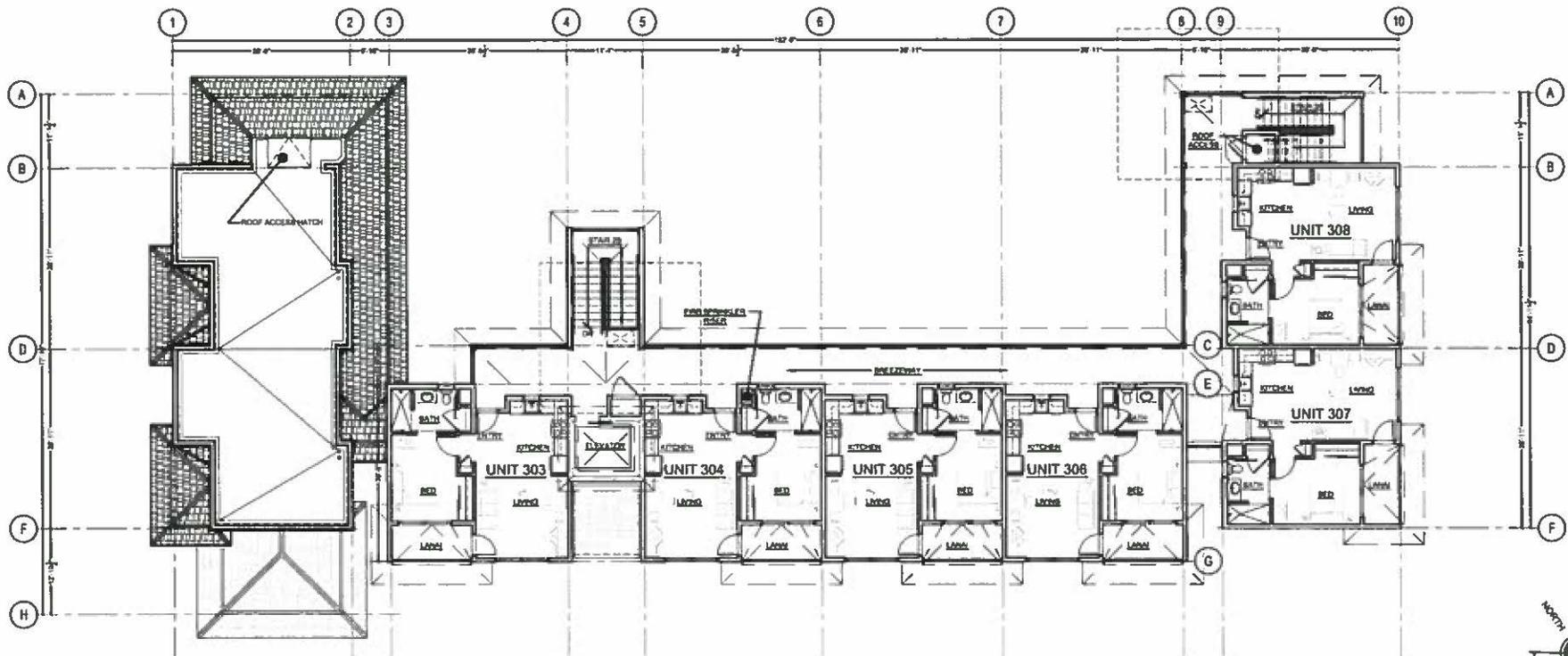
HALE MAHAOLU EWALLU  
 SENIOR HOUSING AT KILAMALLU  
 T.M.K. (2) 2-3-066, 019 & 020



PROJECT NO: 2012-006  
 DATE: OCTOBER 2012

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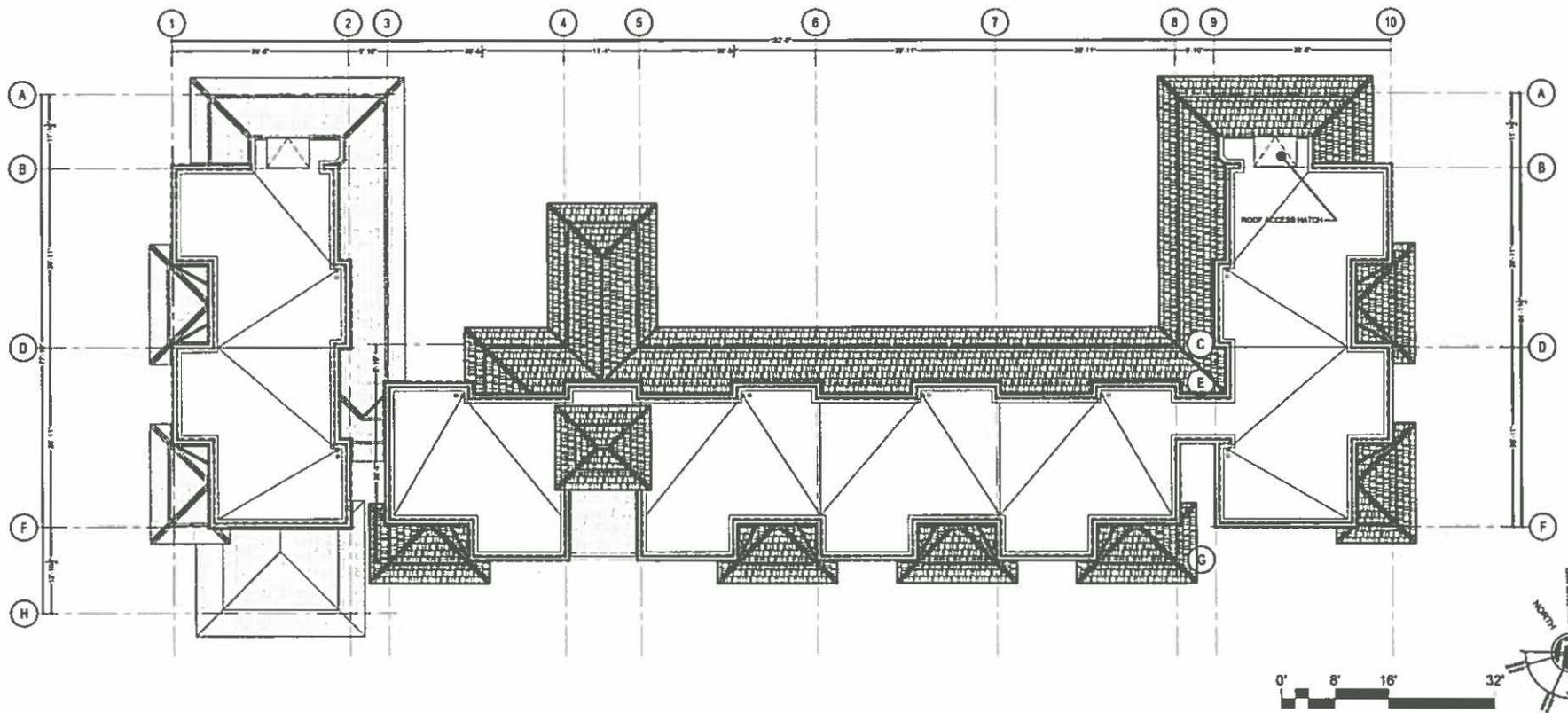


**RESIDENTIAL BUILDING B - 3RD FLOOR PLAN**

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KULAMALU  
T.M.K. (I) 2-3-066-019 B 029

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PROJECT NO. 2019-006  
DATE: OCTOBER 2019  
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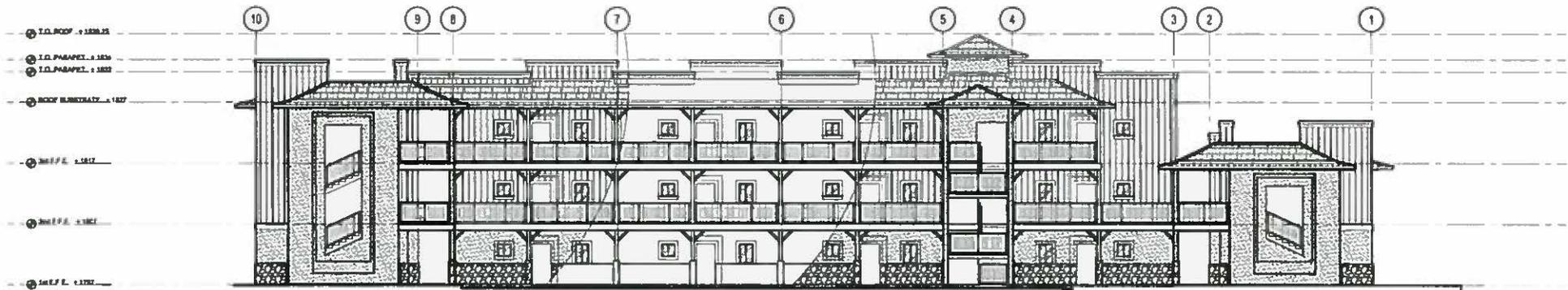
**RESIDENTIAL BUILDING B - ROOF PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALU  
 T.M.K. (2) 2-3 088; 019 & 020

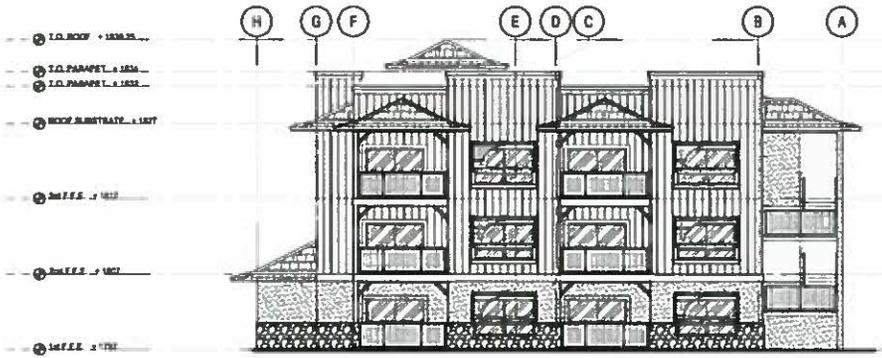
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 LTD.

PROJECT NO: 2019-008  
 DATE: OCTOBER 2019

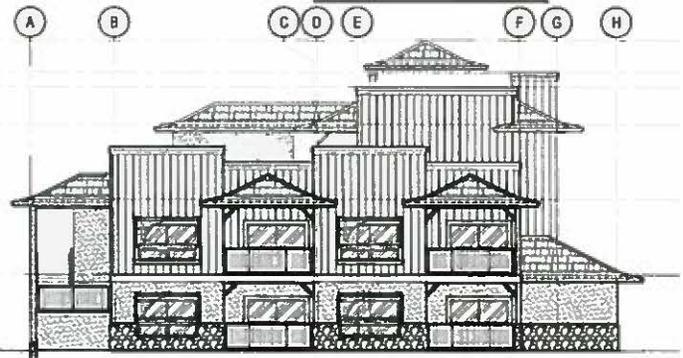
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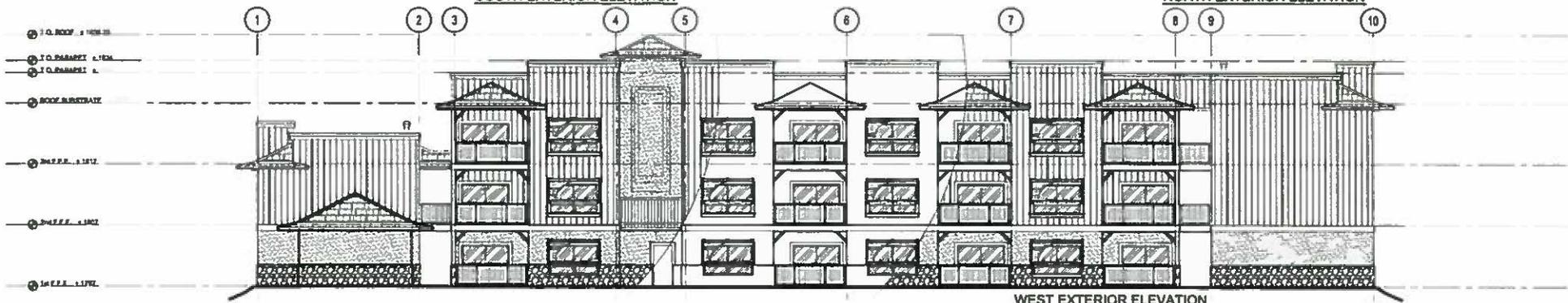
EAST EXTERIOR ELEVATION



SOUTH EXTERIOR ELEVATION



NORTH EXTERIOR ELEVATION



WEST EXTERIOR ELEVATION

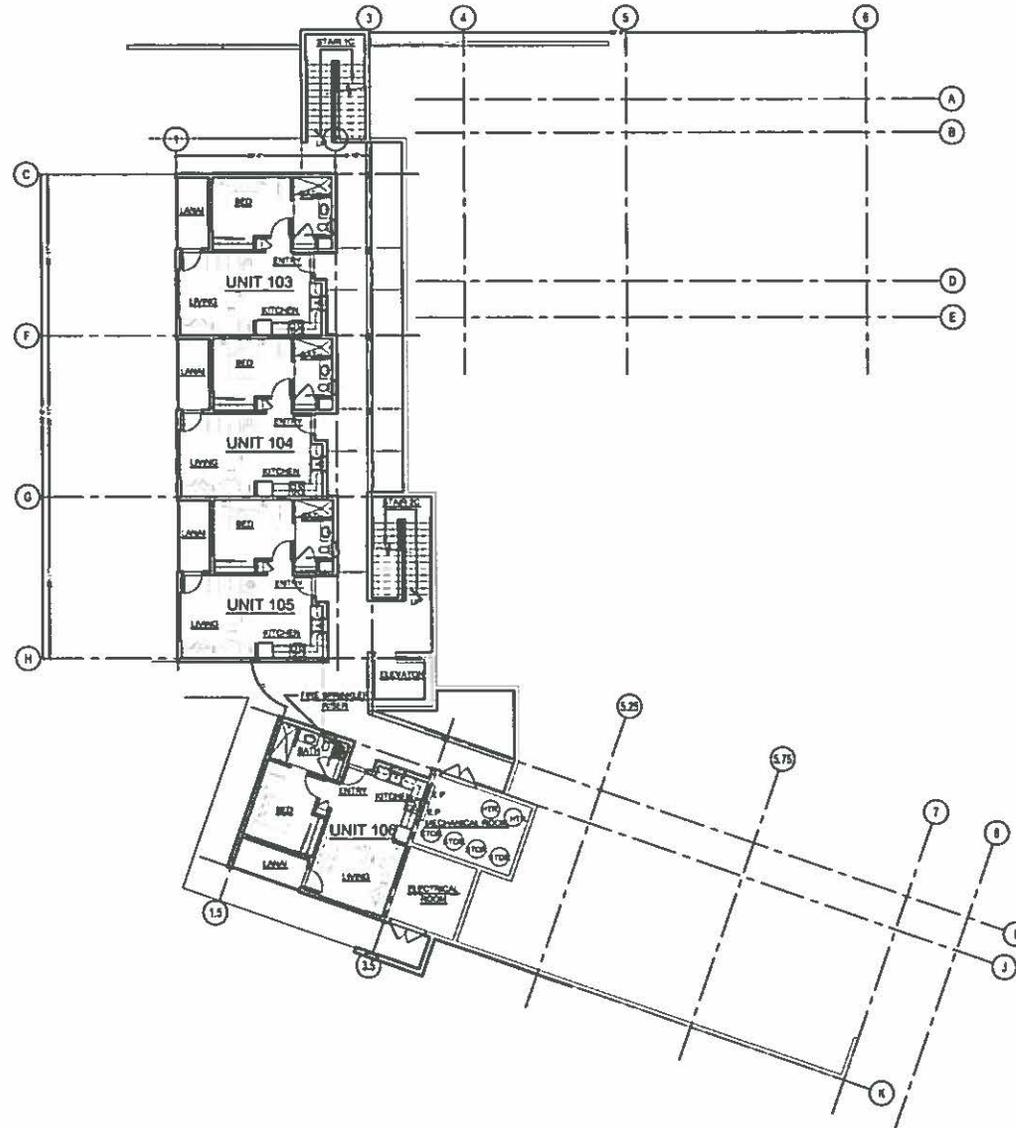


RESIDENTIAL BUILDING B - EXTERIOR ELEVATIONS

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALLU  
 T.M.K. (2) 2-3-086 019 & 020

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PROJECT NO. 2012-005  
 DATE: OCTOBER 2013  
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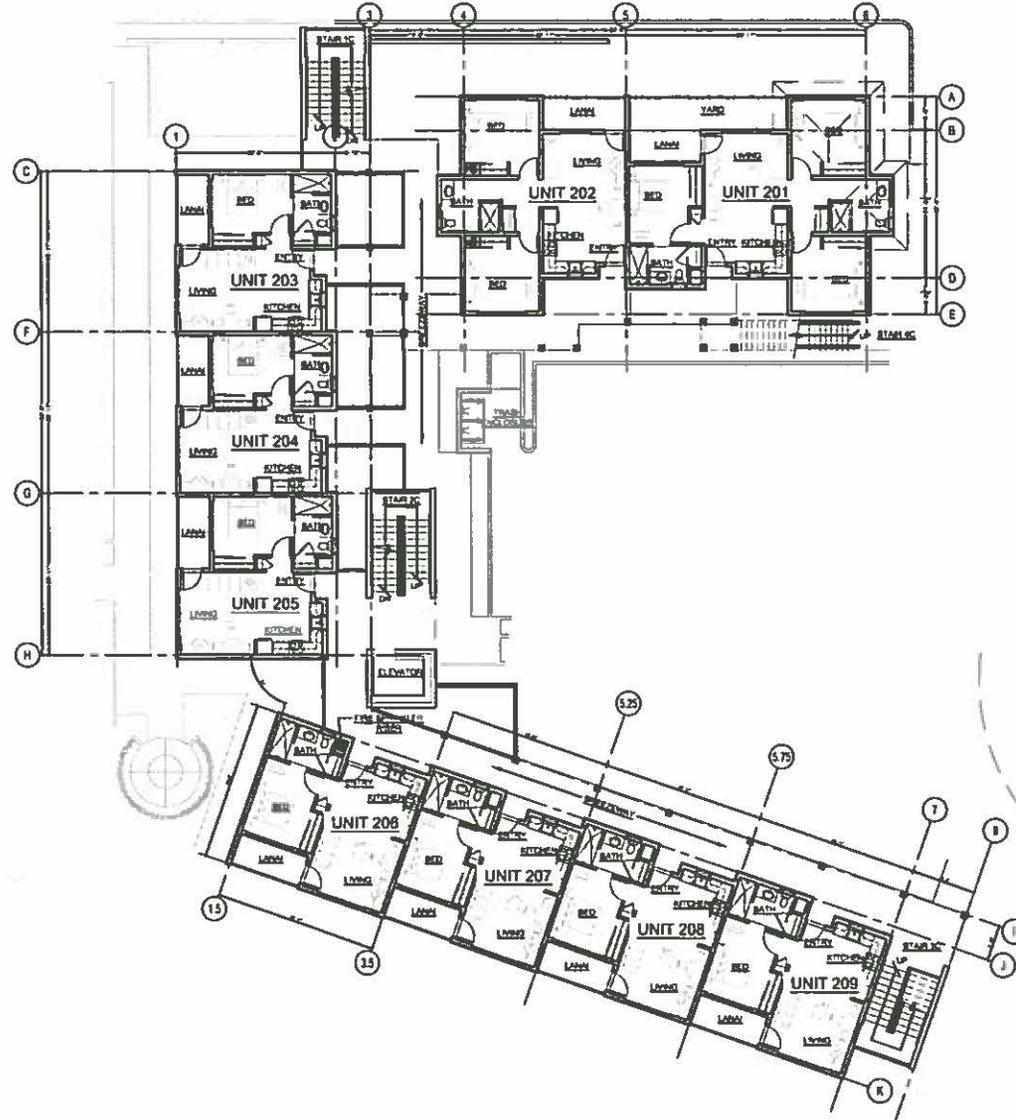
**RESIDENTIAL BUILDING C - 1ST FLOOR PLAN**

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KULAMALU  
T.M.K. (2) 2-3-068-019 & 020

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KONO**

PROJECT NO. 2017-006  
DATE: OCTOBER 2013

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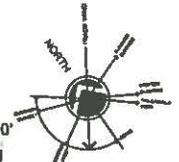
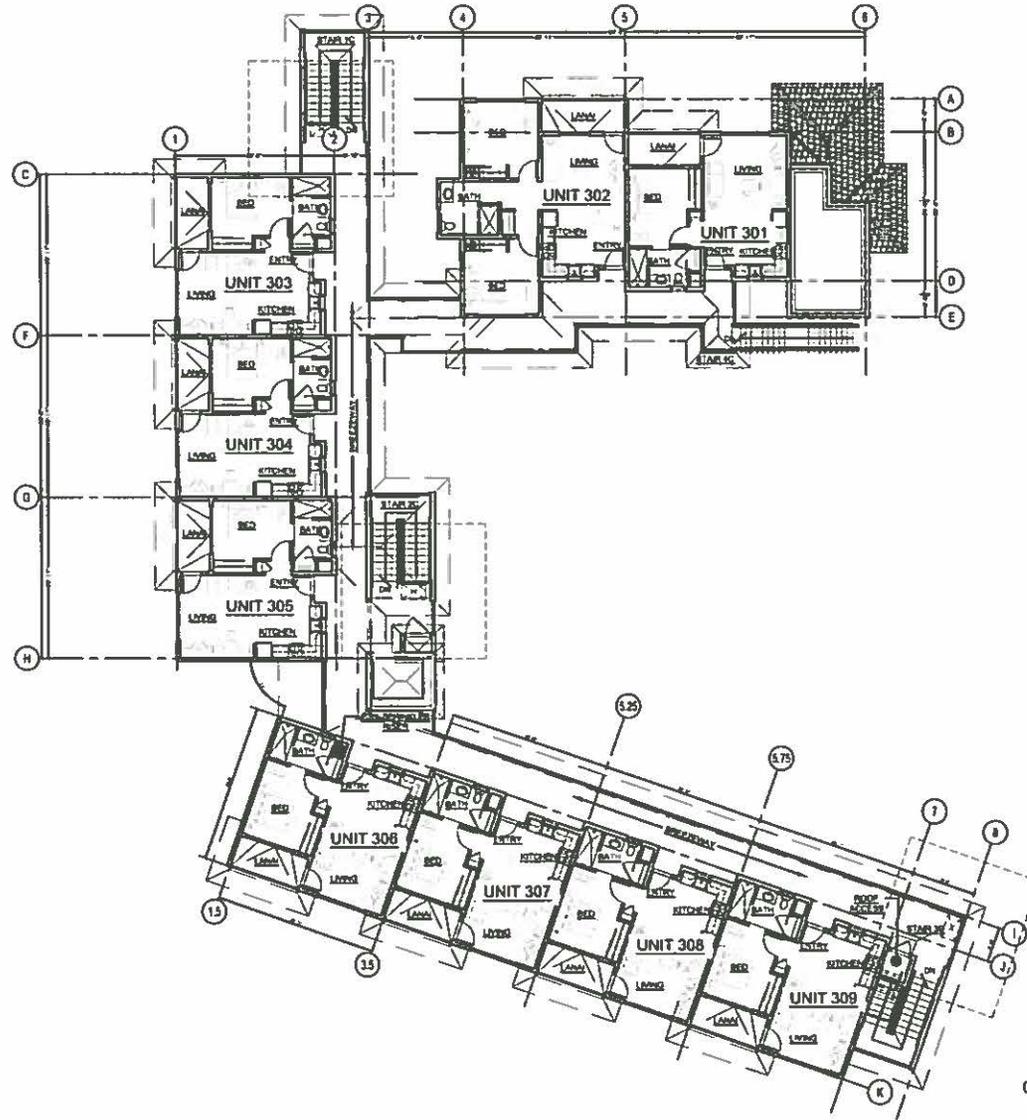


**RESIDENTIAL BUILDING C - 2ND FLOOR PLAN**

HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KILAMALU  
 T.M.L. (2) 2-3 0081, 019 & 020

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PROJECT NO. 2012-008  
 DATE: OCTOBER 2013  
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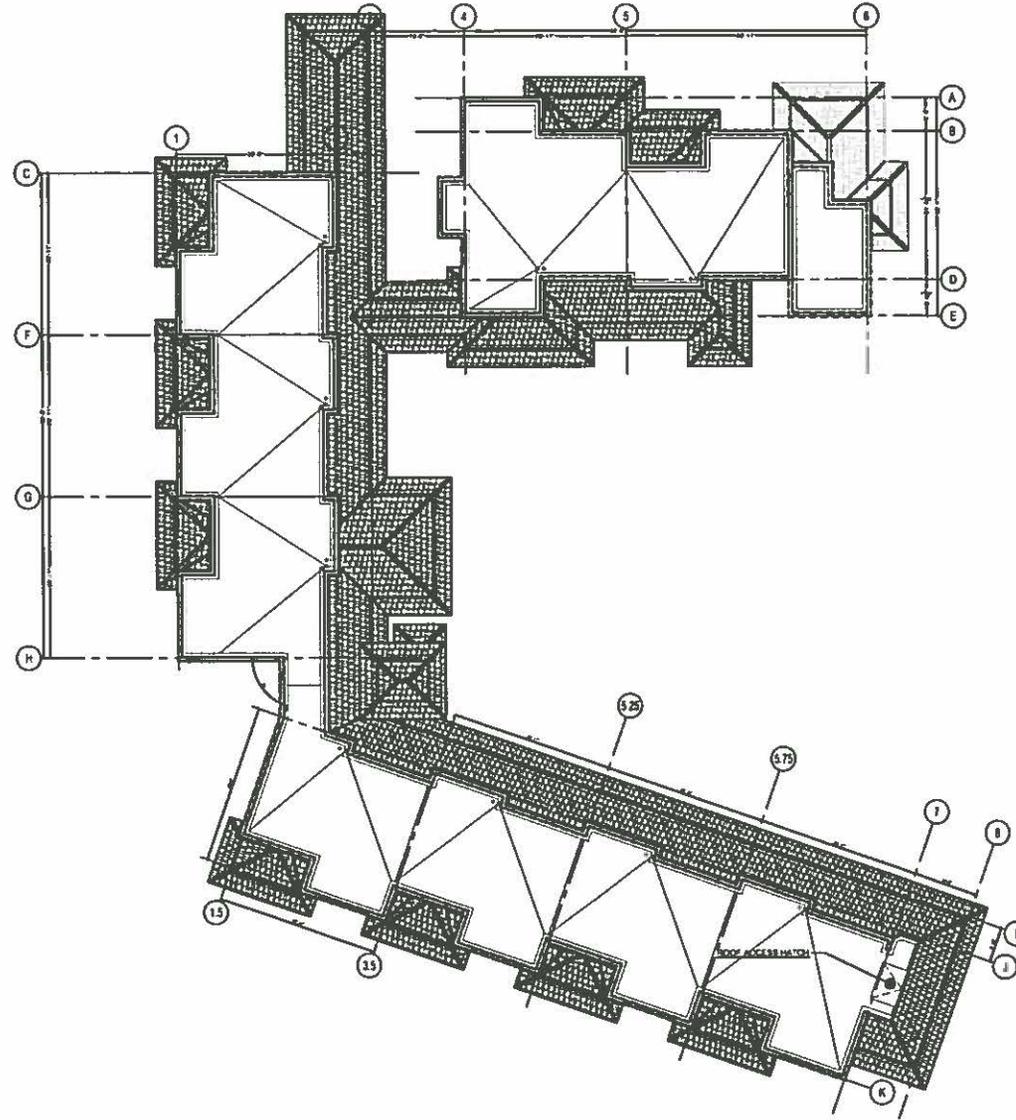


**RESIDENTIAL BUILDING C - 3RD FLOOR PLAN**

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KILAMALU  
T.M.K. (1) 2-3-066, 019 & 020

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ARCHITECTS  
KONO**

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DATE: OCTOBER 2013  
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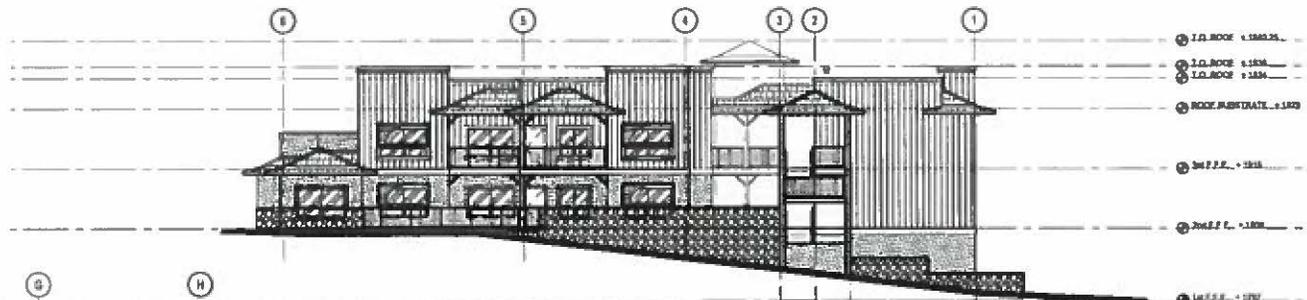


**RESIDENTIAL BUILDING C - ROOF PLAN**

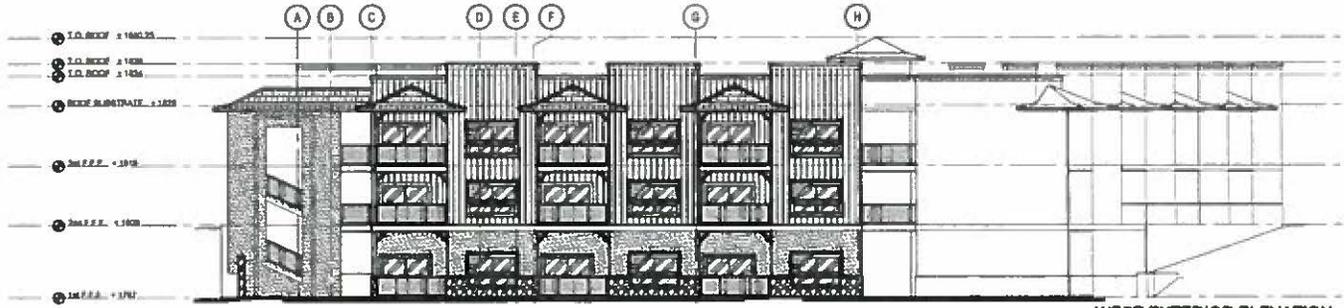
HALE MAHAOLU EWALU  
 SENIOR HOUSING AT KULAMALU  
 T.M.A. (2) 2-3-0000 019 & 020

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 ARCHITECTS  
 LTD. KONO**

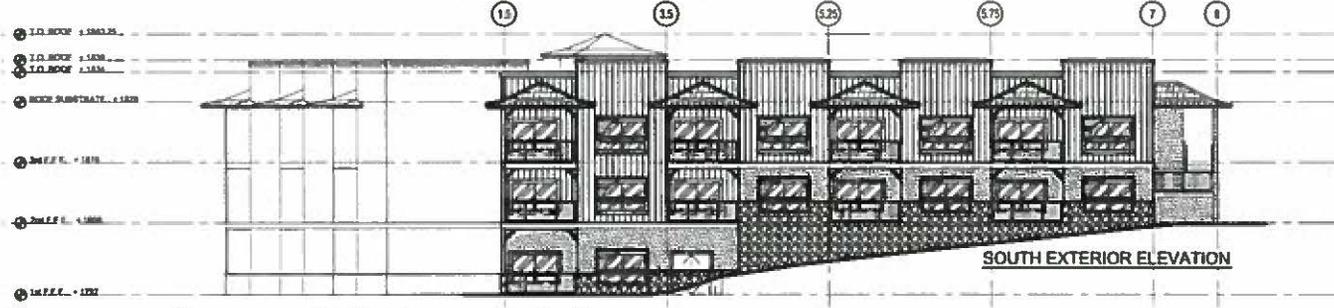
PROJECT NO. 2012-008  
 DATE: OCTOBER 2012  
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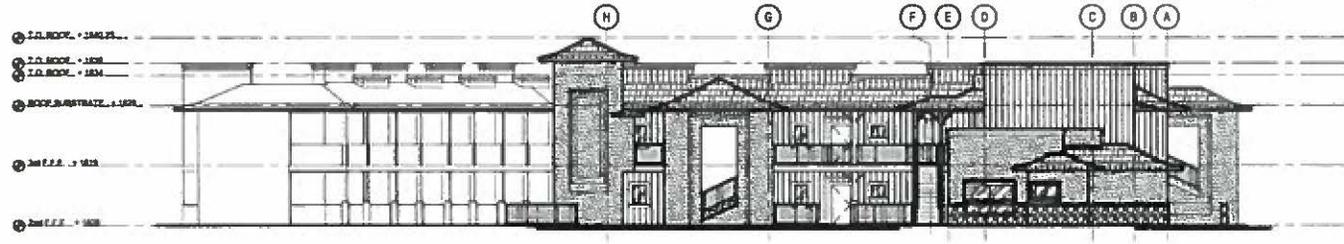
**NORTH EXTERIOR ELEVATION**



**WEST EXTERIOR ELEVATION**



**SOUTH EXTERIOR ELEVATION**



**EAST EXTERIOR ELEVATION**



**RESIDENTIAL BUILDING C - EXTERIOR ELEVATIONS**

HALE MAHAOLU EWALU  
SENIOR HOUSING AT KULAMALU  
T.M.H. (C) 2-3 088-019 & 020

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