

House District(s) \_002\_

Senate District(s) \_002\_

THE TWENTY-NINTH 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:  
Five Mountains Hawaii

Dba: Kipuka o ke Ola

Street Address: 64-1035 Mamalahoa Hwy, Suite F,  
Kamuela, HI, 96743

Mailing Address: PO Box 818, Kamuela, HI, 96743

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name DR. CLAREN KEALOHA-BEAUDET

Title Executive Director

Phone # 808-885-5900

Fax # 808-885-6900

E-mail ClarenK@aol.com

3. TYPE OF BUSINESS ENTITY:

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

6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:

KIPUKA O KE OLA RURAL HEALTH CLINIC: EXPANSION AND DIVERSIFICATION OF PRIMARY CARE AND MENTAL HEALTH SERVICES TO THE UNDERSERVED POPULATIONS OF HAWAII ISLAND

4. FEDERAL TAX ID #: [REDACTED]

5. STATE TAX ID #: [REDACTED]

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2019: \$ 300,000

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

[REDACTED SIGNATURE]

LOHA-BEAUDET, EXECUTIVE DIRECTOR

1/15/2018  
DATE SIGNED

JAN 19 2018 11:30 AM

## Application for Grants

### I. Background and Summary

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

Five Mountains Hawaii dba Kipuka o ke Ola (KOKO) is a private, non-profit health clinic in Waimea on Hawaii Island that was founded in 2013. KOKO provides a full range of mental health and primary care services to anyone who presents for treatment, but KOKO's emphasis is on addressing the physical and mental health disparities of the Kanaka Maoli population through culturally-informed direct services. KOKO's services are differentiated from other local healthcare providers by:

- 1) Integrated health services in a culturally competent way,
- 2) Behavioral and primary care health services, emphasizing interventions to bring about desired lifestyle changes.
- 3) Treatment of patients regardless of financial resources and insurance provider

Currently, KOKO is transitioning to a Patient-Centered Medical Home Model, which integrates Behavioral Health and Primary Care services under one clinic. This allows us to work with our patients in a holistic and culturally-informed manner.

KOKO began in 2013 with two Clinical Psychologists, Dr. Claren Kealoha-Beaudet and Dr. Franco Acquaro. The KOKO team has strategically expanded over the last 4 years and now employs the only Psychiatrist in the region who is also a dually certified Pediatrician. Also on the KOKO team is Nurse Practitioner – Laura Butcher, Physician's Assistant – Kaidden Kelly, Case Manager – Luana Keakealani and 5.5 office staff. We are also in the process of hiring an additional Psychologist and a PTE Nurse Practitioner.

Since its establishment, KOKO has taken intentional steps to qualify to receive federal designation as a Rural Health Clinic under the Centers for Medicare and Medicaid Services. This is a critical step for clinic services to become financially sustainable because this designation increases reimbursement rates for Medicare and Medicaid Services to better cover the true cost of services. KOKO is dedicated to serving the underserved who primarily have low reimbursement rate insurances. Last year, KOKO fulfilled the final steps and received Rural Health Clinic status. We are now shifting our service mix from 70% mental/behavioral health and 30% medical to be closer to 50%/50%; this further improves reimbursements and supports KOKO's long-term sustainability.

In 2016, KOKO had 4,000 patient visits, and in 2017, that grew to 1,000 patients and 5,000 visits. Of these patients, 10%, ~100 are keiki, which we are now trying to increase. Additional support from grants and partnerships catalyzes the continued expansion and diversification of KOKO's services as well as provide support for non-billable services and patients who cannot pay.

2.  The goals and objectives related to the request;

There is still an unmet demand for healthcare services in KOKO's service area, and funding from donations and grants is what enables service expansion by covering the high cost of recruiting and onboarding new medical professionals, the purchase of new equipment, and supplementing operational revenue loss from treating low-income/pro-bono patients.

Kīpuka o ke Ola's overarching goal has always been that Native Hawaiians in the North Hawaii region achieve parity across all major health indicators. It is also, that all people can access high quality medical and mental health services regardless of financial resources.

The primary objectives for this request are to:

- Increase pediatric care from 100 patients to 600 patients and help to address growing health disparities in youth (see statistics below)
- Support on boarding of additional healthcare providers to expand from 5,000 visits in 2017 to 8,500 visits in 2018/2019, with special attention to expanding primary care services
- Increase community outreach and marketing of new primary care and pediatric services
- Support for our Case Worker to continue to help connect vulnerable populations to services that help them get back on their feet and stay off the streets
- Create a funding pool for patients who cannot pay to ensure they can receive the care they need

3.  The public purpose and need to be served;

To begin, Hawaii County has a severe physician shortage; it is a Federally designated Medically Underserved Population (MUP) and Medically Underserved Area (MUA). Access to health services in the region is difficult in general, but it's much worse for Medicaid/Medicare/uninsured/low-income individuals as many mental health and primary care professionals will not accept these patients. Support for community medical services that treat underserved populations in Hawaii is critical, especially improved access to primary care and preventative care which alleviate pressure on more costly emergency services.

In 2013, the Healthcare Association of Hawaii conducted a comprehensive assessment of the healthcare needs in Hawaii County in the *Hawaii County Community Health Needs Assessment (CHNA)*. This document, published in 2013, very clearly and succinctly explains the need to support healthcare services for the poor and underserved populations in Hawaii County, and that across many topic areas, low-income residents are both the most affected by health problems and the most difficult to help. In this report, the approach taken by Kīpuka o ke Ola is outlined as one of the best opportunities to reach and serve populations with the highest need. The following quote from the CHNA outlines the status of healthcare, and in particular the need to support clinics like Kīpuka o ke Ola.

“... [K]ey health behaviors that impact chronic disease, including optimal exercise, nutrition, and weight, need attention across all age, gender, and race/ethnic groups. However, the rise in poor health outcomes and risky behaviors among children and teens is particularly alarming. Chronic diseases and their drivers are becoming more prevalent

in the county; obesity has been on the rise, and diabetes is going undiagnosed. Unmanaged heart disease has led to high rates of hospitalizations and deaths among residents of the Big Island. Hawaii County residents are at special risk for chronic respiratory problems, evidenced by unusually high asthma rates and high rates of COPD and asthma hospitalizations. Factors contributing to poor respiratory health include high smoking rates, high particulate pollution, and exposure to volcanic gases. Mental health and associated substance abuse are key concerns as chronic conditions that significantly influence overall health in Hawaii County. The low-income population is particularly afflicted by substance abuse, but the issue impacts all groups. Attention to health risk factors, at all levels of intervention, could have an enormous positive impact on the long-term health of the community.”

Source: *Hawaii County Community Health Needs Assessment*, July 3, 2013 (Page 5) from the Healthcare Association of Hawaii

Secondary, the CHNA states that “[a] significant finding is that Native Hawaiians and Pacific Islanders are faring worse across more topic areas than any other group.” KOKO was founded on with the mission to improve health disparities for Native Hawaiians, and in our 4 years of operation, we have proven our ability to reach and provide treatment to this underserved group through culturally informed direct services; 50% of our patients are Native Hawaiian.

The 2013 CHNA also recommended that an effective approach to addressing these health disparities and filling some of the provider gap is focusing on intervention through community health centers employing culturally informed primary care. This is precisely the roll that Kīpuka o ke Ola fills within the North Hawaii community, and its success in this area is clearly demonstrated in its continual growth and expansion of services to meet demand, as well as its patient mix being primarily made up of underserved populations. Fifty percent of our patients are Native Hawaiian, and fifty percent of our patients are Medicaid/Medicare; KOKO also serves a number of homeless and uninsured individuals.

Finally, the State of Hawaii has a homelessness epidemic; Hawaii has the largest per capita population in the Country. The first line of defense against homelessness is connecting individuals in need with social programs that can help prevent homelessness and assist individuals and families to get back on their feet - programs like SNAP benefits, housing assistance, Social Security for mentally or physically ill, job training, and access to health insurance. Unfortunately, people in crisis and people with less education or resources frequently struggle to find out about and access the programs that are designed to help them. In 2017, Hawaii County had a reduction in homeless population for the first year in many, and much of that reduction was the result of connecting people in need with these assistance programs, especially section 8 housing and federal rental assistance (source: Hope Services Hawaii, *Big Island Headlines Statewide Dip in Homeless Count*). Case Managers like KOKO’s Luana Keakealani play a critical role in assisting people, especially people who are more vulnerable or in distress, in accessing these programs; this can range from providing information to assisting individuals in filling out applications or contacting service providers. Unfortunately, this is not a billable service and the people who need this help do not have the financial resources to pay service fees. This is an absolutely critical function to the help that KOKO provides for the most

vulnerable populations – mentally ill, physically disabled, and poor people, and maintaining this function required financial subsidy from grants and donations.

4.  Describe the target population to be served;

The statistics in the previous section highlight a few populations in critical need, and these are the same populations that KOKO's proposed expansion would target. 1. Keiki through an expansion of pediatric care; 2. Native Hawaiians, who are always a part of KOKO's mission, target population, and culturally informed treatment approach; 3. Low income residents who are identified as 'in great need' and are very difficult to reach.

KOKO has had great success in reaching both Native Hawaiians and low-income residents, and we want to continue to build and expand on this success, focusing now on the further expansion on primary care services.

5.  Describe the geographic coverage.

Though KOKO is located in the North of Hawai'i Island, in the center of Waimea, our service area is much wider. Our patients come from all corners of Hawai'i Island. This is symptomatic of 3 main issues:

1. Limited access for medical and mental healthcare
2. A lack of culturally-informed service providers;
3. A lack of service providers who will accept Medicaid, Medicare, and uninsured patients.

Frequently, our patients are some of the most vulnerable citizens who, without KOKO, could not get the medicine or services they need. KOKO has patients who travel from more than 3 hours away (Ka'u) because there is no other Psychiatrist who will accept their insurance or provide pro-bono treatment. One patient travels over 2 hours every month to receive their medication via shot because this patient has a developmental disability. Without this medication, this patient would very likely end up in a state of acute Psychosis. This is one example of the system-wide challenges of treating those patients most in need, that makes maintaining open accessibility of our services to all patients absolutely critical not only to our patients, but for the well-being of our entire community. KOKO has ~12 mental health patients who are all homeless who travel from around the island every month to receive their medication which comes in the form of a monthly shot.

## **II. Service Summary and Outcomes**

1.  Describe the scope of work, tasks and responsibilities;

Support through the State of Hawaii Grant-in-Aid program will allow KOKO to continue to expand its patient load and provide mental health and medical services to the underserved and

disparaged populations of Hawaii. In particular, it will support an expansion of primary care and pediatric services and enable a continuation of the critical work by the Case Manager.

KOKO will be expanding its patient load and number of visits throughout the grant cycle, eventually reaching the 8,500 visits by the end of the year-long grant period, while maintaining similar patient statistics, serving ~50% Medicaid/Medicare and 50% Native Hawaiian patients. Pediatric patients increase from 100 currently to 600 patients. This expansion is supported by the recent addition of a Physician Assistant but may require an additional Nurse Practitioner and Psychologist. KOKO is currently trying to recruit and hire an additional Psychologist. Outreach and marketing will be critical to sharing our expanded services with the community and recruiting new patients.

KOKO Executive Director, Dr. Claren Kealoha-Beaudet will manage all grant funded activities, and she will be assisted by Business Manager, Wendy Cypriano for reporting programmatic and financial information.

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

#### **Quarter 1**

Upon completing contracts and receiving grant funding, KOKO will begin developing an outreach and marketing strategy to promote new services, and expanded patient load, especially focusing on underserved families with keiki. Additionally, equipment procurement will begin immediately and will be delivered and installed within this quarter. Funding will also support the continuation of Clinical Case Management services and RHC compliance activities.

Under RHC, KOKO adheres to Universal Standards and Specialty Standards which include domain areas of corporate compliance, administration, human resources, quality improvement plan, and risk management. Specialty standards include domain areas of equipment management, infection control, patient services & instruction, pharmaceutical services, diagnostic services, and regulatory. Each standard has accompanying policies, procedures, and documentation demands. This is supported by our administrative team and Dr. Acquaro, and it is enabled through our healthcare management software systems. KOKO will also assess best practices and create a fair and effective system for the funding pool for patients who cannot afford services.

Dr. Kealoha-Beaudet will submit regular and timely reports to compile with State GIA requirements.

#### **Quarter 2 & 3**

Operational support and outreach efforts continue as patient numbers expand. General systems for managing additional requirements under RHC are fully integrated in operations and incremental improvements are made to improve efficiency. Case Management services will continue and tracking metrics to better quantify and understand the impact of this service will be integrated.

Providers will comply with continuing education requirements to maintain their licensure by taking Continuing Medical Education (CME) courses and/or Continuing Education Units (CEU).

Dr. Kealoha-Beaudet will submit regular and timely reports to compile with State GIA requirements.

#### **Quarter 4**

Operational support and outreach efforts continue, and by the close of the grant, Kīpuka o ke Ola's total patient visits will have increased by 3,500 throughout the year to reach the 8,500 goal. An assessment of outreach effectiveness, especially to the target populations of the underserved and keiki will be conducted to identify areas of improvement.

Dr. Kealoha-Beaudet will prepare the Final Report on the substantial impact that the State GIA funding in sustaining and expanding healthcare services to underserved populations on Hawaii Island.

3.  Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results; and

Continual assessment of patients' well-being is an innate part of patient services to monitor changes and adjust treatment level and approach, especially for mental health services. Surveys and questionnaires are a critical part of KOKO's operations and patient monitoring, especially for mental health. Patients take a standard health questionnaire at each visit, either the Patient Health Questionnaire (PHQ9) or the Generalized Anxiety Disorder 7-item (GAD-7) scale. Both are used as a screening and diagnostic tool for mental health disorders, screening for degree of depression and anxiety, as well as rating the social, occupational, and psychological functioning of adults. We also have several other tools that we have identified to be used at intake and through-out course of treatment as needed:

- Assessment of Hawaiian Well-Being Scale
- Cross-cutting Symptom Measure (Adult Self-rating)
- Cross-cutting Symptom Measure (Adolescent Self-rating)
- Cross-cutting Symptom Measure (Parent-rating for Child)

Before each session patients fill out a questionnaire; changes in answers are used to track their progress. As improvement is shown through survey responses, the frequency of visits is reduced and this gradual step down in frequency continues until appointments occur only once a month or are no longer necessary. Chronic and biologically based disorders, generally do not subside completely, so session frequency and medications will instead be adjusted based mental health status reflected in the surveys and one-on-one sessions.

Most of the patients who come in for treatment, eventually reach an improved and stable place of mental and physical reducing the frequency of visits, which a strong indicator of effectiveness. This is not true of all patients, as some do require continual support, but success is achieved when appointments become less frequent and their ability to maintain relationships and healthier

lifestyles is stable. These surveys also allow the team to assess whether or not the treatment approach needs to be adjusted to improve effectiveness and impact.

KOKO does not currently have the equipment to track bio-physical indicators which would provide better information on the effectiveness of treatment approaches and meeting the larger mission of improving overall health and well-being, especially for patients with chronic disorders. For primary care services, the focus is primarily on expanding the number of patients, both adults and children, since this is the newest addition to our healthcare services. The rate of increase in the number of patients for primary care services will be used to evaluate effectiveness of outreach activities as well. Primary care will be better evaluated through the Ulu Laukahi program which focuses on treating chronic disorders like diabetes and obesity.

4.  List the measure(s) of effectiveness that will be reported to the State agency through which grant funds are appropriated (the expending agency).

Overall of Measures of Effectiveness in meeting our mission and achieving intended goals and objectives are centered around reaching our target population, serving the underserved on the island, and expanding capacity to treat more patients and provide more services. Reports to the State-expending agency will include information on baseline levels before grant support was received as compared with levels throughout the grant funded period. KOKO will track and report the following metrics:

- Number of patients and patient visits
  - o Primary care
  - o Mental Health
  - o Pediatric
  - o Assisted by case manager to access services
- Number and/or percentage of patients who would be considered an underserved population
  - o Uninsured
  - o Underinsured
  - o Medicaid
  - o Medicare
  - o Native Hawaiian
  - o Low income
  - o Pro bono clients
  - o Outstanding payments
  - o Patients who commute from outside the North Hawaii district because of a lack of access to services/culturally-informed treatment approaches
  - o Estimates on number of homeless patients



### **III. Financial**

#### **Budget**

1.  The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
  - a. Budget request by source of funds ([Link](#))
  - b. Personnel salaries and wages ([Link](#))
  - c. Equipment and motor vehicles ([Link](#))
  - d. Capital project details ([Link](#))
  - e. Government contracts, grants, and grants in aid ([Link](#))

All listed forms are included in the application package.

2.  The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2019.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$108,375	\$65,875	\$64,375	\$61,375	\$300,000

3.  The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2019.

Applied for, pending:

- Atherton Family Foundation - \$40,000

Will apply for:

- Hawaii County Non-profit Grant Program - \$25,000

- Friends of Hawaii Charities - \$15,000

- National Health Service Corps Loan Repayment Program – Amount and details TBD. This program will help attract and retain healthcare providers through student loan repayment assistance.

Possibly Robert Wood Johnson Foundation and O’Neill Foundation depending on their 2018 program priorities

4.  The applicant shall provide a listing of all state and federal tax credits it has been granted within the prior three years. Additionally, the applicant shall provide a listing of all state and federal tax credits they have applied for or anticipate applying for pertaining to any capital project, if applicable.

Five Mountains Hawaii dba Kīpuka o ke Ola is a 501(c)3 tax exempt organization under the United States Internal Revenue Code. This is not a tax credit, but reduces taxable income.

5.  The applicant shall provide a listing of all federal, state, and county government contracts, grants, and grants in aid it has been granted within the prior three years and will be receiving for fiscal year 2019 for program funding.

Please see attached form (2018GIA\_Page9) detailing all government contracts, grants, and Grants in Aid for the prior three years. It includes: FY2017-2018 State of Hawaii Grant in Aide and 2015 County of Hawaii Research and Development grant. This form does not include the Rural Health Clinic status under the Centers for Medicare and Medicaid Services (Federal) as this is an accreditation as there is no contract amount, though it does impact reimbursement rates. Additional details about this can be provided upon request.

6.  The applicant shall provide the balance of its unrestricted current assets as of December 31, 2017.

The balance of its unrestricted current assets as of December 31, 2017 is \$24,530.81.

#### **IV. Experience and Capability**

1.  **Necessary Skills and Experience**

Our team has a history of creating community based health programs that pre-dates the establishment of Kīpuka o ke Ola, and since KOKOs launch in 2013, this team has shown an ability to provide high quality healthcare while expanding our capacity to serve more patients. The practice started with two Clinical Psychologists, Dr. Claren Kealoha-Beaudet and Dr. Franco Acquaro, and 2 support staff, treating around 150 patients. KOKO has been successful in recruiting and on-boarding additional experienced and licensed healthcare providers and support staff. We now employ a dually certified psychiatrist/pediatrician - Dr. Ian Chun, Nurse Practitioner - Lauren Butcher, and now Physician Assistant – Kaidden Kelly. KOKO served ~1,000 patients in 5,000 visits, which was a 1,000-visit increase from the previous year. Our providers also serve key roles within the organization management and structure.

As a healthcare organization, our support staff are an indispensable part of our team; the medical and mental health staff is supported by Luana Keakealani - Clinical Case Manager, Mai Ah Puck - Medical Assistant, Wendy Cypriano - Business Manager, Che Tadio – Biller, Alita-Ray Cookman - Administrative Assistant, Sandra Kaniho - Administrative Assistant, and Melinda Nugent - Practice Management Consultant.

Please see the Proposed Staffing and Qualifications section for additional details on staff experience and credentials.

KOKO has established effective financial accounting systems. Our annual operating budget for 2018 is estimated to be ~\$1,700,000.00. KOKO's primary revenue is from patient fees and insurance reimbursements. Insurance reimbursements require effective management and detailed

record keeping. Kīpuka o ke Ola has successfully implemented numerous grants and partnerships, complying with implementation and tracking requirements. Some of these are listed in the Budget section above, but include Atherton Family Foundation, Shippers' Wharf, County of Hawaii, HMSA, Hawaii Healthcare Connector, Queen's Medical System, and Medtronics.

Finally, on March 28, 2017, KOKO received Federal Accreditation from the Centers for Medicaid and Medicare, as the first independent Rural Health Clinic in the State of Hawai'i. This was the culmination of a rigorous, nearly year-long clinic expansion and modification and compliance review before this accreditation could be completed. Maintaining this status requires constant reporting from our compliance team and also requires an annual independent audit.

**2.  Facilities**

In 2017, Kīpuka o ke Ola completed the renovations of their new expanded offices at U'ilani Plaza in downtown Waimea. This has allowed an expansion of both patient capacity and diversification of services by increasing the number of treatment rooms, type of treatment rooms, and creating a clinic space that is ADA compliant. This expansion and improvement of access to all individuals was an accomplishment that put KOKO in compliance with Rural Health Clinic regulations and supported the approval of the accreditation process.

The Primary Care and Pediatric Clinic build-out included five treatment rooms which accommodates additional providers in the future. There is one treatment/procedure room and four Primary Care visit rooms. This expanded space is already in use from our nurse practitioner, recently welcomed Physician Assistant, Kaiden Kelly, and Pediatric care.

On the Mental Health side of the clinic, there are also five offices - one office for Child/Adult Psychiatry, and four additional offices for Psychology, Social Work, and Case Management. We currently have two full time Psychologists and one full time adult and child Psychiatrist, and we are looking to bring on another psychologist because their patient load is already too full to meet demand.

The renovations were completed, but there are still critical equipment needs and additional supply requirements for the expanded medical services; specifically, for equipment KOKO needs bariatric table(s) for medical exams and a medical refrigerator/freezer for vaccines and medication.

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

**1.  Proposed Staffing, Staff Qualifications, Supervision and Training**

The Executive Director is Dr. Kealoha-Beaudet; Dr. Kealoha-Beaudet was the former Director of Behavioral Health at Kaheleaulani, the Native Hawaiian Health Program at North Hawai'i Community Hospital (NHCH). She was key in establishing Kaheleaulani at NHCH, and she has worked with the North Hawai'i District Dept of Education, West Hawai'i Community Health Center and E Ho-ona-auao Psychological Services as a Clinical Psychologist.

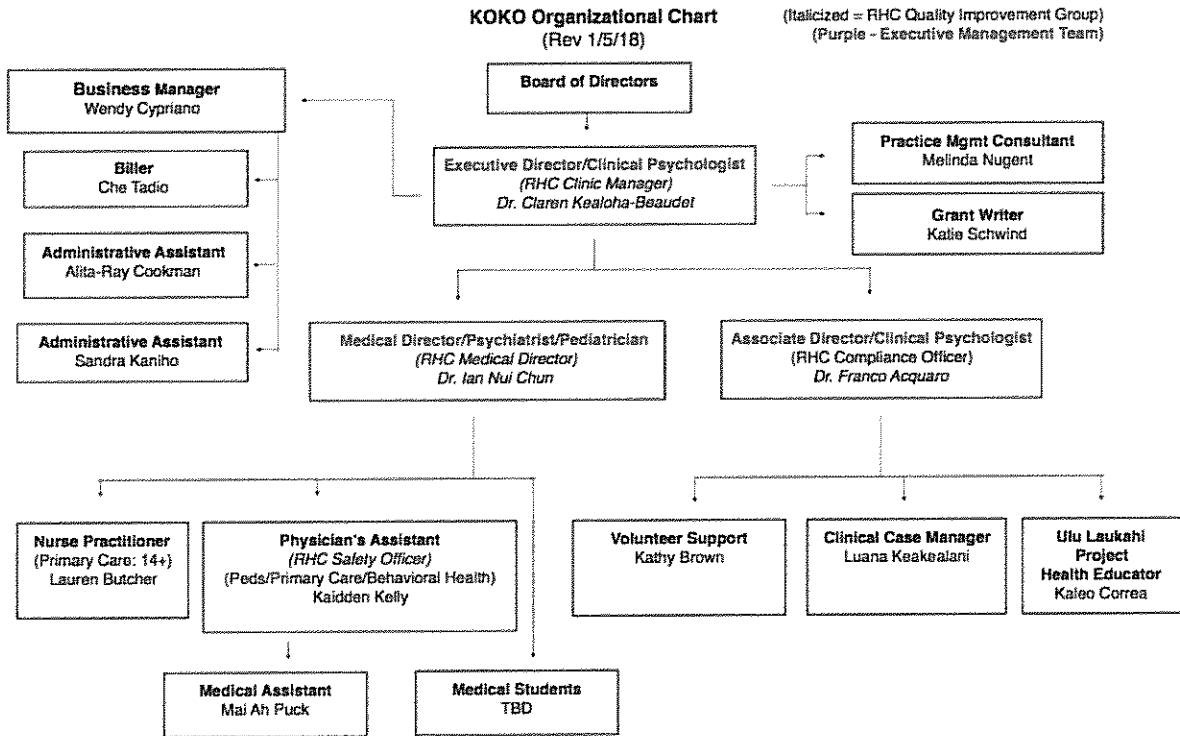
KOKO's Associate Director is Dr. Franco Acquaro, who is also the lead for the Rural Health Clinic compliance team. Dr. Acquaro has worked as a Clinical Psychologist at Kapi'olani Child Protection Center, Kealamakani Psychological Services, and North Hawai'i Community Hospital before joining KOKO.

Dr. Ian Chun serves as the Medical Director for RHC. Dr. Chun has worked as a Psychiatrist at Kauka Hawai'i Telepsychiatry, Hilo Medical Center, and Department of Health - Child & Adolescent Mental Health Division.

Kaiden Kelly, MS, PA-C has worked at Mango Sleep Disorders Center, Mango Medical, and Oregon Health & Science University; he was also a Native Hawaiian Health Scholar, and he serves as the RHS Safety Officer.

As a healthcare organization, our support staff are an indispensable part of our team; the medical and mental health staff is supported by Luana Keakealani - Clinical Case Manager, Mai Ah Puck - Medical Assistant, Wendy Cypriano - Business Manager, Che Tadio - Biller, Alita-Ray Cookman - Administrative Assistant, Sandra Kaniho - Administrative Assistant, and Melinda Nugent - Practice Management Consultant.

2.  **Organization Chart**



3.  **Compensation**

Dr. Ian Chun, Psychiatrist and Medical Director: \$220,000  
 Dr. Claren Kealoha-Beaudet, Clinical Psychologist and Executive Director: \$140,000  
 Dr. Franco Acquaro, Clinical Psychologist, Assistance Director, RHC compliance: \$135,000

VI. **Other**

1.  **Litigation**

Five Mountains Hawaii dba Kīpuka o ke Ola (KOKO) has no pending litigation.

2.  **Licensure or Accreditation**

**Claren Kealoha-Beaudet, Psy.D.** - Licensed Psychologist. Executive Director/ Clinical Psychologist (Native Hawaiian Health Scholar)

**Franco Acquaro, Ph.D.** - Licensed Psychologist. Associate Director/Clinical Psychologist

**Ian Chun, M.D.** - Medical Director/Psychiatrist/Pediatrician (Native Hawaiian Health Scholar)

**Lauren Butcher, MSN, APRN, ANP-C** - Nurse Practitioner

**Kaidden Kelly, MS, PA-C** – Physician Assistant (Native Hawaiian Health Scholar)

3.  **Private Educational Institutions**

This project is independent of any educational institutions.

4.  **Future Sustainability Plan**

As Kīpuka o ke Ola expands services, our business model is strengthened, especially with the newly achieved designation as a Rural Health Clinic which improves reimbursement rates for Medicaid and Medicare patients. The recent expansion to include primary care services and shift to a Medical Home Model further supports the financial sustainability of KOKO once these new providers establish their patient base.

Marketing funds supported through this grant will assist in reaching our target population and expanding the patient base to a sustainable level. Some services like Case Management and the Funding Pool for pro-bono services are more challenging to sustain without outside support but KOKO is confident in the community's support for these services, and between grants and fundraising, we believe these can continue to be sustained. As KOKO's impact is becoming more well-known in the community it has significantly strengthened community fundraising potential.

5.  **Certificate of Good Standing (If the Applicant is an Organization)**

Please see the Certificate of Good Standing for Five Mountains Hawaii dba Kipuka o ke Ola included in the Application package.

6.  **Declaration Statement**

Please see the Declaration Statement executed by Kīpuka o ke Ola's Executive Director, Dr. Claren Kealoha-Beaudet that is included in this application packet.

7.  **Public Purpose**

Kīpuka o ke Ola is committed to using funding through the Hawaii State Grant-in-Aide program for a public purpose pursuant of Section 42F-102, Hawaii Revised Statutes.

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2018 to June 30, 2019

Applicant: Five Mountains Hawaii dba Kipuka o ke Oia

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
<b>A. PERSONNEL COST</b>				
1. Salaries	114,000			5,000
2. Payroll Taxes & Assessments	2,000			
3. Fringe Benefits	8,000			
<b>TOTAL PERSONNEL COST</b>	<b>124,000</b>			<b>5,000</b>
<b>B. OTHER CURRENT EXPENSES</b>				
1. IT subscriptions/medical management software	6,500			
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space	49,500			8,000
5. Continuing Medical Education	15,000			6,000
6. Medical Supplies	30,000			4,000
7. Marketing/Outreach	15,000			5,000
8. Utilities	15,000			3,000
9. Reserve for pro-bono/discounted services	10,000			
10. Auditing/accounting/RHC compliance	10,500			
11. IT contractor	8,000			
12. Computers (upgrades/new staff)	8,000			2,000
13. Bariatric tables & vaccine frig/freezer	8,500			7,000
14				
15				
16				
17				
18				
19				
20				
<b>TOTAL OTHER CURRENT EXPENSES</b>	<b>176,000</b>			<b>35,000</b>
<b>C. EQUIPMENT PURCHASES</b>				
<b>D. MOTOR VEHICLE PURCHASES</b>	0			
<b>E. CAPITAL</b>	0			
<b>TOTAL (A+B+C+D+E)</b>	<b>300,000</b>			<b>40,000</b>
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	300,000	Katherine Schwind & Dr. Kealoha-Beaudet 885-5900		
(b) Total Federal Funds Requested		[REDACTED]		
(c) Total County Funds Requested		[REDACTED]		
(d) Total Private/Other Funds Requested	40,000	Signature of Authorized Official _____ Date <u>7/7/18</u>		
<b>TOTAL BUDGET</b>	<b>340,000</b>	Dr. Claren Kealoha-Beaudet, Executive Director Name and Title (Please type or print)		





## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2018 to June 30, 2019

Applicant: Five Mountains Hawaii dba Kipuka o ke Ola

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

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

## BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2018 to June 30, 2019

Applicant: Five Mountains Hawaii dba Kipuka o ke Ola

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2016-2017	FY: 2017-2018	FY:2018-2019	FY:2018-2019	FY:2019-2020	FY:2020-2021
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
<b>TOTAL:</b>						
<b>JUSTIFICATION/COMMENTS:</b>  <div style="text-align: center; padding: 10px;">NOT APPLICABLE</div>						

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

Applicant: Five Mountains Hawaii dba Kipuka o ke Ola

Contracts Total: 374,750

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S. / State / Haw / Hon / Kau / Mau)</b>	<b>CONTRACT VALUE</b>
1	State of Hawaii Grant-in-Aid	7/1/17- 6/30/18		State of Hawaii	350,000
2	R&D - Economic Development for Healthcare	7/1/15 - 6/30/16	Dept of Research and Develo	County of Hawaii	24,750
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**DECLARATION STATEMENT OF  
APPLICANTS FOR GRANTS PURSUANT TO  
CHAPTER 42F, HAWAI'I 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 pursuant to Section 42F-103, Hawai'i Revised Statutes:
  - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant is awarded;
  - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
  - c) Agrees not to use state funds for entertainment or lobbying activities; and
  - d) Allows the state agency to which funds for the grant were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant.
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawai'i Revised Statutes:
  - a) Is incorporated under the laws of the State; and
  - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided.
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawai'i 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, Hawai'i Revised Statutes, for grants used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant was awarded and disposes of the land in fee simple or by lease, the organization shall negotiate with the expending agency for a lump sum or installment repayment to the State of the amount of the grant used for the acquisition of the land.

Further, the undersigned authorized representative certifies that this statement is true and correct to the best of the applicant's knowledge.

Five Mountains Hawaii dba Kipuka o ke Ola



(Signature)

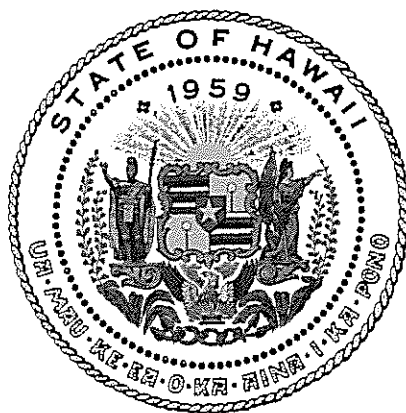
(Date)

1-15-2018

Dr. Claren Kealoha-Beaudet  
(Typed Name)

Executive Director  
(Title)





## Department of Commerce and Consumer Affairs

### CERTIFICATE OF GOOD STANDING

I, the undersigned Director of Commerce and Consumer Affairs of the State of Hawaii, do hereby certify that

FIVE MOUNTAINS HAWAII, INC.

was incorporated under the laws of Hawaii on 06/25/1996 ; that it is an existing nonprofit corporation; and that, as far as the records of this Department reveal, has complied with all of the provisions of the Hawaii Nonprofit Corporations Act, regulating domestic nonprofit corporations.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the seal of the Department of Commerce and Consumer Affairs, at Honolulu, Hawaii.

Dated: January 18, 2018

Director of Commerce and Consumer Affairs

