

## Application Submittal Checklist

*The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.*

- 1) Certificate of Good Standing (If the Applicant is an Organization)
- 2) Declaration Statement
- 3) Verify that grant shall be used for a public purpose
- 4) Background and Summary
- 5) Service Summary and Outcomes
- 6) Budget
  - a) Budget request by source of funds ([Link](#))
  - b) Personnel salaries and wages ([Link](#))
  - c) Equipment and motor vehicles ([Link](#))
  - d) Capital project details ([Link](#))
  - e) Government contracts, grants, and grants in aid ([Link](#))
- 7) Experience and Capability
- 8) Personnel: Project Organization and Staffing



SUSANNA F. CHEUNG, PRESIDENT AND CEO

JANUARY 15, 2020

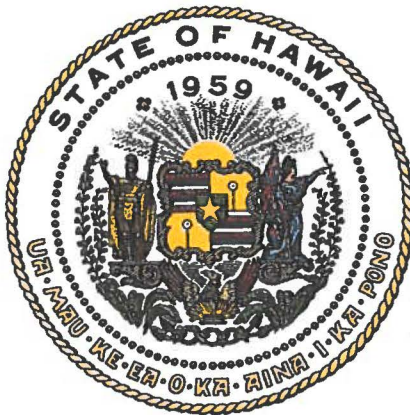
AUTHORIZED SIGNATURE

PRINT NAME AND TITLE

DATE







## 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

ORI ANUENUE HALE, INC.

was incorporated under the laws of Hawaii on 12/17/1993 ; 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 10, 2020

*Catharine P. Owaiki-Cole*

Director of Commerce and Consumer Affairs

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

The undersigned authorized representative of the applicant certifies the following:

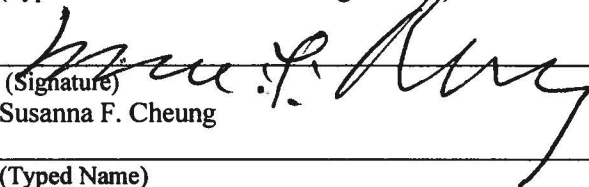
- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii Revised Statutes:
  - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant is awarded;
  - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
  - c) Agrees not to use state funds for entertainment or lobbying activities; and
  - d) Allows the state agency to which funds for the grant were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant.
  
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
  - a) Is incorporated under the laws of the State; and
  - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided.
  
- 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 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.

ORI ANUENUE HALE INC.

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

  
\_\_\_\_\_  
(Signature)  
Susanna F. Cheung

1/13/2020  
\_\_\_\_\_  
(Date)  
President and CEO  
\_\_\_\_\_  
(Title)

## Application for Grants

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

### **I. Certification – Please attach immediately after cover page**

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

Please see attached Certificate of Good Standing.

**2. Declaration Statement**

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

Please see attached Declaration Statement.

**3. Public Purpose**

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

The grant will be used for a public purpose, serving adults with special needs such as the elderly and the disabled in the community. Please see response to Section II, # 3.

### **II. Background and Summary**

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

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

ORI Anuenue Hale Inc. is a private, not-for-profit corporation located in Central Oahu, which was founded in 1993 by Susanna F. Cheung. The organization promotes the general welfare of the elderly, the disabled and the economically and socially disadvantaged through social, health and wellness activities, supportive services, education and job skills training.

The agency's Wellness Center in Wahiawa offers a venue for seniors and the disabled to participate in social, therapeutic and group learning activities, helping to maintain and support community living and prevent premature institutionalization.

**note that if the level of appropriation differs from the amount included in this application that the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.**

Periodic reports as required will be submitted to the State Agency which provides an update on the program and tracks the numbers served. Reports will address any problems/challenges, which may affect meeting the target goal.

- Health and Wellness Programs: 120 sessions per year
- Target number of minimum people served: 50 seniors and/or severely disabled adults
- Outreach activities: 2 activities per year

**IV. Financial**

**Budget**

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
  - a. Budget request by source of funds ([Link](#)) Attached
  - b. Personnel salaries and wages ([Link](#)) Attached
  - c. Equipment and motor vehicles ([Link](#)) Attached
  - d. Capital project details ([Link](#)) Not applicable
  - e. Government contracts, grants, and grants in aid ([Link](#))
  
2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2021.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$ 94,500.00	\$ 94,500.00	\$ 94,500.00	\$ 94,500.00	\$ 378,000.00

3. **The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2021.**

ORI Anuenue Hale will continue with fundraising efforts and solicitations for funding from private and public sources including foundations.

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.**

Not applicable

5. **The applicant shall provide a listing of all federal, state, and county government contracts, grants, and grants in aid it has been granted within the prior three years and will be receiving for fiscal year 2021 for program funding.**

ORI Anuenue Hale did not receive any program funding for the last 3 years nor is it expected to receive for fiscal year 2021 any federal, state or county program funding.

6. **The applicant shall provide the balance of its unrestricted current assets as of December 31, 2019.**

## **V. Experience and Capability**

### **1. Necessary Skills and Experience**

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

ORI Anuenue Hale's executive management experience includes nearly four decades of providing health and wellness programs, outreach services and recreational/social activities for adults with special needs. In the past, 500+ to 1,000+ seniors per year benefitted from the various outreach and wellness programs offered by ORI Anuenue Hale Inc.

In addition, it also has had nearly three decades of experience providing vocational training, employment and supportive services to people with intellectual disabilities and the economically disadvantaged, including the unemployed and underemployed.

ORI Anuenue Hale has the experience coordinating program services for people with special needs. Collaborative relationships with other human services agencies, community partners / organizations and resources, are maintained as an integral part of the coordination process to help meet the needs of program participants.

ORI Anuenue Hale is part of a network of agencies serving people with special needs, which can provide referrals and resources for program participants. The Department of Health, Developmental Disabilities Division and Case Management Units are community partners providing case management and support services to adults with developmental disabilities. The Department of Human Services is another community partner providing financial assistance and support to low income individuals, particularly those who receive Medicaid and other welfare assistance.

Community associations such as the United Chinese Society and Chinese Chamber of Commerce of Hawaii are business connections, which will help the agency in expanding its community resources and links.

ORI Anuenue Hale will continue to network and cultivate its relationship with various businesses, community associations, governmental and service providers. It will continue to utilize its current network of business and professional associations in order to share financial and human resources. ORI Anuenue Hale is able to access as a valuable resource a centralized administrative, marketing, accounting and management team, which enables the agency to minimize program costs and allow the program to devote funds more to direct service.

The agency's management team has had prior government contract experience and has provided satisfactory services for the disabled and the elderly for nearly four decades. Our agency, however, has not received any government funding for its program services at the Wellness Center for at least 5 years.

## **2. Facilities**

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

ORI Anuenue Hale's facilities are located at 64-1488 Kamehameha Highway in Wahiawa, which is adjacent to the Helemano Plantation complex. The Wellness Center is wheelchair-accessible and the facility has met the city and state's requirements for compliance with fire, building, sanitation, health and safety codes. It has several multi-purpose rooms decorated and furnished with chairs, tables, and basic audio-visual equipment. The Center has karaoke equipment, a large TV, DVD/VCR, microphone and projection screens for use in training / lectures as well as recreational activities. There is sufficient space for floor and standing exercises (i.e., Tai Chi, Chi Kung, meditation, yoga, stretching, etc.). The Center also has a Beauty Salon, Massage Room, Reading Room, Meditation Room, ample ADA toilets, small and large meeting rooms, dining room, and kitchenette for use primarily of its program participants (seniors and adults with disabilities).

Bathing and toilet facilities have grab bars and are wheelchair-accessible. Emergency call buttons were placed in each toilet stall and in the shower room in case participants, seniors and the disabled, needs assistance. Aisleways and doorways meet the physical requirements for accessibility. There are exterior ramps to enter the facility and wide sidewalks / exterior walkways.



ORI Anuenue Hale also has a recreational facility equipped for overnight camping experience. The campground is ADA, wheelchair-accessible with wide walkways. There is a small and large meeting room for group activities.

## **VI. Personnel: Project Organization and Staffing**

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

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

ORI Anuenue Hale has an experienced executive management team to oversee and administer the quality of its programs. Many of ORI Anuenue Hale's employees have been with the agency for several years and key employees have worked with the agency between 10 to 30+ years. The management team is well trained under the leadership of its founder and current president and CEO, Susanna F. Cheung.

Mrs. Cheung has nearly 40 years of management experience as founder and chief executive officer of private, non-profit organizations serving multiple groups with special needs. Her educational background includes a master's degree in Special Education at the University of Hawaii, a Certificate in Rehabilitation Administration from the University of San Francisco and a Certificate in Education from the Grantham teacher Training College in Hong Kong. Her Bachelor's degree was in Home Economics.

She also has extensive experience in establishing excellent partnership between the public and private sector. Mrs. Cheung previously worked for 15 years as Program Director for another non-profit organization in Hawaii serving persons with mental retardation / developmental disability, doing direct care supervision, program planning and implementation.

Prior to her professional experience in the field of human service, Mrs. Cheung was a Language instructor for 2 years with the Department of Education, Adult Education, and had 5 years prior experience as an administrator for a public service facility in Hong Kong.

A **Program Coordinator** will coordinate the marketing, documentation / recordkeeping and planning. Professional services, when volunteers are not available, as well as a recreation activity coordinator, and program aides will also be necessary through this grant in order to implement the various therapeutic and rehabilitative activities at the Center.

## **2. Organization Chart**

The applicant shall illustrate the position of each staff and line of responsibility/supervision. If the request is part of a large, multi-purpose organization, include an organization chart that illustrates the placement of this request.

### **PROGRAM COORDINATOR**

Coordinates program activities, services and reporting and documentation requirements. Ensures program compliance, trains staff, works with the recreation and program activity staff / volunteers in program implementation, supervises instruction, and collaborates with other resources for program support and funding.

### **PROGRAM AIDE**

Assists with the implementation of various program activities, including center-based daily activities and hands-on care of the elderly and disabled. May assist in providing care/assistance and transportation to the seniors and disabled in a variety of community settings, including the home setting.

### **CONTRACT – PROFESSIONALS**

Instructors may be hired on a contractual hourly or flat rate fee basis to conduct, teach or coordinate the program activity (i.e., Tai Chi, Chi Kung, Yoga, Computer or High Tech for Seniors, Physician or Medical Professional Health Talks, Cooking Lessons, etc.). They work directly with the program participants as scheduled.

### **VOLUNTEERS**

Assist in the implementation of recreation, social and therapeutic activities. Assist with monitoring and supervision of program participants.

**An organizational chart is attached.**

## **3. Compensation**

The applicant shall provide an annual salary range paid by the applicant to the three highest paid officers, directors, or employees of the organization by position title, not employee name.

## **VII. Other**

### **1. Litigation**

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

There is no pending litigation.

**2. Licensure or Accreditation**

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

ORI Anuenue Hale Inc. has been operating its various program services at the Wellness Center since 2009. The agency's management team also operates other government-contracted program services for adults with intellectual / developmental disabilities. Since the agency's inception in 1993, the program's mission has been to promote the general welfare and provide therapeutic, recreational and social services to primarily economically disadvantaged adults with special needs (seniors and the disabled).

**3. Private Educational Institutions**

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

Not applicable

**4. Future Sustainability Plan**

**The applicant shall provide a plan for sustaining after fiscal year 2020-21 the activity funded by the grant if the grant of this application is:**

**(a) Received by the applicant for fiscal year 2020-21, but**

ORI Anuenue Hale will utilize the funding to support its programs and save monies it generates through fundraising events throughout the year to help expand its programs and work on facility improvements. Activities conducted at its campground facility would be another opportunity for the agency to generate some income for the program.

**(b) Not received by the applicant thereafter.**

ORI Anuenue Hale has fundraising events throughout the year to help support its programs. Activities conducted at its campground facility would be another opportunity for the agency to generate some income for the program.

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2020 to June 30, 2021

Applicant: ORI ANUENUE HALE INC.

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	82,071			
2. Payroll Taxes & Assessments	6,278			
3. Fringe Benefits	19,636			
<b>TOTAL PERSONNEL COST</b>	<b>107,985</b>			
<b>B. OTHER CURRENT EXPENSES</b>				
1. Airfare, Inter-Island				
2. Insurance	10,470			
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				
6. Supplies	18,500			
7. Telecommunication	2,219			
8. Utilities	18,830			
9. Custodial Services	22,195			
10. Security Services	8,566			
11. Ground Maintenance				
12. Repairs and Maintenance	10,000			
13. Audit	3,200			
14. Contract Services - Professional	131,990			
15. Contract Services - Payroll	750			
16. Administrative Support				
17. Advertising	4,712			
18. Transportation	10,505			
19.				
20.				
<b>TOTAL OTHER CURRENT EXPENSES</b>	<b>241,937</b>			
<b>C. EQUIPMENT PURCHASES</b>				
<b>D. MOTOR VEHICLE PURCHASES</b>	<b>28,000</b>			
<b>E. CAPITAL</b>				
<b>TOTAL (A+B+C+D+E)</b>	<b>377,922</b>			
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	377,922	Melba D. Martinez	808-622-3929	
(b) Total Federal Funds Requested		Name (Please type or print) Phone		
(c) Total County Funds Requested			1/13/2020	
(d) Total Private/Other Funds Requested	10,000	Signature of Authorized Official Date		
<b>TOTAL BUDGET</b>	<b>387,922</b>	Susanna F. Ouedraogo, President and CEO Name and Title (Please type or print)		

**BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES**

Period: July 1, 2020 to June 30, 2021

Applicant:     ORI ANUENUE HALE INC.    

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Instructor & Consultant: Cooking / Dance / Crafts / Rec	\$ 67.73 x 624 hrs	\$42,264.00	100.00%	\$ 42,264.00
Instructor & Consultant: Yoga / Chi-Kung / Rec Coordinator	\$ 67.73 x 650 hrs	\$44,025.00	100.00%	\$ 44,025.00
Instructor & Consultant: Music / Singing / Rec & Leisure	\$ 1,000.00 /month	\$12,000.00	100.00%	\$ 12,000.00
Instructor & Consultant: Tai Chi / Computer / Rec & Leisure	\$ 1,000.00/month	\$12,000.00	100.00%	\$ 12,000.00
Instructor & Consultant: Medical	\$ 203.19/month		1 hr/ month	\$ 2,438.00
Other Consultants / Speakers (including Health, Legal, Educ)				\$ 19,263.00
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
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				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
<b>TOTAL:</b>				131,990.00
<b>JUSTIFICATION/COMMENTS:</b>				
Consultants / Instructors provide direct services to seniors and the disabled providing instruction / knowledge on their field of expertise.				

## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2020 to June 30, 2021

Applicant:     ORI Anuenue Hale Inc.    

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

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
Mini-Van (6 to 8 passengers)	1.00	\$28,000.00	\$ 28,000.00	28000
			\$ -	
			\$ -	
			\$ -	
			\$ -	
<b>TOTAL:</b>	<b>1</b>		<b>\$ 28,000.00</b>	<b>28,000</b>
<b>JUSTIFICATION/COMMENTS:</b>				
To be used for transporting seniors and the disabled to community activities.				

## BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2020 to June 30, 2021

Applicant: \_\_\_\_\_ORI Anuenue Hale Inc.\_\_\_\_\_

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2018-2019	FY: 2019-2020	FY:2020-2021	FY:2020-2021	FY:2021-2022	FY:2022-2023
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
<b>TOTAL:</b>						
<b>JUSTIFICATION/COMMENTS:</b>						
Not applicable						

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

Applicant: ORI ANUENUE HALE INC.

Contracts Total: -

	<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	No government contracts or grants since 2014.				
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Board of Directors



ORIANUENUE HALE INC.

WELLNESS CENTER

### VOCATIONAL TRAINING

- CONTRACT SERVICES
- FOOD PREP & SERVICE
- AQUACULTURE
- AGRICULTURE
- CAREGIVER
- CUSTODIAL / JANITORIAL
- MESS ATTENDANT
- OTHER INDUSTRY SERVICES

### ELDER CARE PROGRAM

- HEALTH & WELLNESS PROGRAM
- ADULT DAY CARE / DAY HEALTH
- FAMILY CAREGIVER TRAINING,  
RELIEF & SUPPORT SERVICES
- SENIOR OUTREACH SERVICES

### CAMP 808

- CAMP RECREATION
- CAMP 808 PAVILION
- CAMP 808 REC CENTER
- ANTHURIUM HALE
- LAUAE LODGE
- CABINS



**Board of Directors**

**President & CEO**

**Program Director**

**Elder Care Staff /  
Caregivers, Wellness  
Program Instructors /  
Consultants and  
Volunteers, Vocational  
Trainers, Program Aides**

**Contracting  
Department**

**Contract Services, Custodial  
Services, Mess Attendant  
Services, Contract Workers,  
Job Coaches and Aides**

**Administrative  
Staff**

**Human Resources,  
Accounting, Project  
Management  
Executive Assistant  
Public Relations**

**Project  
Development**

**Expansion and  
enhancement of  
program services and  
includes capital  
campaigns and  
improvement projects,  
construction, program  
and curriculum  
development, etc.**

**Adult Day  
Care  
Program  
Services**

**Wellness  
Program  
Services**

**Residential  
Program  
Services**

**Recreational  
Services for Elderly  
and Disabled  
Camp Activities**