





STATE OF HAWAII  
STATE PROCUREMENT OFFICE

**CERTIFICATE OF VENDOR COMPLIANCE**

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

**Vendor Name:** Habitat for Humanity International Inc.

**DBA/Trade Name:** Habitat for Humanity Hawaii Island, Inc.

**Issue Date:** 01/16/2024

**Status:** **Compliant**

Hawaii Tax#: [REDACTED]  
New Hawaii Tax#: [REDACTED]  
FEIN/SSN#: XX-XXX5149  
UI#: XXXXXX3297  
DCCA FILE#: 122999

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

**Status Legend:**

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

**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; and
- 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.
- 4) The use of grant-in-aid funding complies with all provisions of the Constitution of the State of Hawaii (for example, pursuant to Article X, section 1, of the Constitution, the State cannot provide "... public funds ... for the support or benefit of any sectarian or nonsectarian private educational institution...").

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.

\_\_\_\_Habitat for Humanity Hawaii Island, Inc.

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

Chris Marlett Patulski  
(Signature)

01-16-2024  
(Date)

\_\_\_\_Chris Marlett Patulski,  
(Typed Name)

Executive Director  
(Title)

## 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) Hawaii Compliance Express Certificate (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

Chris Marlett Patulski Chris Marlett Patulski, Executive Director 1-19-24  
AUTHORIZED SIGNATURE PRINT NAME AND TITLE DATE

## 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. Hawaii Compliance Express Certificate (If the Applicant is an Organization)**

If the applicant is an organization, the applicant shall submit one (1) copy of a Hawaii Compliance Express Certificate from the Comptroller of the Department of Accounting and General Services that is dated no earlier than December 1, 2023.

Attached

#### **2. Declaration Statement**

The applicant shall submit a declaration statement affirming its compliance with Section 42F-103, Hawaii Revised Statutes.

Attached

#### **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.

Yes, all funds received through the awarding of the GIA-CIP Grant program for FY 2024-2025 will be used for public purposes as specified in Section 42F-102, Hawai'i Revised Statutes. More specifically, the funds will be used for the construction of affordable single-family housing for low-income, hardworking, families residing in Hawai'i County.

### **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; Habitat for Humanity Hawaii Island, Inc. was formed when the former Habitat for Humanity West Hawaii (established 2002) acquired certain assets and liabilities of Hale O Hilo Habitat for Humanity (established 1998), and then changed its name in 2017, to serve all of Hawaii Island.

#### **Our Mission:**

“Seeking to put God’s love in action, Habitat for Humanity brings people together to build homes, community, and hope”.

**Our Vision:**

Our vision is “A world where everyone has a decent place to live.”

To date, Hawaii Island Habitats have built 61 new homes, completed 62 critical home repairs, and undertaken a neighborhood revitalization project in Waimea.

HFHHI is a designated Community Housing Development Organization (CHDO), recognized by the State and County of Hawai’i to be a non-profit organization with the capacity to develop affordable housing opportunities in our community. This designation allows us exclusive access to certain governmental funding opportunities available only to organizations receiving this designation.

Habitat for Humanity Hawai’i Island strives to break the cycle of poverty and homelessness by providing affordable homeownership opportunities to low-income families on the Big Island of Hawai’i.

**Organization’s Experience and Accomplishments:**

As noted, HFHHI has completed the construction of 61 new affordable homes and 62 critical home repairs for families in need in Hawai’i County. Other noted points of accomplishment and responsibility include:

- West side affiliate, Habitat for Humanity West Hawaii, incorporated east side affiliate, Hale O Hilo Habitat for Humanity, to serve entire island of Hawaii.
- 3 ReStore locations in Kona, Hilo, and Waimea contribute more than \$700,000 dollars annually in revenue to our operations and affordable housing programs, as well as keep reusable items that can be resold from entering the landfill.
- 2012 Blitz Builds- 5 homes in 10 days (Kailapa, Kawaihae)
- 2017 Blitz Build - 10 homes in 10 days (Lai Opuia, Kailua-Kona)
- 2018 Kilauea Disaster Response –Participated in build of 30 micro shelters for transitional housing, and performed 28 home pairs necessary as part of recovery efforts, while being involved in ongoing disaster recovery efforts in affected neighborhoods
- Awarded County of Hawai’i Kilauea Recovery Grant of \$500,000 to erect 5 factory built homes in Nanawale Estates for families who were displaced by the volcanic eruption (later amended to 2 traditional built homes as factory built homes stuck in permitting)
- While shut down during pandemic, unable to make progress on our mission of building homes or performing critical home repairs, participated with other non-profits to administer the Hawaii County RMAP (Rental and Mortgage Assistance Program) and ERAP (Emergency Rental Assistance Program) programs. Typically, Habitat doesn’t participate in these programs, but this allowed us to keep our operations going while the main part of our mission was shut down or limited, all the while assisting our community as everyone navigated through the effect of the pandemic.

Currently, Habitat Hawai'i Island is planning to build 15 homes in partnership with 15 Low-income families, the Department of Hawaiian Homelands (DHHL) funding 7 of the 15 homes total cost of \$2,835,000 and the State of Hawaii, in conjunction with other funding sources, funding 8 of the 15 homes total cost \$3,328,500 through the 2024-2025 GIA grant program request for gap funding of \$500,000 (pending). The total cost to complete the construction of 15 homes is \$6,163,500.

The Habitat model helps families build homes with affordable monthly mortgage payments so they may use the remainder of their income for nutritious food, adequate health care, education, and reliable transportation. The mortgage payments help fund Habitat operations to build more homes. This also allows Habitat homeowners to "pay it forward", creating more affordable housing opportunities for future families in need.

Habitat Hawai'i Island strives to empower and strengthen low-income families by providing them with a solid foundation from which to build a better life.

2. The goals and objectives related to the request;

**Overall Goal: To Help Build Strength and Stability**

At Habitat for Humanity, we build. We build because we believe that everyone, everywhere should have a healthy, affordable place to call home. When a family helps build or improve a place they can call home, they are also building a better community, and a better life for themselves.

Habitat's purpose is to provide affordable homeownership opportunities for low-income families. Evidence-based, best practices guide the services provided for affordable, sustainable home ownership. Habitat staff and volunteers work to build new homes with families and then offer an affordable mortgage along with support such as training in home maintenance, home repair, budgeting/financial literacy, and more.

**Goal FY 2024-2025**

Habitat for Humanity Hawai'i Island has an overall goal of building 15 new, affordable, sustainable homes with low-income families earning between 30% and 80% of the Area Median Income (AMI).

**Intended Outcomes FY 2024-2025**

This project will lead to the following intended outcomes:

1. 15 new affordable homes constructed with 15 hardworking low-income families, Habitat volunteers, and staff, with 7 being built and funded through DHHL and NAHASDA.
2. 15 Habitat families close on respective homes, pay an affordable mortgage and move into new, safe, affordable homes.

3. Strong partnerships and a multi-sector collaboration with foundations, corporations, small businesses, and the county, state, and federal government lessens the burden on government and social services agencies.
4. 15 hardworking deserving families (an estimated 45-75 individuals depending on family size of 3-5) move out of the inescapable cycle of poverty/homelessness and into safe affordable homes leading to family stability and prosperity.

To achieve this goal habitat Hawai'i Island has outlined the following objectives:

1. Continue to search and increase monetary and in-kind resources to meet the costs of building 15 new homes in FY 2024-2025.
2. Develop partnerships and collaborate with foundations, corporations, local businesses, and county, state, and federal agencies to build safe, affordable single-family homes for low-income families on the Island of Hawai'i.
3. Recruit and coordinate teams of volunteers to assist with the construction of the 15 homes.
4. Family Selection Committee: Provide mentorship to the 15 (qualified) low-income families earning between 30%-80% of the AMI for Habitat homes to be constructed.
5. Habitat families, staff, contractors, and teams of volunteers work together to build 15 new affordable homes.
6. All 15 Habitat families close on their respective homes, move into new, safe homes and begin paying an affordable mortgage.

3. The public purpose and need to be served;

The state of Hawai'i has long experienced a housing crisis with one of the highest rates of homelessness in the country. Residents of Hawai'i are also seeing the highest increase in the country for cost of living, one of the costliest housing markets, and a rapid increase in the rate of poverty.

Due to wages not keeping up with inflation, heavy taxes, and the high cost of food and necessities, home ownership is a distant dream for most families on the Big Island. Even the average salaries of workers critical to Hawai'i's economy such as teachers, emergency responders, and construction workers are unable to afford fair market value rent and homes for sale.

Statistics show, 51% of the population of Hawai'i is cost-burdened by housing Expenses, spending more than 50% of their income on housing (HUD standard is spending no more than 30% of income). When families pay too much for their housing, it means sacrifices in other areas of their lives, like nutritious food, healthcare, childcare, and solid transportation.

All of these factors create a cycle of poverty and/or homelessness that is inescapable no matter how hard a family works. In Hawai'i, 1 in 5 households is at risk of homelessness. Over half of the families that are homeless or in transitional housing have jobs. The high cost of living and homelessness is not only felt by those it directly



affects-each year: The public cost of someone who is homeless (the most vulnerable and disabled) can range between \$35,000 and \$150,000 in services funded by public assistance. Many of these services are temporary solutions to the problem.

Habitat Hawai'i Island offers the permanent solution of homeownership as a cost-effective and efficient way to impact this issue. Building and owning a home provides the foundation for families to realize their true potential. Studies show that students with a stable home environment have higher grades in school, and increased participation in social activities. Children are healthier and safer. There is a great benefit to local, state, and federal agencies, because homeownership means that families are less likely to rely on those agencies for funding and services, therefore, improving the entire community.

Building 15 new homes creates the potential to improve the lives of an estimated 45-75 individuals (depending on family size of 3-5) living in poverty and unhealthy, unsafe, and overcrowded conditions. We are asking for G.I.A. assistance for 7 of our anticipated 15 projects, to be used in conjunction with other funding to complete homes, so families can move to permanent solutions for their own individual housing crisis.

4. Describe the target population to be served; and

Habitat for Humanity Hawai'i Island serves the following target population:

1. Hardworking low-income families earning between 30% and 80% of the Area Median Income (AMI) with priority to families making less than 60% AMI and residing in Hawai'i County, including Native Hawaiian families eligible for land through Hawaiian Homelands, with the same AMI criteria.
2. Habitat has also determined that it will give priority to families that are the following:
  - a. homeless or at risk of homelessness
  - b. have young children that need safe and stable housing
  - c. elderly in need of a safe home.
  - d. Families willing to share in the responsibility of building their own home through Habitat for Humanity's sweat equity program and meeting Habitat criteria
  - e. Families with the ability to pay an affordable mortgage.

The number of persons anticipated to be served for FY 2024-2025: The intended result is to serve 15 hardworking low-income families (with 8 being DHHL land lease recipients that will be totally funded outside of the scope of houses being included in the projects that we are asking G.I.A. assistance for). The actual number of individuals will depend on the size of each household. For example, a household of 3-5 members serves between 45-75 individuals.

The specific age range of persons served depends on the final selection of the qualified families. Individuals served by this project typically range from infants to senior citizens.

5. Describe the geographic coverage.

Geographic area we serve is all of Hawaii Island. Habitat families and construction project(s) will all be located in Hawai'i County, Hawai'i. Current projects underway are in the Puna district, Kailapa in Kawaihae (DHHL), and H.O.V.E., with anticipated near future projects to start in Discovery Harbor (DHHL), Lai Opua in Kailua-Kona (DHHL), H.O.V.E., and the Puna district.

### **III. Service Summary and Outcomes**

The Service Summary shall include a detailed discussion of the applicant's approach to the request. The applicant shall clearly and concisely specify the results, outcomes, and measures of effectiveness from this request. The applicant shall:

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

**Scope of work:**

The primary focus of this project is to give a "hand up" not a "hand out" to 15 hard-working, low-income families who are affected by the nearly inescapable cycle of poverty and homelessness. Many of the families served would not be able to own a home otherwise and are families impacted by several critical factors such as lingering effects of the Covid-19 pandemic, and the rapid inflation and cost of living and housing.

Each year, Habitat Hawai'i Island tries to increase capacity, and strives to do more in alignment with the growing need for affordable housing. Habitat Hawai'i Island is committed to increasing significantly its impact on the gap between affordable homes, the needs of working families, and the crisis of homelessness and poverty on the Island of Hawai'i.

Each new Habitat home begins with fundraising by the Habitat Hawai'i Island Board of Directors, Habitat Hawai'i Island's Executive Director, and Staff for the cost associated with construction. Confirmation of adequate funding is the first step that begins the building process.

In FY 2024-2025, Habitat desires to construct 15 new homes with 15 families in need island-wide. Working in partnership with local and state agencies, the Department of Hawai'ian Homelands (DHHL), (through which leasehold property and construction loans are provided on behalf of native Hawai'ians), and our corporate and community partners, we will achieve this goal. 7 out of the 15 families will receive assistance through DHHL in FY 2024-2025 to build their new affordable homes in partnership with HFHHI. For purposes of this grant HFHHI is making this request for funding \$500,000 through CIP/GIA grant for gap funding to help serve the remaining 8 families in need of assistance.

**Tasks and Responsibilities:**

Under the general direction of the Board of Directors, and the Building and Construction Committee, the Executive Director, the Finance Committee, and Construction Manager will begin project planning on March 1, 2024. Meetings are scheduled for project planning and will include the Family Services Manager, and a Volunteer Coordinator.

Work is already underway for the Habitat Family Services staff and committee to deliver orientations for prospective Habitat homeowners in locations across Hawaii Island. After orientations, the Habitat Family Selection Committee meets and selects families based on need, ability to pay an affordable mortgage, and willingness to work 500 hours of sweat equity on the construction of their home.

The Marketing and Community Outreach Manager and Construction Manager recruit volunteers, while the Family Services Managers and Construction Manager vet sub-contractors to keep the costs of construction as low as possible to insure the home is affordable for Habitat families.

The Construction Manager puts together a construction schedule and plans are drawn up. The schedule includes site preparation, installation of the foundation, acquiring building materials and all supplies, framing, roofing, and finishing. The Executive Director, Construction Manager and the Board of Directors Building/Construction Committee oversees the schedule and tasks to complete.

These tasks have already been identified and assigned for the 8 GIA funded homes beginning July 1, 2024. Although it is sometimes challenging to raise sufficient funds, Habitat staff and board members are committed to doing so and providing homeownership opportunities for hardworking, low-income, deserving Habitat families during FY 2024-2025.

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

The project is scheduled to begin with Habitat’s fiscal year, July 1, 2024 and completed by September 30, 2025. The chart below is an estimated timeline of construction activities.

Construction Timetable	Start Date	End Date
Pre-Construction • Building Permits Fees, etc. • Site Prep • temporary electric utilities • Materials on Site	Jul.1, 2024	Oct. 31, 2024
Construction: • Concrete Foundation	Oct. 15, 2024	Mar. 15, 2025

<ul style="list-style-type: none"> <li>• Framing</li> <li>• Roofing</li> <li>• Exterior finishes: walls, siding, windows, doors, painting</li> </ul>		
Plumbing and electrical	Mar. 15, 2025	April 30, 2025
Interior finish work	May 1, 2025	June 30, 2025
Additional Site work	July 1, 2025	July 31, 2025
Walkways installed	August 1, 2025	August 15, 2025
Project Complete	Sept. 30, 2025	

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

Quality assurance is one of the building blocks of the Habitat for Humanity Risk Prevention and Response Program. This program includes the annual Habitat Affiliate Agreement to conduct business according to the principles established by Habitat International for all facets of the organization, ranging from family selection, service delivery, governance, human resources, and financial and legal practices. All Habitat for Humanity affiliates must adhere to Habitat International’s specific criteria.

Additionally, each Habitat affiliate is required to report quarterly to Habitat International on progress towards approved targets for the number of homes built, outputs/outcomes for homeowners, human resource practices, and board governance.

As with any construction project, Habitat for Humanity Hawaii Island must adhere to the local county building codes for their county (Hawaii Island). At the appropriate times, a county inspection will be called for and conducted. Any deficiencies will be noted by the county inspector, and must be addressed for the property to pass inspection, including final inspection.

For this project, home construction inspections will be regularly scheduled and performed at each phase of construction assuring the quality of work. Site supervisors closely monitor the work of volunteers where appropriate and volunteers attend a required online safety course.

Once a home is completed, the homeowner must fill out a buyer’s checklist for each room of the interior and general exterior. All (if any) deficiencies are noted and a plan is made to rectify them. Habitat for Humanity Hawaii Island has a one year warranty period, consistent with other builders, that a defect of construction can be noted and rectified for the homeowner.

4. List the measure(s) of effectiveness that will be reported to the State agency through which grant funds are appropriated (the expending agency). The measure(s) will provide a standard and objective way for the State to assess the program's achievement or accomplishment. Please note that if the level of appropriation differs from the amount included in this application that the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.

Early and robust evaluation is a key aspect of Habitat Hawai'i Island's homebuilding program and Habitat has adopted several planning, monitoring, and evaluation tools.

Habitat's evaluation process starts with setting the vision of what is to be achieved, defining the results, selecting the tools, implementing the monitoring activities, and then using the resulting data to determine whether the right approach is being taken or what adjustments might be necessary because of what is learned.

Contributing to both quantitative and qualitative data collection, several tools are used. First, we measure the number of low-income families that respond to our outreach efforts, to ascertain our effectiveness in serving the target population. Second, we monitor the number of families that qualify as Habitat homeowners according to the program criteria set.

We also consider the number of families who may not qualify in the short term but may benefit from a plan to qualify in the future, such as starting a savings account or becoming a part of an "incubator" program set up to assist families to qualify and become homeowners or work to help them improve their credit scores. In the longer term, we monitor and evaluate the family's responsiveness to the mandatory financial literacy training and the Family Support Representative's assessment of their progress as potential sustainable homeowners. This allows us to take timely action to remedy any problems that might arise.

Habitat Hawai'i Island also administers an annual Habitat family survey in order to track each family's overall satisfaction with the process of becoming a homeowner. The survey delves into what they learned from the experience, and how they compare the quality, affordability, and size of their new space with that of their prior housing. The survey also asks questions that gauge the experience that each family had with Habitat for Humanity Hawai'i Island staff and volunteers.

Habitat implemented a sophisticated system of evaluation known as "Success Measures" provided by Habitat for Humanity International to evaluate its' new home construction program. Success Measures is the only national effort of its kind to support the collection of outcomes and impact data from the community development field and consists of various survey tools, focus groups, and observation formats. Using this information, Habitat Hawai'i Island can determine the impact of the actions and then act on the findings.

Finally, in addition to local data collection, analysis, and evaluation programs, Habitat International has aggregated research that shows that affordable housing brings great benefits to communities and to individuals in the areas of economic stability, wealth accumulation, safety, health, education, and civic participation.

This information establishes a template for longitudinal evaluation of each affiliate's home building and critical repair program.

Measurable Results: Habitat for Humanity measures effectiveness in several ways. Habitat Hawai'i Island will measure the completion of the overall goal of completing the construction of 8 out of 14 homes within the timeframe outlined. Habitat will report on the number of families participating in the orientation process as well as the number of low-income families qualified for the homes. Other data reported: a survey of families regarding improvement of quality of life.

The following are the measurable results expected by the end of the project/grant period. These measurements do not include the projects that are to be built for DHHL land lease recipients, as any awarded G.I.A. funding will not be used on these projects.

1. 8 families (24-40 individuals) selected who qualify as a Habitat homeowner.
2. 8 families complete a minimum of 500 sweat equity hours.
3. 8 Families complete homeownership training.
4. Construction of 8 new, safe, affordable homes completed.
5. 8 families participate in a survey to report on the quality of life changes after becoming an affordable homeowner.

#### **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](#))
  - 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](#))
2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2025.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$50,000	\$150,000	\$150,000	\$150,000	\$500,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2025.

Habitat for Humanity Hawaii Island has a number of funding sources secured for the FY 2024-2025, and those sources will be listed in the appropriate section below. Habitat for Humanity is contributing 8 site lots to the project for the homes to be built on. The approximate value of these lots is estimated to be approximately \$93,400 based on current property tax valuations.

Habitat for Humanity has applied for 2024 HOME funding with its CHDO designation. It is awaiting County decision regarding awarding of funds.

As funding opportunities become available Habitat Hawaii Island will apply for additional funding to meet the project finance goal for 8 homes (with a separate 7 homes already funded through DHHL/NAHASDA). For the purposes of this grant \$500,000 is being requested to assist with 8 out of 15 homes.

Common types of funding that Habitat seeks are private foundation funds such as the Healy Foundation, the Atherton Foundation, the Cooke Foundation, the Dorcy Foundation and others. Habitat also applies for sources of funding from Hawaii Community Foundation and the United Way. We will be monitoring for application and deadline periods for these opportunities and act accordingly if a funding opportunity that aligns with our mission becomes available.

Additionally, the County of Hawaii has established a Homelessness and Housing Grant opportunity from set aside from property tax revenue. We currently have an award that runs through end of calendar year 2024, but will apply for funding through this grant for 2025 when appropriate. We will also assess and apply, if appropriate, for the County of Hawaii Non-Profit Grant for 2025.

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

Habitat Hawaii Island did not receive any state or federal tax credits for any capital projects. Additionally, Habitat Hawaii Island has not applied and does not intend to apply for state or federal tax credits at this time.

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 2025 for program funding.

Habitat Hawaii Island grants awarded and will be used for FY 2024-2025:

- 2021-Home Grant Funds in the amount of \$450,000 and has received an extension for FY 2024-2025 to expend
- 2019-Kilauea Recovery Grant funds awarded in the amount of \$500,000 extended because of Covid-19 to expend beyond the closing date.
- 2024 County of Hawaii Homelessness and Housing Grant Capacity Build Grant award of \$166,000 for use from May-December 2024
- 7 projects anticipated for DHHL land lease recipients of self help award lots. Would be funded by DHHL/NAHASDA after approval and qualification of lease award recipients

Habitat Hawaii Island grants awarded in last 3 years but anticipated to be expended by start of FY 2024-2025:

- 2018-Home Grant Funds in the amount of \$451,000 and has received an extension to expend the remaining \$60,000
- County of Hawaii Homelessness and Housing Capacity Building Grant award in the amount of \$240,000 (awarded from May 2023-April 2024)
- FY 2023-2024 State of HI G.I.A./CIP award in the amount of \$350,000

For the two years 2020-2022 Habitat for Humanity Hawaii Island was a subrecipient to the County of Hawaii contracts awarded to HCL (Hawaii Community Lending). Under these contracts, a hui of several non-profits coordinated to distribute assistance to qualified applicants, first under the Rental and Mortgage Assistance Program, then under the Emergency Rental Assistance Program. Both programs were funded through the Federal CARES Act.

Additionally, Habitat Hawaii Island does receive funding through USDA Housing Preservation Grant programs and through HUD for the Veterans Housing Rehabilitation and Modification Program for critical home repairs, which is an entirely separate program run by Habitat Hawaii Island, and not part of any of the narrative included elsewhere in this application.

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2023.

Habitat for Humanity Hawai'i Island has a balance of \$3,233,045 in unrestricted assets as documented in the preliminary Balance Sheet dated December 31, 2023.

## **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.

As stated earlier, Habitat for Humanity has built 61 homes and provided 62 critical home repairs on Hawaii Island since their presence on the island, starting in 1998.

Habitat for Humanity Hawai'i Island has the backing and support of Habitat for Humanity International's 40+ years of experience in building safe affordable homes for families all over the world, with a well-documented record of positive results.

Extensive levels of experience reside with Habitat Hawai'i Island's Board of Directors. The Board of Directors consists of 12 (9 Regular members and 2 Advisory Members) dedicated volunteers from various sectors of the local professional business network. With their expertise and guidance, they work together with staff to ensure the mission of HFHHI is being met, as well as have a fiduciary responsibility to the organization.

Habitat Hawai'i Island Board members actively participate in committees. The following is an outline of committees, the duties they are charged with, and the skills required to help with the work at hand.

**Building Committee:** The Building Committee is responsible for all aspects related to the actual construction of Habitat homes. Including but not limited to: scheduling, permitting, design, and structural issues. Members include Habitat staff, outside building contractors, Habitat board members, and industry representatives. Skills and experience include prior contracting/building experience, knowledge of the County of Hawai'i permitting process, working relationships with County of Hawai'i representatives, and architecture and engineering experience.

**Finance Committee:** Responsible for the fiscal health of the Habitat Hawai'i Island organization through the development of an annual budget by monitoring monthly and annual income statements. Members include Habitat staff, Habitat board members, bankers, accountants, and those knowledgeable of finances and accounting. Skills include accounting, banking, and or legal experience.

**Family Selection Committee:** Responsible for screening family applications and selecting qualified partner families based on a variety of criteria, the most important of which are:

1. A family's level of need for affordable housing (Habitat helps those who are living in substandard housing)
2. Household income between 30%-80% AMI (with specific priorities)

3. Willingness to partner with Habitat Hawaii'i Island as a Habitat Partner-Family (including the performance of 500 hours of 'sweat equity').

Skills and experience include prior involvement with Habitat Family Selection, knowledge of fair housing laws, knowledge of home mortgages and/or finances, as well as a willingness to commit to the sometimes-lengthy process of family selection.

Habitat has served families on the Big Island since 1998 and has gained recognition as the only affordable homebuilder that addresses the holistic needs of low-income families in such a way as to create actual housing, sustainability, and stability. This extensive experience coupled with Habitat's model for the construction of safe, affordable, decent homes makes Habitat Hawaii'i Island uniquely qualified for this project.

## **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.

Habitat for Humanity Hawaii'i Island operates out of the main office located at 73-4161 Ulu Wini Place, Bay 1 Kailua-Kona, Hawaii'i, 96740. The office is co-located with the Kona ReStore, which operates on the lower level of the warehouse.

The construction office is located at 65-1259 Kawaihae Road in Waimea, HI, and is co-located with the Waimea ReStore.

A third ReStore facility is at 871 Iolani Street, Hilo, HI 96720.

Offices and ReStores have access to office equipment, internet, phone, as well as adequate meeting space for administration and planning. Space is available at the construction office site and Hilo site for some storage of tools and supplies related to construction.

## **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.

Each staff person hired to work at Habitat Hawai'i Island goes through the process of recruitment, application, interview, and selection based on Habitat's HR policies and procedures. In general, we make staff selections based on minimum qualifications, experience, skills, and a "passion for the mission".

Once hired, each staff person enrolls in Habitat-designed training aligned with his or her particular area of responsibility.

HFHHI has a top management team consisting of the Executive Director and the Construction Manager, who in tangent oversee the day-to-day operations. The Executive Director works directly with the Board of Directors and all committees responsible for all HFHHI critical home repair and home build projects, while the Construction Manager works with Site Supervisors, Construction Laborers, and Volunteers to oversee that actual construction activities are kept on track and to standards, regulations, and codes of building.

The following are the roles and qualifications of administrative personnel who will be executing the project and managing funds and will work collaboratively as a team toward success to meet the goal of building 8 new homes as part of this request (of the total 15 planned):

The Executive Director of Habitat for Humanity Hawai'i Island is responsible to provide general oversight of the entire Habitat for Humanity Hawai'i Island organization and be administratively involved to ensure achievement of the overall goal of 8 homes (included in this portion of the project) as planned. The Executive Director reports to the HFHHI Board of Directors and meets regularly with all committees and employees that are involved in construction related activities. Since the Executive Director was formerly the Finance Director at Habitat for Humanity Hawaii Island, she is currently also responsible for the overall financial management of the organization and construction projects, overseeing all financial activities, and ensuring that the financial management is within the policies, procedures, and guidance set forth in auditing requirements, and government grant requirements with internal/external controls. Once a Revenue Specialist is hired (see below), the Executive Director will be closely training and monitoring that individual to assume a number of these tasks, preparing the individual to step into either a Finance Manager or Resource Development role within the organization.

**Chris Patulski, Executive Director**— employed with HFHHI since 2018

**Education**

- Bachelor of Science in Business Administration, Accounting; Aquinas College, Grand Rapids, MI (1983) - Magna Cum Laude

- Associate in Accounting; Davenport College of Business, Grand Rapids, MI (1981) – Highest Honors

### **Work Experience**

- 40+ Years of Accounting Experience in various industries

### **Community Engagement**

- Treasurer (former Secretary) and Board Member, Hawaii Habitat Affiliate Sponsored Organization

**Revenue Specialist** is a hybrid position, responsible for certain grant writing and reporting activities along with certain accounting activities related to recording the various revenue streams of the organization into the general ledger and financial statements. The position will also be responsible for looking for and developing additional sources of funding and revenue streams that are consistent with the organization's mission and purpose. The intent is for this individual to learn while on the job to grow into either a Resource Development Manager or a Finance Manager. The successful candidate will have a degree in Business Administration or a closely related field, and 2 or more years experience in a administrative position.

**Bookkeeping/Executive Assistant** is responsible for bookkeeping functions of the affiliate (preparing payment vouchers, paying bills, tracking unpaid invoices, payroll, including 941 reporting), preparation and printing of regular monthly and other financial reports as needed, answering incoming calls, handling donations of funds, payments, and other revenue daily, and depositing funds accordingly, handling sponsor and existing homeowner correspondence, and other financial transactional recordings as necessary.

**Anita Stalb, Bookkeeping/Executive Assistant**– employed with HFHHI since 2017

### **Education**

- 2-year Foreign Certification in Accounting & Business

### **Work Experience**

- 15+ years experience in Accounting & Business
- 7 years direct bookkeeping experience with HFHHI

The Family Services Manager/Mortgage Specialist-(2 positions) is responsible for working with families throughout the application and selection process. In addition, the Family Services Manager coordinates and facilitates the Homeowner Education component of the program providing classes in home repair, soft/life skills training, and financial literacy setting the stage for long-term success and sustainability. This position also assists with details of purchases for project materials, tracking project status, and overseeing the preparation of closing documents for sale of completed homes to homeowners.

**Jane Mireles, Family Services Manager, Mortgage Specialist Kona** -employed with HFHHI since 2018.

**Expert Training:**

- Qualified Mortgage Loan Originator since 2018

**Licensing:**

- 12 years experience Licensed Hawaii Realtor

**Community Engagement**

- Family Services Committee HFHHI since 2018

**Adrienne Eisele, Family Services Manager, Mortgage Specialist Hilo** – employed with HFHHI since 2018

**Education**

- Bachelor of Arts in Psychology from the University of Hawai'i, Hilo, Hawaii

**Expert Training:**

- Qualified Mortgage Loan Originator since 2021

**Qualifications/Certifications**

- Disaster Case Management
- Habitat Competent Person Training
- 14+ years experience with HFH on Hawai'i Island
- Former Habitat Volunteer
- Home Builds
- Community Events
- Fundraisers
- Former Board Secretary for Hale Aloha O Hilo Habitat for Humanity
- Transitional Board Member (during 2017 merger)

**Community Outreach and Marketing Manager** is responsible for the affiliate's public relations activities so that media coverage and communication with partner families, volunteers, donors, and the general public is effective. A special emphasis of this position is supporting volunteerism at every level of the organization. Primary job duties include, but are not limited to the following: public relations, community outreach, event planning, volunteer coordination and graphic design. This position also provides a variety of literature, marketing materials, and volunteer outreach and coordination.

**Margo Takata, Community Outreach and Marketing Manager**—employed with HFHHI since 2009.

## **Training and Qualifications**

- Good communicator; interpersonal and organizational skills; attention to detail
- Public speaking and writing skills
- Strong computer skills; publishing, presentation software
- Experience in managing multiple priorities
- Experience in dealing with printers and audio/visual houses
- Background in dealing with the media
- Strong commitment and calling to Habitat, its mission and its philosophy of Christian outreach

## **Education**

- Bachelor of Business Administration, University of Hawaii at Manoa, Honolulu, Hawaii

## **Experience**

- 14 years experience with Habitat Hawaii Island
- Former HFHHI Family Services Manager (2015-2018)
- Former HFHHI Community Relations/Volunteer Manager (2009-2015)

## **Construction Manager**

The Construction Manager is responsible to oversee all aspects of the construction process in a way that utilizes staff, sub-contractors, Site Supervisors, volunteer labor, and materials to produce quality homes in a safe and affordable manner.

Construction management includes the following duties: managing construction staff and volunteers, overseeing residential construction sites, training volunteers, assisting with plan and site development, and developing methods for construction quality assurance to improve the long-term product. The Construction Manager also provides oversight of the logistics of coordinating sub-contractors, and suppliers, scheduling of delivery of building materials/supplies, and working with inspectors at each phase of construction.

**Jason Taylor, Construction Manager**—employed with HFHHI since 2023.

## **Experience**

- 20 years experience in the Construction industry
- Owned own construction company for 19 years
- Property Management experience

## **Training and Qualifications**

- Licensed contractor (state of TN)
- Certification in AAC block installation
- Licensed Property Manager in Charge (state of SC)

- Licensed Home Builder (state of SC)
- InterNachi certified professional home inspector

### **Construction Site Supervisors**

Under the direct supervision of the Construction Manager, Site Supervisors are placed at each home and responsible for coordinating and managing volunteer construction teams to meet the daily goals. Site Supervisors also create tasks and match volunteer crew leaders with other volunteers as appropriate. The Supervisors monitor each task, assuring job safety and quality workmanship, as well as communicate any issues, concerns or needs to the Construction Manager.

**Board of Directors Building/Construction Committee:** The Board of Directors formed the Building/Construction Committee for oversight of all aspects of financial planning, scheduling, and evaluating the completion of homes as outlined in the annual goal, in this case, 8 new homes. The Committee meets monthly and more often as needed to keep projects on target and within the budget and timelines.

## **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.

Attached

The placement of this grant request is under the general stewardship of the Habitat Hawai'i Island Board of Directors and the direct administrative responsibility of the HFHHI Executive Director. The Executive Director is supported by Habitat personnel whose responsibilities involve tasks related to construction or financial activities. The Executive Director is the main contact for the coordination of grant writing and reporting with the assistance of the Revenue Specialist, when in place.

## **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.

The current salaries of the top three highest-paid employees for FY 2024-2025 at HFHHI range from \$56,984 to \$83,000 as outlined below:

1. Executive Director \$83,000
2. Construction Manager \$65,000
3. Marketing and Community Outreach Manager \$56,984

## **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.

None

### **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.

Habitat for Humanity Hawai'i Island is a registered 501 (C) (3) non-profit organization in the State of Hawai'i.

HFHHI is a designated Community Housing Development Organization (CHDO), recognized by the State and County of Hawai'i to be a non-profit organization with the capacity to develop affordable housing opportunities in our community. This designation allows us exclusive access to certain governmental funding opportunities available only to organizations receiving this designation.

The Family Services Managers are qualified Mortgage Loan Originators and have several years experience with Habitat for Humanity Hawaii Island.

All construction related areas requiring licensing, i.,e., electrical, plumbing, roofing, solar, etc. will be contracted with experts licensed in the State of Hawai'i.

### **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

If awarded, the 2024-2025 GIA/CIP State of Hawai'i Grant Funds will not be used for sectarian or non-sectarian private educational institutions.

### **4. Future Sustainability Plan**



The applicant shall provide a plan for sustaining after fiscal year 2024-25 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2024-25, but
- (b) Not received by the applicant thereafter.

The financial stability of the organization is achieved through several revenue streams. Habitat for Humanity Hawaii Island operates ReStores in 3 locations--Kailua Kona, Hilo, and Waimea on the Big Island. The 3 ReStores generate income by accepting donated new and gently used building materials and home furnishings and selling these items at a drastically reduced price.

Another key source of revenue for Habitat Hawai'i Island is the Development Team's solicitation of Federal, State, County grants. The team also applies for Foundation and Corporate grants. Additionally, Habitat receives funding in the form of direct individual and corporate donations as well as sponsorships.

When mortgage and repair recovery payments are received and deposited, Habitat in turn uses these funds to help operations with a goal of building capacity to be able to build or repair more homes. The more homes we build, the more low-income families we can help with the opportunity of affordable housing on Hawai'i Island.

This specific funding request is for 8 out of 15 homes to be built in funding year 2024-2025. Upon completion of the project Habitat families will close on the low cost mortgage and move into their new affordable homes. For those families that obtain a mortgage through Habitat, once a family takes ownership of their new home and begins to make mortgage payments, they remain a partner with Habitat Hawaii Island throughout the duration of the life of the mortgage (typically a 30 year partnership).

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2024 to June 30, 2025

Applicant: Habitat for Humanity Hawaii Island

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			166,000	
2. Payroll Taxes & Assessments				
3. Fringe Benefits				
<b>TOTAL PERSONNEL COST</b>			<b>166,000</b>	
<b>B. OTHER CURRENT EXPENSES</b>				
1. Airfare, Inter-Island				
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				
6. Supplies				
7. Telecommunication				
8. Utilities				
9 Building Costs	500,000		950,000	95,000
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
<b>TOTAL OTHER CURRENT EXPENSES</b>	<b>500,000</b>		<b>950,000</b>	<b>95,000</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>500,000</b>		<b>1,116,000</b>	<b>95,000</b>
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	500,000	Chris Marlett Patulski	808-331-8010	
(b) Total Federal Funds Requested		Name (Please type or print)		Phone
(c) Total County Funds Requested	1,116,000	<i>Chris Marlett Patulski</i>		1/19/2024
(d) Total Private/Other Funds Requested	95,000	Signature of Authorized Official		Date
<b>TOTAL BUDGET</b>	<b>1,711,000</b>	Chris Marlett Patulski, Executive Director		
		Name and Title (Please type or print)		



## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2024 to June 30, 2025

Applicant: Habitat for Humanity Hawaii Island, Inc.

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
			\$ -	
N/A--Habitat for Humanity Hawaii Island, Inc. is not requesting			\$ -	
Equipment reimbursement as part of this G.I.A. request			\$ -	
			\$ -	
			\$ -	
TOTAL:			\$ -	
JUSTIFICATION/COMMENTS:				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ -	
N/A--Habitat for Humanity Hawaii Island, Inc. is not requesting			\$ -	
Motor Vehicle reimbursement as part of this G.I.A. request			\$ -	
			\$ -	
			\$ -	
TOTAL:			\$ -	
JUSTIFICATION/COMMENTS:				

## BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2024 to June 30, 2025

Applicant: Habitat for Humanity Hawaii Island

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: 2022-2023	FY: 2023-2024	FY:2024-2025	FY:2024-2025	FY:2025-2026	FY:2026-2027
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION	442221.58	404161	500000	2476900	2386500	4190000
EQUIPMENT						
<b>TOTAL:</b>			<b>500,000</b>		<b>2,386,500</b>	<b>4,190,000</b>
<p><b>JUSTIFICATION/COMMENTS:</b> For equitable comparative purposes, this spreadsheet is reflective of construction activities and awards only, and does not reflect operating funds and awards received by the operation. Funding provided to build for DHHL lessees IS included in prior year Activities for the last 2 fiscal years, as spreadsheet indicates to include ALL sources of funds. Activities still ramping up from being stagnant after the COVID 19 pandemic.</p>						

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

Applicant: Habitat for Humanity Hawaii Island

Contracts Total: 1,116,000

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	2021 HOME Funds	2024-ongoing(1)	Office of Housing & Community Development	Hawaii County	450,000
2	Kilauea Recovery	2020-ongoing (3)	Planning Department	Hawaii County	500,000
3	County of HI Homelessness & Housing Grant	May-Dec 2024	Office of Housing & Community Development	Hawaii County	166,000
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26	(1) Because of COVID pandemic, 2018 contract extended until funds are expended. 2021 contract not initiated until				
27	2018 funds expended, and then ongoing until expended (anticipated end of 2025).				
28	(2) Because of COVID pandemic and house plans held up in permitting, contract extended				
29					
30		10			Application for Grants



**Habitat  
for Humanity®**  
Hawai'i Island

## Habitat for Humanity Hawaii Island Organizational Chart

