



## 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) Requested- pending receipt
- 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



Jessica McCullum (Jan 17, 2025 13:27 HST)

AUTHORIZED SIGNATURE

Jessica McCullum, President

PRINT NAME AND TITLE

1/15/2025

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, 2024.

See attached

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

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

See 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](#).

The Ava Sofia Foundation requests operational support for the public purpose of providing individuals access to housing to develop independence and improve their quality of life. This purpose is in alignment with Section 42F-102, Hawaii Revised Statutes.

### **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;

Autism Moms of Kona has been established as a community group since 2018 and we were granted our 501(c)3 tax exempt status for our nonprofit aegis, the Ava Sofia Foundation in March of 2023.

Autism is a developmental disorder which varies in severity and is characterized by difficulty in social interaction, communication, and learning. Over the past several years the Autism Moms of Kona have grown from 30 members to 390 members, with 80 of those families active in our private programs. Our motto is WE are Special Needs, and we strive to support the whole through additional therapies, respite, and support groups. In addition, we look to create awareness and acceptance for Autism in our community so that families can understand better their child's disability prior to or upon diagnosis.

The goal of Autism Moms of Kona is to encourage awareness in the broader community, so that parents can identify potential early signs of Autism so that early intervention and support can begin at a young age when a child's brain is more pliable and receptive to treatment. Another aim of awareness-building is to promote inclusive environments in the community where children with autism can thrive. If children understand that their peers with neurogenic differences need support, and their parents know how to have those conversations with their neurotypical children and know how to answer their questions, then they can become enthusiastic about helping their peers in and out of classroom settings.

As our children grow older, we know that they will continue to require support throughout adulthood. To that end, we are turning our attention to forming a physical community - with both residential and day-use space. We envision a place that will serve our autistic children as they age, as well as welcome the broader community to participate with them in an integrated setting.

2. The goals and objectives related to the request;

At this time, the Ava Sofia Foundation is looking to expand the definition of community to include housing. We are looking to support the creation of a housing community, tentatively named Kokua Kona, with the intent of serving vulnerable populations on Hawai'i Island.

We intend to proceed in phases over the next several years.

- 1) Research, Design and Planning
- 2) Land Acquisition and Construction
- 3) Operations/Community Launch

The purpose of this request is to create the infrastructure to further pursue the design and development of the housing community. This initial request is to support activities in phase 1 above, including:

- Engage relevant experts: Identify external vendors (e.g., legal counsel, accountants, realtors) to advise on entity formation, community design, property evaluation, and capital raise.
- Entity formation: Research and formalize the legal and practical entity that will hold the property, including but not limited to the personnel/staffing for the entity.
- Needs assessment: Assess community interest and conduct a needs assessment from proposed stakeholder groups:
  - Adults with developmental disabilities who are able to live independently
  - Families including a dependent with a developmental disability (or similar)
  - Care providers
  - Researchers
  - Older adults (*kupuna*)
- Community design and feasibility study: Develop the specifications for the community and assess feasibility of target properties.
- Fundraising: Begin to raise capital to purchase and develop a multi-acre property with a new build to serve the above populations, and potentially support additional housing that is affordable, depending on the size of the parcel and the eventual scope of the project.

We have begun to assess the benefits and challenges of various models across the country for housing communities for adults with developmental disabilities. Our vision is to secure a property and design and develop a multi-unit housing community. We also envision forming a co-op or other association to which to lease many/most of the residential units. This provision will allow families who are able to buy into the project to partially support the initial build-out costs, while guaranteeing their own family member's spot in the community. Other units will be retained by the non-profit and rented through an application/lottery process.

Eventually, the goal is for ongoing operating expenses for the housing community to be paid by a "rent" payment that is tied to the the SSI amount for individuals living in a Private Non-Medical facility, serving more than 5 people (\$1859 in 2025, <https://www.ssa.gov/pubs/EN-05-11108.pdf>).

3. The public purpose and need to be served;

***Housing that is Affordable:***

There is an acute need for housing that is affordable across Hawai'i Island, with an extra challenge for individuals and families with developmental disabilities. Additionally, turnover in the caregiver community is high and we hope to support stability in the availability of support/care services by offering housing that is accessible and affordable.

***Building Community:***

The overall intention is to build community while also providing housing. Nationwide, only 10% of adults with developmental disabilities have access to support to live outside of their family home. About half of adults with autism report feeling lonely and/or depressed.

***Serving the Wider West Hawai'i Island Community:***

The fully realized community will be an integrated community where individuals with neurogenic differences, including those with intellectual / developmental disabilities can live safely, but are not isolated. The intention is for the community to be multi-generational. We believe the Kupuna can bring, but also find, healing by being in a specialized, sensory friendly environment designed to live peacefully with the keiki as one 'ohana. A portion of the community will be adults or families without special needs, including care providers.

The design will aim to include many of the following components, in order to support both the formation and maintenance of the community, as well as provide vocational/day program opportunities for residents with developmental disabilities and daytime employment for other residents/caregivers. Potential inclusions:

- Multi-unit property, either apartments or homes
- Ideally sensory-friendly design (research-based)
- Community Kitchen and Dining
- Work Spaces - Offices and Hands On Workshops
- Research Spaces for assessments and trials
- Play Centers and Sensory Gyms
- Community Garden
- Event Spaces
- Possible retail or other commercial space to provide income & work experience opportunities eg, cafe, farm stand

4. Describe the target population to be served; and

When fully realized, the community will ideally serve a combination of the following groups:

- Families with a child with a profound disability, particularly neurogenic and developmental / intellectual disabilities
- Semi-independent living situation for adults with a need for support (due to aging, and/or intellectual/developmental disability)
- Direct care providers for the above individuals

It is expected that residents will require varying levels of care; caregivers may spend the night on the property, or be residents.

5. Describe the geographic coverage.

Though the Ava Sofia Foundation serves individuals county-wide, with a satellite entity in Hilo, the focus for this project request will be in West Hawai'i, ideally in the Kona District. Assuming successful implementation of the project, the intention would be to replicate this type of community in East Hawai'i, and, if there is interest, in other communities across the state.

### 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;

As noted above, the scope of work is to create the infrastructure to further pursue the design and development of an integrated housing community. This initial request is to support the tasks outlined below.

Task	Responsible Party
Engage relevant experts: Identify external vendors (e.g., legal counsel, accountants, realtors) to advise on entity formation, community design, property evaluation, and capital raise.	Ava Sofia Foundation leadership
Entity formation: Research and formalize the legal and practical entity that will hold the property, including but not limited to the personnel/staffing for the entity.	Ava Sofia Foundation leadership
Needs assessment: Assess community interest and conduct a needs assessment from proposed stakeholder groups: <ul style="list-style-type: none"> <li>• Adults with developmental disabilities who are able to live independently</li> <li>• Families including a dependent with a developmental disability (or similar)</li> <li>• Care providers Researchers Older adults (kupuna)</li> </ul>	Ava Sofia Foundation leadership

Task	Responsible Party
Community design and feasibility study: Develop the specifications for the community and assess feasibility of target properties.	Ava Sofia Foundation leadership
Fundraising: Begin to raise capital to purchase and develop a multi-acre property with a new build to serve the above populations, and potentially support additional housing that is affordable, depending on the size of the parcel and the eventual scope of the project.	Ava Sofia Foundation leadership

Anticipated Outcomes:

- Identification of and formation of necessary entities to hold, maintain and manage future real property
- Identification of and engagement of stakeholders for project, including participants, investors, and participant-investors
- Community design specifications and preliminary assessment of potential properties
- Funds raised to support an initial investment in a property to realize this project

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

Activity	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Entity formation research and implementation	X	X	X	
Needs assessment	X	X	X	
Community design/Feasibility research(this will be an iterative process)		X	X	X
Fundraising		X	X	X

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

The Ava Sofia Foundation Board will provide quality assurance by reviewing progress reports from staff and external consultants at quarterly Board meetings.

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.

These items will be completed by the end of the Project Period:

- Identification of and formation of necessary entities to hold, maintain and manage future real property as documented by Board records
- Identification of and engagement of stakeholders for project, including participants, investors, and participant-investors as maintained in community database
- A first draft of design specifications and/or a business plan
- Funds raised to support an initial investment in a property to realize this project

## **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](#))

Description	Amount
Professional Services (eg, legal, accounting, design, real estate)	\$100,000
Project Management	\$50,000

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2026.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$37,500	\$37,500	\$37,500	\$37,500	\$150,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2026.  
As this project is new, no other applications have been submitted at this time. We are also seeking other philanthropic contributions.
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 2026 for program funding.  
Not applicable
6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2024.  
\$5,828.70

## **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.

Board President - Jessica McCullum is a Realtor® for the Hawai'i Island area and has a broad range of experience ranging from Listing, Buyers, 1031 forward and reverse exchanges, development, and other responsibilities relating to real estate purchases and investments. She is a member of a high-volume team of 3 with an average of \$40M in sales per year, with 7 years of experience in the field and a combined-experience of over 30 years of knowledge. In her spare time, she manages the grassroots 501(c)(3) nonprofit the Ava Sofia Foundation, and is a mother with lived experience raising 3 children on the Autism Spectrum. She has a BS in Business Management, and previous work experience in the Legal/Technological Sectors out of California.

Board Vice President - Jesse McCullum is the Assistant General Manager for Miller & Lux, a Luxury Resort Style Restaurant at the Four Seasons Resort, Hualalai. He has an extensive background in Luxury Hospitality working in management for 15+ years, and has earned accolades with the more reknowned Thomas Keller's Bouchon and the Four Seasons Luxury Brand.

Board Treasurer - Marlaina Julio-Haretuku maintains a Series 7 license in the State of California for her investment broker duties and has done so for over 10 years.

Board Secretary - Erin Zimmerman is the Office Manager for a local hospitality group in Kailua Kona, HI called Alii Ocean Tours, and volunteers the majority of her time as an event coordinator for our special needs families.

We anticipate a restructuring and reorganization of the existing Board in the near future as we move toward fulfilling wider organizational goals.

\_\_\_\_\_

\_\_\_\_\_

## 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.

None

## VI. Personnel: Project Organization and Staffing

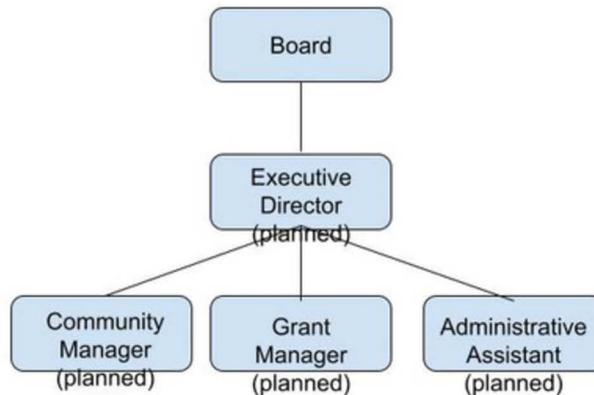
### 1. Proposed Staffing, Staff Qualifications, Supervision and Training

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.

We intend to create Executive Director and Community Manager positions with this grant funding, to support the development of this project.

### 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.



### **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.

Current organizational structure includes no salaried employees.

## **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.

Not applicable

### **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.

Not applicable

### **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 2026 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2026, but
- (b) Not received by the applicant thereafter.

**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.

**Ava Sofia Foundation**

(Typed Name of Individual or Organization)



Jessica McCullum (Jan 17, 2025 13:27 HST)  
(Signature)

1/15/2025

(Date)

**Jessica McCullum**

President

(Typed Name)

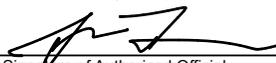
(Title)

# BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2025 to June 30, 2026

App

Ava Sofia Foundation

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
A. PERSONNEL COST				
1. Salaries				
2. Payroll Taxes & Assessments				
3. Fringe Benefits				
TOTAL PERSONNEL COST				
B. OTHER CURRENT EXPENSES				
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. Prof. Serv. (eg, legal, acct, design, prop)	100,000			
10. Project Management	50,000			
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES	<b>150,000</b>			
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
<b>TOTAL (A+B+C+D+E)</b>	<b>150,000</b>			
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested		Jessica McCullum <span style="float: right;">808-937-9008</span>		
(b) Total Federal Funds Requested		Name (Please type or print) <span style="float: right;">Phone</span>		
(c) Total County Funds Requested				
(d) Total Private/Other Funds Requested		Date <span style="float: right;">1/15/2025</span>		
		Signature of Authorized Official <span style="float: right;">Date</span> <b>Jessica McCullum (Jan 17, 2025 13:27 HST)</b>		
<b>TOTAL BUDGET</b>		Jessica McCullum, President Name and Title (Please type or print)		



BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES      Period: July 1, 2025 to June 30, 2026

Applicant: Ava Sofia Foundation

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

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

Applicant: Ava Sofia Foundation

<b>FUNDING AMOUNT REQUESTED - N/A</b>						
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:2023-2024	FY:2024-2025	FY:2025-2026	FY:2025-2026	FY:2026-2027	FY:2027-2028
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
<b>TOTAL:</b>						
<b>JUSTIFICATION/COMMENTS:</b>						

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

Apr

Ava Sofia Foundation

Contracts Total: -

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)</b>	<b>CONTRACT VALUE</b>
1	N/A				
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**Signature:** *Kokua Kona*  
Kokua Kona (Jan 17, 2025 13:44 PST)

**Email:** [kokuakona@gmail.com](mailto:kokuakona@gmail.com)

# Ava Sofia Foundation\_150000\_OP

Final Audit Report

2025-01-17

Created:	2025-01-17
By:	Kokua Kona (kokuakona@gmail.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAA2v7Onwe9mYXJ69bi6hIP898ysBVUfqRv

## "Ava Sofia Foundation\_150000\_OP" History

-  Document created by Kokua Kona (kokuakona@gmail.com)  
2025-01-17 - 9:42:48 PM GMT
-  Document emailed to Jessica McCullum (avasofiafoundation@gmail.com) for signature  
2025-01-17 - 9:43:02 PM GMT
-  Document emailed to Kokua Kona (kokuakona@gmail.com) for signature  
2025-01-17 - 9:43:02 PM GMT
-  Document e-signed by Kokua Kona (kokuakona@gmail.com)  
Signature Date: 2025-01-17 - 9:44:25 PM GMT - Time Source: server
-  Email viewed by Jessica McCullum (avasofiafoundation@gmail.com)  
2025-01-17 - 11:26:42 PM GMT
-  Document e-signed by Jessica McCullum (avasofiafoundation@gmail.com)  
Signature Date: 2025-01-17 - 11:27:54 PM GMT - Time Source: server
-  Agreement completed.  
2025-01-17 - 11:27:54 PM GMT