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IA-0000000538

Individual Application

Application ID	IA-0000000538	Account	
Application Status	Submitted	Contact	Bethany Geiger

ACT 310 - Application for Grants

Legal Name of Requesting Org/Individual	Hale Makua Health Services	DBA	
Type of Business Entity	501 (C)(3) Non-Profit Corporation	Existing Service(Presently in Operation)	Yes
Mailing Address	472 Kaulana St Kahului, Hawaii 96732 United States	Amount of State Funds Requested	\$684,000.00
Island	Maui		

Program Overview

Program 1 Overview	Maui is at a pivotal moment, with the highest cost of living in the nation and a rapidly growing aging population growing at a rate never before seen on Maui. There is a profound shortage of key healthcare professionals to address the growing needs of this population, due to a lack of necessary training to enter these career pathways. Our goal is to build career development opportunities and grow the health-care and social services workforce to meet the increasing needs of our aging population. We are developing educational pathways to train and support Community Health Workers (CHWs) to support the transitions in care for patients. Most Americans view nursing home living with dread, preferring to spend their later years at home. CHWs are a cost-effective way to prevent the need for acute care by identifying problems, providing early intervention and acting as social service navigators, ultimately decreasing the overall burden on the islands' residents. In addition to bringing a cost-effective workforce model that offers career growth in the skilled nursing and home and community-based services sectors. Many of these specialized trainings ensure that optimal quality of care and career growth are not available on Maui.
Program 2 Overview	
Program 3 Overview	
Department Notes	

Agency Eligibility

Recipient of Terminated Federal Funding	No	Able to Provide Documentation Evidence	Yes
Serves Negatively Impacted Populations	Yes	Narrative	N/A
Date Funding Stopped	10/31/2025		

Amount of Other Funds Available

State Fund Total Amount	\$0.00	County Fund Total Amount	\$0.00
Federal Fund Total Amount	\$0.00	Private/Other Fund Total Amount	\$6,020,070.00

Total Amount of State Grants \$700,000.00

Unrestricted Assets \$10,511,000.00

Contact Person for Matters Involving this Application

Applicant Name	Natasha Tome	Applicant Title	Grants Specialist
Applicant Phone	(808) 873-6620	Applicant Email	natasha.tome@halemakua.org

State of Hawaii Eligibility

Organization is Licensed or Accredited	Yes	Nonprofit is a 501c3	Yes
Complies with Anti-Discrimination Laws	Yes	Nonprofit has Governing Board	Yes
Will not Use State Funds for Lobbying	Yes	Is Incorporated Under Laws of State	Yes
Will Allow Access to Audit Records	Yes	Has Bylaws and Policies	Yes

Account Information

Organization Name	Hale Makua Health Services	Organization DBA	
EIN	[REDACTED]	Street	472 Kaulana Street
Account Email		City	Kahului
Account Phone	(808) 877-2761	State	HI
Website	https://www.halemakua.org/	Zip	96732
Mission Statement	Hale Makua's mission is to improve the well-being of those in our care through compassionate, personalized health services in our home and yours.		

Point of Contact

Point of Contact First Name	Bethany	Point of Contact Last Name	Geiger
Point of Contact Title	VP Strategy	Point of Contact Email	bethany.geiger@halemakua.org
Point of Contact Phone	(808) 852-8093		

Leadership

Leadership First Name	Wes	Leadership Last Name	Lo
Leadership Title	CEO	Leadership Email	wes.lo@ohanapacific.com
Leadership Phone	(808) 871-9217		

Background and Summary

Applicant Background Hale Makua Health Services is one of Maui's most significant non-profit kupuna-care providers with deep roots in the community and culture. Beginning in 1946 to serve elders "who needed residential care, but had no one to care for them and no means to pay for care," Hale Makua's impact has grown over decades by expanding nursing home and in-home care across Maui.

In 2022, Hale Makua partnered with Kālele Care Services, LLC to address critical gaps in post-discharge care, social services support, and access to primary care services for Maui's kupuna. Kālele is a comprehensive care management program that provides post-discharge care coordination, primary care bridge services, palliative care assessments and advanced care planning, and ongoing social support to help kupuna transition safely home and manage their health in the community.

This partnership was initially supported by federal grant funding that ended in October 2025. During the grant-funded pilot phase, Hale Makua and Kālele demonstrated measurable impact by reducing 30-day hospital readmission rates from 18.3% (the baseline for Medicare beneficiaries discharging from a skilled nursing facility (SNF) on Maui) to just 8.61% for patients engaged with Kālele's services. The program also achieved a world-class Net Promoter Score of 98, indicating nearly universal satisfaction among patients and families served.

Funding Request Purpose

The primary goal of this funding request is to sustain and expand Kālele's evidence-based care management services for Maui's vulnerable kupuna population during the critical transition period following the loss of federal grant funding, ensuring continuity of care for existing patients while maintaining capacity to serve those most impacted by federal funding cuts to social safety net programs that began this year. We will maintain and continue to expand our capacity to serve Maui's kupuna as well as maintain our quality and impact by meeting the following goals: 1. Serve a minimum of 120 active patients per quarter across all service lines (Outreach, PCP Bridge, Community Health Integration (CHI), and Principal Illness Navigation(PIN)) 2. Ensure 100% of patients discharged from skilled nursing facilities receive supportive telephonic outreach contact within 72 hours of discharge 3. Provide medical evaluation by Kālele's Advanced Practice Provider (APP) within 5 days of referral or facility-discharge for all PCP Bridge patients requiring access to primary care services 4. Screen 100% of PCP Bridge, Community Health Integration, Principle Illness Navigation, and Palliative Assessment patients for social needs across key domains (food security, housing stability, transportation access, social isolation, and financial assistance needs, and more) 5. Successfully connect at least 80% of patients with identified social needs to appropriate community resources, benefits programs, or support services 6. Maintain Net Promoter Score of 85 or above, reflecting sustained high satisfaction and likelihood to recommend services 7. Maintain 30-day hospital readmission rate at or below 10% for patients engaged with Kalele services, representing a significant reduction in unnecessary hospitalizations for Maui residents

Geographic Coverage Served

The coverage area for services is primarily the island of Maui though telephonic and video conferencing support can be provided for kupuna on Molokai and Lanai. Support is generally provided in-person within the home/ community, skilled nursing facilities, hospitals, etc. and telephonically or via video conference, depending on the kupuna and their caregiver's preference and needs. Funding will further allow Kālele to develop infrastructure to expand statewide in partnership with other non-profits, addressing the critical gaps that kupuna face across the state which continue to be exacerbated by federal funding cuts and program termination.

Public Purpose or Need Served

Maui County faces a severe healthcare access crisis that disproportionately impacts its kupuna population, creating an urgent public need that Kalele directly addresses. The county has the largest physician shortage in Hawaii at 43%, including a complete absence of geriatricians (100% shortage), while simultaneously having a high concentration of older adults with chronic healthcare needs. This mismatch between need and resources creates dangerous gaps in care that result in preventable suffering, avoidable hospitalizations, and escalating healthcare costs that burden the entire community.

The Access to Care Hawaii Report (2022), referenced at the March 2025 State Health Planning and Development Agency meeting, documented the scope of this crisis through public testimony. Maui residents report being unable to get appointments or even reach anyone by phone due to provider shortages, being directed to urgent care rather than receiving primary care, experiencing rushed appointments without adequate time for thorough evaluation and conversation to address concerns, and facing rising costs even among the well-insured. Particularly troubling are reports of inequitable care and lack of cultural competency affecting kupuna, neighbor island residents, Native Hawaiians and Pacific Islanders, and those on Med-QUEST and Medicare.

The already inadequate healthcare infrastructure faces additional strain from federal funding reductions and program terminations that began in January 2025. These cuts directly impact the most vulnerable populations Hale Makua and Kālele serve. Kālele serves the essential public purpose of bridging critical gaps that neither primary care practices, health plans, nor other community organizations can adequately address by providing timely access to care especially post-discharge from an institutional setting, comprehensive care coordination with a focus on social factors impacting health delivered by medical practitioners and culturally competent Community Health Workers that can actually spend time with kupuna and their caregivers, and a prevention-focused approach.

In Hawaiian culture, caring for kupuna is a fundamental responsibility and privilege. Hale Makua and Kālele honors this value while addressing a critical public need, ensuring Maui's most vulnerable elders receive the timely, culturally appropriate medical and social support necessary to live safely and healthfully in their communities. As federal safety net programs are reduced and healthcare access barriers intensify, Kālele's role becomes increasingly essential to preventing a public health crisis among Maui's kupuna population.

Target Population Served

The target population is kupuna across Maui who have limited access to care with significant social and medical factors impacting their health. Nearly all kupuna served have at least one social factors that has been negatively impacted by federal funding cuts and program terminations, making it even more vital to provide support, guidance, advocacy, and care for our kupuna.

Summary and Outcomes

Measure(s) of Effectiveness

1. Serve a minimum of 120 active patients per quarter across all service lines (Outreach, PCP Bridge, Community Health Integration (CHI), and Principal Illness Navigation(PIN))
2. Ensure 100% of patients discharged from skilled nursing facilities receive supportive telephonic outreach contact within 72 hours of discharge
3. Provide medical evaluation by Kālele's Advanced Practice Provider (APP) within 5 days of referral or facility-discharge for all PCP Bridge patients requiring access to primary care services
4. Screen 100% of PCP Bridge, Community Health Integration, Principle Illness Navigation, and Palliative Assessment patients for social needs across key domains (food security, housing stability, transportation access, social isolation, and financial assistance needs, and more)
5. Successfully connect at least 80% of patients with identified social needs to appropriate community resources, benefits programs, or support services
6. Maintain Net Promoter Score of 85 or above, reflecting sustained high satisfaction and likelihood to recommend services
7. Maintain 30-day hospital readmission rate at or below 10% for patients engaged with Kalele services, representing a significant reduction in unnecessary hospitalizations for Maui residents
8. Maintain and report on client demographics for 100% of clients including insurance type, age, primary language, race, ethnicity, and housing status.

All outcomes and process measures will be reported in quarterly reports with a comprehensive year-end report.

Projected Annual Timeline

Kālele Care Services is currently operational with established infrastructure, clinical staff, and an active caseload of 141 patients, allowing immediate community impact. Act 310 funding will enable immediate continuation and strategic enhancement of proven services. The following timeline outlines how proposed activities will unfold over the funding period:

1. First month: Recruit 2-3 additional CHWs to expand CHI and PIN service capacity; Finalize electronic medical record (EMR) system and processes for efficient documentation, care coordination, and communication
2. Second month: Onboard new CHWs; Implement tracking dashboard to monitor process and outcome metrics and support continuous quality improvement;
3. Third Month: Achieve target metrics and expand caseload; Produce quarterly outcomes report
4. Second Quarter: Expand referral partners and streamline processes to support bi-directional care coordination across multiple settings; Develop and distribute provider education materials and provide in-services; Produce quarterly outcomes report
5. Third quarter: Continue quality improvement efforts; Assess additional funding opportunities and partnerships for sustainability; Produce quarterly outcomes report
6. Fourth quarter: Finalize sustainability plan for continued operations in support of Maui's kupuna; Produce comprehensive final outcomes report

Quality Assurance and Evaluation Plans

Kālele uses a comprehensive quality assurance and continuous improvement framework that combines real-time monitoring, regular evaluation, and data-driven decision-making to ensure optimal patient outcomes and program effectiveness. Funding will allow us to further develop process and outcome measure dashboards within our electronic medical record (EMR) that will allow us to better track and report on key performance indicators (KPI) such as timeliness of follow-up, readmission rate, caseload, social screening rate, social factor prevalence rates, social services connection rates, net promotor score, client demographics, and more

Kālele currently maintains ongoing monitoring through multiple mechanisms to ensure quality and identify areas for improvement:

1. All encounters are documented in EMR for compliance, reporting, and quality improvement initiatives
2. Weekly to bi-weekly case review with entire care team
3. Chart audits for quality assurance
4. Regular shadowing of CHWs and other support staff my Clinical Manager for quality assurance and constructive feedback
5. Monthly to quarterly outcomes reports outlining demographics and comprehensive impact of kupuna served

This multi-layered quality assurance and evaluation approach ensures Kālele maintains the proven outcomes they have demonstrated while continuously improving services to meet the evolving needs of Maui's vulnerable kupuna population, especially as other social support services are reduced.

Scope of Work

Kālele Care Services, operating in support of Hale Makua Health Services, will provide comprehensive bridge medical services, care management, and social support services to vulnerable kupuna across Maui through five integrated service lines:

1. Outreach Services: Conduct telephonic follow-up within 72 hours of discharge from skilled nursing facilities; Verify patient safety, medication availability, equipment delivery, and scheduled follow-up appointments; Identify and triage urgent medical concerns requiring immediate attention
2. PCP Bridge Services: Provide telehealth or in-person medical visits with Advanced Practice Provider (APP) within 5 days of referral or institutional discharge; Perform comprehensive medical evaluation and medication reconciliation; Order necessary home health services, durable medical equipment, laboratory

tests, and imaging studies; Facilitate specialty referrals and coordinate care transitions to established primary care providers; Screen all patients for social determinants of health across key domains (food security, housing stability, transportation, financial assistance, social isolation, and more); Create individualized care plans addressing medical and social needs

3. Community Health Integration (CHI): Deploy Community Health Workers (CHWs) to provide ongoing support for patients with complex social needs and their caregivers where applicable; Connect patients to community resources, benefit programs, and social services; Provide health education, medication adherence support, and healthcare system navigation

4. Principal Illness Navigation (PIN): Deliver comprehensive support for patients managing serious or complex chronic illnesses with support from medical providers and CHWs; Coordinate multidisciplinary care across providers and settings; Address social barriers impacting disease management and treatment adherence; Provide patient and family education about disease progression and self-management strategies; Facilitate advance care planning and goals of care discussions

5. Community-Based Palliative Care (CBPC) Assessment and Referral: Assess patients for CBPC benefit eligibility based on serious illness criteria; Educate patients and families about palliative care services and benefits; Coordinate referrals to appropriate CBPC providers; Facilitate advanced care planning conversations and documentation of patient preferences

Financial Information

Q1 Requested Amount	\$171,000.00	Q3 Requested Amount	\$171,000.00
Q2 Requested Amount	\$171,000.00	Q4 Requested Amount	\$171,000.00
Sources of Funding	Kālele, on behalf of supporting Hale Makua, is actively developing fee-for-service billing capabilities and has begun submitting claims to Medicare, Medicaid, and commercial insurance payers for covered services including PCP Bridge medical visits and certain care management activities. However, insurance reimbursement alone cannot sustain Kālele's comprehensive service model. Critical services that are not covered by insurance include all outreach services provided post-discharge from an institutional setting and services provided to uninsured or underinsured clients. Act 310 funding is critical to sustain these uncovered but essential services during the transition period as we work toward a diversified funding model that includes insurance billing, foundation grants, philanthropic support, and potential county or state contracts. Without this bridge funding, Kālele would be forced to drastically reduce the time, scope, and depth of support provided to Maui's most vulnerable kupuna precisely when federal safety net cuts have increased the need for these services and as more of the population is projected to become uninsured or underinsured.	State and Federal Tax Credits	Hale Makua Health Service's Employee Retention Credit 2021, \$2,867,243. No credits expected for capital projects in 2026.
State and Federal Contracts and Grants	We do not currently have any upcoming grants for 2026. Please see Hale Makua Health Services_Budget Forms 3 attached	Prior FY Balance of Unrestricted Assets	Excerpt from Finance committee package, \$10,511,000 unrestricted assets available to Hale Makua Health Services.

Experience, Capability, and Personnel

Skills and Experience	Hale Makua has provided exceptional kupuna care for nearly 80 years with deep expertise in serving some of the most vulnerable members of our community. Hale Makua's organizational infrastructure includes: 1. Licensed healthcare facilities operating under State of Hawaii regulations 2. Experienced leadership team with decades of combined healthcare administration experience 3. Established relationships with hospitals, physicians, health plans, and community organizations across Maui County
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4. Comprehensive compliance systems including HIPAA privacy protections, quality assurance protocols, and financial management capabilities
5. Proven track record of managing complex healthcare programs and maintaining regulatory compliance and quality
6. Part of Ohana Pacific Health's statewide network as the largest post-acute care provider in the state

Kālele Care Services, operating on behalf of Hale Makua Health Services since 2022, brings specialized expertise in care transitions, care management, and community health integration. The Kalele team possesses unique skills and knowledge essential to the proposed services. Expertise includes:

1. Licensed Advanced Practice Provider with Doctoral degree (Nurse Practitioner) with geriatric care experience and expertise in post-acute care management, chronic disease management, advanced care planning, and care coordination
2. Experience delivering telehealth and in-person care in community and home-based settings
3. Culturally competent CHWs with deep community connections and language diversity (including languages other than English)
4. Extensive training in social determinant screening, motivational interviewing, care navigation, and resource connection
5. Experience working with vulnerable populations including those experiencing homelessness, food insecurity, housing instability, and complex social challenges
6. Licensed Clinical Social worker with significant expertise in care coordination, resource connection, and social factors impacting health

Facilities

Hale Makua Health Services operates Long-Term Care, Short-Term Rehabilitation, Care Homes, Home Health, Adult Day Health, and Care Management (in partnership with Kālele) facilities and services on the island of Maui. Kālele currently holds office space on the Hale Makua Kahului campus though care is provided for clients in various settings, primarily in the home and community, negating the need for additional facilities to provide care.

Proposed Staffing and Service Capacity

Kālele's staffing model is designed to deliver comprehensive, culturally competent care management services across five integrated service lines to a minimum of 120 active clients or patients per quarter. The proposed staffing pattern supports both immediate service delivery and strategic expansion during the funding period:

1. Advanced Practice Provider: Advanced Practice Registered Nurse (APRN) licensed in the state of Hawaii and residing on Maui; Provide medical evaluation, diagnosis, and treatment for PCP Bridge services; conduct comprehensive assessments; perform medication reconciliation; order home health services, DME, labs, and imaging; coordinate with specialists and primary care providers; oversee clinical care plans; supervise Community Health Workers' clinical activities; supervised by VP of strategy for Hale Makua/ Ohana Pacific Health
2. Clinical Operations Manager: Licensed Clinical Social Worker (LCSW) licensed in the state of Hawaii and residing on Maui; Oversee daily operations; directly supervise Patient Care Coordinator and CHW staff; ensure protocol compliance and quality standards; manage partnerships with hospitals, providers, and community organizations; analyze program data and outcomes; lead quality improvement initiatives; prepare reports for funders and stakeholders; manage budget and staffing; provide social services consult and oversee care of clients as needed
3. Community Health Workers (CHWs): Three CHWs residing in Maui; Conduct telephonic outreach post-discharge; further assess social factors impacting health through patient interview techniques; provide ongoing support through Community Health Integration (CHI) services; navigate healthcare system and community resources; assist with benefit applications, food access, housing support, transportation coordination; provide health education and medication adherence support; conduct home visits; deliver Principal Illness Navigation (PIN) services in accordance with APP care plan
4. Patient Care Coordinator: Professional with relevant experience and expertise.; Manage referrals from hospitals, SNFs, home health agencies, and community partners; coordinate patient scheduling and appointment management; verify insurance coverage and benefits; support billing activities and claims submission; facilitate communication between patients, families, providers, and community resources; maintain EMR documentation; track patient progress and follow-up needs; support quality assurance activities

Staff Position(s) and Compensation

Annual salary range for 3 highest paid officers includes \$184,623.85 (SNF Administrator), \$195,811.48 (Staff Nurse RN), and \$200,590.28 (Staff Nurse RN)

Other Information

Pending Litigation Not applicable

Special Licensure or Accreditations

Kālele's NPI: 1861089906
 Kālele's APP's NPI: 85-2931322
 Kālele's APP's License: APRN-3133
 Kālele's LCSW's License: LCSW-4982
 These are relevant licensures to provide medial and social services care in the state of Hawaii.

Private Educational
Institutions

Not applicable

ConfirmationsDocumentation of
Federal Impacts☐Hawaii Compliance
Express Certificate☐IRS Determination
Letter☐Records Retention
Policy☐Authorized
Representative
Certification☒Active Status with the
Hawaii AG☐Certificate of Good
Standing by the DCCA☐By-laws or Corporate
Resolutions☐

Signee Title

VP Strategy

System Information

Application Type Act 310 Nonprofit Grant Application

Applied Date 10/23/2025, 1:36 PM

Owner Name

Category Grant Application

Created By Bethany Geiger, 10/20/2025, 12:07 PM

Created Date 10/20/2025, 12:07 PM

Last Modified By Bethany Geiger, 10/23/2025, 1:36 PM

Last Modified Date 10/23/2025, 1:36 PM

Federal Grants**ARPA Healthcare Workforce Development (CFDA Number 21.027)**Name of Program **Program 1**Original Funding Award **\$2,500,000.00**

Amount Reduced or Cut

Grant Cycle of Award **June 1, 2022 - May 31, 2024 extended to October 31, 2025****Files****Hale Makua Health Services_Future Sustainability Plan**Last Modified **10/23/2025, 1:30 PM**Created By **Bethany Geiger****Hale Makua Health Services_Organizational Chart**Last Modified **10/23/2025, 1:25 PM**Created By **Bethany Geiger****Hale Makua Health Services_Budget Forms 3**Last Modified **10/23/2025, 1:08 PM**Created By **Bethany Geiger****Hale Makua Health Services_Budget Forms 2**Last Modified **10/23/2025, 1:08 PM**Created By **Bethany Geiger****Hale Makua Health Services_Budget Forms**Last Modified **10/23/2025, 1:08 PM**Created By **Bethany Geiger****Hale Makua Health Services_Hawaii Compliance
Express Certificate**Last Modified **10/23/2025, 1:04 PM**Created By **Bethany Geiger****Hale Makua Health Services_Impact Docs**Last Modified **10/23/2025, 1:03 PM**Created By **Bethany Geiger****Hale Makua Health Services_Hawaii Compliance
Express Certificate**Last Modified **10/22/2025, 1:25 PM**Created By **Bethany Geiger****Hale Makua Health Services_Future Sustainability Plan**Last Modified **10/22/2025, 1:24 PM**Created By **Bethany Geiger****Hale Makua Health Services_Organizational Chart**Last Modified **10/22/2025, 1:23 PM**Created By **Bethany Geiger****Hale Makua Health Services_Budget Forms 2**Last Modified **10/22/2025, 1:23 PM****Hale Makua Health Services_Budget Forms**

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Last Modified **10/22/2025, 12:41 PM**Created By **Bethany Geiger****Hale Makua Health Services_Future Sustainability Plan**

Last Modified **10/22/2025, 9:08 AM**Created By **Bethany Geiger****Hale Makua Health Services_Budget Forms 2**

Last Modified **10/22/2025, 8:55 AM**Created By **Bethany Geiger****Hale Makua Health Services_Future Sustainability Plan**

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Last Modified **10/22/2025, 9:35 AM**Created By **Bethany Geiger****Hale Makua Health Services_Organizational Chart**

Last Modified **10/22/2025, 9:06 AM**Created By **Bethany Geiger****Hale Makua Health Services_Budget Forms**

Last Modified **10/22/2025, 8:55 AM**Created By **Bethany Geiger****Org Chart**

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