

HUALALAI 'OHANA FOUNDATION



2020 Educational Opportunities Award Application

Aloha Educational Opportunities Applicant:

Mahalo for applying for an educational award through the Hualalai 'Ohana Foundation. We are happy that you wish to invest in your education or that of a family member. Quality education is the best investment we can make. This award is available to employees, spouses or children of the Hualalai Community, which include Hualalai Investors LLC, Four Seasons Hualalai, and Hualalai Resort contractor employees.

Award amounts are equal to 50 - 90% of the eligible costs applied for; not to exceed \$1,000 per recipient per calendar year. The Educational Opportunities Award is not designed for acquiring an academic degree, rather should be relevant to the applicant's chosen (or aspiring) career path; or toward gaining a greater understanding of Hawaiian culture and our island community. Core skills, including, but not limited to leadership, life management, personal and inter-personal development, foreign languages, and software education are eligible to all employees and family members, regardless of job position. Limited to three awards per family, per calendar year.

Following the completion of your chosen program, award recipients will need to provide a brief letter or essay, along with a picture, which describes what you felt was valuable about your program and how it enhanced your education.

The Hualalai 'Ohana Foundation has established an Educational Opportunities award amount of:

**Between 50-90% of the cost of eligible program(s) applied for;
not to exceed \$1,000 per award recipient per calendar year; and limited
to 3 awards per family per year.**

Educational Opportunities award applications can be submitted any time before the program or within 30 days of the program's last day. Once your application is received, you will be notified of its status within two weeks.

Please contact our office with any questions. We look forward to hearing from you.

Much aloha,

A handwritten signature in black ink that reads 'Ed Mueller'.

Ed Mueller, 2020 Board President

HUALALAI ‘OHANA FOUNDATION

EDUCATIONAL OPPORTUNITIES AWARD APPLICATION GUIDELINES

Individuals are eligible to apply for the Educational Opportunities Award under the following conditions:

- You have been employed part-time or full-time as a Hualalai community employee for at least one year as of the date of application;
- Your combined family annual gross income** does not exceed \$195,000.

Eligible Recipients:

Hualalai community employees*, their spouses and legal dependent children up to age 21. Employees who are not parents of children they are applying for must provide documentation of legal guardianship. If the child does not reside with the employee, financial information for the custodial parent will be required.

To apply for this award, the applicant or parent/guardian:

- Must **write a brief statement** regarding his or her motivation to take the coursework. Please describe how this coursework will benefit you or your child. All information in your application will be confidential;
- Must **complete the attached application form**

To submit application:

Please submit the completed application, using the attached checklist. Your application may be submitted at any time, but must be submitted within 30 days of program completion. Incomplete applications left over 30 days will be closed. All eligible applicants will be notified within two weeks regarding the status of their application.

Program Restrictions:

The following types of programs/training are not eligible: personal hobbies, athletic, religious, spiritual training, or more than one career change per recipient. The foundation reserves the right to determine the eligibility of all programs. Eligible recipients may apply multiple times throughout the year, but total award amounts are not to exceed \$1,000 per calendar year.

Eligible Travel Expenses

The cost to travel to approved workshop/trainings may be included in the total cost of the programs. Eligible travel expenses are as follows:

- Coach Airfare
- Hotel Lodging – up to \$125/day
- Rental Car – up to a mid-size car
- Ground Transportation by Uber, Lyft or Taxi

Award Payments:

Awards are paid directly to the designated service provider or reimbursed to the award recipient with a qualifying receipt.

If you receive an award and have not already paid the cost, please ask your designated service provider to provide an invoice directly to the Hualalai 'Ohana Foundation.

If you have already paid at least one-half the cost of the program, please submit a receipt for payment, which clearly shows the amount you paid. The foundation cannot reimburse third-party individuals who pay on your behalf.

DEFINITIONS

****Hualalai Community Employee*** includes employees of Hualalai Investors, LLC or Four Seasons Hualalai; and any Hualalai Resort contractor, which means an employee or independent contractor of another company who provide services to the resort, hotel or resident homeowner for a minimum of 20 hours per week for over one year.

Hualalai Resort contractors must provide two (2) verification letters of eligibility – from your employer, hotel or resort verification or homeowner – with their application.

*****Annual gross income*** is a total of all forms of gross income, prior to deductions, including pre-tax adjustments or deductions, contributions to retirement accounts or cafeteria plans, i.e., Social Security wages per W-2 form, and also includes any self-employment or rental property income

EDUCATIONAL OPPORTUNITIES AWARD APPLICATION

Please type or print clearly.

Is this your first time applying for this award?
YES NO

How did you hear about this award?

Program Fair Ambassador HR

Website Other: _____

Name of Hualalai Community Employee: _____

Name of Employer: Four Seasons Hualalai Hualalai Investors, LLC Resort Contractor

Job Title & Department _____ Date of Hire: _____

Name of Student (actual person to receive award): _____

Your Relationship to Student (self, parent/guardian, spouse): _____

Applicant's Address: _____

City, State, ZIP: _____

Phone: _____ Cell Phone: _____

Email: _____

Are you on Facebook or Instagram? (Circle One) Yes No If Yes, Name: _____

Please fill in name of the program:

Program Name: _____ Provider Name: _____

What is the cost of the program? _____

Have you already applied for the program? Yes No

Include brochure (or photocopy of brochure)

When will you/your child start the program? _____

I request special consideration for financial assistance due to: *(circle all that apply)*

- | | |
|---|---|
| <input type="radio"/> Employed at multiple jobs | <input type="radio"/> Reduction of wages |
| <input type="radio"/> Household with more than 2 children | <input type="radio"/> Single income household |
| <input type="radio"/> Recent financial hardship | <input type="radio"/> Single parent |

By signing this application, I, the Hualalai Resort employee, hereby certify that I understand the terms of the award and that my annual household income does not exceed \$195,000 which would make me ineligible per the terms and conditions.

I also understand that I will be asked to submit a brief essay and photograph to describe how the program enhanced my education.

Signature: _____ Date: _____



EDUCATIONAL OPPORTUNITIES AWARD APPLICATION CHECK LIST

Please use the attached checklist to complete your application process.
Applications will remain pending until all items listed below are received by the foundation.
Incomplete applications will be closed after 30 days.

- Completed Award Application**
- Hualalai Resort Contractors only** –
Two (2) letters verifying employment at Hualalai Resort
- Personal Letter with description of:**
 - educational goals and special needs (if any)
- Program Information** (flyer, brochure, printed web page)
- Proof of enrollment** (payment receipt)
- Invoice or original receipt of payment by applicant**

To submit completed application packet, you may:

- Drop off in person to HOF office at mauka trailers
- Send by inter-office mail to Hualalai 'Ohana Foundation
- Drop off in person to your Human Resources department
- Mail to the address listed below
- **Faxed applications or documents will not be accepted.**

Any questions? Contact our office or visit www.hualalaiohanafoundation.org

P.O. Box 5227 Kailua-Kona, Hawaii 96745 (808) 325-4701 office

HUALALAI 'OHANA FOUNDATION

EDUCATIONAL OPPORTUNITIES AWARD SUMMARY

**Please keep this form and submit after completing the program*

1. This program has helped me by:

2. The most meaningful part of this program was:

3. I will be able to enrich Hualalai and/or my community by:

4. Any additional comments:
