

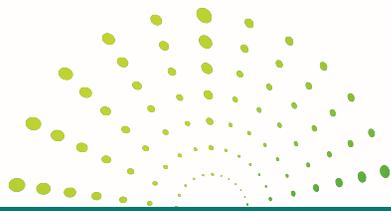


This is the difference

**<<opportunity>>**

makes.

Hualalai 'Ohana Foundation  
2016 Annual Report



## Our Mission

The Hualalai 'Ohana Foundation strives to support the educational goals and exceptional medical needs of our employee families, while providing a vehicle to allow residents opportunities to contribute to the well-being and aloha spirit of our uniquely blessed community.

## Our Values

*Aloha (love, compassion)* - We give of ourselves when we give from our heart. Hualalai embodies aloha in so many ways, yet most importantly through the aloha spirit of its people.

*Mahalo (appreciation)* - More than merely 'thank you', mahalo represents gratitude, appreciation and esteem. This sincere appreciation for the aloha shown by people of Hualalai inspired our homeowners to create the Foundation and continues to guide our mission today.

*'Ohana (family)* - We believe the generosity within our uniquely blessed community creates 'ohana. We are connected and care for each other. We want the best for our family members. We serve those who are 'ohana in our hearts.

*Kokua (help others)* - We were created to give help to our 'ohana and this value continues to guide our actions each day. We strive to help those who wish to help their families grow and thrive. Kokua aku, kokua mai.

*Ho'oko (commitment)* - We are committed to our goal of providing opportunities where many do not exist. We do so with pono (integrity) and lokahi (unity).



E Komo Mai (Welcome),

I hope you will enjoy reviewing the first ever *Spring Edition* of the Ohana Foundation Annual Report. The timing of this report and those in the future, will keep you more current with our giving season and the progress we make each year. We are very pleased to share with you in the following pages our impact in 2016.

After 14 years of positive momentum, additional advances have been made in the areas of education and medical assistance. New programs have been added annually, including 5 programs launched in 2016. Still, the needs of our recipients and the importance of being able to meet those needs continues to grow.

Since the inception of the Foundation approximately \$3,900,000.00 has been awarded for educational needs and over \$900,000.00 awarded in support of medical needs.

Amazing, to say the least! This is only possible because of the ongoing support received every day from people like you. Many, many thanks for your generous spirit!

As I look back over the past annual reports, there are a few themes that are repeated:



*The generosity of our donors*  
*The gratitude of our recipients*  
*The spirit of ohana and aloha*

These are what inspired those who created the Foundation in 2002 and in looking forward, they are what guide us still today.

With ho'omaika'i (gratitude),

*Donna Chipp*

Hualalai Ohana Foundation  
President 2015-2017



## The 2016 Board of Directors

### Executive Officers

Donna Chipps

#### *President*

Ann Marie Mahoney

#### *Vice President*

Renee Parsons

#### *Secretary*

### Directors

Eleo Ammen

Marti deBenedetti

Michele Dominick, *Junior Board Chair*

Becky Holman, *Alumni*

#### *& Investments Chair*

Susan Johns

MaryBee Johnston, *Education Chair*

Deborah Justice

Richard Meschke

#### *Treasurer*

Dr. Ray Lagger

*Immediate Past President*

#### *& Medical Chair*

Maureen Kim

Scot McClone, *Finance Chair*

Bill McDowell

Lilian Murray, *Governance Chair*

Rhonda Peed

Hans Riddervold

Florian Riedel

Robert Whitfield

## The 2016 Junior Board

Ryan Dominick

#### *President*

Travis Taube

#### *Vice-President*

Lucie Anderson & Olivia Dominick

#### *Co-Secretary*

Lanie Montag & Justin Smrke

#### *Co-Treasurer*

Nate Anderson & Amanda Smrke

#### *Fundraising Committee*

## *Hualalai Ohana Foundation Office*

Cara Price, *Executive Director*

Erlinda Borges, *Foundation Coordinator*



# <<TALK STORY>>



## Savannah Harriman - Pote

Savannah shared with the July 2016 auction crowd the impact of her K-12th grade Scholarship awards. Now attending college at Mount Holyoake she said "The assistance of the Ohana Foundation has always been of critical importance to me and my family; since elementary school, your support has been a deciding factor in my ability to attend the schools of my choice. I am unendingly grateful. Your dedication to my academic career will continue to inspire me to strive for success."



## Lilia & Liliana Salinas

The Little Passport Educational subscription program launched in the Fall of 2016. Lila & Liliana were thrilled to receive their first delivery in the mail.

This monthly exploration kit gives our keiki the opportunity to learn about individual US states and the unique countries around the world.

Each kit explores different cultures, science and geography through activities, worksheets and learning experiments.



## Julia Grace Govier

The younger the better when it comes to reading. Julia is learning the value of a great book with our Dolly Parton Imagination Library.

Each month the Library sends an age appropriate book in the mail, providing newborn to 5 year old keiki with a full home library before starting kindergarten. HOF's goal is to encourage parents to read to their children, promoting early childhood literacy and the association of reading with love and comfort.

# Financial assistance with life-threatening illness, surgeries and dental procedures

## *Serious Illness Award*

Access to quality healthcare is limited on the Big Island. In the event of a serious illness employees and their family typically travel off-island to receive proper treatment and incur excessive medical expenses. When this occurs, the Foundation helps to ease the burden by assisting with patient co-pays, prescriptions, and travel related expenses.

**Proudly, the Foundation has placed no cap on this award and supports employees throughout their time of need.**

## *Surgical Assistance Award*

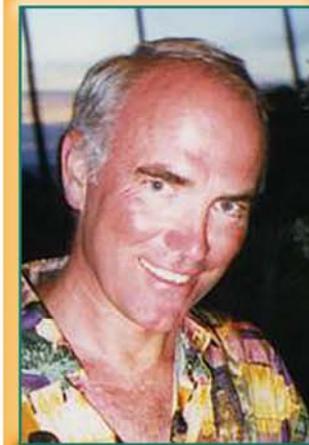
Some medical conditions, though not life-threatening, still require necessary treatment. Due to the costs involved, some employees postpone the surgery until they are no longer able to work. To encourage earlier care for these types of non-urgent issues, the Foundation established this award to help with the out of pocket costs and travel expenses.

**The Foundation increased this award in 2016 from \$2,000.00 to \$3,000.00 to better assist with the average cost of necessary routine and serious surgeries.**

## *Dental Assistance Award*

To help support the significant number of employees suffering from a wide range of dental issues, an award specific to dental care was created. Following similar guidelines to the Surgical Assistance Award, this helps with the high cost of urgent and necessary dental procedures. **The Foundation increased this award in 2016 from \$1,000.00 to \$2,000.00 to address the growing cost of crucial dental treatments.**

*"While the Ohana Foundation touches the lives of our families in so many wonderful ways, none is more gratifying than coming to the aid of those struck by a severe or life threatening illness. Not only do we provide financial support when medical insurance falls short, but we also strive to find the very best, state of the art medical care for our families both here in Hawaii, and if need be, on the mainland as well. Through the ongoing work of our Medical Committee, which is carried out with both compassion and kokua, many lives breathe easier here at Hualalai"*



**Dr. Ray Lager,  
Past President  
& Medical  
Committee,  
Chair 2016**

# <<New & Exciting>> education programs

## Little Passports Monthly Mailer

The Little Passport Program is offered to encourage keiki interest in geography, science and world discoveries. The kit is mailed each month directly to the student. Each set features a new location and contains an assortment of activities, tasks and souvenirs, designed to match curriculum.

## Keiki Summer Book Challenge

This program offers a set of five, grade specific books that are delivered to the student in May. The challenge is to complete all five books and their worksheets to earn tickets for the Grand Prize Drawing held at the end of summer.

## Computer Award Give-a-way

Geared for student households with limited technology resources this award provides our highest need families with a computer bundle. The bundle includes a HP laptop computer, upgraded software package, virus protection with warranty and an all-in-one printer.

## 'Ike Loa Academy

This year-long program was designed to provide students an opportunity to make good life choices and develop skills while preparing for college and/or a career.

Students meet once a month on scheduled public school break days. All sessions take place at Hualalai Resort and include mentorship, a morning learning program focused on lifeskills; budget/finance, resume writing, mock-interviews.

Each afternoon is an activity; a tour of resort operations, job shadowing, community service, and cultural tours.

## Academic Merit Award

This award was established to reward students achieving academic excellence for the hard work and dedication shown in their studies,

Unique to this award, students do not have to have significant financial need. To be eligible a student must maintain a cumulative GPA of at least 3.5. Awards are made at the end of each school year. High school graduates can receive a one-time \$500.00 award, while Higher Education students are awarded \$2,500.00 for each year they qualify.



*Ralph Yawata, Security Officer since 2012 with his wife Priscilla, daughter Ruth and son Phillip.*

*Ruth: "The Hualalai Ohana Foundation has helped me reach my educational goals by allowing me to pursue my degree without the stress of financials. It encourages me to strive for the best I can achieve and aim for higher goals".*

*Phillip: "Thanks to the Hualalai Ohana Foundation, I was able to continue my college education with the goal of becoming an English teacher in Japan. The scholarship allowed me to study in Japan, where I could experience the culture firsthand".*

*Higher Education Scholarship recipients 2014, 2015 and 2016*

# Education Programs

## Pre K – 12th Grade Scholarship Award

Awards are granted to eligible applicants for **private school tuition** on a sliding scale, which is based on gross income, financial need, size of household and overall academic merit.

Awards are made up to **\$4,000.00**.

## Higher Education Scholarship Award

The Higher Education scholarship award follows the same sliding scale as the Prek-12th Grade Award and provides employee families with **college tuition assistance** for Bachelors, Masters and Doctoral programs. Awards are made up to **\$6,000.00**.

## Honor Roll Award & Ceremony

This program recognizes the **academic work** of employee children in 6th-12th grade. Students must achieve a 3.0 GPA. Recipients and their ohana are invited to attend the carnival and awards ceremony. Each **recipient receives a cash award** during the ceremony. In 2016, the cash award was increased to **\$150 for middle school and \$250 for high school students**.

In addition, award recipients and their siblings can redeem their carnival tickets for school supplies and a drawing is held for a MacBook Pro and an Ipad.

*"Every July we celebrate by recognizing the academic excellence of our students with their families at the annual Honor Roll event. It is truly heartwarming to share in their pride and joy at the award ceremony. I enjoy meeting the employee's whole family and it's gratifying to see how HOF impacts the lives of those who care for us each day."*

**MaryBee Johnston,  
Education Committee,  
Chair 2016**



## Educational Opportunities Award

This program supports **personal and professional development** for children and adults. The intent of the program is to enrich the employees' families and through them, their community. The coursework is relevant to the employee's current or new career path; for the child curriculum based programs, camps or class field trips qualify.

Adults and children can both apply this award toward classes that create a greater understanding of **Hawaiian culture** and our island community.

**Learning Tools-** the foundation supports early childhood education by providing at home learning tools.

In November, Children between 3 – 8 years old received a **Leap Pad 3 tablet and \$20.00 game download card**. This is a favorite program of the employees and a good investment in helping young children to associate learning with fun.

In our year-round partnership with the **Dollywood Foundation, the Imagination Library** delivers a new book each month to children from birth until five years old. The books are addressed to the children, which creates excitement when they get their own mail.



# Statement of Activity

## Event Donations & Other Support

2016 Annual Appeal Contributions	\$259,005
Golf & Auction	\$832,400
Mitsubishi Pro Am Tournament	\$92,570
Donated Services	\$87,722
Other General Donations	\$14,882
<b>Total Contributions</b>	<b>\$1,286,579</b>

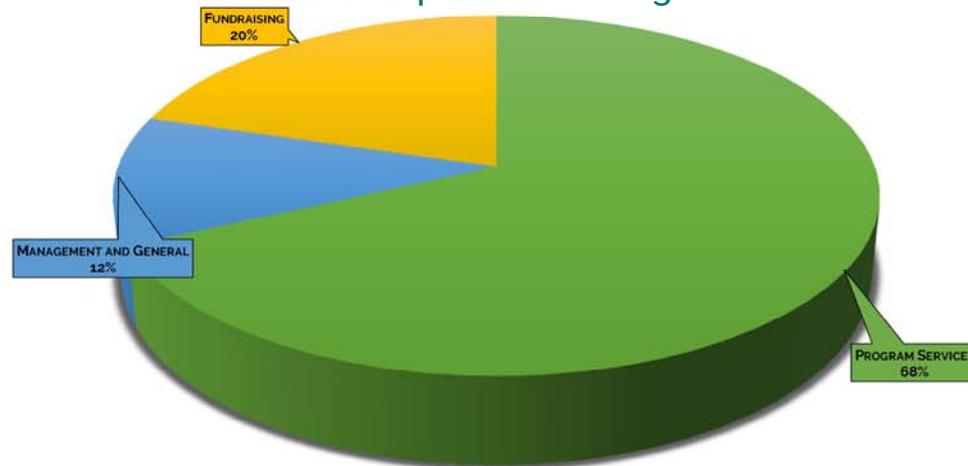
## Expenses

Program Services	\$686,999
Fundraising	\$204,910
Management & General	\$116,314
<b>Total Expense</b>	<b>\$1,008,223</b>

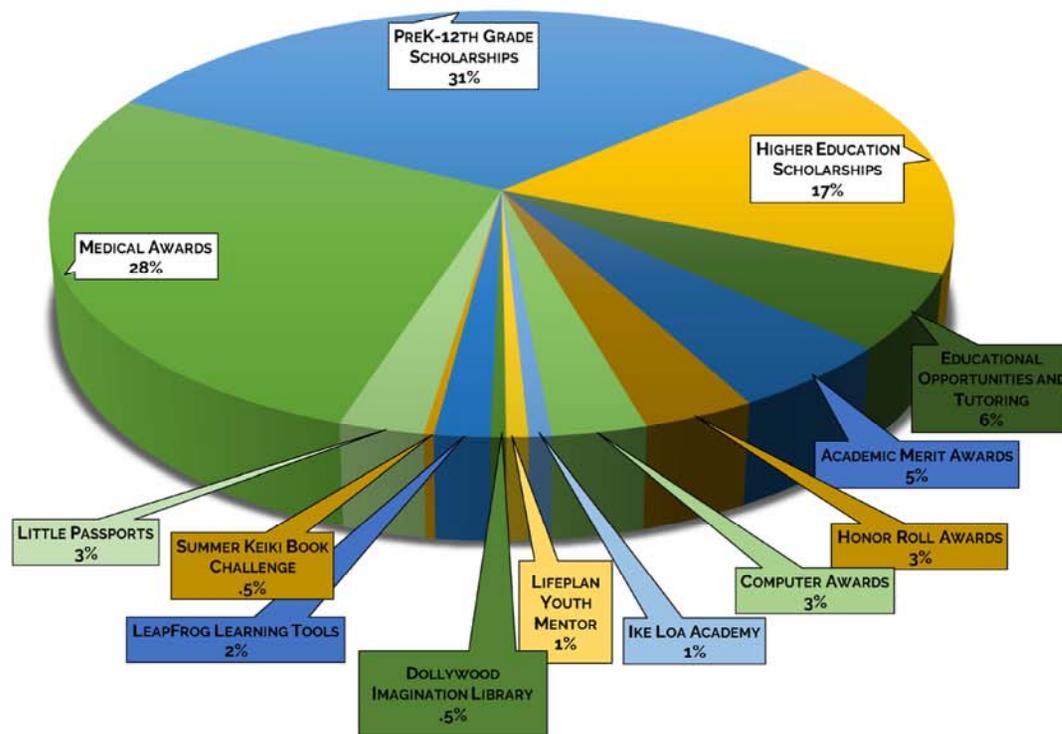
## Program & Award Distribution

Medical	\$164,360
PreK- 12th Grade Scholarships	\$186,500
Higher Education Scholarships	\$103,808
Educational Opportunities & Tutoring Awards	\$34,347
Academic Merit Awards	\$31,000
Honor Roll Awards	\$25,210
Computer Awards	\$14,466
Ike Loa Academy	\$4,233
Lifepan Youth Mentoring	\$8,398
Dollywood Imagination Library	\$2,854
LeapFrog Tools	\$10,236
Summer Keiki Book Challenge	\$1,831
Little Passports Program	\$15,799
<b>Total Distribution</b>	<b>\$603,042</b>

2016 Expense Percentages



Program Distribution = Percent of \$603,042.00 in total awards



# 2016

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V

20 COMPUTER  
BUNDLES  
given away



18 COLLEGE  
ACADEMIC  
merit awards

30 MEDICAL & 12 DENTAL  
SURGERIES SURGERIES  
PERFORMED

91 STAMPED  
Keiki  
Little Passports™



22 Different colleges  
attended by Scholarship  
recipients



375  
Summer  
Books  
read by  
1st - 8th  
graders



103

Honor  
Roll  
Students

3 Programs  
increased  
the award  
amount



117

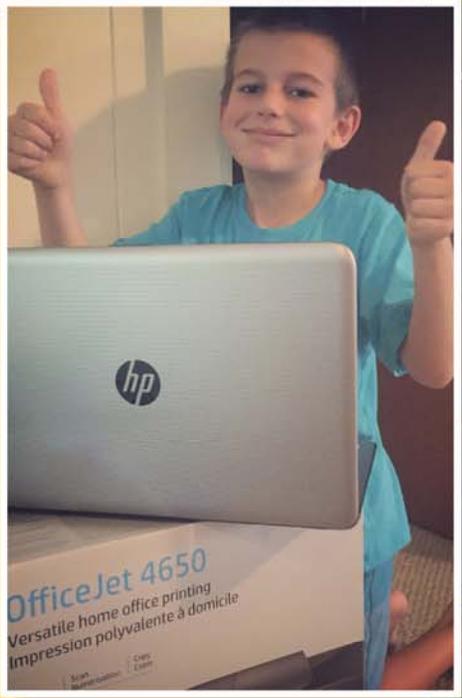
Academic  
Scholarships  
Awarded

Individual Awards  
Distributed

<<837>>

5

New Education programs were launched



# The Foundation's success is attributed solely to the kindness of our donors.

The Foundation receives income from three critical areas. These **three avenues** generate the incredible funds that we use to expand and grow our mission:

- 1** The Annual Appeal-This pure form of philanthropy allows us to provide access to quality education, educational support tools and medical aid for the employee 'ohana year-round.
- 2** Events & Fundraising-The Foundation and the Junior Board host a variety of events that enhance the sense of Hualalai community, while raising money to support our programs.
- 3** Mitsubishi Pro Am Tournament-The Four Seasons Resort Hualalai graciously donates a portion of the event entry fees from this annual event held at the resort.

The Hualalai community is unique in so many ways. This is highlighted by the incredible generosity of individuals who give of their time and make contributions to support our mission. **Thank you for helping** our Foundation continue to grow and flourish while we develop new programs and expand our existing education and medical awards.

**It is the compassion of the following people, that allows us to offer a helping hand to our Hualalai 'Ohana**

**A special mahalo nui loa to  
Bob & Renee Parsons and  
The Bob & Renee Parsons Foundation  
for their loyal patronage and remarkable contribution of \$ 549,125.76**

# Thank you to the following families who have contributed through a combination of annual giving and event participation

## Over \$50,000

Susan Johns and The Johns Family  
Thomas & Rhonda Peed & The Peed Foundation

## \$35,000.00 - \$49,999.99

Dr. Bradley & Donna Chipps  
Thomas & Janet Montag

## \$20,000.00 - \$34,999.00

Marti deBenedetti  
Jerry & Adi Greenberg  
Richard & Deborah Justice

Norma Foster Maddy & Doug Parks  
James & Anne Marie Mahoney  
William & Leigh Matthes

Edward & Susan Mueller  
Julie Wrigley & Bill McDowell

## \$10,0000 - \$19,999.99

Jim & Jan Bochnowski  
William & Renee Brinkerhoff  
Steven & Christine Burd  
Ken & Donna Coit Family Foundation  
Jenard & Gail Gross  
John & Helen Guiltinan

Ralph & Lisa Hoard  
Rick & Kandace Holley  
Jim O. & MaryBee Johnston  
Mark Kawashima  
Rob & Barbara Kildow  
Thomas & Sara Lewis

Dr. Peter & Faith Linden  
Scot & Carolyn McClone  
John & Patricia Nickoll  
Wally & Nicola Opdycke  
Anthony & Beatrice Welters

## \$5,000.00 - \$9,999.00

Paul & Judy Andrews  
Mark & Deborah Attanasio  
Roberta Bialek  
Tim & Mary Boyle Charitable Trust  
Barbara Britt  
Coit Real Estate Group, Inc  
Leon & Joy Dreimann  
Leldon & Gwen Echols

Steve & Jolene Gabbay  
Kevin & Mun Sok Geiger  
Bob & Becky Holman  
Robert & Judy Huret  
David & Doreen Keyes Foundation  
Gene & Maureen Kim  
Mike & Laurie Kozlak  
Bill & Gay Krause Foundation

Dr. Ray L. Lager  
Dave & Dawn Lenhardt  
Ken & Pennie Maney  
D.B & Lilian Murray  
George R. Roberts Foundation  
John & Judy Runstad  
Sy & Laurie Sternberg

# We are grateful for everything you give to support our ohana

## Up to \$4,999.00

Beecher & Robin Abeles  
Foundation  
Tamotsu & Sumie Adachi  
Maureen Adams  
Matthew Ament  
David L. & Eleanor Ammen  
Chris & Anita Anderson  
Taber & Kim Anderson  
Nicole Bacon  
Janice Baucum  
Stephen Bennett &  
Marsha Jordan  
Eve Bernstein &  
Alex Gerschnowicz  
Jennifer Bolosan  
Stephen Borg  
Summer Brennen  
Maile Brown  
Maryann R Broyles  
The Burns Family Foundation  
Chris Carley  
Mark Carter  
Ron Turiello & Margaret Caruso  
David & Helen Cashman  
Kris Casil  
Daniel Chipps  
Timothy Cirillo  
Kriss Cloninger  
Anthony Cook  
Malia Cooke  
Velma Covarrubias  
Kelly Cygan  
Frank Dattoma  
Charles Dawrs  
Cher DeLeon  
Vivian Dixon

Frank & Michele Dominick  
William B. Donner  
Michelle Dreimann  
Joy Escobal-Luea  
Carolyn Estrada  
Tom Fall  
Patrick Fitzgerald  
Rick & Donna Fluegel  
Harry & Susan Frampton  
Roselle Fujihara  
James Galloway  
Greg & Frances Gomes  
Donald & Laura Goo  
Angela Hacker  
Cathy Hansen  
Sylvia Heller  
Frank & Maryellen Herringer  
Thomas Hodge Foundation  
Linda Holloway  
The Houska Family Trust  
Hualalai Investors LLC.  
Steven Huntley  
Terry & Carol Johnston  
Keala Kadooka  
Enola Kaneta  
Ken & Eileen Kaplan  
The Karsh Family Foundation  
Christopher Keiter  
George & Bonnie Kennedy  
Carlos Kennedy  
Gilbert Kilman  
Kanja King  
Eleanor Kinitake  
Leah Klawanskys  
Paul & Pamela Krug  
Christpher Lammers

John & Nancy Lindhal  
Paul & Yen Yee Locklin  
David & Chris Lucchetti  
Jack Lutsky & Susan Mendelson  
Cher Mardon  
Erin-Ann Masaoka  
Tim Gonzales & Ann Mather  
Donna Maxx  
Katie McCullough-Simmons  
James & Susan McIntosh  
Yista Merianos  
Lila Mero  
Peggy Kent & Richard Meschke  
Sean & Emi Miller  
Shayn Miyasato  
Peter Morris  
John & Martha Mouer  
Brendan Mullinix  
DB & Lilian Murray  
Elizabeth Markham Nicholson &  
Philip Nicholson  
Wally & Pat O'Dell  
Perry & Lynne Olson  
Ed & Cathy O'Neill  
Karen Orr  
Shantelle Pahio  
Lisa Park  
Yvonne Khouri-Morgan  
& P.D Parker  
Lorianne Pasalo  
Susan Pietrucha  
Daniel & Cara Price  
Jesus Reyes  
Kevin & Lynn Reedy  
Florian Reidel  
Robert & Elizabeth Reniers

Joseph Renton  
Susan Resatka  
Bruce Rockowitz  
John Ryan & Anne Barasch Ryan  
Michael Sack & John Saul  
Nancy Schmidt & Julia Rahn  
Harvey Shein  
Kosti & Marian Shirvanian  
Foundation  
SJ Communications, LLC  
Sloan Foundation  
Alex Smith  
Kent & Cindy Snyder  
Robert & Kathleen Styer  
Nicole Tachibana  
Tad & Dianne Taube &  
Taube Family Foundation  
Susie & Chris Taylor  
Violet Terawaki  
Allen Tochihara  
Heather Tonkins  
Robert & Lisa Wahbe  
Austin Watkins  
Frank Weiser  
Robert Whitfield  
Paul & Karin Wick  
Ava Wick  
Thomas & Diane Windler  
Deb Worthing  
Cy Yamamoto  
Nani Zack  
The Mark Zurack &  
Kathy Ferguson Foundation

<<Our gratitude extends to the 10 generous families who have given their support and asked to remain anonymous>>

# <<Mahalo>>

We wish to recognize the following companies and individuals for their generous donations to our fundraising efforts throughout 2016

Dr. Brad & Donna Chipps  
Marti deBenedetti  
Frank & Michele Dominick  
Leon & Joy Dreimann  
Leldon & Gwen Echols  
Four Seasons Hotel Seattle  
Four Seasons Hotel San Francisco  
Jerry & Adi Greenberg  
Jenard & Gail Gross  
Hawaii Forest & Trails  
Susan Johns  
Rick & Deborah Justice  
Kekela Farms  
Rob & Barbara Kildow  
Gene & Maureen Kim  
Dr. Ray Lager  
James & Ann Marie Mahoney  
Katie McCullough Simmons  
Nichole Meier  
Thomas & Janet Montag

MSD Capital & The Fairmont Hotel  
& Bungalows  
Ohana Spice Trading Company  
Ed & Cathy O'Neill  
Palamina Wines  
Bob & Renee Parsons  
Tom & Rhonda Peed  
Roy's Waikoloa Bar & Grill  
Liz Rudinica  
Jon & Judy Runstad  
Jahn Sawinski  
Sundot Hawaii, LLC  
SugarFish by Sushi Nozawa  
Tad & Dianne Taube  
Tiffany & Company  
Dennis "Devo" Voss  
Warriors Community Foundation  
W.M. Keck Observatory  
Julie Wrigley & Bill McDowell



FOUR SEASONS  
RESORT  
HUALALAI

*Hualalai*  
at Historic Ka'upulehu



**BIG ISLAND**  
TRAVELER



Communication, LLC



*Mahalo to Tek Mapon Photography the official photographer of the 2016 Foundation Events*

HUALALAI 'OHANA FOUNDATION  
P.O. Box 5227 | Kailua-Kona | HI | 96745 | (808) 325-4701  
www.HualalaiOhanaFoundation.com  
Cara Price, Executive Director: CaraPrice.HOF@gmail.com