

Our Mission is Growing



*Hualalai 'Ohana Foundation
2015 Annual Report*

Our Mission Statement

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).

A Note From Our President

The family and friends of Hualalai are an inspiration!

After 14 years, your generous support of the Ohana Foundation is astounding and I sincerely thank you. The employees that we serve are equally as inspiring - always a smile, a helping hand, whatever we ask of them.

Assisting with the medical and educational needs of our ohana continues to grow. In 2003, we provided educational scholarships and life threatening illness assistance to 39 employees. In 2015, just in those same 2 categories, we assisted 218! And, if you add in the new programs initiated during those years in medical (surgical and dental awards) and education (mentoring, college excellence, elementary programs), the total number of "touches" with our employees has risen to over 1700. Truly remarkable! With your sustained contributions, our hope is to grow each year to meet the needs of the Hualalai Ohana.

This is the final annual report we will publish in the fall. In 2016, our report will come to you in the spring, to more closely coincide with our giving season.

With ho'omaika'i (gratitude),



Hualalai Ohana Foundation
President 2015-2016

Me ke aloha, kokua aku kokua mai: Pela iho la ka nohona 'ohana

Grants & Scholarships

PreK – 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 academic merit.



Award Range:
\$750.00-\$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 college tuition assistance for employees, their spouses and children.



Award Range:
\$750.00-\$4,000.00

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.



Award Range:
Middle School
\$ 75.00

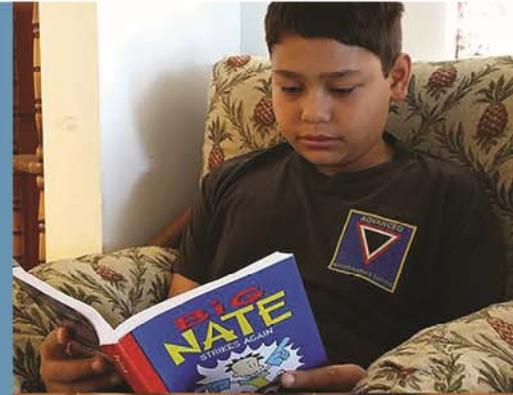
High School
\$150.00

Early Childhood Educational Tools

Leap Frog Learning Tools

Each November, the foundation supports early childhood education by providing at home learning tools. Children between 3 – 8 years old receive 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 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.



Educational Opportunity 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. Coursework is relevant to the employee's career path; for the child curriculum based programs, camps or 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.



Lifepan Mentor Program

The **mentor program** focuses on the public school sector by helping to mentor teens in life skills and college/career readiness. Resort employees and other adults volunteered alongside the teachers to mentor students in their 45-minute homeroom class. This partnership between the Foundation, school, mentors, teachers, and youth has made a positive difference in the school environment and for the students.

The 2015-2016 school year concluded the Foundations 5-year pilot program at nearby Kealakehe High School. The school administration considered it such a success they have opted to continue the program with internal support from the Department of Education.



Financial assistance with life-threatening illnesses and important surgeries help families concentrate on healing.

Serious Illness Award

Access to quality healthcare can be a challenge. In the event of a serious illness or injury, employees and their family must travel off-island for treatment. When this occurs, the Foundation helps to ease the burden by helping 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, require necessary treatment to avoid disability. Due to the costs involved, some employees postpone the surgery until they are no longer able to work. The Foundation's Surgical Award provides up to \$2,000 to help with necessary routine and serious surgeries.

Dental Assistance Award

In 2012, it was brought to the attention of the Medical Committee that many employees suffer from a wide range of dental issues. The Committee then developed a program to support those in need of urgent dental procedures. This award provides up to \$1,000.00 toward necessary dental treatments.

\$59,909.00

Amount spent on educational tools, books and mentor programs



221

Individual donor contributions made the 2015 programs possible

132 Keiki

From newborn to 5 years of age, received a book each month from the Dolly Parton Imagination Library

13

Years HOF has supported the families of the Hualalai Community



Number of different schools attended by our Hualalai keiki

28



2015 AUCTION REVENUE

\$1,503,944.00

Number of Leap Frog Learning Tools distributed

259

1,084

Number of students, youth leaders, volunteer mentors and teacher partners in the 2015 LifePlan program held at Kealakehe High School in Kailua-Kona, Hawaii

66 MEDICAL CASES =EQUALS= \$147,649.00 IN AWARDS



0 Qualified employees turned away without assistance



5 NEW EDUCATION PROGRAMS APPROVED TO LAUNCH IN 2016

\$288,822.00

Awarded for a total of 230 Grants and Academic Scholarships



OUR 'OHANA





The Foundation's success

is attributed to the kindness and generosity of our donors.

The Foundation receives income from three critical areas:

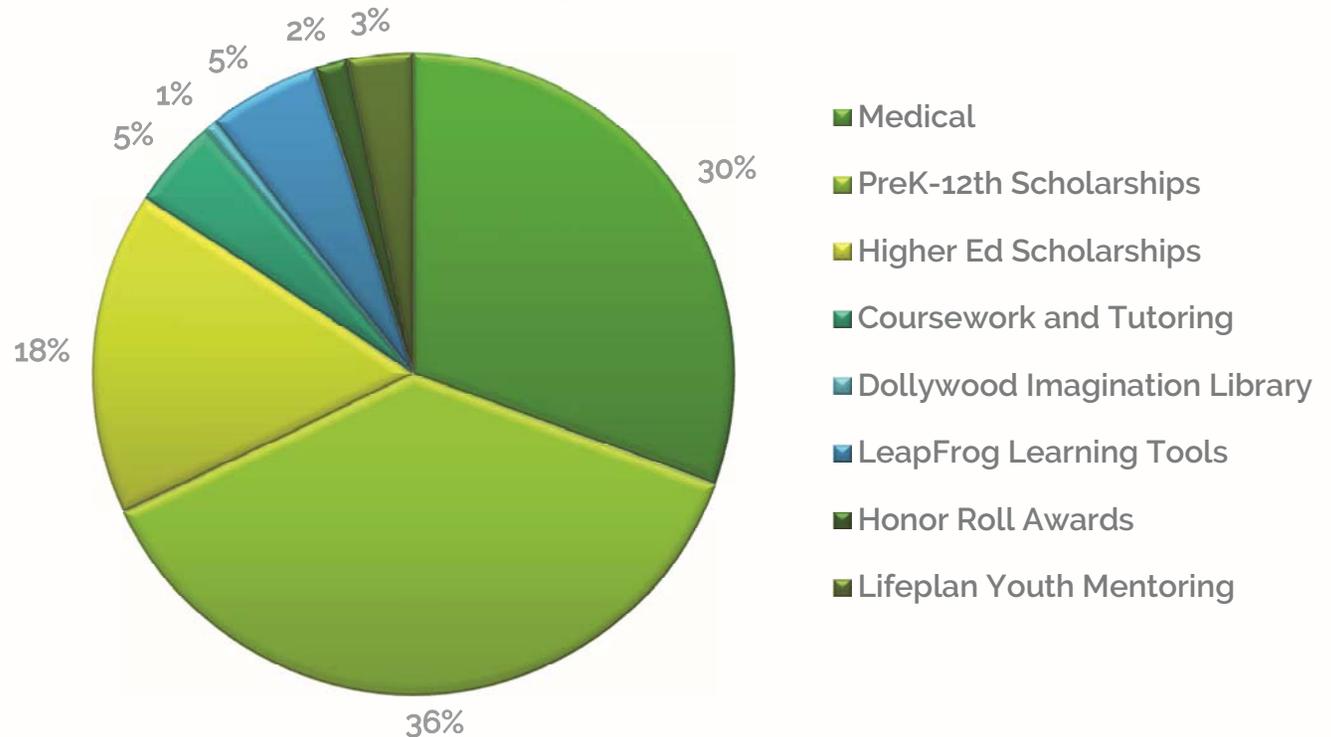
The Annual Appeal-This pure form of philanthropy allows us to provide access to quality education, educational support tools and medical aid for the employee 'ohana year-round.

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. The Paint Run was the family favorite in 2015, while the 11th Annual Golf & Auction event was the most successful fundraising event in the history of the foundation.

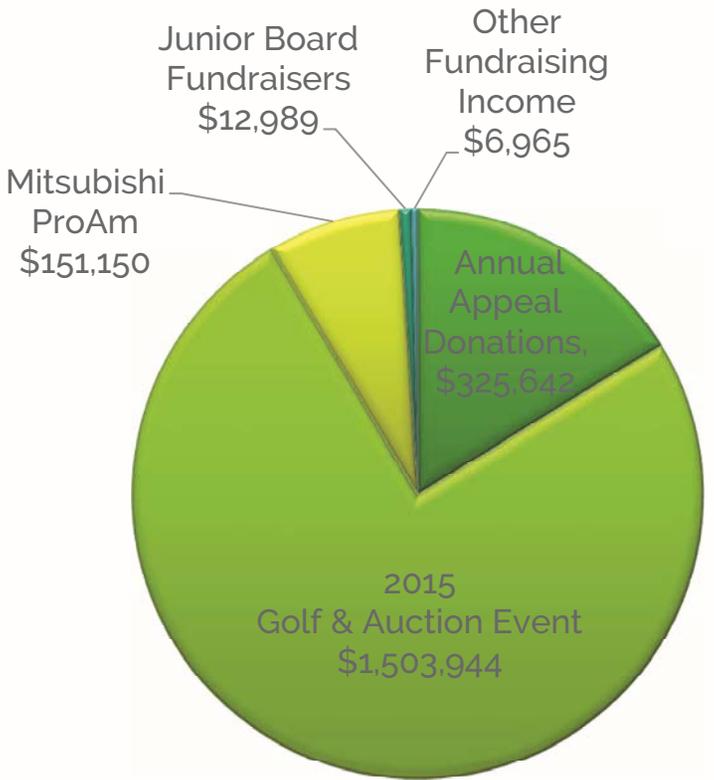
Mitsubishi Pro Am Tournament-The Four Seasons Resort Hualalai graciously donates a portion of the event entry fees from this annual event held at the resort.

These three avenues generate the incredible funds that we use to expand and grow our mission.

2015
Program Distribution
Percent of \$497,576.00
in total awards

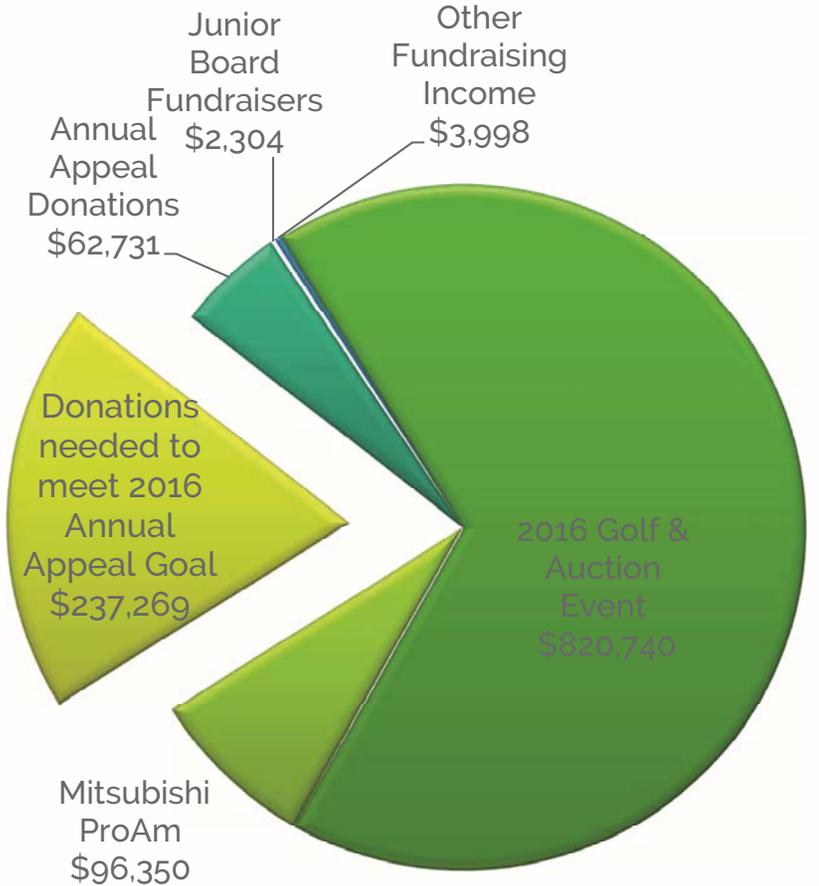


2015 Revenue
\$2,000,069.00



- 2015 Annual Appeal Donations
- 2015 Golf & Auction Event
- 2015 Mitsubishi ProAm
- 2015 Junior Board Fundraisers
- Other 2015 Fundraising Income

2016 Revenue
Year-to-date
\$986,123.00



- 2016 Golf & Auction Event
- 2016 Funding Needed
- 2016 Mitsubishi ProAm
- 2016 Annual Appeal Donations
- Junior Board Fundraisers
- Other Fundraising Income

Mahalo Nui Loa

2015 Contributions

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 kindness of the people listed, that allows us to offer a helping hand to our Hualalai 'Ohana in times of need.

Mahalo piha to
Bob & Renee Parsons and The Bob & Renee Parsons Foundation
for their unwavering patronage and exceptional contribution
of *over \$634,000.00*

Mahalo Nui Loa to
Susan Johns and the Johns family for their
loyal support and remarkable contribution
of *over \$110,000.00*

Our heartfelt thank you to the following families who have contributed varying amounts, through a combination of annual giving and event participation in 2015.

\$55,000.00 - \$75,000.00

Elliott & Suzanne Felson
Norma Foster Maddy & Doug Parks

\$35,000.00 - \$54,000.00

Marti deBenedetti
Curtis & Sandy Le Macnguyen
Hans & Elaine Riddervold

\$25,000.00 - \$34,999.00

Eve Bernstein &
Alex Gersznovicz
Dr. Bradley & Donna Chipps
Marianne Curran
The Adi and Jerry Greenberg Foundation

Drs. Dennis & Mireille Gillings
Robert & Judy Huret
Richard & Deborah Justice
Edward & Susan Mueller
Thomas & Rhonda Peed

We are grateful for everything you give to our ohana

\$10,000.00 - \$24,999.00

Jim & Jan Bochnowski
Michael Bonahan & Ricci Racela
Barbara Britt
Tom & Marj Callinan
Leon & Joy Dreimann

Harry & Susan Frampton
Steve & Jolene Gabbay
Rick and Kandace Holley
Hualalai Investors, LLC.
Dr. Jim O. & MaryBee Johnston

Rob & Barbara Kildow
Richard & Kathryn Kimball
Dr. Peter & Faith Linden
James & Ann Marie Mahoney
Anthony & Beatrice Welters

\$5,000.00 - \$9,999.00

Beecher & Robin Abeles Foundation
Paul & Judy Andrews
Roberta Buffett Bialek
Ron & Linda Borgman
Frank & Michele Dominick
Rick & Donna Fluegel
Ryutaro Fukamachi
Jenard & Gail Gross
Bob & Becky Holman

Bruce & Martha Karsh Foundation
Mark Kawashima
George and Bonnie Kennedy
David & Doreen Keyes Foundation
Mike & Laurie Kozlak
Dr. Ray L. Lagger
Thomas & Sara Lewis
Scot & Carolyn McClone
Tom & Janet Montag

John & Patricia Nickoll
Wally & Nicola Opdycke
George R. Roberts Foundation
Jon & Judy Runstad
Arun & Rummi Sarin
Lex Van Hessen
Paul & Karin Wick
Julie Wrigley & Bill McDowell

Up to \$4,999.00

Tamotsu & Sumie Adachi
Daniel Alberstone & Lisa Ogawa
Guy & Sherry Alexander
David L. & Eleanor Ammen
Chris & Anita Anderson
Mark & Tammy Aiona
Dianne Bailey
Janice Baucum
Charles & Jenny Beeler
Kathy Behrens-Wilsey
Stephen Bennett & Marsha Jordan
Mercedes Berg
Mem Bernstein
Big Island Villas
Jerry Blevins
Kasey Bigelow
Jennifer Bolosan

Elliot Boschwitz
Emily Boschwitz
Tim & Mary Boyle
Mark Brinkerhoff
Michael Buhl
Marc & Lisa Cabi
Ellen Carvalho
Kei-Lin K.H.Cerf
Shoko Chambers
John Chapple & Vivian Dixon
Chris Carley
Allan & Katie Chipps
Keenan & Bree Choy
Jack & Gloria Clumeck
Anthony Cook
Ken & Donna Coit Family Foundation
Adelaide Crosby

Melynda Dart
Sean DiPaola
Betty Dockweiler
Dan Dutton
Leldon & Gwen Echols
Greg Econn
Mark & Gail Edwards
Joy Escobal-Luea
Phillip Fewster
Tom Fleck
Cindy Freitas
Berta Figueroa
Patrick Fitzgerald
Glenn Fuhrman
Sydney Gamiao
Stephen Gardner
Kevin & Mun Sok Geiger

Continued

John Geschke
Greg & Frances Gomes
Donald & Laura Goo
Sherrine Gray
Kate Gross
John & Helen Guiltinan
Allen Guirguis & Patricia Johnson
Jolene Head
Anders & Elizabeth Hejlsberg
Frank & MaryEllen Herringer
Denise Hill
Rebecca Hill
Thomas Hodge Foundation
George & Sandy Holstead
Lefko Horner
Hank & Judy Hummelt
James Juarez
Dave Justice
Jay and Ronnie Kaiser
Ka'aina Keawe
Donald & Diana Kennedy
David Kolon & Karen Morris
Eleanor Kunitake
Susan Lansbury
Dan & Stacey Lanterman
Al Latham
Dave & Dawn Lenhardt
Paul & Yen Yee Locklin
Thomas Loratta
David & Christine Lucchetti
Jack Lutsy & Susan Mendelson
Michael & Kathleen Mahoney
John & Pat Maney
Mollie Maresco
Cheryl Markham

Christi Markham
Erin-Ann Masaoka
Ann Mather & Tim Gonzales
Katie McCullough-Simmons
Consuelo McHugh
Robert McHugh
James & Susan McIntosh
Andy & Kate Mecca
Giselle Melendez
Rich Meschke & Peggy Kent
Sean & Emi Miller
Kris Mitchell
Jessica Morales
Deseree Morrison
Brendan Mullinix
D.B. & Lilian Murray
NaHHA
Debra Neil-Fisher
Larry Owen
PAJ Inc.
James & Linda Phillips
Betsey Pick
Tony & Ericka Pinkert
Dan & Cara Price
Barbara Prima
Kendra Ragatz
Stephanie Raps
Florian & Wendy Reidel
Robert & Elizabeth Reniers
Jay & Carol Rosenbaum
Richard & Barbara Rosenberg
Mike & Liz Rudinica
John & Anne B. Ryan
Eric Salus
Robert Samuel

Frank Scherkenbach & Kim McGovern
Thomas Schmalzreid
Nancy Schmidt
Chris & Kirsten Shilakes
Shannon Shivley
Barry & Frankie Sholem
SJ Communications, LLC.
Stuart Sloan Foundation
Shelley Smith
Tony & Jennifer Smorgon
Kent & Cindy Snyder
Patrick & Sita Soesman
Mary Spears Art
Sy & Laurie Sternberg
David & Wendie St. Jean
Joe Syufy
Tad & Dianne Taube
Cindy Thompson
Allen Tochiara
Ron Turiello & Margret Caruso
University Tees
Joseph Walter & Kathy Mares
Robert & Lisa B. Wahbe
Gary & Becky Watts
Austin Watkins
Jessica Weil
Rory & Jamie Weinstein
Robert & Ceri Whitfield
Scott Wiitala
Thomas & Diane Windler
Karen Witesman
Don & Ann Wood
Paula Wright
Nani Zack
Mark Zurack & Kathy Ferguson

Our appreciation also goes to the 7 generous families who have given their support and asked to remain anonymous

A Special Mahalo to our corporate in-kind donors for their support and contribution to our success. Also, we wish to recognize the following companies and individuals for their generous donations to our fundraising efforts throughout 2015

Eve Bernstein
& Alex Gersznowicz
Blink & Brow, Sarah Nicola
Central Coast Wine Classic
Dr. Bradley & Donna Chipps
Marti deBenedetti
Dolphin Bay Resort & Spa
Leon & Joy Dreimann
Four Seasons Resort Bora Bora
Frank & Michele Dominick

Hawaii Forest & Trails
Becky Holman
Kekela Farms
Kona Family Fishing Charters
Dr. Ray Lagger
James & Ann Marie Mahoney
Katie McCullough-Simmons
Kate Mecca
Nichole Meier
Palamina Wines

Paradise Gourmet Catering
Bob & Renee Parsons
Tom & Rhonda Peed
Liz Rudinica
Jahn Sawinski
Southern Wine & Spirits
Sundot Hawaii, LLC
The Friends of Hearst Castle
Tiffany & Co.
Dennis "Devo" Voss

Thank You



Mahalo to Tek Mapon Photography the official photographer for 2015 Foundation Events

HUALALAI 'OHANA FOUNDATION

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