



*Our Story
is their Story*



2011 Annual Report
Hualālai 'Ohana Foundation

A person is kneeling on a sandy beach, drawing a large, intricate sand mandala. The mandala consists of several concentric circles and lines, with some areas filled with small stones or shells. The person is wearing a patterned shirt and blue pants. The background shows the ocean and some rocks.

Our Message

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

With love, help others, be helped:
Such is a family relationship.

We have so much to be thankful for.
Another year has passed and while we
pause to take pride in all that we have
achieved, we maintain our *ha'aha'a*
(humility); knowing that we thrive
because of the gifts and many blessings
from our unique and wonderful
community.

In our Hualalai 'ohana, we have smiled,
cried, and grown together. We have
triumphed and at times, we have known
the loss of loved ones. Together, we have
shown strength, persistence, and grace.
Together, we are united in *aloha*.

For another wonderful year we say,
mahalo nui loa,

A handwritten signature in black ink, appearing to read "Michael Bonahan".

Michael Bonahan
2012 President

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).





Our Work

Education

Quality education is a precious resource on Hawai'i Island. Our goal is to improve access to education through scholarships, programs, and various learning tools.

The Dollywood Imagination Library, LeapFrog Learning Toys, and Pre-K Scholarships are part of the Foundation's commitment to early childhood education.

Coursework/Tutoring, Private School and Higher Education Scholarships, and Honor Roll Awards support the educational aspirations of learners from elementary school to graduate programs.

Lifeplan Youth Mentoring focuses on the public school sector by helping adult employees to facilitate youth development with high school teens.

Since 2002, the Foundation has given over \$2 million in support of educational programs.

Medical

Significant medical treatment can sometimes create financial distress for our 'ohana. Our financial assistance with life-threatening illnesses and important surgeries helps families to concentrate on healing.

Since 2002, the Foundation has given over \$400K to help with significant medical treatment expenses.

Our Progress

Dollywood Imagination Library

130 children from newborn to 5 years old received a new book each month; \$2,700

LeapFrog Learning Toys

204 children from 3 to 8 years old received a new learning tool; \$12,691

Pre-K to 12th Grade Scholarships

57 students age 3 to 17 years old received financial assistance to attend private school; \$136,600

Coursework and Tutoring

49 children and adults expanded their education through programs in the community; \$18,309

Higher Education Scholarships

36 graduating seniors and continuing adults attended community colleges and universities; \$75,477

Honor Roll Awards

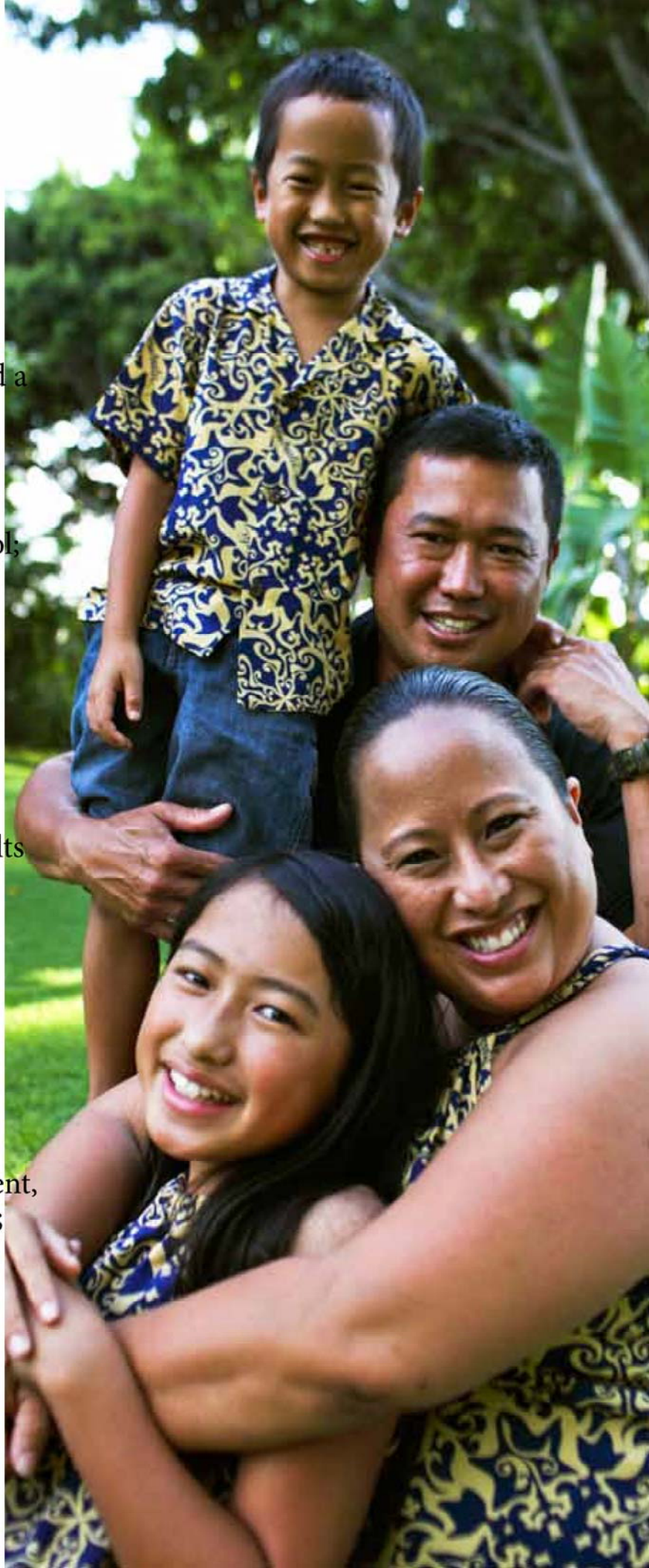
89 students from 6-12th grade received recognition and reward for academic excellence; \$11,524

Lifeplan Youth Mentoring

240 teens participated in youth development, leadership, and our annual Youth Summit; \$7,066

Kona Village/Hualalai Relief Fund

288 adults received \$339K in aid from the Foundation, Kona Village guests and community.





Our Team

2012 Board of Directors

Michael Bonahan

President

Ann Marie Mahoney

Vice President

Donald Goo

Secretary

David Keyes

Treasurer

Paul Blavin

Nancy Boschwitz

Donna Chipps

Marti deBenedetti

Joy Dreimann

Sandy Holstead

Patrick Fitzgerald

Ray Lager

Rich Meschke

Hillary Mow

Scott Murray

Renee Parsons

Barbara Rosenberg

Robert Whitfield

Committees

Education, Chair Marti deBenedetti

Medical, Chair Donna Chipps

Finance, Chair Dave Keyes

Development, Chair Michael Bonahan
(interim)

Investment, Chair Paul Blavin

Governance, Chair Ann Marie Mahoney

Staff

Kei-Lin Cerf, Executive Director

Erlinda Borges, Foundation Assistant

Our Funding

The Foundation's success would not be possible without the generosity of our donors. Each year, gifts to the Annual Appeal provide funding for 65% of our annual expenditures. In addition, the Foundation participates in a variety of events that provide additional support and promote engagement in our community.

Mitsubishi ProAm

In 2011, thanks to the generosity of Hualalai Investors, LLC, the Foundation was the recipient of \$113,000.

7th Annual Golf & Auction Event

In 2011, the Foundation's annual event was held in August, attended by over 100 guests and raised almost \$100,000.

Our 2012 event is scheduled for Sunday, August 5th at Keolu.

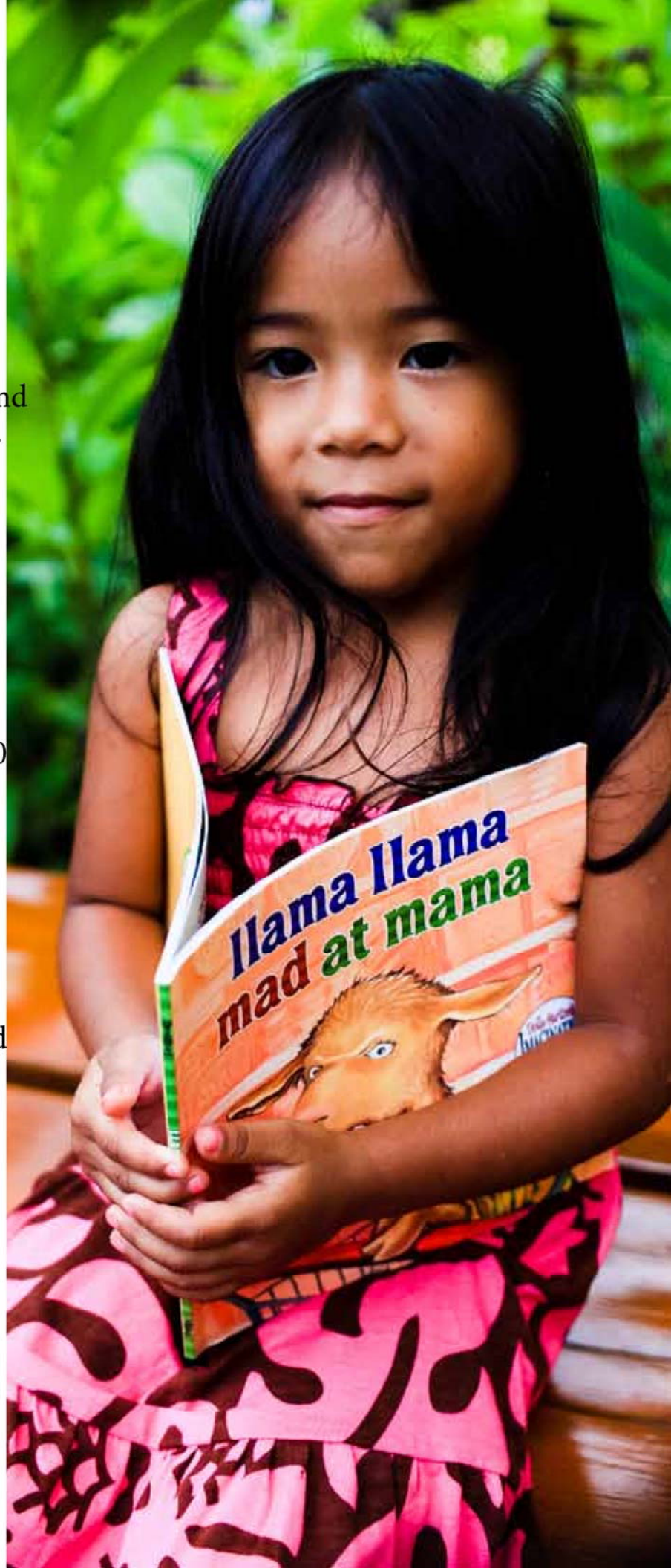
Zumbathon®

The Junior Board of the Foundation, engaged homeowners and employees with its first fundraising event and raised \$13,350 to support programs. The 2012 event, *Dancing With Our Stars*, will be held on Saturday, August 4th.

'Ohana Hana Hou Sale

An employee favorite, this program collects item donations from homeowners and then hosts a rummage sale for employees, who enjoy the opportunity to contribute over \$2,600 to their Foundation in 2011.

Our 2012 sale event will be on October 5th.

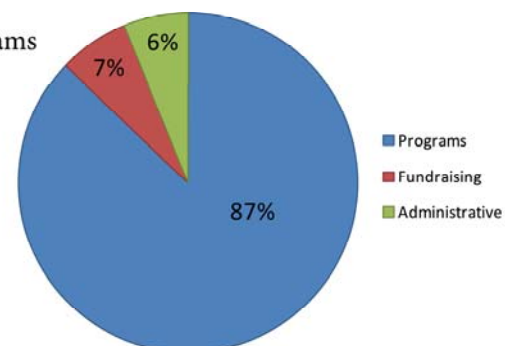


Our Finances

2011 Operating Statement

	Actual Jan - Dec 2011	Budget Jan - Dec 2012
Income		
Annual Appeal Contributions	\$ 399,469	\$ 400,000
Special Event Revenue		
Mitsubishi ProAm ¹	\$ 130,000	\$ 105,000
HOF Golf/Auction Event	\$ 98,070	\$ 90,000
Kona Village/Hualalai Fund	\$ 343,477	\$ -
Other Event Revenue	\$ 16,182	\$ 12,500
Total Contributions Received	\$ 987,198	\$ 607,500
Interest Income	\$ 2,372	\$ 3,000
Perpetual Fund Income	\$ -	\$ 27,300
Total Income	\$ 989,569	\$ 637,800
Expense		
Awards		
Medical Awards	\$ 32,925	\$ 60,000
Education Awards ²	\$ 271,179	\$ 371,500
Kona Village/Hualalai Fund	\$ 339,200	\$ -
Total Awards	\$ 643,303	\$ 431,500
Award program expenses	\$ 70,335	\$ 75,120
Fundraising expenses	\$ 54,794	\$ 46,540
Administrative expenses ³	\$ 50,850	\$ 48,260
Perpetual Fund allocation	\$ 43,716	\$ 36,500
Total Expenses	\$ 862,998	\$ 637,920
Total Profit (Loss) ⁴	\$ 126,571	\$ (120)

1. Includes ProAm payments received in 2010
2. Includes second scholarship payments for 2010 awards
3. Includes expenses for accounting/audit/legal fees
4. Includes year-end funding allocated for 2012 programs



Our Future

Looking Ahead in 2012

In Education, the Foundation has begun its second year of offering financial assistance for pre-school to help create a strong beginning in early childhood education.

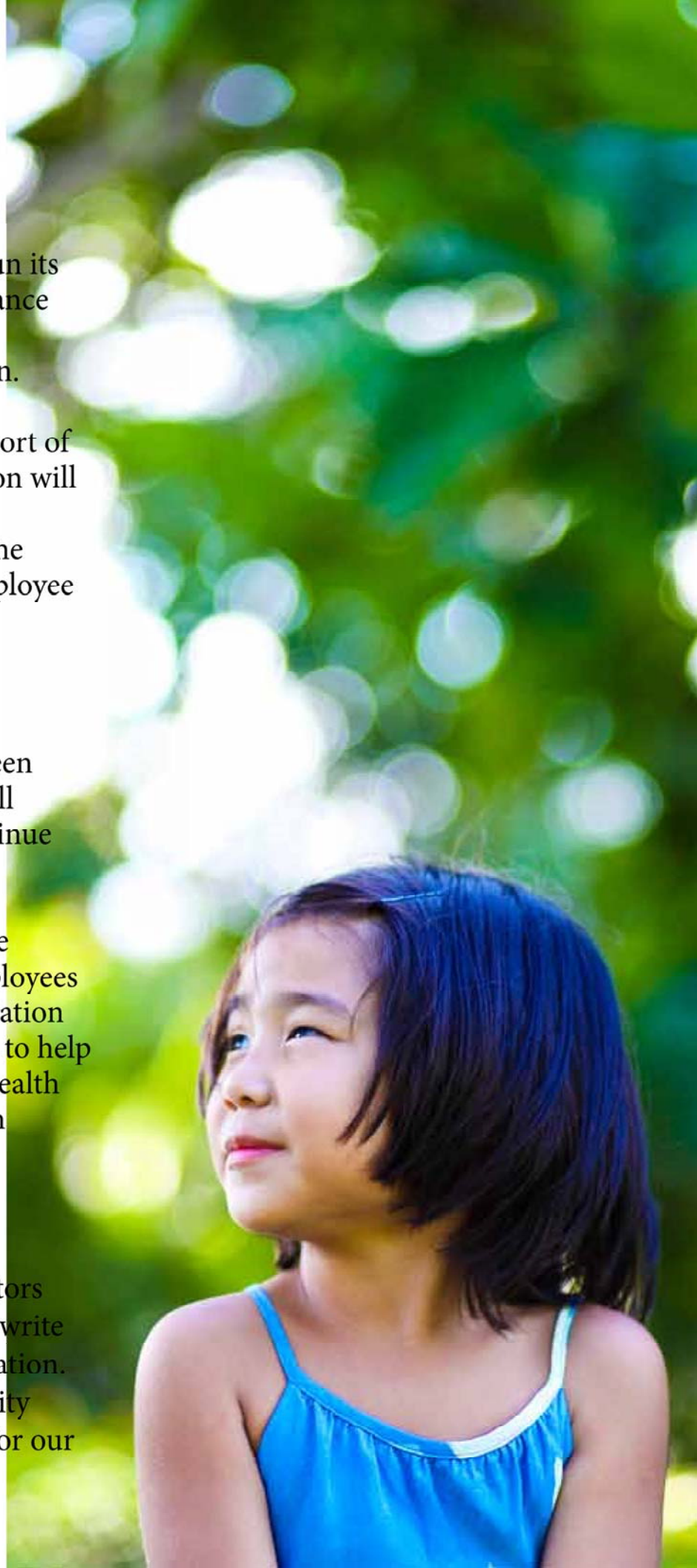
In response to the rising need for support of public school education, the Foundation will expand its Lifeplan Youth Mentoring program at Kealakehe High School. The Lifeplan program, with the help of employee mentors, supports over 400 teens per academic year.

Coursework/Tutoring and Higher Education Scholarship Awards have been increased to help youth and adults at all levels, who aspire to improve and continue their education.

In Medical, following the success of the Surgical Assistance Award to help employees avoid a disabling condition, the Foundation has created a Dental Assistance Award to help families in cases of significant dental health need, when all other options have been exhausted.

100% Commitment

Beginning in 2012, the Board of Directors will commit its annual giving to underwrite the administrative costs for the Foundation. We gladly support the operating capacity needed in order to provide programs for our Hualalai 'ohana.



Our Thanks

100% Generosity

We are fortunate to reside in a community of exceptional individuals willing to give freely of their time and contributions to support our mission.

Mahalo for helping our foundation to offer a helping hand to our Hualalai 'ohana in times of need. We encourage everyone to participate in our various events as well as to support our annual appeal. Together, we can reach our vision of 100% participation from our Hualalai homeowner community.

The following 54 families have contributed \$5,000 or more through a combination of annual giving and events from November 15, 2010 to December 31, 2011.

* In 2011, the foundation converted to a calendar year of giving.

Beecher and Robin Abeles
Paul and Judy Andrews
Delone Bailey
Gerson and Barbara Bakar
Tom Blackburn and Kate Bell
Amy and Paul Blavin
Jim and Jan Bochnowski
Michael Bonahan and Ricci Racela
Andrew and Tanya Borrok
David and Nancy Boschwitz
Bill and Renee Brinkerhoff
Glen and Barbara Britt
Steven and Christine Burd
Bradley and Donna Chipps
Ken and Donna Coit
Phyllis and David Cook
Marti deBenedetti
Joy and Leon Dreimann
Rich and Julianne Erickson
Elliott and Suzanne Felson
Noel and Sarah Fenton
Harry and Susan Frampton
Ryutaro Fukamachi
Donald and Laura Goo
The Kenneth and Anne Griffin Foundation
Rick and Kandy Holley

Hualalai Resort
William and Pattie Dunn Jahnke
Susan Johns
Jim and MaryBee Johnston
Jay and Ronnie Kaiser
Bruce and Martha Karsh
Doreen and David Keyes
K.C. and Toni Knudson
Mike and Laurie Kozlak
Ray L. Lagger
Paul and Yen Yee Locklin
James and Ann Marie Mahoney
Drs. Kate and Andrew Mecca
Tom and Janet Montag
Bill and Rosa Mow
Mary Murfey
John and Patricia Nickoll
Renee and Bob Parsons
Hans and Elaine Riddervold
Mr. and Mrs. George R. Roberts
Barbara and Richard Rosenberg
John and Anne B. Ryan
Joe and Debbie Schell
Jose Pepe Sigal
Robert W. and Kathy Styer
Lex and Hannie Van Hessen
Bill and Vonnie Wavish



The following 128 families have contributed varying amounts up to \$5,000 through a combination of annual giving and events from November 15, 2010 to December 31, 2011.

Myron and Tracy Abrams
Stephen Akerley and
Tricia McCarthy
Mr. and Mrs. David L. Ammen
Chris and Anita Anderson
Taber and Kim Anderson
Debbie and Mark Attanasio
Charles and Jenny Beeler
Eve Bernstein and
Alex Gersznowicz
Erlinda Borges
Ron and Linda Borgman
Dick and Monene Bradley
Trevor Brown
Greg Bundy
Marc and Lisa Cabi
Tom and Marj Callinan
Garrett G. Carlson
Marsden and Roxanne Cason
Kei-Lin K.H. Cerf
John Chapple and Vivian Dixon
Keenan Choy and Bree Wong
Don and Ellen Clark
Raoul Clark
Caroline Crawford Labe
Frank and Michelle Dominick
Mark and Gail Edwards
Aki Egashira
David and Bertie B. Elliott
Susan and Richard Fade
Patrick and Marilyn Fitzgerald
Rick and Donna Fluegel
Four Seasons Hualalai
David Garsh
Malin Giddings
Dr. Dennis Gillings
Greg and Frances Gomes
Michael and Judy Greenfeld
Leonard and Beth Griffiths
Jenard and Gail Gross

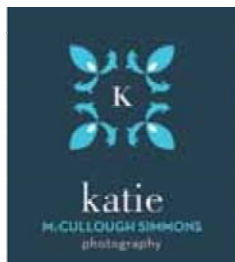
John and Helen Guiltinan
Jacqueline Happich
JC and Susan Henry
Herringer Family Foundation
Robert Herwick
Julie and Peter Hill
Rebecca Hill
Thomas Hodge
George and Sandy Holstead
Judy and Hank Hummelt
Robert and Judy Huret
John and Jacque Jarve
Robert and Kim Kaminsky
Eileen and Ken Kaplan
Jay and Patricia Small Kellett
Don and Diana Kennedy
Bonnie and George Kennedy
Margaret Kent and
Richard Meschke
Yvonne Khouiri-Morgan and
P.D. Parker
Mark and Marilouise Kiesel
Barbara and Rob Kildow
Kathy and Rick Kimball
Masatomo Kimura
Chris and Debbie Lammers
John and Lisa Lee
David Lenhardt
Thomas and Sara Lewis
John and Nancy Lindahl
Peter and Faith Golding Linden
Dave and Chris Lucchetti
Cathy Lynn
John and Pat Maney
Richard and Marlene Mastenbrook
Ken and Dottie McGowan
Connie McHugh
J.B. McIntosh
Stephen McParland
Joe and Virginia Mello
Roger and Mimi Menard
Susan Mendelson and Jack Lutsky
Sean and Emi Miller
Peter Morris
Leanne and John Mothershead
Mr. and Mrs. Terry Mullin
Lilian and D.B. Murray
Scott Murray
Wally and Nicola Opdycke
Mary and Pete Pohlmann
Mitchell and Nina Quaranta

Kevin and Lynn Reedy
Donald and Christine Reimann
Edward Ringness
Bruce Rockowitz
Linda Rodriguez
Michael and Stella Rosendin
Mike and Liz Rudinica
John and Arlene Saffro
Gary Salter and Zoe Anne Secord
Steve Sarkissian
John D. Sauter
Jim and Maura Schumacher
Kosti and Marian Shirvanian
Barry and Frankie Sholem
Joan Davis, Jordan and Jason Sills
Stuart Sloan
Wynne and Lindy Smallwood
Alex Smith
Barry and Edie Snowbarger
Kent and Cindy Snyder
Marlene and Martin Stein
Sy and Laurie Sternberg
Mike Stinson
Deborah Svoboda
Bob and Sheila Swanson
Tad and Diann Taube
Robert and Sandra Teitsworth
Jeff and Bobbie Terai
Ken and Susan Thomas
Masao Tsukada
James and Robin Ullakko
Dell and Alyce Van Gilder
Lisa and Robert Wahbe
Joseph Walter
Deborah Webster and
Stephen Blanchard
Brian and Rachel Wells
Robert Whitfield
Paul and Karin Wick
Thomas Windler
Julie Wrigley
Michael and Gail Yanney

Our thanks and appreciation also go to the 17 generous families who have given their support and asked to remain anonymous.



Hualālai Resort



Photography for the Annual Report by Katie McCullough Simmons

A special *mahalo nui loa* goes out to our corporate in-kind donors, who have made a significant contribution to our success. In addition, we wish to recognize the following companies and individuals for their donations to our event and throughout the year.

- | | |
|-------------------------------------|---------------------------|
| Alaka'i Nalu | LuxCurious, LLC |
| Better Brands | Jim and Ann Mahoney |
| Michael Bonahan
and Ricci Racela | Andy and Kate Mecca |
| Chambers and Chambers | Barbara Rosenberg |
| Donna Chipps | Katie McCullough Simmons |
| Coconut Girls Massage | Sita Soesman |
| Leon and Joy Dreimann | Dr. John Stover |
| Flora Springs Winery | Bob and Kathleen Styer |
| Four Seasons Resort Hualalai | Sun Dot Marine Flags |
| Hokulia | Sundot Hawaii, LLC |
| Hualalai Investors, LLC | Under Armour |
| Bill and Pattie Dunn Jahnke | Lex and Hannie Van Hessen |
| Rob and Barbara Kildow | Holman Photography |

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