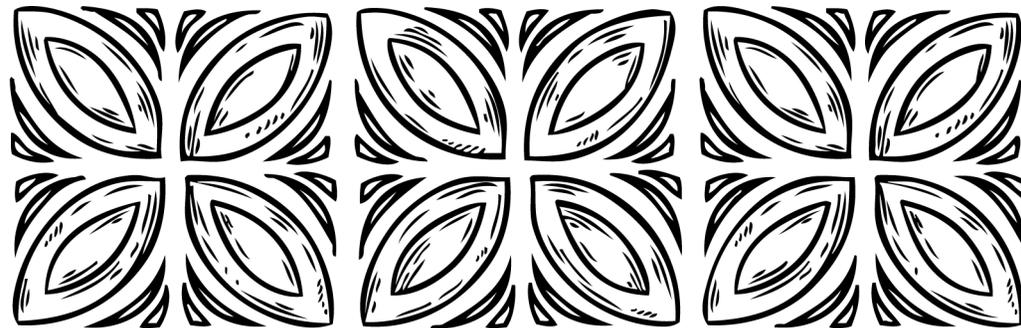


Hualālai Ohana

FOUNDATION

Annual Report

Hawaii Island, 2017





Our Mission

The Hualālai '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. Hualālai 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 Hualālai 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).





Junior Board President, Ryan Dominick (back, center) celebrating with the Honor Roll drawing winners

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Educational Learning Tools

One goal of the Foundation is to support the many different aspects of learning. Learning tools provide an opportunity to reinforce learning at home and showcase the importance of education while encouraging development.

Dolly Parton Imagination Library Books

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.

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 the related worksheets to earn tickets for the Grand Prize Drawing held at the end of summer.

Little Passports Monthly Mailer

The Little Passport Program is offered to encourage keiki interest in geography, science and world discoveries. Each monthly set features a new location (state or country) and contains an assortment of activities, tasks and souvenirs designed to match age appropriate curriculum.

Computer Award Give-a-way

Geared for student households with limited technology resources this award provides our highest need families with a computer bundle.

Selected families receive a laptop computer, 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 general life skills while preparing for college and/or a career.

Students meet once a month on scheduled public school break days. Sessions take place at Hualālai Resort and include mentorship and life skills; budget, finance, college preparedness, resume writing and mock-interviews.

Two off-property excursions take students on campus tours of Palamanui Community College, University of Hawaii at Hilo and The 'Imiloa Astronomy Center. In addition, students job shadow at Hualālai resort and perform community service.

Medical Assistance

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

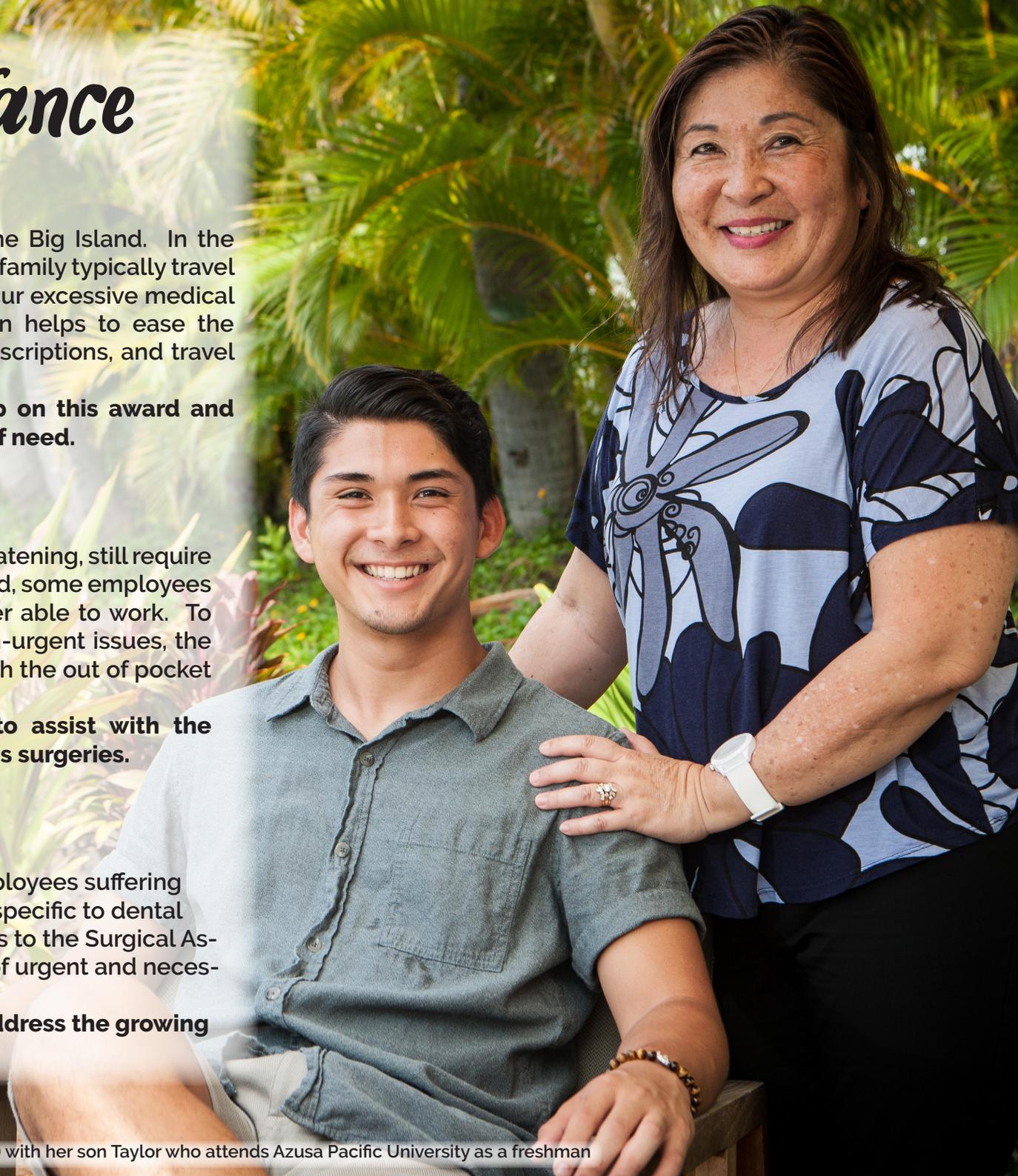
Some medical conditions, though not life-threatening, still require necessary treatment. Due to the costs involved, some employees postpone the surgery until they are no longer able to work. To encourage earlier care for these types of non-urgent issues, the Foundation established this award to help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

The Foundation awards up to \$3,000.00 to assist with the average cost of necessary routine and serious surgeries.

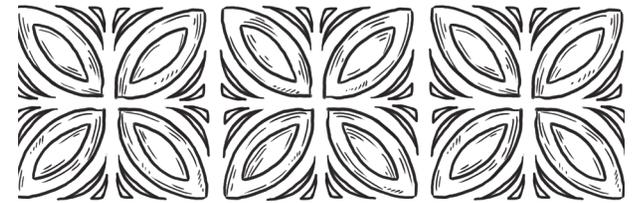
Dental Assistance Award

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 awards up to \$2,000.00 to address the growing cost of crucial dental treatments.



Scholarships and Grants



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. Award recipients and their siblings can redeem carnival tickets for school supplies and a drawing is held for a Mac Book Pro and an Ipad. **Each award recipient receives a cash award of \$150.00 for middle school and \$250.00 for high school students.**

Academic Merit Award

This award was established to **reward students achieving academic excellence for the dedication shown in their studies.**

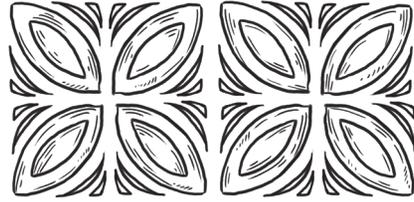
Unique to this award, students do not have to have significant financial need. To be eligible a student must maintain a cumulative GPA of at least 3.5. Awards are made at the end of each school year. **High school graduates can receive a one-time \$500.00 award, while Higher Education students are awarded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

Work For College Match

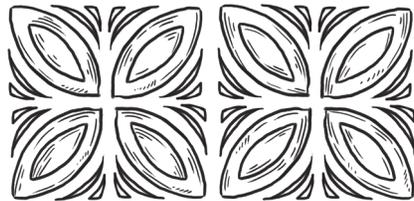
This award was established to **provide incentive to students who are in the summer workforce while attending a higher education institution.** This award rewards their hard work and dedication toward their education and is not based on need or tuition cost. **Full-time students can submit verifiable summer employment earnings for hours worked between May and September to receive a cash Match of up to \$1,500.00.** The Match earnings will be paid directly to the student's college/university and credited towards students' tuition and fees.

Educational Opportunities Award

This program supports personal, professional and vocational 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 employees' 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. **An award for on-island programs has an annual cap of \$1,000.00 per recipient while the award for off-island programs additionally supports transportation and accommodation with an annual cap of \$3,000.00.** The typical award amount is 50% of the cost to attend the program within the designated cap.



The Faces of Our 'Ohana



Statement of Activity

Program & Award Distribution

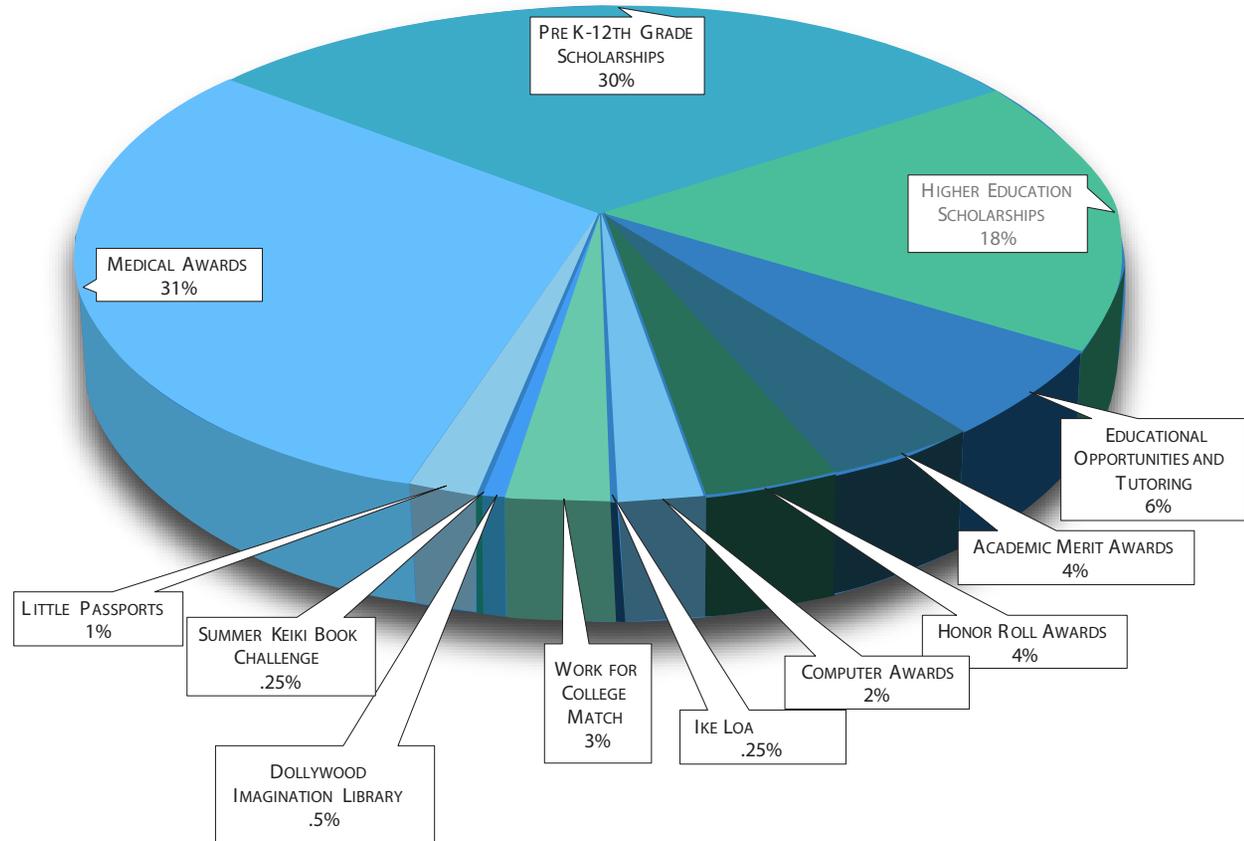
Medical Awards	\$216,235
Pre K-12th Grade Scholarships	\$215,830
Higher Education Scholarships	\$126,122
Educational Opportunities & Tutoring Awards	\$40,248
Academic Merit Awards	\$31,500
Honor Roll Awards	\$24,473
Work for College Match Awards	\$19,804
Computer Awards	\$14,995
Little Passports Program	\$12,966
Dollywood Imagination Library	\$3,165
'Ike Loa Academy	\$1,968
Summer Keiki Book Challenge	\$1,522
Total Distribution	\$708,828

Event Donations

2017 Golf & Auction Event	\$803,716
2017 Annual Appeal Contributions	\$415,545
2017 Mitsubishi Pro Am Tournament	\$196,915
Other General Donations	\$29,542
Total Event Donations	\$1,445,718

Expenses

Program Services	\$816,553
Management & General	\$138,499
Fundraising	\$77,961
Total Expense	\$1,033,013



Program Distribution = Percent of \$708,828 in total awards

2017



150 medical awards to 122 different households = \$216,000

69 Little **passports** mailer recipients "visited" 12 countries and 24 states



Average surgical award per person \$1,020.00

15 **higher** education students earned a cumulative GPA of 3.5+



111 educational scholarships

On average 130 books per month mailed to keiki under 5



Scholarship students attended 30 different higher education institutions nationwide

18 laptop computers with printers awarded to highest need households



104 Honor Roll recipients

\$19,804.00 spent to match student summer earning in the Work for College Match program



380 Summer Books read

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

With a Special Mahalo Nui Loa to

Bob & Renee Parsons and The Bob & Renee Parsons Foundation for their exceptional contributions in excess of \$460,000.00.

\$60,000.00 - \$95,000.00

William & Renee Brinkerhoff
Thomas & Rhonda Peed
Bradley & Donna Chipps
Susan Johns
Suzanne & Walter Scott Foundation

\$30,000.00 - \$45,999.00

Drs. Dennis & Mireille Gillings
Jay & Renee Haladay
Rick & Debi Justice
Edward & Susan Mueller

\$15,000.00 - \$29,999.00

Marti deBenedetti
Jerry & Adi Greenberg
Rick & Kandace Holley
Ted & Tanya Jernigan
Jim O. & MaryBee Johnston
Thomas & Sara Lewis
Jim & Cheryl Markham
Hans & Elaine Riddervold

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\$2,500.00 - \$4,999.99

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Kristin Newman
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Nancy Schmidt & Julia Rahn
Schwab Fund for Charitable Giving
Eric Schwartz
The Sloan Foundation
Julie Wrigley & Bill McDowell
The Mark Zurack & Kathy Ferguson
Foundation

\$1,000.00 - \$2,499.99

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Kevin & Lynn Reedy
Robert & Elizabeth Reniers
The Shirvanian Family Foundation
Barry & Frankie Sholem
Kent & Cindy Snyder
Taube Family Foundation
Wanderfull Adventures

Mahalo to the seven additional donors that wish to remain anonymous.

Mahalo

We wish to recognize the following companies and individuals for their generous donations to our fundraising efforts throughout 2017



Mahalo to Tek Mapon Photography the official photographer of the 2017 Foundation Events

Arbor Links
Iwalani Atkinson
BallyHack Golf Club
Blink and Brows Salon
Bonita Lao Catering
Briggs Ranch Golf Club
William & Renee Brinkerhoff
Certified Piedmontese
Lisa Chasey
Dr. Brad & Donna Chipps
Marti deBenedetti
Frank & Michele Dominick
Leon & Joy Dreimann
Four Seasons Resort Hualalai

Four Seasons Resort
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Goose's Edge Inc.
Hana Nai'a Aromatherapy
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Hawaii Forest & Trail & Kohala Zipline
Huggo's On The Rocks
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