



HUALĀLAI 'OHANA FOUNDATION

CELEBRATING
20 YEARS OF
SUPPORTING
HUALĀLAI'S
WORKFORCE AND
THEIR FAMILIES

E Holomua

*To develop
in a positive way;
to move forward*

2022 Annual Report

E Holomua:

To develop in a positive way; to move forward

2022 was a year of resilience, commitment, and momentum. Together with our donors, the Hualālai 'Ohana Foundation was able to create opportunities for greater health and well-being, to open doors to access quality education for students and families and to empower families with the tools they need to succeed.

Hualālai is a community whose shared purpose is to help the workforce of Hualālai thrive in their lives outside of work and in 2022, lives were changed in meaningful and transformative ways.

The Foundation focused on 3 areas through 2022:

MAKING FUTURES POSSIBLE

- Providing access to college education and vocational training for first gen students and lifelong learners
- Supporting PreK12 education and child literacy for Hawai'i's next generation
- Responding and evaluating impact

SEEDING SUCCESS

- Incentivizing and rewarding and academic achievement
- Transforming lives through college education
- An investment in the future

CREATING MOMENTUM

- Commitment to education, excellence, and teamwork
- Meeting students and families where they are and through their time of need
- Creating a better Hawai'i for us all

Our ambition is to leave the lives of Hualālai's families and workforce better than we found them. The Hualālai community aids this endeavor by supporting our scholars, their families, the spaces they work in, and the goals they pursue. Each gift to the Foundation is a driving force.

Philanthropy creates a momentum that leads to excellence. With the generosity of our donors, the Hualālai 'Ohana Foundation moves onward and upward.

MAHALO FOR YOUR GENEROSITY

There are not enough words to express how thankful we are for the support the 'Ohana Foundation provides for the Hualālai Community. The recognition that you provide whether it be monetary, presence or words of encouragement during the various events you create for our kids is incredibly impactful. Thank you for the continued support, motivation, and inspiration.



Our Mission

The heart of the Hualālai 'Ohana Foundation's mission is supporting the educational goals, health and well-being of Hualālai Resort's working families while providing a way for residents to contribute to the aloha spirit and enlightened sense of 'ohana within 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. Our goal is to connect our donors to meaningful opportunities to help make a difference in the lives of Hualālai's workforce.

Mahalo **APPRECIATION**

More than merely 'thank you', *mahalo* represents the gratitude, appreciation and esteem. This sincere appreciation for the aloha shown by people of Hualālai inspired our homeowners to create the Hualālai 'Ohana 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. Your 'ohana nourishes you.

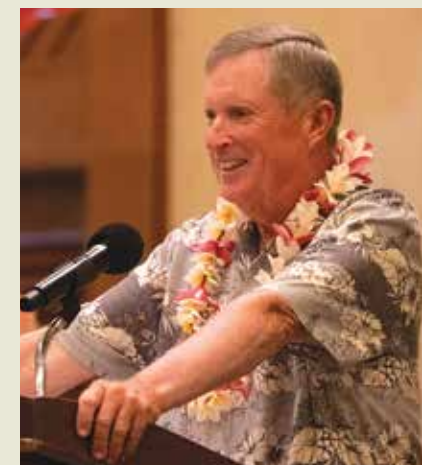
Kōkua **HELP OTHERS**

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. *Kōkua aku, kōkua mai.*

Ho'okō **COMMITMENT**

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

2022 Board of Directors



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Medical Financial Programs

*Providing access to better health and wellness
for local families, today and into the future.*

For many local families in West Hawai'i, accessing routine medical care or even urgent dental care is a challenge. Long drives to reach big-city medical support are common in rural America, where populations are too small to support specialized doctors who diagnose and treat serious and chronic health issues. But on an island, it's more complicated.

Hawai'i faces profound health and educational disparities, facing an unprecedented shortage of over 288 physicians. Hawai'i Island has a small and isolated health workforce and minimal resources to make significant changes. Aside from emergencies, access to medical care is often limited to traveling off-island to receive care, meaning that patients incur excessive medical expenses.

We believe that everyone has the right to health. Yet without additional financial support, even out of pocket costs and copays can mean the difference between delaying care or accessing the healthcare support needed to live well and thrive.

The Foundation is committed to providing life-changing support for individuals in their pursuit of better health through three different medical financial assistance awards:

DENTAL AWARD:

Providing support to help with the high cost of urgent and medically necessary dental procedures and surgeries up to \$2,000 per individual, twice each year. Examples include insurance eligible oral surgeries, braces (up to \$1,000) and extractions.

SURGICAL AWARD:

This award provides up to \$3,000 per person per year for out-of-pocket surgical costs and related travel expenses.

SERIOUS MEDICAL AWARD:

This award provides financial support for the most serious cases, directing immediate need to where it counts. The foundation has placed no cap on this award and supports employees through their time of need.

\$193,896 DIRECTED TO THE HEALTH AND
WELL-BEING OF HUALĀLAI'S WORKFORCE
FAMILIES IN 2022

ELIGIBILITY REQUIREMENTS:

- Applicants must complete a medical financial assistance application along with a treatment plan from a licensed medical provider. Applications can be found online at HualalaiOhanaFoundation.org under 'Ohana Awards & Programs.
- Employment Eligibility verification form as an independent contractor, vendor, service provider or Four Seasons hotel employee.
- Applicants must work on Hualālai Resort footprint for at least 6 months and at least 20 hours per week to qualify.
- Applicants must provide proof of insurance eligibility and payment.

AVERAGE AMOUNT
SPENT ON MEDICAL
AWARDS IN 2022:
\$1,564

AVERAGE AMOUNT
SPENT ON LIFE
THREATENING MEDICAL
AWARDS: **\$2,918**

NUMBER OF FAMILIES
HELPED: **124**



Education Programs

*Inspiring the next generation. Empowering families.
Supporting workforce development.*

‘ĀINA - ACADEMIC INCENTIVE AWARDS

- **Honor Roll Award** - \$150 cash award for 6-8th graders and \$250 for 9th-12th graders with 3.0 GPA. 91 Honor Roll Awards given in 2022.
- **Academic Merit Award** - \$500 for incoming college freshmen, \$2,500 for continuing sophomores, juniors or seniors with a 3.5 GPA. 22 Academic Merit Awards given in 2022.
- **Work for College Match** - \$1,500 summer employment earnings match toward your college tuition. 25 Work for College Match awards given in 2022.

LEAP – LEARNING ENRICHMENT AWARDS

- **Lifelong Learning Award** - \$1,000 to \$3,000 to support personal and professional development coursework, tutoring, vocational training certificate programs, art classes, summer classes, financial literacy programs and other learning enrichment support. 44 Lifelong Learning awards given in 2022.
- **Technology Award** - \$500 to \$800 for purchase of a computer, router or printer to support learning. 17 Technology awards given in 2022.

- **Keiki Literacy & Learning Award** - \$250 per year for subscription-based learning programs including Dolly Parton Imagination Library, Lovevery, Kiwi Co., Bumo Brain, Tinker & Co. for children from birth to age 12. 140 Keiki Literacy Awards given in 2022.
- **Summer Camp at Kalaemanō** – a two-week ‘aina-based learning camp for children of Hualālai Resort’s workforce in Grades 1-5 from 8am to 3pm daily in the summer. 40 children sponsored in 2022 (\$1,500 per child).

SCHOLARSHIPS

- **PreK-12 Scholarships** - needs based scholarships to private schools for eligible families. Preschool scholarships up to \$4,000, Kindergarten to Grade 5 up to \$8,000, Grade 6-12 up to \$9,000. 83 PreK12 scholarships awarded in 2022.
- **Higher Education Scholarships** - needs based scholarships up to \$15,000. 50 higher education scholarships awarded in 2022.
- **Hualālai Scholars** – a competitive scholarship designed for first generation college students studying at schools in Hawai‘i up to \$10,000 per year. 3 Hualālai Scholars awards given in 2022.



Financials

Consolidated Statement

Your partnership made it possible to improve the quality of life for all Hualālai employees, with every dollar given going to benefit the Hualālai workforce 'ohana. Together, we ensure that future generations of Hawai'i's children can pursue their dreams of academic achievement. Your donations teach keiki to reach for the stars through early child education, paving the way for a lifelong love of learning. Your gifts support workforce development here in Hawai'i by providing skills training and development opportunities for their future. Thank you for giving and supporting 763 individuals and families in 2022.

PROGRAM SERVICES & AWARDS DISTRIBUTED

PreK-12th Grade Scholarships.....	\$ 261,870
Medical Financial Assistance Awards	\$ 193,896
Higher Education Scholarships... ..	\$ 290,000
Technology for Education Award ..	\$ 9,100
Academic Merit Awards	\$ 47,000
Honor Roll Awards.....	\$ 31,648
Work for College Match	\$ 35,385
Lifelong Learning & Vocational Training Awards.....	\$ 69,967
Child Literacy Initiatives:.....	\$ 17,695
Little Passports	
Travel Subscriptions for Kids.....	\$ 9,344
Dolly Parton Imagination Library	
Books for Kids	\$ 1,287
Keiki Children's Book Fair	\$ 17,695
Keiki Summer Camp at Kalaemanō	\$ 63,746
Total Program Services & Awards Distributed:.....	\$1,048,633

2022 OPERATING REVENUE & SUPPORT

Annual Appeal Contributions ...	\$ 1,171,541
Special Events	\$ 401,881
• 2022 Mitsubishi ProAm Tournament	\$ 212,600
• Hualālai Rounders Classic... ..	\$ 12,270
• Brendan's 100 Holes.....	\$ 168,209
• Hana Hou Sale & Other	\$ 8,802
Total Support & Revenue	\$1,573,422

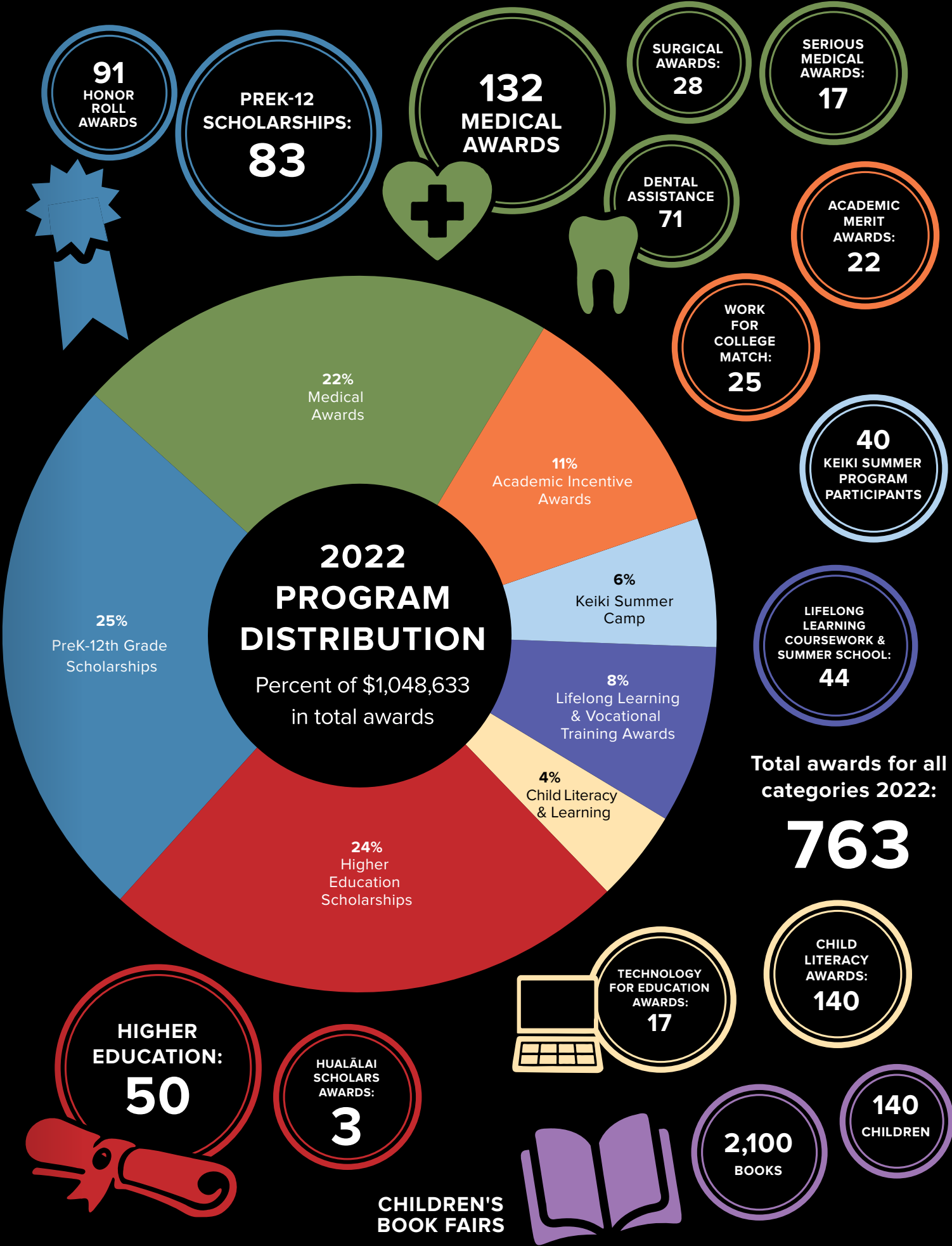
2022 OPERATING EXPENSES

Supporting Services:	
Administrative, management & fiscal services:.....	\$ 156,998
Special Events Expense.....	\$ 1,318
Development & communications:	\$ 5,223
Total Supporting Services:.....	\$ 163,539

Fundraising:	
Fair Market Value cost of tickets paid to ProAm:	\$ 101,494
Total Fundraising:.....	\$ 101,494

Total Operating Expenses: \$ 265,033

Financial information for the year ended December 31, 2022. To review the complete audited financials used for this data, please contact our office.



Special Donors

The Hualālai 'Ohana Foundation would like to thank the following donors for their transformative support over the past year.

Mahalo nui loa

\$400,000+

The Bob & Renee Parsons Foundation

\$100,000 to \$399,999

*Hualālai Investors
& Hualālai Realty*

Edward & Susan Mueller

\$50,000 to \$100,000

Rick Kimball

\$25,000 - \$49,999

*Bochnowski Family
Foundation*

*Marti deBenedetti
Thomas & Rhonda Peed*

*Bradley Chipps & Kathy Kehoe
Bob & Stella Zamarripa*

Our appreciation goes to the 2 generous families who have given their support for the 2022 year and who wish to remain anonymous.

\$10,000 - \$24,999

Eve Bernstein & Alex Gersznowicz
Mem Dryan Bernstein
Bertie Bialek Elliott
Tom & Marj Callinan
Coit Family Foundation
Michael & Susan Dell Foundation
Mike & Linda Fazio
Patrick & Marilyn Fitzgerald
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Thomas Osborne Stair & Lucy Caldwell-Stair
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David Strohm & Kathy Reavis
Jim & Mimi Weinstein Foundation
Beatrice & Anthony Welters
Julie Wrigley & Bill McDowell

\$5,000 - \$9,999

Beecher & Robin Abeles Foundation
Tamotsu & Sumie Adachi
Tiffany's Art Agency
Nate & Kim Anderson
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Kathy Behrens Wilsey
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Ken & Pennie Meany
D.B. & Lilian Murray
Wally & Pat O'Dell
Lou & Marci Palatella
Jon* & Judy Runstad
Robert & Terry Samuel
Spencer 'Ohana
Taube Family Foundation

\$2,500 - \$4,999

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Stephen Blanchard & Debbie Webster
Scott & Renee Bowie
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Alex Earls
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Tom Fall
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Laura Goo
Hank & Judy Hummelt
Stephen Bennett & Marsha Jordan

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David & Christine Lucchetti
Lynn Williams & Mike Croft
Elliot & Sharon Maluth

James & Lisa O'Neal
Jeff Probst & Lisa Ann Russell
Robert & Elizabeth Reniers
Joe & Teresa Schneider
Sloan Foundation

\$1,000 - \$2,499

Tyson & Rebecca Cichos
Susan & Gary Dempze
Susan & Richard Fade
Elliott & Suzanne Felson
Richard & Traci Goldman
Grindon Charitable Fund

David & Lori Haley
Frank & MaryEllen Herringer
Danielle Limp
Matsuri Foundation U.S.
Miller Family Foundation

Brendan Mullinix
Mary Murfey
John & Patricia Nickoll
Lynne & Perry Olson
Edward & Cathy O'Neill
The Roberts Foundation

Bruce Rockowitz
Barry & Frankie Sholem
Kent & Cindy Snyder
Thomas & Diane Windler

* Posthumously: In memory of the generosity of our donors whose contributions made in 2022 will live on through the Hualālai community and 'ohana for many years to come. Our hearts and deepest condolences go out to surviving loved ones.

Education Testimonial

Inspiring Futures; Supporting Student Success

Reygenald's Story

Celeste Ines has worked as a housekeeper at the Four Seasons Hualālai for almost 20 years. When she found out that her son could apply for a scholarship through the 'Ohana Foundation, she encouraged him to apply. Thanks to your support, her son Reygenald was able to access scholarship support and pursue his dream of becoming the first in his family's history to pursue higher education. Reygenald is currently pursuing a bachelor's and master's degree in public health at Johns Hopkins University with the support made possible through your donations to Hualālai 'Ohana Foundation.

Reygenald is quickly becoming an asset and leader in his community. He recently completed a semester abroad in South Korea and took the Medical College Admission Test (MCAT). In his spare time, Reygenald is an active participant in student life, participating in Hopkins Sport Taekwondo, Health Leads, hospital scribing, and alumni relations programs.

Driven by public health challenges witnessed firsthand in Hawai'i and now working in underserved communities in Baltimore, Reygenald aspires to ensure universal access to healthcare. *"All in all, I strive to make the future of not only Hawai'i but the world to be equal, more productive, and affordable especially when it comes to healthcare—a commodity that should be made readily available for every person in the world."*

Your support continues to allow students like Reygenald the financial freedom to contemplate solutions to the challenges facing our world today. To that effect, your generosity has the potential to not only change the lives of our students, but of their families, children, and those they will help and positively affect in their lifetimes.



Medical Testimonial

Providing Support in Time of Need
Iwalani Atkinson

Concierge Iwalani Atkinson has worked as part of the Hualālai 'ohana since 1999. Though she had always been aware of the Foundation, she did not become familiar with its programs until her son decided to continue his education at Pacific Oregon University as a student athlete and she sought scholarship support.

"Being the sole financial supporter of my son, I knew I was going to need help so I reached out."

In 2021, Iwalani faced a sudden and debilitating health crisis. She was diagnosed with an autoimmune disease that left her bed-ridden for months.

"I reached out to the 'Ohana Foundation out of despair. Honestly, I didn't even know if they could help me with any of it. I ended up calling and within five minutes, I felt that soothing, healing feeling that Hualālai brings."



Iwalani applied for a Medical Assistance Award through the Hualālai 'Ohana Foundation and was able to access the resources she needed.

"I wasn't going to be alone on my medical journey. I wasn't going to be alone with my son in college and not being able to work. And that is where I saw the truest potential of the Foundation, which to me means the highest level of aloha you can give someone, to be supported."

Thanks to your gifts, Iwalani was able to make a full recovery and return to her role as Four Seasons Concierge, spreading aloha to all she encounters.



"I want to say the biggest mahalo to all of the donors. You have changed my life and my son's life. You've saved my life."



Hualālai Scholars:

A Competitive Scholarship for First Generation Students

In 2022, the Hualālai 'Ohana Foundation launched the inaugural cohort of Hualālai Scholars. This program is seeding more opportunities for local kids to attend in-state universities and vocational training programs right here in Hawai'i where their families are. The Hualālai 'Ohana Scholars program offers a \$10,000 scholarship for first generation college students attending a school in Hawai'i. Applicants are strong leaders with volunteer experience in the community and high performers with good grades and a minimum GPA of 3.0.

In 2022, 3 students received the Hualālai Scholars Award. A scholarship brunch was held at 'Ulu Restaurant with members of HOF's Education Committee, the Hualālai Scholars and their families. Each scholar was gifted with a small gold fortune cookie memento box with a pearl necklace inside and the message *"The world is your oyster, it's up to you to find the pearl."*

"Throughout the pandemic, I realized how few health professionals we have in Hawai'i, and I want to be part of this world. I want to use my education to show that with a lot of hard work and determination, anything is possible."
- Keilana Crane, 2022 Hualālai Scholar & daughter of Ed Crane, Beach Tree Bartender



"With the Knowledge I will gain from pursuing higher education in Hawai'i, I believe I can help contribute to aiding our community towards the direction of greater health. This award will grant me the opportunity to join the workforce of diligent health care workers and better my understanding of the community around me."
- Sabrina Lelm, daughter of Maribeth Lelm, Golf Operations housekeeper



"My goal is to either major in Veterinary Technology or Marine Biology. I would be the first person in my family to finish college and I take pride in wanting to reach that goal. Without the help from Hualālai 'Ohana Foundation I might not have continued my higher education goals."
- Gabriella Gutierrez, daughter of Alfonso Gutierrez, Landscaping Section Tender



PGA Championship Tour:

Pro-Am Supports
Hawai'i Island Families:
January 18-19, 2022

Each year, the Mitsubishi Electric Championship graciously extends a number of one-day Pro-Am spots for Hualālai Club Members' participation. A portion of the proceeds support the programs of the Hualālai 'Ohana Foundation, helping to create access to education and necessary



medical aid for employees and their families. Members enjoy the opportunity to play with legendary professionals in support of a great cause.

Participation includes several activities during the week of the Championship including a welcome reception and draw party for contestant and spouse, breakfast and lunch, a round of golf with tee gift package, attendance at the ProAm Dinner. Since 2010, the ProAm has raised \$2,282,700 in support of Hualālai's workforce and their families, directing scholarship funding, medical financial assistance, child literacy initiatives and vocational training resources to over 8,000 individuals and families.

Hualālai Investors & Hualālai Realty Giving Back

In 2022, the Hualālai 'Ohana Foundation received a \$100,000 gift from Hualālai Investors & Hualālai Realty in recognition of the impact the Foundation and its donors have made on the well-being of local families of Hualālai's workforce.

"This gift marks an investment in Hualālai's most important asset - the employees who make it what it is. We are honored to have a role in helping families to thrive, in upskilling and reskilling the workforce and in supporting those who create lasting memories for our guests and residents."

- Rob Kildow

Hualālai Realty



Keiki Book Fair

In December 2022, donors to the Hualālai 'Ohana Foundation and the Education Committee helped organize a book fair for Hualālai Resort families. The book fair welcomed 140 children for a grab and go event with their parents in the parking lot of the 'Ohana Foundation offices from 9 to 11am.

The Hualālai Fire Brigade brought fire hats, a big red firetruck, a 4x4 fire squad quad and real life fire hoses for the children to see. Children loved seeing a firetruck up close and personal and having the opportunity to sit in the driver's seat of the firetruck, pick up a Captain's fire hat and meet Elmo in person. Children and families danced to keiki favorite Disney tunes along with volunteers and staff of the Hualālai 'Ohana Foundation.

Each child received a large paper bag filled with 15-20 age level books from Scholastic Books. Book bags were heavy so thankfully happy moms and dads helped to carry them for their children while they picked out their stuffed animal dragons at the Cookies & Dragons treat table. To add to the fun, The Roberts Foundation generously donated in-kind character-themed bendable booklight clips including a dinosaur, dog, bookworm, owl, and robot. Children also received a large sugar cookie with the face of Clifford The Big Red Dog, a Scholastic Books mascot, on it.



Our Programs:

‘ĀINA – ACADEMIC INCENTIVE AWARDS

- Honor Roll Award (\$150 cash award for 6-8th graders and \$250 for 9th-12th graders)
- Academic Merit Award (\$500 for incoming college freshmen, \$2,500 for continuing students)
- Work for College Match (\$1,500 summer earnings match)

LEAP – LEARNING ENRICHMENT AWARDS

- Lifelong Learning Award (\$1,000 to \$3,000 in lifelong learning support)
- Technology Award (\$500 to \$800 for purchase of a computer, router or printer)
- Keiki Literacy & Learning Award (\$250 per year for subscription-based learning programs)

SCHOLARSHIPS

- PreK-12 Scholarships (needs based – Preschool up to \$4k, K-5 up to \$8k, 6-12 up to \$9k)
- Higher Education Scholarships (needs based up to \$15k)
- Hualālai Scholars (\$10k for first generation college students studying at schools in Hawai‘i)

SUMMER ENRICHMENT CAMP

- Hālau Lamakū at Kalaemanō – 2 week ‘āina-based learning camp for keiki Grades 1-5 (\$1500 per child)

MEDICAL FINANCIAL ASSISTANCE AWARD

- Dental assistance (up to \$2k, twice each year)
- Surgical assistance (up to \$3k)
- Serious medical assistance
- Kāko‘o Award for hardship (employees with 5+ years of service – case by case award)

MINIMUM ELIGIBILITY REQUIREMENTS:

- Complete application with all required documentation submitted and signed by applicant
- Employee eligibility verification form
- Effective March 1, 2023 – 6 months of service to Hualālai Resort as an independent contractor, vendor, service provider or hotel employee
- At least 20 hours a week worked.
- Household combined income must be less than \$195k

Hualālai ‘Ohana Foundation was established in 2002 as a 501(c)3 nonprofit organization to provide a vehicle to allow residents the opportunity to contribute to the well-being and aloha spirit of our uniquely blessed community.

HUALĀLAI ‘OHANA FOUNDATION

P.O. Box 5227 Kailua-Kona, HI 96745

808-325-8177 | www.HualalaiOhanaFoundation.org

Nico Leilani Verissimo, Executive Director | Sonnaly Lee, Programs Manager
Ashley LaPan, Administrative Assistant

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