



HUALALAI  
'OHANA  
FOUNDATION

# 2018 ANNUAL REPORT



Aloha Hualalai 'Ohana Foundation,

*Mahalo!*



As my time at Wheaton College is slowing coming to an end, I hope to make the most of my final year as an undergraduate student. My experience would not have been the same if it wasn't for the Hualalai 'Ohana Foundation supporting me throughout my academic journey. I am currently a double major in Psychology and Theatre, with a focus in Acting and Directing. Wheaton College provides many academic and extracurricular activities for me to explore and thrive within my areas of study. This past year I have won Lead Residential Advisor of the Month, played Nick Bottom in A Midsummers Night's Dream, got accepted into an all-female acapella group called the Wheaton Whims, performed Ukulele in Much Ado about Nothing, became President of an inclusive theatre club on-campus, and much more.

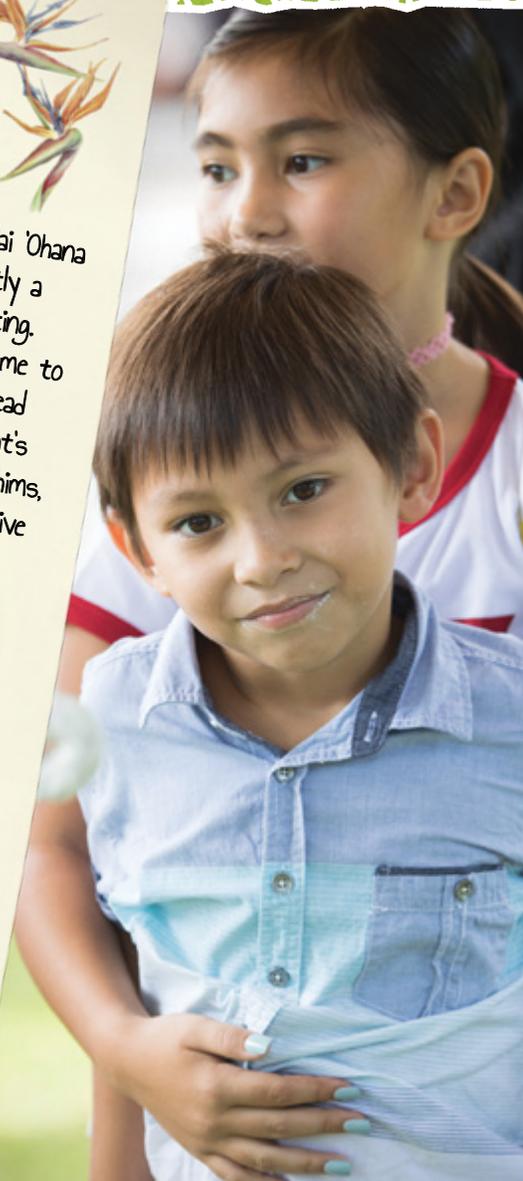
Without the assistance of scholarships, I would not be where I am today. The Hualalai 'Ohana Foundation has created an opportunity for me to further my education and passions, without having to stress and struggle with tuition payments. However, I still continue to work two jobs in order to fund travel to school, supplies, and off-campus adventures. Through the support of the Hualalai 'Ohana Foundation my path of education and success has been paved.



Mahalo,

Sarah Rouse

Daughter of Ed Rouse,  
Culinary Department



# 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.

## Mahalo nui loa!

Dear 'Ohana Foundation,

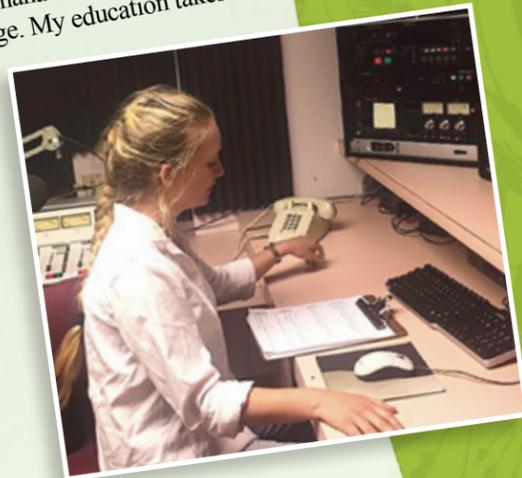
This letter will be the last I write to you while I am in college. I cannot thank you enough for your continued support throughout my academic career. My accomplishments thus far are a testament to your generosity.

As I wind down on my time at Mount Holyoke, I look forward to pursuing a career in public radio. This summer, I'll return to Honolulu to work again with Hawai'i Public Radio. I'm excited to bring my experience to the station as a production intern on the daily live news show The Conversation.

I am wrapping up my major in International Relations. My major has equipped me with the necessary vocabulary to engage with the world and explore it to its fullest extent. Before I return to campus for my final semester, I will have the opportunity to travel outside the United States for the first time. I received the Mount Holyoke Karen Snyder Sullivan Travel Award, granted to one student a year for an independent travel itinerary of the students' choice. I will spend two weeks in Tasmania, before crossing two continents to reach Portugal. Additionally, I will be conducting an independent project investigating how sound contributes to one's sense of place, with case studies in Hawai'i, Tasmania and Portugal.

I hope this letter captures the full extent of what the 'Ohana Foundation's financial support has allowed me to do in my time in college. My education takes place not just in the classroom, but across the globe. I have the confidence to explore new territory, both academically and geographically, knowing that I have the support of the community behind me. Once again, I profoundly thank you, and I look forward to returning home and bringing a little of the world with me.

Sincerely,  
Savannah Harriman-Pote  
Daughter of Katherine Harriman, Executive Office



**20**  
mainland college  
students attended  
**17**  
different campuses

**14**  
households participated in  
the Educational Opportunities  
Award for Financial Education  
Courses

# 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).



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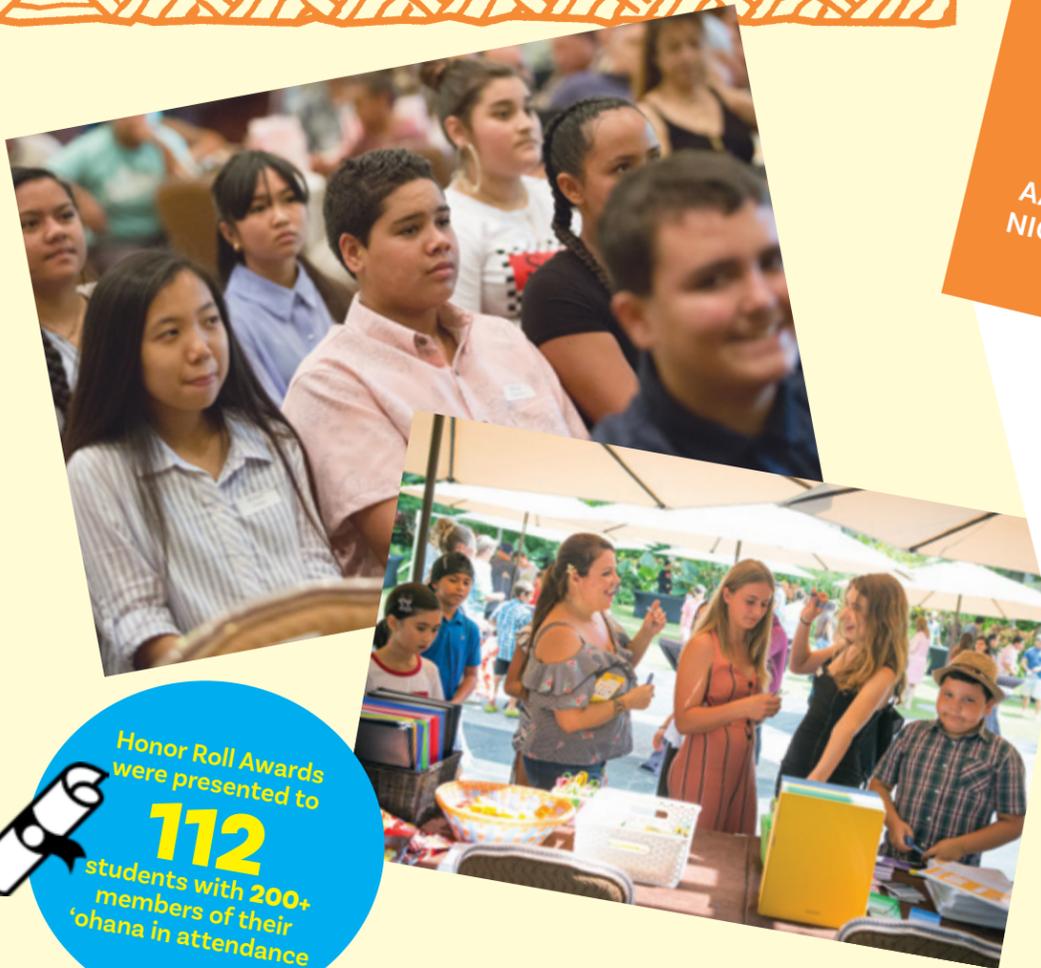
AARON FRIEDMAN &  
NICHOLAS DOMINICK  
Directors

## Foundation Office Staff

Cara Price  
Executive Director

Erlinda Borges  
Program Coordinator

Kristi Sekiya  
Administrative Assistant



Honor Roll Awards  
were presented to

112

students with 200+  
members of their  
'ohana in attendance

# 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.

455  
Summer Books were  
read by 1-8th graders

- ▶ DOLLY PARTON IMAGINATION LIBRARY BOOKS
- ▶ KEIKI SUMMER BOOK CHALLENGE
- ▶ LITTLE PASSPORTS MONTHLY MAILER
- ▶ LAPTOP COMPUTER & PRINTER AWARD GIVE-A-WAY
- ▶ 'IKE LOA ACADEMY
- ▶ SCHOLARSHIPS & GRANTS
- ▶ PRE K - 12TH GRADE SCHOLARSHIP AWARD
- ▶ HIGHER EDUCATION SCHOLARSHIP AWARD
- ▶ HONOR ROLL AWARD & CEREMONY
- ▶ ACADEMIC MERIT AWARD
- ▶ WORK FOR COLLEGE MATCH
- ▶ EDUCATIONAL OPPORTUNITIES AWARD

# Medical Awards

## 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.**

Average amount spent  
on Surgical Awards was  
**\$1,353**

## 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.**

180  
Medical Awards were  
granted to 137  
different households  
totaling  
**\$199,365**

## 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.**

99  
Dental Surgery Awards  
were granted

Dearest Hualalāi 'Ohana Foundation,  
 Thank you all so much for being such a blessing to us!  
 We are so grateful for our new laptop and printer!  
 We're so touched by your thoughtfulness! We also want  
 to thank you for blessing us with the Surgical Award.  
 This help is amazing! We really can't thank you enough!

With much love,  
 Tyson, Kimi & Josiah Ka'auia,  
 Residents Beach House



## Thank you

The role of the Hualalāi 'Ohana Foundation has been instrumental with my girls attending Corvid Academy's summer programs. This wouldn't have been a thought without having the Foundation Educational Opportunities Award program. There really aren't enough words to express how thank-ful and humbling it is to have these financial aid programs offered. With the help of the HOF, my family will not only have peace-of-mind for Kitana's much needed structured education during the summer and Mileena's love for school, but peace-of-mind for financial reasons. Working full-time, running a household, home, bills, pets, everything can add-up quick. Having the financial assistance to have my girls attend this summer program is something we will be forever grateful for.

My family and I love the Hualalāi 'Ohana Foundation!

Thank you,  
 Jasmine Kahumoku,  
 Retail Department



Ohana  
 Foundation  
 Honor Roll  
 Ceremony

**25** **A+**  
 Higher Education  
 students achieved a  
 cumulative  
**3.5 GPA**  
 or higher

# CONSOLIDATED STATEMENT OF ACTIVITY

## Award Distribution

Pre K - 12th Grade Scholarships	\$234,032
Medical Awards	\$199,365
Higher Education Scholarships	\$117,833
Academic Merit Awards	\$40,500
Educational Opportunities & Tutoring Awards	\$35,861
Work for College Match	\$34,868
Honor Roll Awards	\$25,618
Computer Give-a-way Award	\$14,373
Little Passports Mailer	\$9,570
Ike Loa Academy	\$3,087
Dolly Parton Imagination Library	\$3,072
Keiki Summer Book Challenge	\$2,229
<b>Total Award Distribution</b>	<b>\$720,408</b>

## Support & Revenue

Annual Appeal Contributions	\$455,672
The Wacky Golf Outing	\$245,806
2018 Mitsubishi Pro Am Tournament	\$189,600
Sita Soesman Art Showcase	\$45,531
Brendan Moynahan's 100 Holes Golf	\$12,200
Junior Board Fundraisers	\$9,095
Other General Donations	\$8,850
<b>Total Support &amp; Revenue</b>	<b>\$966,754</b>

## Expenses

Program Services	\$852,979
Management General	\$93,932
Fundraising	\$73,672
<b>Total Expenses</b>	<b>\$1,020,583</b>

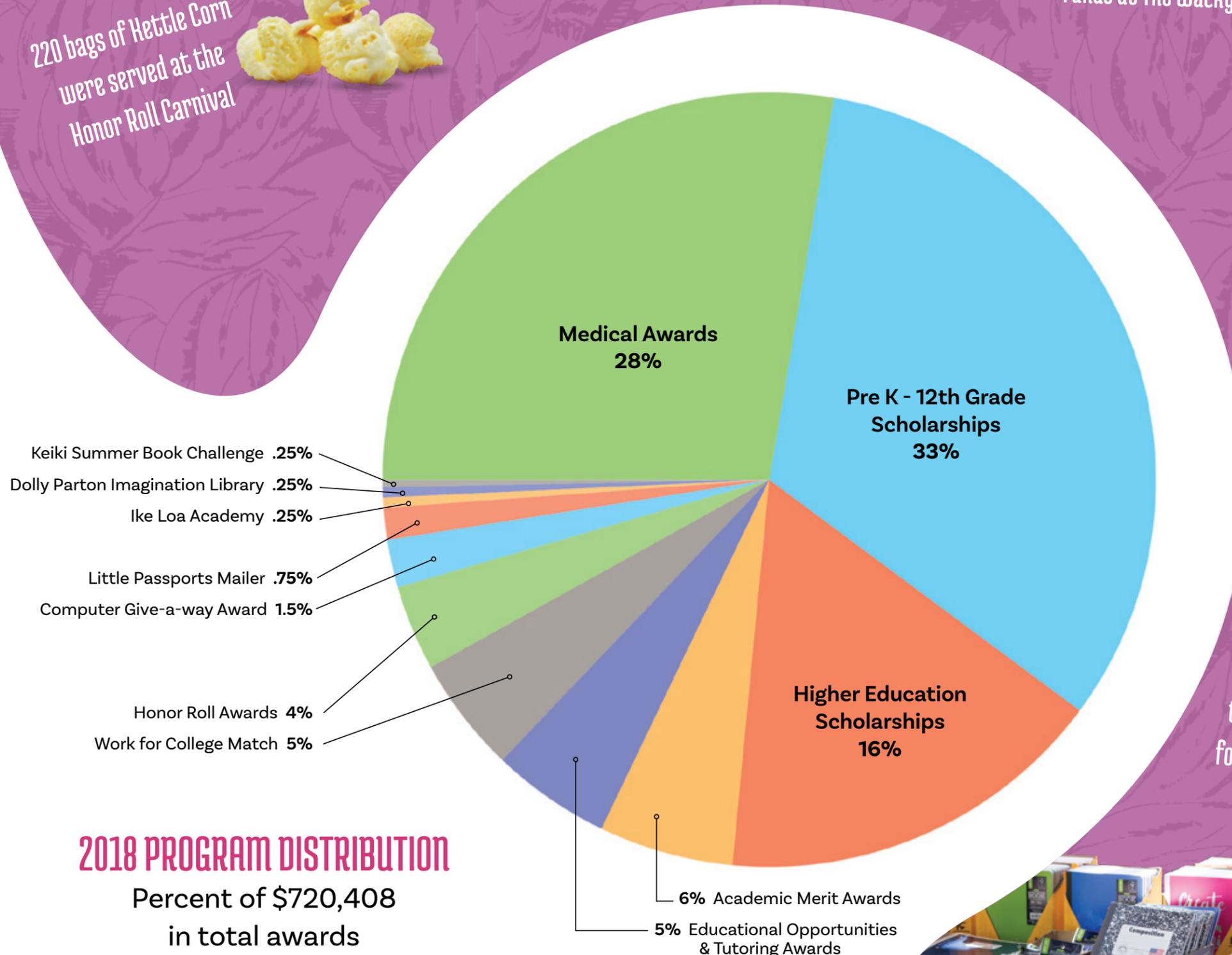
Financial information for the year ended December 31, 2018. Independent Auditor: Alex J. Smith, Certified Public Accountant. To review the complete 2018 Hualālai 'Ohana Foundation audited financials used for this data, please contact our office.

# JUST FOR FUN...

220 bags of Kettle Corn were served at the Honor Roll Carnival



159 golf balls were hit at HOF President, Ed Mueller to raise funds at The Wacky Golf Outing



8,960 carnival prize tickets were redeemed for school supplies at the Honor Roll Carnival



Mahalo nui  
loa to the  
following  
families  
who have  
contributed  
through a  
combination  
of annual  
giving  
and event  
participation.

**A special Mahalo Piha to  
Bob & Renee Parsons and the  
Bob & Renee Parsons Foundation  
for their generous contributions  
in excess of \$155,000!**

**\$40,000.00 - \$59,999.99**

Susan Johns  
Tom & Rhonda Peed  
Ed & Susan Mueller

**\$20,000.00 - \$39,999.99**

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**\$10,000.00 - \$19,999.99**

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Jon & Judy Runstad

**\$5,000.00 - \$9,999.99**

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**\$1,000.00 - \$2,499.99**

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Scott Murray  
The Sloan Foundation  
Allen & Susan Tochihara

**Thank you to the 9 additional donors  
who wish to remain anonymous.**

We wish to recognize the following companies and individuals for their generous donations toward our 2018 fundraising efforts

## 2018 Wacky Golf Outing Hole Sponsors



*Hualālai*

Anna Pacheco Photography  
Certified Piedmontese  
Donna Chipps  
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Hualālai Realty  
Susan Johns

Kohanaiki Golf and Ocean Club  
Mauna Kea Beach Hotel  
Mauna Lani Bay Hotel & Bungalows  
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Edward & Susan Mueller  
D.B & Lilian Murray  
Bob & Renee Parsons  
99, Five & 88 Parsons  
Tom & Rhonda Peed  
Patrick, Sita & Marley Soesman  
Turtle Bay Resort

**WACKY GOLF OUTING  
WALL OF FAME 2018  
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Dr. Jim & Marybee Johnston  
Rob & Barbara Kildow  
Gene, Maureen, Greg & Doug Kim  
Edward & Susan Mueller  
D.B & Lilian Murray  
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Hualālai 'Ohana Foundation

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Cara Price, Executive Director | [Foundation.admin@gmail.com](mailto:Foundation.admin@gmail.com)