

# HUALĀLAI 'OHANA FOUNDATION



2019 *Annual Report*



# Our Mission

The Hualālai ‘Ohana Foundation strives to support the educational goals and exceptional medical needs of Hualālai Resort employee families while providing a vehicle to allow residents opportunities to contribute to the well-being and aloha spirit of our uniquely blessed community.

Known widely for its rugged beauty, the ahupua‘a of Ka‘ūpūlehu is considered one of the most historic and desirable areas along the Kohala Coast. It’s also home to the Hualālai ‘Ohana Foundation, sharing space with the Four Seasons Resort Hualālai and surrounded by a community of over 350 Hualālai resident households, providing services to residents, guests, and over 1,300 jobs to kama‘āina families.

For many, Hualālai is a winter paradise or summer vacation hub. What many don’t realize is what makes Hualālai so special; the people and families that live and work to maintain a world-class community. In order to sustain this unique culture, Hualālai ‘Ohana Foundation

provides resources for local families, as well as support for young adults moving into post-secondary schooling and then into the workforce.

Because of your generosity, toddlers have entered elementary schools with a love of reading and learning. Children have thrived in their Hawai‘i Island education and begun their adult lives in college. Adults have continued to expand their knowledge and grow their abilities. Precious lives have been saved as illness and injury were overcome. Because of you, our ‘ohana has not only grown, but thrived in the face of adversity.

*I can't believe that I've had such kind people who really believe in and support me. Thank you so very much for all of your kindness, from the bottom of my heart.*

— Anna



# 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.

## 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 *lōkahi* (unity).





# Educational Tools

KEIKI & YOUTH DEVELOPMENT, COLLEGE & CAREER READINESS,  
EMPLOYEE LIFELONG LEARNING & SKILLS TRAINING

## Inspiring Hualālai's Future

### SCHOLARSHIPS GIVE STUDENTS A NEW BEGINNING ...

The Hualālai 'Ohana Foundation is proud to host four different types of college and career readiness scholarship awards for high school seniors looking to attend post-secondary education. These students often learn, grow, develop, and return to Hawai'i Island and give back to their hometown by joining the workforce. Our local keiki deserve to have a good future and our goal is to help them thrive, making it easy for them to access high-quality educational opportunities.

Hualālai 'Ohana Foundation's scholarship program helps students who may not have otherwise had the opportunity to attend college. Each year, many of our scholarship recipients are first generation college students; the first in their family to attend university.

There are seven keiki and youth development programs that help inspire a love for reading, travel and learning as well as inspire children to do well in school through academic merit and honor roll programs designed to motivate.

## Supporting bright minds

Though the primary goal of the Foundation's scholarships is to fund thriving students, the scholarships also impact the lives of young community members far beyond the classroom.



Above and beyond the financial support that the scholarships provide, they also serve as a reminder to students that they have the community's support as they enter this next stage in their life.

Our students come back with so much knowledge on how to build a thriving economy that is resilient and such a deep passion for this place they grew up in that they can make a really significant contribution.

As students work hard, receive scholarships, and make their way into the world of higher education, our Hualālai 'Ohana Foundation donors are opening doors for students. Every day we see the way that strategically funding our local students can make a difference in the lives of many.

*I also would like to thank you for helping pay for both me and my brother's tuition over the years. It has been such a great big help to my parents. I couldn't be happier with my experiences from K-12 grade and I'm so thankful you guys were by my side from start to finish.*

– Bennett

*My mom has recently retired from the Four Seasons but worked there for almost 20 years. I am 23 with a Master's Degree in Health Education and for much of my life the Four Seasons has been a source of income for my family and I am grateful for that. The 'Ohana Foundation has helped fund my education from the beginning. In high school, my mom gave birth to my brother Makani who faced a series of severe medical complications that you generously assisted in giving us 7 months of beautiful life with him. This fall I present my research to conclude my education, thank you so much for the financial assistance over the years to help me be where I am today. I hope to give back to my community as much as you and others have given to me. 'Ohana Foundation scholarships and work experience left me debt-free upon graduation.*

– Alexandria

*Thank you for all the programs and assistance you offer in support of all the employees and families. I am a believer in the value of being a lifelong learner, my teammates in the bakeshop have heard me quote the importance of continuing education. With all the changes that have been taking place around the world, learning new skills is a must. By getting certified through the Security Guard Training program at Hawai'i Community College, I'm expanding my skills for the future.*

– Edward

*I want to become a neurologist. Every day I wake up with a goal in my mind. I contemplate all the possible ways I can achieve my goal successfully, and I will not stop until it is reached.*

– Trinity

*Education is the key to growth and improvement. I am encouraged and excited to grow, educate myself and learn new skills.*

– Nicole







*Your generosity, warmth, and unconditional support couldn't have come at a better time. To lighten my financial responsibilities, the Hualālai 'Ohana Foundation stepped in. Please know that you have given me inspiration and faith in humanity from your kindness.*

*Today I am cancer free, continue with therapy and recognize that you were a part of my life saving struggle. Mahalo for your thoughtful words and contributions. You are Champions!*

*- Robert*

*My family and I would like to express our heartfelt thanks and gratitude to HOF for helping us with my surgical procedures in March 2019. These were a very great help to me and my family financially and morally. Without the help of these generous donors, our life would have been in misery and left in debt for the settlement of my hospital bills. Thank you to the whole Foundation and may God continue to shower his blessing on each one of them so they may continue doing their mission of helping those in need.*

*- Leo*

# Medical Awards

## Health & Community Well-Being – Medical Financial Assistance for Our Families...

### SERIOUS ILLNESS AWARD

Access to quality healthcare can be limited on Hawai'i Island. In the event of a serious illness, employees and their family often travel off-island to receive care, incurring excessive medical expenses. When this occurs, the Foundation helps 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 \$3000 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 \$2000 to address the growing cost of crucial dental treatments.

MEDICAL AWARDS  
WERE GRANTED TO  
**211** HOUSEHOLDS  
TOTALING **\$205,739**  
IN SUPPORT.



THE AVERAGE  
AMOUNT SPENT ON  
SURGICAL AWARDS  
WAS **\$973.**



# Consolidated Statement of Activity

Hualālai ‘Ohana Foundation strives to improve the quality of life for all Hualālai employees, with every dollar given going to benefit the Hualālai ‘Ohana. Your commitment lets new nurses graduate without debt, making it feasible for them to practice in their community. Your donations teach keiki to reach for the stars through early child education, paving the way for a lifelong love of learning. Your gifts recruit future employees by providing skills training and development opportunities to improve access. Together, you and the Hualālai ‘Ohana Foundation work toward an even better place for our families to live, grow and learn.

## AWARD DISTRIBUTION

Pre-K12th Grade Scholarships.....	\$ 232,000
Medical Awards .....	\$ 205,737
Higher Education Scholarships.....	\$ 118,702
Academic Merit Awards .....	\$ 27,000
Educational Opportunities & Tutoring Awards..	\$ 45,333
Work for College Match .....	\$ 35,831
Honor Roll Awards.....	\$ 27,312
Technology for Education Award .....	\$ 9,326
Little Passports Travel Subscription Box .....	\$ 6,468
Ike Loa Youth Mentoring Academy .....	\$ 3,988
Dolly Parton Imagination Library.....	\$ 2,830
Keiki Summer Book Challenge.....	\$ 2,298
<b>Total Award Distribution: .....</b>	<b>\$ 716,737</b>

Financial information for the year ended December 31, 2019. Independent Auditor: Alex J. Smith, Certified Public Accountant. To review the complete 2019 Hualālai ‘Ohana Foundation audited financials used for this data, please contact our office.

## 2019 OPERATING REVENUE & SUPPORT

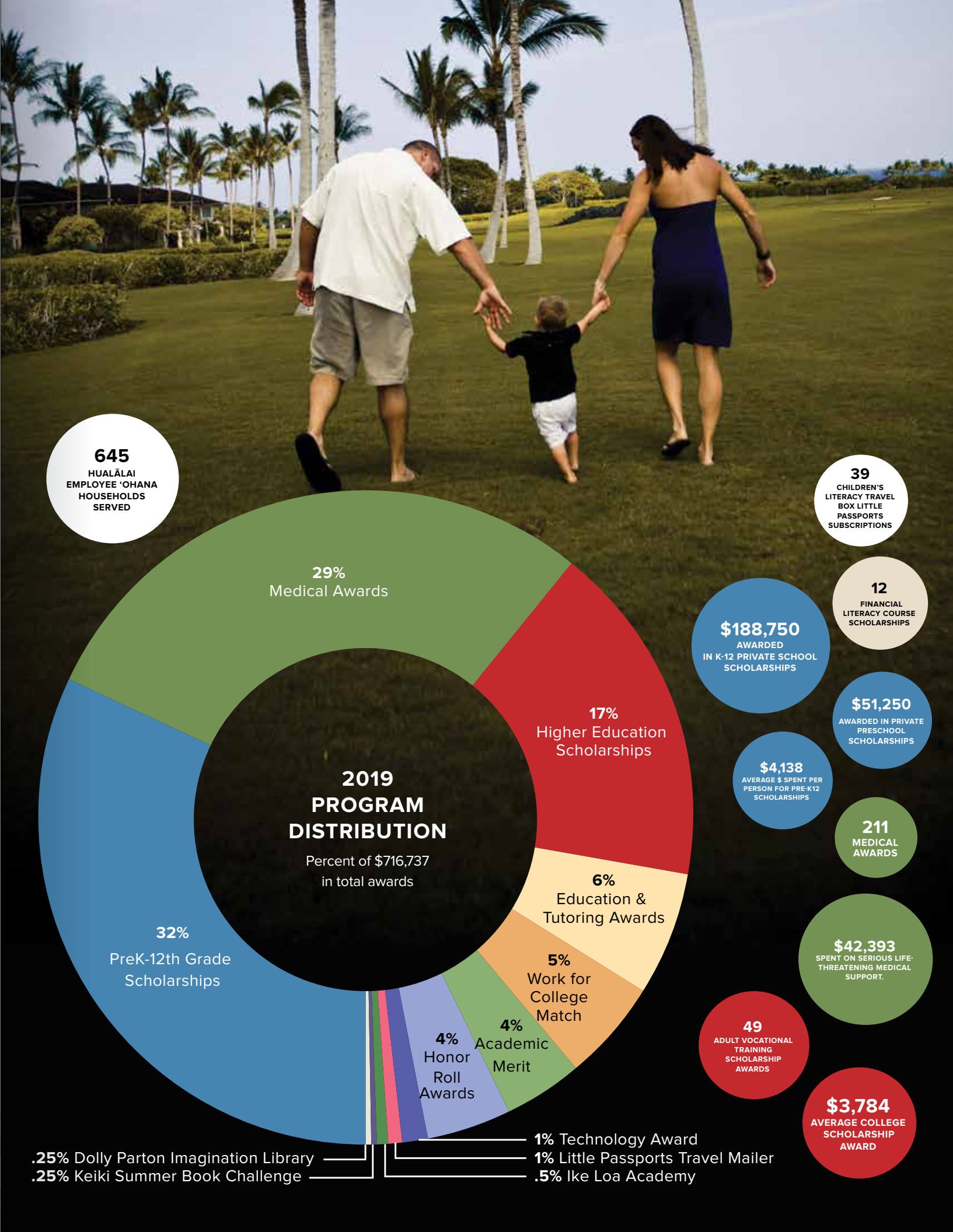
Annual Appeal Contributions .....	\$ 531,953
Foundation Grants.....	\$ 300,000
2019 Mitsubishi ProAm Tournament .....	\$ 177,800
Hualālai Rounders Classic.....	\$ 117,851
The Wacky Golf Outing.....	\$ 91,250
Brendan Moynahan’s 100 Holes of Golf .....	\$ 28,200
Other General Donations.....	\$ 31,292
<b>Total Support &amp; Revenue .....</b>	<b>\$ 1,278,346</b>

## 2019 OPERATING EXPENSES

Program Services .....	\$ 846,393
Management General.....	\$ 102,118
Fundraising.....	\$ 184,338
<b>Total Expenses .....</b>	<b>\$ 1,132,849</b>

*One of the things I love about Hualālai is that it goes beyond the norm to make sure that the employees are cared for. In the six years I have worked here I have witnessed several examples of fellow coworkers receiving this extra care from the ‘Ohana Foundation; from scholarship assistance to financial aid for an emergency medical procedure, and even myself when I had to return to school to further my qualifications in order to help our department grow in it’s capabilities. Not only is Hualālai a great place to work because of the location, it cultivates an environment that makes it feel like family. Thank you for your part in making Hualālai feel like family.*

– Kelsey





# Special Donors



We Are Grateful For Everything You Give To Our ‘Ohana.

The Hualālai community is unique in 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 ways of helping more ‘ohana members in a meaningful way.

It is the kindness of the people listed that allows us to offer a helping hand to our Hualālai ‘Ohana in times of need. Our heartfelt thank you to the following families who have contributed varying amounts, through a combination of annual giving and event participation in 2019.

A special mahalo piha to

*Bob & Renee Parsons and  
The Bob & Renee  
Parsons Foundation*

for their generous contributions in excess of  
**\$350,000!**

**\$100,000 +**  
*Tom & Rhonda Peed*

**\$50,000 - \$99,999.99**  
*Susan Johns*  
*Ed & Susan Mueller*

**\$25,000 - \$49,999.99**  
*Kriss & Lisa Cloninger*  
*Marti deBenedetti*  
*Gillings Family Foundation*  
*Parsons Xtreme Golf*

**\$10,000 -  
\$24,999.99**

Bertie Bialek Elliott  
Bradley Chipps  
Norma Foster-Maddy &  
Doug Parks  
Harry & Susan  
Frampton  
Great Plains Beef  
Robert & Judy Huret

Jim & MaryBee  
Johnston  
Rick & Debi Justice  
Keyes Foundation  
Barbara & Rob Kildow  
Paul & Pam Krug  
Chris & Marianne Lane  
Tom & Sara Lewis

Peter Linden & Faith  
Golding  
Locklin Charity Trust  
The Mahoney Tallman  
Family Foundation  
Scot & Carolyn  
McClone  
Patty & John Nickoll

Barry & Frankie Sholem  
Sy & Laurie Sternberg  
Anthony & Beatrice  
Welters  
Julie Wrigley & Bill  
McDowell

**\$5,000 -  
\$9,999.99**

Paul & Judy Andrews  
Eve Bernstein & Alex  
Gersznowicz  
Ron & Linda Borgman  
Barbara Britt  
Thomas W. Callinan  
Family Fund  
Rick & Donna Fluegel  
Ryutaro Fukamachi  
Rick & Kandy Holley  
Bob & Becky Holman

Ted & Tanya Jernigan  
Mike & Laurie Kozlak  
Sarah & John Lechleiter  
Pacific Coast Building  
Products, Inc. Charitable  
Dean & Yuriko McPhail  
John & Martha Mouer  
D.B. & Lilian Murray  
Moe & Cindy Muscatel  
Hans & Elaine  
Riddervold

Jim & Linda Southern  
John & Maureen  
Stadter  
David N. Strohm &  
Kathryn A. Reavis  
Tom & Diane Windler  
Rich and Helen Gates  
Foundation  
The Mark Zurack  
& Kathy Ferguson  
Foundation

Chambers Gardening &  
Irrigation  
GM Construction  
The Adi & Jerry  
Greenberg Foundation  
The Roberts Foundation  
The Runstad  
Foundation  
Tim & Mary Boyle  
Charitable Trust

**\$2,500 -  
\$4,999.99**

Tamotsu & Sumie  
Adachi  
Chris & Anita Anderson  
Burns Family  
Foundation  
Ken & Donna Coit  
Michael Croft & Lynn  
Williams  
Scott & Marci Dorey

Leldon & Gwen  
Echols  
Mark & Gail Edwards  
Maryann & Irwin Gold  
David & Lori Haley  
Judy & Hank Hummelt  
Steven Huntley  
Jay & Ronnie Kaiser  
Mark Kawashima

Larry & Mary Jane  
Kelley  
Rick & Kathy Kimball  
Bill & Gay Krause  
Dave & Dawn Lenhardt  
Roger & Diane Lewis  
Elliot & Sharon Maluth  
Ken & Pennie Meany  
Mary Murfey

Nancy Schmidt & Julia  
Rahn  
Joe & Teresa Schneider  
Sloan Foundation  
Allen & Susan Tochihara  
David Vanacore  
Chris & Susan Yates

**\$1,000 -  
\$2,499.99**

Beecher & Robin  
Abeles  
Janice Baucum  
Kate Bell & Tom  
Blackburn  
Stephen M. Bennett &  
Marsha C. Jordan  
Mr. & Mrs. Bowie  
John Chapple & Vivian  
Dixon  
John & Linda Daane  
Aki & Naomi Egashira

Patrick & Marilyn  
Fitzgerald  
Donald & Laura Goo  
John & Helen Guiltinan  
Maryellen & Frank  
Herringer  
The Julie Hill  
Foundation  
Gregory & Carol  
Lindstrom  
Tom & Amy Loratta  
Consuelo H. McHugh

Art & Melveen Medina  
Susan Mendelson &  
Jack Lutsky  
Brendan Mullinix  
Ed & Cathy O'Neill  
Palatella Family  
Tony & Ericka Pinkert  
Robert & Betsy Reniers  
Coco & Bruce  
Rockowitz

Nat Simons & Laura  
Baxter-Simons  
Kent & Cindy Snyder  
Taube Family  
Foundation  
Dean & Leslie Tuftin  
SJ Communications  
The Castellano Family  
The Thomas Hodge  
Foundation

Our appreciation also goes to the 5 generous families who have given their support and who wish to remain anonymous.



*Ed and Susan Mueller*  
*Holley family*  
*Justice family*



# Events & Sponsors

*Mahalo to our 2019 corporate and in-kind donors whose support helps ensure that the legacy of helping Hualālai families to thrive continues – now and into the future.*

## 2019 Wacky Golf Outing Hole Sponsors

### 2019 WACKY GOLF SPONSORS

The Bob & Renee Parsons Foundation  
Chambers Landscaping & Irrigation  
G's Que  
GM Construction  
Certified Piedmontese  
The Johns Family  
Parsons Xtreme Golf  
Pinkert & Loratta Properties

### 2019 WALL OF FAME SPONSORS

D.B. & Lilian Murray  
Marti deBenedetti  
Rob & Barbara Kildow  
SJ Communications

### WALL OF FAME FOUNDERS

Big Island Candies  
Chris Carley  
Dr. Jim and MaryBee Johnston  
Rob & Barbara Kildow  
Gene, Maureen, Greg & Doug Kim  
Edward & Susan Mueller  
D.B. & Lilian Murray  
Tom & Diane Windler



## First Annual 2019 Hualālai Rounders Classic Event

The 1st Annual Hualālai Rounders Classic fundraiser was held on March 26. Participants enjoyed 18 holes of golf at Ke'olu, a tennis round robin and a bocce ball tournament before a festive afternoon awards reception. Donors enjoyed a full day of neighborly competition raising much-needed support for Hualālai 'Ohana Programs.

A very special mahalo to our event underwriters:  
Marti deBenedetti (Event Chair)  
Susan Johns

Mahalo to all our sponsors, partners and other attendees for making our first Hualālai Rounders Classic a great success!

Jason David  
Marti deBenedetti  
Four Seasons Resort  
Hualālai  
Hualālai Resort

Hualālai Resort  
Marketing  
Hualālai Realty  
Huggo's  
Merriman's

Anna Pacheco  
Photography  
Certified Piedmontese  
D.B. & Lilian Murray  
SJ Communications







# 2019 Board of Directors

## EXECUTIVE OFFICERS

Ed Mueller  
**President**

Harry Frampton  
**Vice President**

Paul Locklin  
**Treasurer**

Maureen Kim  
**Secretary**

## COMMITTEE CHAIRS

Marti deBenedetti  
**Events & Development Chair**

Harry Frampton  
**Governance Chair**

MaryBee Johnston  
**Education Chair**

Rick Holley  
**Medical Chair**

Scot McClone  
**Finance Chair**

Lilian Murray  
**Investment Chair**

## DIRECTORS

Debbie Casey

Colin Clark

Susan Johns

Debi Justice

Rob Kildow

Bill McDowell

Cindy Muscatel

Wally O'Dell

Rhonda Peed

Diane Windler

## FOUNDATION OFFICE STAFF

Cara Price  
**Executive Director, January-July 2019**

Nico Leilani Verissimo  
**Executive Director, September 2019 - present**

Erlinda Borges  
**Programs Coordinator**

Kristi Sekiya  
**Administrative Assistant**

## For Our Future

This is a small place where your gift can make an enormous difference on our island. People need to feel a sense of optimism to heal and feel better and that's what Hualālai does – it radiates warmth and hope.

The landscapers, housekeepers, servers, cooks, spa attendants, security guards, concierge and golf maintenance employees are part of our 'ohana. They are our friends and our neighbors – we know of the birth of their children, the joy of their grandchildren graduating from high school, their hopes and dreams – Hualālai's people

aspiring to a vision of the broader community where 'ohana and local families can grow and thrive, inspiring those who make Hualālai such a special place to be.

*It's important to know that  
the things we've done in this  
world have an impact on  
someone else.*

*None of this would be possible without the help that you have given me and my mom for the past 8 years. My mom works 2 jobs to pay for my tuition and other bills and every month I always hear her saying "thank God for the Hualālai 'Ohana Foundation" as she looks at her bills.*

*I promise to continue to work hard in school and hopefully will make you all proud when I leave to go to college. Thank you again from the bottom of our hearts.*

– Zoey

*It's the beauty of Hualālai that first drew me here, but it's the people that keep me here.*

– Hualālai Resident





# Our Programs:

## *Paving the Way...*

### **KEIKI & YOUTH DEVELOPMENT**

- Preschool Scholarships
- K-12 Scholarships
- Little Passports Travel Subscription Box
- Dolly Parton Imagination Library Books
- Keiki Summer Books Challenge
- Honor Roll
- Educational Opportunities Award
- Ike Loa Youth Mentoring

## *Inspiring the Future...*

### **COLLEGE & CAREER READINESS**

- Higher Education Scholarships
- Educational Opportunities Award
- Academic Merit
- Summer Jobs/Work for College Match Program

## *Family Economic Stability...*

### **‘OHANA LIFELONG LEARNING**

- Educational Opportunities & Skills Development Award
- Technology for Education Award
- Financial Literacy

## *Providing Support for the Unexpected...*

### **HEALTH & COMMUNITY WELL-BEING**

- Serious Medical
- Surgical Assistance
- Dental Surgery Assistance

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

100 Ka‘ūpūlehu | P.O. Box 5227 Kailua-Kona, HI 96745 | 808-325-8177 | [www.HualalaiOhanaFoundation.org](http://www.HualalaiOhanaFoundation.org)  
Nico Leilani Verissimo, Executive Director | [contact@hualalaiohanafoundation.org](mailto:contact@hualalaiohanafoundation.org)

EIN#81-0570716

