



HUALĀLAI 'OHANA FOUNDATION

SUPPORTING AND DEVELOPING
HUALĀLAI'S WORKFORCE.

BUILDING COMMUNITY,
GROWING HOPE
FOR THE FUTURE.

2021 *Annual Report*

Iulu no ka lālā I ke kumu

the branches grow because of the trunk

This proverb refers to the branches that continued to grow over the past year at the Hualālai 'Ohana Foundation.

As the workforce of Hualālai and the rest of the world adapts to a new post-pandemic era, your support is making it possible for the Foundation to continue to support the emerging and evolving needs of families, students, and lifelong learners through partnership and commitment to those who make this such special place to be.

As we celebrate our 19th year of supporting this special place so many of us call home, we are grateful to our founders whose vision and generous hearts have catalyzed hope, promise and inspiration for the future. At a time when things in the world might look differently than they have in the past, our mission and impact continue to inspire hope and trust among Hualālai's family.

Since 2002, the Hualālai 'Ohana Foundation has risen to help Hualālai's working families overcome challenges and create new opportunities. From child literacy programs to preschool K12 scholarships, higher education and lifelong learning opportunities, your support has meant that first generation college students can achieve their educational goals. It's meant that Hualālai's working families can sleep better knowing that their most serious medical expenses are covered for a loved one who may be suffering. And it's meant that lives are changed every day and barriers to access are removed.

In 2021, the Hualālai 'Ohana Foundation focused on providing stability and support to Hualālai's workforce as the community worked to regain footing post-pandemic. As a tree grows, its branches expand, providing shade and security to withstand whatever storms may follow.

The Foundation focused in 3 areas through 2021:

Workforce Stability: Upskilling & Reskilling

Supporting Student Success

Growing Opportunities for the Future

Thanks to our donors and a very dedicated group of volunteers, the Foundation was able to quickly mobilize and help meet the most pressing priorities faced by the community.

The changing climate of the pandemic has forced us to be more flexible than ever before and to bring resiliency and resolve to everything we do. We believe that the lessons and insights we learn during these challenging times will continue to shape our futures for years to come.

As you will see in the highlights on programs, the Foundation's work in 2021 addressed not only the needs post-pandemic, but other important challenges – and opportunities – facing Hualālai's workforce.

**YOUR SUPPORT IS CHANGING LIVES
HERE AT HUALĀLAİ EVERY DAY.**



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 job is to connect our donors to the meaningful opportunities to help make a difference in the lives of Hualālai’s workforce.

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. 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. *Kokua aku, kokua 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).



2021 Board of Directors

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FOUNDATION OFFICE STAFF

Nico Leilani Verissimo
Executive Director
2019-present
Sonnaly Lee
Programs Coordinator
February 2021-present
Ashley LaPan
Administrative Assistant
July 2022-present

MEDICAL Financial Assistance Awards

Health and
Community Well-Being
For Our Families...

\$74,386 spent on life-
threatening awards. Average
serious illness award of **\$3,719**.

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.

The Foundation awards up to
\$3,000 to assist with the average
cost of necessary routine and
serious surgeries.

Average amount spent on surgical
awards in 2021 was **\$1,543**.

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 facilitate 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.

My wife and I have been going through a tough time not knowing what's going on with our daughter. We have made many trips to Oahu, plenty doctor visits and a lot of testing along this rough road. The Foundation helped pay for her medical bills and get us through a difficult time. Now our Jasmine is running and chasing her big brother, playing and jumping all over like a normal 3-year-old again. She's turning 4 soon and we recently enrolled her at Creative Day Preschool. From medical financial support to scholarships for my children to access quality early education here in Kona, the 'Ohana Foundation continues to be one of our biggest blessings. - Austin

2021 MEDICAL AWARDS GRANTED TO
144 HOUSEHOLDS
TOTALING **\$252,060** IN SUPPORT.

The Foundation awards up to **\$2,000** (two awards per year) to address the growing cost of crucial dental treatments.

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.

We can't thank you enough for all that the Hualalai Ohana foundation has done to literally put us where we can find footings to guide and assist us through our financial hardship by supporting our medical financial award. Words alone can't explain our gratitude as a family and we felt so much liberated from your generosity, Kindness and love toward us.

Over these last 25 years, you have come to my rescue more than once! I've always felt that I live a semi-charmed life and I count you all at the top of my blessings. Thank you for supporting my Knee replacement surgery, I can't wait to come back to work soon. - Rebecca



EDUCATIONAL Tools for Learning

In 2021, your partnership meant that the Hualālai 'Ohana Foundation's mission could grow to serve the needs of working families. In all, 522 families received the tools to reach their educational goals through child literacy programs, educational scholarships, and academic incentive awards.



How to say thank you to our members and the 'Ohana Foundation? As we celebrate 25 years here at Hualalai, a mere thank you doesn't come close. After such an unprecedented couple of years, all I know is that all of the efforts and contributions from our members have helped this community in countless ways. I am truly proud to be of service to this Hualalai. Mahalo for your continued support and generosity. With warmest aloha - John Novak

In all, the Foundation supports 3 educational priority program areas to help others reach their dreams, removing barriers to access and post-secondary educational attainment:

ACADEMIC INCENTIVE PROGRAMS:

Honor Roll – financial awards for academic performance in grades 6-8 (\$150) and 9-12 (\$250)

Academic Merit – incentive for high-performing college students to earn between \$500 - \$2,500

Work for College Match – a summer earnings match up to help pay for college of \$1,500

LEARNING ENRICHMENT AWARD PROGRAMS:

Child Literacy Initiatives – monthly subscriptions to learning kits including Dolly Parton Imagination Library, Little Passports, science kits with Kiwi & Co., Tinker & Company, Bumo Brain and more.

Tutoring, Coursework & Lifelong Learning – awards between \$1,000 and \$3,000 for personal and professional development coursework, tutoring and special interest or certificate programs including art classes, summer courses, financial literacy programs and other learning enrichment opportunities.

Technology for Education – need-based awards to support the remote learning needs of families through \$500 - \$800 supporting the purchase of a computer, laptop, printer or router.

SCHOLARSHIPS:

Preschool and K-12 Scholarships – need-based scholarships to private schools for eligible families based on income, household size, cost of tuition and estimated family contribution.

Higher Education Scholarships – need-based scholarships to colleges and universities are based on income, household size, cost of tuition and estimated family contribution.

Hualālai Scholars – a competitive \$10,000 college scholarship providing students who are the first in their families to attend college the opportunity to attend a university within the State of Hawai'i.



FINANCIALS

Consolidated Statement

Hualālai ‘Ohana Foundation strives to improve the quality of life for all Hualālai employees, with every dollar given going to benefit the Hualālai workforce ‘ohana. Your commitment inspires future generations to 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 Hawai‘i’s future. 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.....	\$ 268,188
Medical Awards	\$ 260,731
Higher Education Scholarships.....	\$ 285,623
Technology for Education Award	\$ 8,700
Academic Merit Awards	\$ 43,000
Honor Roll Awards.....	\$ 18,385
Work for College Match	\$ 45,000
Lifelong Learning & Vocational Training Awards ...	\$ 67,609
Little Passports Travel Subscription Box	\$ 2,077
Dolly Parton Imagination Library.....	\$ 2,181
Keiki Summer Book Challenge	\$ 861
Keiki Summer Camp	\$ 56,779
Total Award Distribution:	\$1,059,135

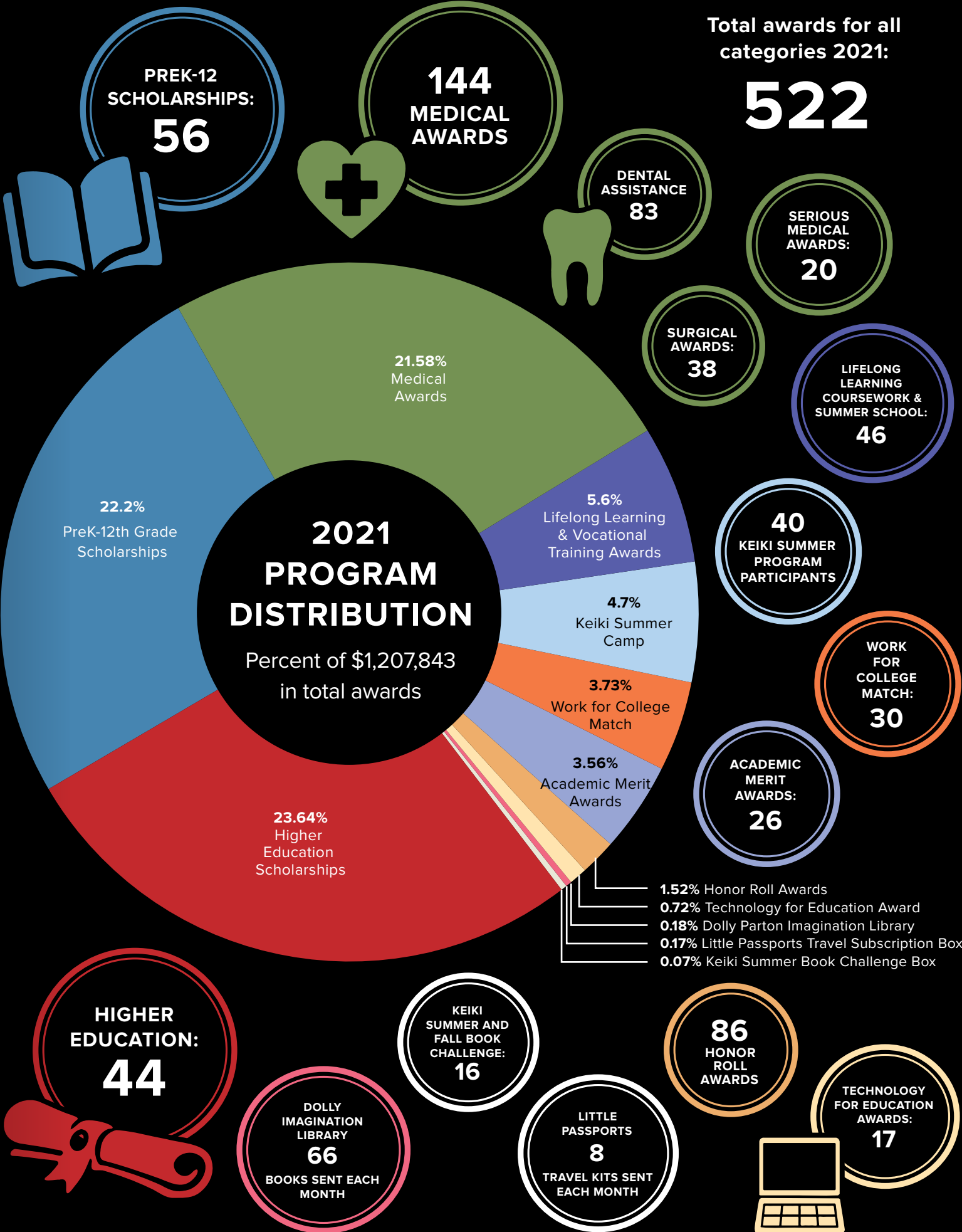
2021 OPERATING REVENUE & SUPPORT

Annual Appeal Contributions	\$ 1,323,920
Special Events	\$ 393,022
• 2021 Mitsubishi ProAm Tournament .	\$ 295,758
• Kiriatty Art Show.....	\$ 62,718
• Hana Hou Sale & Other.....	\$ 34,546
Interest & Investment Income	\$ 819,047
Total Support & Revenue	\$2,535,989

2021 OPERATING EXPENSES

Program Services	\$ 1,207,843
Management General.....	\$ 154,672
Fundraising.....	\$ 220,156
• ProAm Ticket Participation Fees	\$ 112,525
• Special Events Expense.....	\$ 23,455
• Marketing/website.....	\$ 3,047
Total Expenses	\$ 1,582,671

Financial information for the year ended December 31, 2021.
Independent Auditor: Taketa Iwata Hara & Associates, LLC,
Certified Public Accountants & Consultants. To review the complete
2021 Hualālai ‘Ohana Foundation audited financials used for this
data, please contact our office.



SPECIAL DONORS

Mahalo nui loa

We are grateful for the incredible generosity of the following individuals who give of their time and who contribute to our mission. Thank you for helping the Foundation continue to grow and flourish while we develop new ways of helping more Hualālai working families.

It is the kindness of the people listed here 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, time, talent and event participation in 2021.

..... **\$300,000+**

The Bob and Renee Parsons Foundation

..... **\$50,000 - \$100,000**

Susan Johns

Edward and Susan Mueller

..... **\$25,000 - \$49,999**

Drs. Dennis &
Mireille Gillings

Hualalai Investors, LLC
Larry Kelley

Thomas & Rhonda Peed

John & Maureen Stadter

..... **\$10,000 - \$24,999**

Dr. Bradley Chipps &
Kathy Kehoe
Eve Bernstein & Alex
Gersznowicz
Mem Dryan Bernstein
Bertie Bialek-Elliott
Bochnowski Family
Ken & Donna Coit
Marti deBenedetti
William B. Donner
Harry & Susan Frampton

Jerry & Adi Greenberg
Rick & Kandy Holley
Christopher Jones &
Barbara Hugli-Jones
Robert & Judy Huret
Edward & Jill Im
Justice Family
Keyes Foundation
Rob & Barbara Kildow
Richard & Kathryn Kimball

Paul & Pam Krug
Kurland Family
Foundation
Christopher &
Marianne Lane
Thomas & Sara Lewis
Paul & Yen Yee Locklin
Bari Milken &
Fred J. Bernstein
Charles Purse

The Roberts Foundation
David Strohm &
Kathy Reavis
Barry & Frankie Sholem
Regina M. Stuard
Lex Van Hessen
Beatrice & Anthony
Welters
Julie Ann Wrigley
Foundation

..... **\$5,000 - \$9,999**

Chris & Anita Anderson
Paul & Judy Andrews
Mark & Deborah Attanasio
Stephen Bennett &
Marsha Jordan
Boone Family
Ron & Linda Borgman
Tim & Mary Boyle
Bill & Renee Brinkerhoff
Tom & Marj Callinan

Leldon & Gwen Echols
Daniel & Daniell Elperin
Rick & Donna Fluegel
Ryutaro & Akiko
Fukamachi
Bob & Becky Holman
Hank & Judy Hummelt
Steven Huntley
Ted & Tanya Jernigan
Dr. Jim & MaryBee
Johnston

Jay & Ronnie Kaiser
Mike & Laurie Kozlak
Peggy Kent & Rich
Meschke
McPhail Family Fund
Ken & Penny Meany
John & Martha Mouer
D.B & Lillian Murray
Morris & Cynthia Muscatel
Jack S. Mustoe &
Janet Love

Jon & Judy Runstad
Liam Simmons
James & Lisa Southern
Sy & Lauri Sternberg
David & Lisa Vanacore
Dr. Jim & Mimi Weinstein
Thomas & Diane Windler
Bob Zamarripa & Stella
Larsen
Mark Zurack & Kathy
Ferguson

..... **\$2,500 - \$4,999**

Nate Anderson
Kathy Behrens-Wilsey
Mark & Gail Edwards
Brad Ebner
Mike & Linda Fazio
Elliot & Suzanne Felson
Patrick & Marilyn
Fitzgerald
Abe & Jennifer Friedman

Michael Greenfeld
Nicole Hollis
Marissa Kagle
Gene & Maureen Kim
Dave & Dawn Lenhardt
Roger & Diane Lewis
John & Nancy Lindahl
Thomas & Amy Loratta

Dave & Christine Luchetti
Mary Murfey
Bob & Betsey Reniers
Stuart Sloan
Jim & Linda Southern
Dana Spiliotis
Massimo Tassan-Solet
Tiffany's Art Agency

Allen & Susan Tochihara
Steven & Kim Ullman
Ku'uipo Valenzuela
Deborah Webster &
Stephen Blanchard
Lynn Williams & Mike Croft
Christopher &
Susan Yates

..... **\$1,000 - \$2,499**

Beecher & Robin Abeles
David & Gillian Berman
Scott Bowie
Susan & Gary Dempze
Richard & Susan Fade
Elliott & Suzanne Felson
Richard & Tracy Goldman

Michael Grindon &
Chantal Prunier
John & Helen Guiltinan
Peter & Julie Hill
Thomas Hodge
Foundation
Stephen &
Diana Goldman

Donald & Laura Goo
Danielle Limp
Brendan Mullinix
John & Patricia Nickoll
James O'Neal
Ed & Cathy O'Neill
Peter and Lisa Park

Wendy Paskin-Jordan
Barb Reller
Ned Segal
Tad & Diane Taube
Kosti & Marian
Shirvanian Foundation

Our appreciation also goes to the 4 generous families who have given their support and who wish to remain anonymous.

‘OHANA STORIES

Vocational Training Scholarship helps Hualālai Golf Equipment Manager Expand Knowledge

Hualālai Golf Equipment Manager Abel Serrao has worked at Hualālai since 2011. Thanks to donors like you, in 2021 Abel was able to complete a Level 1 Equipment Management Program Certificate through the Golf Course Superintendents Association of America (GCSAA). The program has expanded his knowledge of golf mechanics and has increased his career-earning potential as a Golf Equipment Manager.

To achieve certification in Level 1 Equipment Management, Abel took classes in Metalworking & Fabrication, Spray Systems, Electrical Systems, Cutting Units, Engine Technology, Fundamentals of Turfgrass Operations, Drivetrain Systems, and Hydraulic Systems.



Hualālai ‘Ohana Foundation donors help Abel Serrao achieve GCSAA Certification

Abel is now able to enrich his Hualālai ‘ohana community by putting out world class work and high standards at Hualālai. As the only GCSAA certified mechanic in the State of Hawai‘i, he proudly shares that “The most meaningful part of completing this certification is that I can provide for my family and now motivate my work crew to also get certified with help from the Hualālai ‘Ohana Foundation and it’s generous donors.”

Your support makes it possible for working individuals like Abel to achieve their dreams and reach greater economic stability and mobility through vocational training scholarships offered year-round.

“The most meaningful part of completing this certification is that I can provide for my family and now motivate my work crew to also get certified with help from the Hualālai ‘Ohana Foundation and it’s generous donors.”

By awarding me this generous scholarship, I am able to concentrate on what is important for me, education. Your financial generosity has allowed me to be one step closer to my goal and has inspired me to help others by giving back to the community. Thank you very much for your generosity. - Ryan Kwon

Going to HPA has been a dream of mine since I was in elementary. I am very excited for the school year to learn new things and play new sports. Thank you so much for this opportunity and thank you for paying for my scholarship. - Skye Raymond

Thank you for many things. You helped my daughter get through school. When I was injured, the financial help was invaluable. - Dave Merrin

Big mahalo for all the support over the years. This is truly amazing and unique to our property. The number of lives and families that you have touched with your generosity is amazing. My family has been blessed to be part of this process, allowing my kids to attend a school we wouldn't have been able to afford! - Kawika Montfort-Chang

By awarding this scholarship, you have alleviated my financial dues for college not only for me but also for my parents. This has allowed me to better focus on my studies through this first semester. Your generosity has fueled me to continue to help others and give back to the people in my community. I hope to one day help people achieve goals as you have helped me. - Simon Kwon

'OHANA STORIES

Lifelong Learning Award Helps Screenwriter's Wish Come True

Amy Bircher is the wife of Hualalai Club Engineer Chad Bircher. In 2021, your support made it possible for Amy to achieve her dreams with help from the Hualalai 'Ohana Foundation's Lifelong Learning Award.

Amy has been a proud recipient of the 'Ohana Foundation's support since 2017. Through the Lifelong Learning Award, Amy was able to attend workshops, conferences, and screenwriting courses.

Through hard work and commitment to her craft, Amy completed this work while balancing a day job and raising her children, often waking up at 3 am to finish her writing before work.

Amy credits the Foundation and its donors for helping her achieve her goals. "It has been exhausting, and I probably would have given up on my dream of becoming a screenwriter if it hadn't been for the support of my family and the Hualālai 'Ohana Foundation."

It has been exhausting, and I probably would have given up on my dream of becoming a screenwriter if it hadn't been for the support from my family and the Hualālai 'Ohana Foundation.

I could not have achieved this success without the generosity of Hualālai 'Ohana Foundation and its donors. Our family is forever grateful for everything you have done for us. I can't wait to share future successes with you!



Because of your generosity, both of my children had a computer at home to help with schoolwork through the pandemic. We take part in several other programs provided through the 'Ohana Foundation. Thank you for supporting our Keiki. - Matthew Ament

There are not enough words to express what your support means to my family. My children are healthy, happy and getting a great education and it's thanks to you!

Thank you to all the homeowners and donors that make it possible for David to attend a great school. We could've never done it on our own. Mahalo for your Kōkua!!! It means the world to us!

Receiving this scholarship has greatly motivated me to excel in my studies especially throughout my first year at the Georgia Institute of Technology. I am currently a freshman with 15 credit hours and plan on graduating in the Spring of 2025. I am a part of the Navy ROTC unit at my school and plan on commissioning as a Naval Officer upon graduation from Georgia Tech. Because of this generous scholarship, I am one step closer to this goal.

Thank you so much for the support given to me and my daughter so she can have a good education and so that I can have support for good health. I love this program. Thank you for supporting a single parent, my daughter and I appreciate you! - P. Cook

Thanks to your generosity, I will be able to continue and fully delve into my education at Parker School, which is a great school that is preparing me not just to succeed in college but succeed in life.



Stellar field of PGA Champions Tour Professionals

Mahalo for participating in the ProAm

Each year the Mitsubishi Electric Championship comes to Hualālai in January. Members have an opportunity to play with legendary professionals at the ProAm event while supporting a great cause here at the Hualālai 'Ohana Foundation. Entry fees support programs at the Hualālai Ohana Foundation, helping to create access to education and necessary medical aid for employees and their families.

Activities during the week of the Championship include a welcome reception and draw party, a round of golf for contestants and their spouses, breakfast, lunch, a ProAm dinner and the opportunity to play with the legends.

Since 2010, the ProAm event has raised \$2,070,691 in support of Hualālai 'Ohana Foundation programs benefiting the workforce. Thank you for your support.



OUR PROGRAMS:

Inspiring the Future

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 Summer Earnings Match (\$1,500 summer earnings match)

SCHOLARSHIPS

- Preschool and K-12 Scholarships
- Higher Education Scholarships
- Supporting Student Success : Academic Advising
- Hualalai Scholars Award- a competitive college scholarship for first generation college students studying within State of Hawai'i

LEARNING ENRICHMENT AWARDS

- 'Ohana Lifelong Learning Award (\$1,000 to \$3,000 in support of upskilling and reskilling for personal or professional development, financial literacy)
- Technology for Education Award (\$500 to \$800 for purchase of computer, router, or printer)
- Keiki Literacy & Learning Award (\$250 per child per year for subscription-based learning kits)

SUMMER ENRICHMENT CAMP

Halau Lamaku at Kalaemano – A two-week place-based learning camp for keiki Grades 1-5, supporting busy parents during the summer, providing educational enrichment programming grounded in culture, place and purpose.

PROVIDING SUPPORT FOR THE UNEXPECTED

- Dental Surgery Assistance
- Surgical
- Serious Medical



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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