



KONA
HISTORICAL
SOCIETY 

Preserving Kona's Stories

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January 29, 2013

State Capitol, Rm 208
Senate Committee on Ways & Means
Honolulu, Hi. 96813
Attn: Rod Becker

Dear Mr. Becker

Re: Grant-In-Aid - Fiscal Year 2014

Enclosed is a copy of a Grant-in Aid Application for Fiscal Year 2014 from the Kona Historical Society.

If you have any questions, please contact Jill Olson or Joy Holland at 323-3222.

Officers

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PRESIDENT

William "Buddy" Norwood
VICE PRESIDENT

Joycelyn "Pua" Binney
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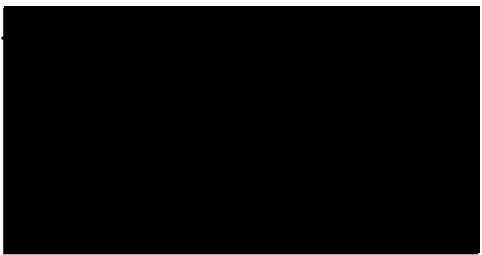
Executive Director

Jill Olson

Program Director

Ku'ulani Auld

Sincerely,



The Kona Historical Society continues to preserve and share an appreciation of Kona's sense of place and inspire everyone to continue the sustainable practices of generations past.

**THE TWENTY-SEVENTH LEGISLATURE
APPLICATION FOR GRANTS & SUBSIDIES
CHAPTER 42F, HAWAII REVISED STATUTES**

House District _____

Log No: _____

Senate District _____

For Legislature's Use Only

Type of Grant or Subsidy Request:

GRANT REQUEST -- OPERATING

GRANT REQUEST -- CAPITAL

SUBSIDY REQUEST

"Grant" means an award of state funds by the legislature, by an appropriation to a specified recipient, to support the activities of the recipient and permit the community to benefit from those activities.

"Subsidy" means an award of state funds by the legislature, by an appropriation to a recipient specified in the appropriation, to reduce the costs incurred by the organization or individual in providing a service available to some or all members of the public.

"Recipient" means any organization or person receiving a grant or subsidy.

STATE DEPARTMENT OR AGENCY RELATED TO THIS REQUEST (LEAVE BLANK IF UNKNOWN): _____

STATE PROGRAM I.D. NO. (LEAVE BLANK IF UNKNOWN): _____

1. APPLICANT INFORMATION:

Legal Name of Requesting Organization or Individual:

Kona Historical Society

Db/a:

Street Address: 81-6551 Mamalahoa Hwy, Kealahou, HI

Mailing Address: PO Box 398, Captain Cook, HI 96704

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name JILL OLSON OR JOY HOLLAND

Title Executive Director

Phone # 808-323-3222

Fax # 808-323-2398

e-mail khs@konahistorical.org

3. TYPE OF BUSINESS ENTITY:

NON PROFIT CORPORATION
 FOR PROFIT CORPORATION
 LIMITED LIABILITY COMPANY
 SOLE PROPRIETORSHIP/INDIVIDUAL

6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:

THE PURPOSE OF THIS PROJECT IS TO PROVIDE PROJECT FUNDING FOR KONA HISTORICAL SOCIETY'S KONA COFFEE LIVING HISTORY FARM AND H.N GREENWELL STORE MUSEUM SUSTAINABLE-STEWARDSHIP PROJECT: PROJECT REINSTATEMENTS TO 2007 LEVELS, WHICH IS DESIGNED TO STABILIZE AND REINSTATE KEY KHS PROGRAMS THAT WERE DOWNSIZED AFTER 2007 AND THE SUBSEQUENT DRAMATIC NATIONAL ECONOMIC DOWNTURN. THIS PROJECT IS ALSO DESIGNED TO CREATE INCREASINGLY SUSTAINABLE PROGRAMS AND DIVERSE STREAMS OF INCOME THROUGH PERFORMING KEY SITE AND EQUIPMENT MAINTENANCE AND UPGRADES, CRUCIAL STAFFING & TRAINING, PRIORITIZED COLLECTIONS CARE AND PROCESSING, AND FOCUSED OUTREACH CAMPAIGNS AND MEMBERSHIP DRIVES, WHICH WILL ALL FOSTER A HIGHER COMMUNITY PROFILE FOR KHS AND INCREASE VISITOR AND LOCAL ENGAGEMENT & PATRONAGE.

4. FEDERAL TAX ID #: _____

5. STATE TAX ID #: _____

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2014: \$ 275,153.46

8. STATUS OF SERVICE DESCRIBED IN THIS REQUEST:

NEW SERVICE (PRESENTLY DOES NOT EXIST)
 EXISTING SERVICE (PRESENTLY IN OPERATION)

SPECIFY THE AMOUNT BY SOURCES OF FUNDS AVAILABLE AT THE TIME OF THIS REQUEST:

STATE \$ _____

FEDERAL \$ _____

COUNTY \$ _____

PRIVATE/OTHER \$ _____

JILL OLSON, EXECUTIVE DIRECTOR

NAME & TITLE

1/29/13

DATE SIGNED

**Application for Grants and Subsidies
The Twenty-Seventh Legislature
Hawai‘i State
Chapter 42F, Hawaii Revised Statutes**

**The Kona Historical Society
Kona Coffee Living History Farm and H.N Greenwell Store Museum
Sustainable-Stewardship Project:
Project Reinstatements to 2007 Levels**

If any item is not applicable to the request, the applicant should enter “not applicable”.

I. Background and Summary

The Kona Historical Society (KHS)

The Kona Historical Society (KHS) is a community based, non-profit 501 (c)(3) organization, Smithsonian Museum affiliate, with the only permanent National Endowment for the Humanities exhibits in the State of Hawai‘i. It was founded in 1976 on Hawai‘i Island for the purpose of collecting, preserving and sharing the history of the Kona districts and their rich cultural heritage in Hawai‘i. These local contributions, so integral to the larger tapestry of voyagers, host cultures, immigrants, and pioneers woven into the history of Hawai‘i Island, Hawai‘i State, and The United States itself, have been collected, preserved, and disseminated by the Kona Historical Society through multiple living history programs, extensive museum and archival collections, and community outreach efforts for over three decades. Local, state, national, and international Society member support and engagement with these award-winning programs and collections are a key component of KHS’s long-standing sustainability.

1. Description

Library and Archives

The Kona Historical Society maintains two nationally and state registered historic sites and the climate-controlled *Jean Greenwell Library and Archives*, which houses one of the most regionally significant and largest photographic collections in any Big Island repository. In addition to its renowned photographic holdings with over 50,000 historically significant photos, slides, and other image formats, the archive also houses over 150 maps, many rare and out-of-print books, unique historical records, manuscripts,

pamphlets and oral history interviews, and many films and videotapes of Kona. The collections housed at KHS provide a valuable community resource for reference and research with special collections and archival materials available, in most cases, nowhere else.

H.N. Greenwell Store Museum Site Programs

The *H.N. Greenwell Store Museum, Portuguese Stone Oven Baking Program, Jean Greenwell Library and Archives, and School Programs* maintained at our historic site in the Kalukalu *ahupua'a* of Kona incorporate living history performance, museum exhibition, historic building preservation, historic trades and crafts demonstrations, archival research, and native forest plants identification and education with hands-on and experiential learning guided by trained and costumed historical interpreters. The history of ethnic groups' immigration to Kona, the history and operation of a general store and its products, the stories and biographies of agricultural pioneers, ranchers, dairymen, bakers, farmers, and merchants as well as the tradition in Kona of Hawaiian and immigrant innovation, adaptation, and cultural achievement constitute the core curriculum for the intensive education and training each KHS historical interpreter undergoes and engagingly passes on to visitors.

The Kona Coffee Living History Farm Site Programs

The *Kona Coffee Living History Farm* and the *School Programs* maintained at the historic seven-acre working coffee and macadamia nut KHS farm site in Kealakekua, Kona, incorporate living history performance, artifact exhibition, historic building preservation, historic trades demonstrations, coffee land and gardens cultivation, farm-animal care (including that of a Kona Nightingale donkey and chickens), Japanese foodways, traditional immigrant games, and themes of sustainability with hands-on and experiential learning guided by trained and costumed historical interpreters. The only living history coffee museum in the United States, the *The Kona Coffee Living History Farm* provides visitors and community members the chance to see the process of cultivation, harvest, maintenance, as well as experience the final product of Kona coffee in its early historical and cultural context. Educational and culturally relevant museum products are available to purchase by visitors, and Kona Coffee demonstrations and tastings are performed at this site as well.

Community Sites Programs

Periodic guided *Historic Jeep Tours, Historic Boat Tours, Historical Performances, and Historic Kailua Village Walking Tours* are additional programs offered by KHS to Society members, visitors, and community members as part of its vision to connect "*past, current, and future generations*" and to inspire "*an appreciation for Kona's diverse heritage.*" Through these programs visitors and *kama'aina* alike find ways to connect the

authentic sights, smells, sounds, and feel of modern-day Kona to the rich historical analogs described by our knowledgeable and expert interpreters, all the while eschewing stereotypes and canned conceptions of Hawai'i. A recently introduced program, *Hanohano 'o Kona* ("Honoring Kona") a free community lecture series which spotlights local and state speakers on topics of cultural and historic interest, such as the history of Hawaiian surfing or Chinese New Year traditions, has also fulfilled this vision of connecting our generations and diverse local culture. Presented by KHS, in cooperation with the County of Hawai'i, this lecture series is a gift from the Society to the community. Free of charge, it is open to residents and visitors alike and is held the last Wednesday of each month at the West Hawai'i Civic Center.

2. Goals and Objectives

The purpose of this project is to provide project funding for Kona Historical Society's *Kona Coffee Living History Farm and H.N Greenwell Store Museum Sustainable-Stewardship Project: Project Reinstatements to 2007 Levels*, which is designed to stabilize and reinstate key KHS programs that were downsized after 2007 and the subsequent dramatic national economic downturn. This project is also designed to create increasingly sustainable programs and diverse streams of income through performing key site and equipment maintenance and upgrades, crucial staffing and training, prioritized collections care and processing, and focused outreach campaigns and membership drives, which will all foster a higher community profile for KHS and increase visitor and local engagement and patronage. This project's budget is \$275,153.46.

Project goals and objectives include the following:

Goals

- To maintain and improve the cultural and historic sites located in our Kalukalu and Kealakekua locations in Kona.
- To continue to introduce and expand authentic and new periodic programs for visitors and island residents, including school, senior, and general community offerings.
- To protect and preserve natural resources, historic buildings, and artifacts at our sites.
- To maintain, preserve, and process archival collections integral to our region and State.
- To reprint KHS publications, key to education of visitors and residents, and indispensable to future sustainable KHS promotion and sales.
- To provide jobs for local residents and restore employment hours to previously furloughed, highly trained and developed employees thereby providing greater access to collections and KHS program resources to both visitors and the community.
- To improve the quality of care that the animals, coffee lands, and gardens receive which are part of our stewardship purview, through additional employee training, further development of school and intern programs, and property maintenance allocations.

- To increase collaboration amongst local, state, national and private and public organizations.
- To increase diverse income streams through cost-saving, sustainable site and program improvements.

Objectives

- To perform much needed landscape maintenance at both of our historic sites, including tree trimming and pasture trimming and native forest clean up.
- To clean the macadamia nut, avocado and coffee orchards at our *Kona Coffee Living History Farm* (KCLHF) site to improve production and increase income for the Living History programs.
- To cut the overgrown grass in the KCLHF donkey pasture in order to double the available grazing for Charlie, our resident donkey, who is part of our interpretive program. This will save money that we spend on feed to supplement his diet.
- To repair stepped areas, broken picnic tables, and grade uneven spots leading down to pasture with Portuguese Bread Oven at our Kalukalu *H.N. Greenwell Museum* Site to promote safety and encourage visitor involvement.
- To replace native *Ohia* wood pole railings at KCLHF for safety and appearance.
- To move, improve, stock and re-merchandise museum retail kiosk at KCLHF to include buying a cash register and hiring additional dedicated kiosk and reception staff.
- To hire Dr. Tom Woods (Living History Museum Programs Consultant), Dolly Strazar (Consulting Collection Manager), and Menzi Behrnd-Klodt, J.D, C.A., (Certified Archivist) or other experts, to consult on 3 needed projects: supplemental training of living history interpreters, processing approximately 80-cubic feet of backlogged crucial archival material, including collections supporting our living history programs and those with key KHS organizational records, historically significant collections on ranching industries in Kona, and oral histories processing, description and transcription.
- To clear and clean Native Forest area at Kalukalu *H.N Greenwell Museum* site for educational programs.
- To increase paid advertising and marketing in target publications and venues such as Big Island TV, and to expand social media and online marketing presence.
- To purchase equipment crucial to current programs and collections including a speaker and microphone, a digital video camera, a used or reconditioned computer laptop, a used or reconditioned freezer, a single-room air conditioning unit, archival boxes, folders, cotton archival gloves, paper and archival pencils sufficient to process 100 cubic feet of archival materials, archival artifact and textile boxes for collections presently insufficiently housed, and a HEPA archival vacuum.

3. The Public Purpose and Need to Be Served

Access to Significant Historical Collection and Community Exposure to Culture and Arts

The Bishop Museum remains the largest museum in the State whose collections tend to focus on a specific Hawaiian and Pacific cultural area of specialization. Although a unique museum with rich resources, its collections do not focus on the variety of other ethnic groups which make up many parts of Hawai'i's history, and it is often left up to many historical societies and small preservation organizations throughout the State to serve as the repository for these one-of-a-kind cultural, artistic, and archival contributions by ethnic immigrants and groups now firmly embedded in Hawaii's culture. In addition to this key role that Kona Historical Society plays, it also serves as a local repository for Big Island residents, many who do not have the financial resources or the local connection to collections elsewhere to visit museums on other islands for genealogical, historical, or regional research material.

In the past, our organization has provided employment to residents in remote and not easily commutable areas, provided important professional intern and volunteer opportunities for students and residents interested in library, museum, and archival professions, and intern possibilities for students enrolled in remote college or UH commuter degree programs on-island, and provided school outreach, community education, volunteer engagement, and genealogical and research opportunities. To provide these opportunities again, and to create a sustainable, measured-growth organization in the coming year with all of our rich program offerings, we first need to restore our programs and staffing to a level approaching that of our 2007 operation.

Like so many museums in the State of Hawai'i, at the end of 2007, KHS was forced to downsize its organization in order to survive. It went from a budget of about 1.2M down to \$400,000. In the process, hours of operation became limited to just four days a week, with some key programs downsized to one or two days a week. A staff of 30 was slashed to what was manageable to keep going. Furloughs were instated and all marketing came to a standstill. Our Executive Director position was scaled back to half-time, and our curator/archivist was laid-off. Our archival technician's hours were scaled back dramatically, and our volunteer coordination was virtually eliminated in order to provide enough hours for the remaining staff to keep our many programs and library and archives open to the public. We have been able to survive and have found room to start to increase staff, expand hours and programs open to public, and begin new marketing strategies. However, for us to provide our much needed services to the public, we must perform long deferred maintenance and collections care, restore site conditions and appearance, and provide adequate staff hours to get us to a place of full sustainability and growth again.

4. Target Population to be Served

The target population to be served is Hawai'i Island visitors, Hawai'i Island residents, and local and neighbor-island elementary and secondary school groups, including underserved and low-income K-12 students and groups, and finally, University of Hawai'i (UH) Center at West Hawai'i, UH Hilo, and UH Manoa, and other regional college and graduate students interested in internship and mentoring possibilities.

5. Describe the geographic coverage

This project is inclusive of visitors from neighbor islands, the mainland United States, and international locations as well as school groups, visitors, and community members from North and South Kona, Ho'okena, and Na'alehu areas in particular, but also community individuals and groups from Waikoloa, Kohala, Waimea, Hamakua, Hilo, Puna, and Volcano areas of the Big Island.

II. Service Summary and Outcomes

1. Scope of work, tasks, and responsibilities

This funding, if awarded, would help Kona Historical Society restore valuable community and visitor programs, provide much-needed jobs to Hawai'i residents, reinstate important volunteer and internship opportunities, allow continued expansion and variety in educational and cultural programs available to the community, encourage tourism and economic vitality in a region of the island often under-emphasized for visitor experiences, protect and preserve registered historic buildings and rare archives and treasures, and would provide the foundation and restored assets for the organization to create a viable, sustainable, economically-vital model for future operation and success. Initial preparations would be underway for Kona Historical Society's *Kona Coffee Living History Farm and H.N Greenwell Store Museum Sustainable-Stewardship Project: Project Reinstatements to 2007 Levels*, by July 1, 2013.

Project Work and Responsibility Components

H.N. Greenwell Museum Site Maintenance and Repair

- Long-deferred tree and plant trimming, chipping, and clean-up have made signage for our museum and programs less visible to visitors and created an uninviting environment for potential patrons.

- Step and railing repair, picnic table repair, weed whipping, pasture gradation and other maintenance is much needed both for appearance and safety for our *Portuguese Bread Oven* patrons and other program participants.
- Signage upgrades, professional installation, and needed signage updates with program hours expansion should be addressed in the first quarter of the project.
- Bread oven repair and stone restoration is also part of the scope of this work and is something which KHS will be funding itself. Other KHS financial contributions to this component will include greeter-kiosk construction-planning, and staffing and facilities (bathrooms, grounds, administration, utilities) cosmetic upgrades and maintenance.

Jean Greenwell Library and Archives Maintenance and Repair

- Library cleaning, artifact preservation measures, and climate-control system maintenance and upgrades are badly needed. In the six years since needed staff cutbacks have been made, dust, pest, and mildew and mold prevention and mitigation have been needed, and many community accessed collections have not been adequately stored or sorted since their use.
- Intensive maintenance and cleaning is needed and collections sorting and storing is urgent and will require additional Archive Technician hours, Program and Collections Manager hours, and intern and volunteer coordination for qualified MLIS (Masters in Library Science) students from UH Manoa's MLIS graduate program to be trained to safely sort and store collections.
- Archival safe cleaning supplies and a HEPA-filter vacuum purchase (from an archive supply vendor such as Gaylord) are needed for this urgent work. Additionally, acid-free folders, paper, and containers are needed to sort and store collections presently at-risk. These items are estimated to constitute archival supplies for ~20 cubic feet.
- Extensive supervisory and training hours for the volunteer component of this work will be provided at KHS's cost, and collection "weeding" needed for preparation of these projects will be provided at KHS's cost as well.

Kona Coffee Living History Farm

- Long deferred tree and plant trimming and chipping, seedling suckering, and macadamia nut, avocado, and coffee orchards cleaning needs to be completed in order to improve production and increase income for our living history programs. Macadamia, avocado, and coffee sales income could be significantly increased and allow sustainable income streams with this initial ground work, which could then be maintained by staff in manageable increments.
- Weed whipping and grass cutting in the pasture where a popular feature of our interpretative program, our Kona Nightengale donkey, Charlie, resides would double the available grazing for Charlie. This will save money that we spend on feed to supplement his diet and make it possible for us to consider implementing a plan of obtaining a second donkey for our programs and the companionship of Charlie, who is a herd animal and is presently on his own.

- *Ohia* railing and pole repair is needed for the safety and appearance of the farm, and dead and standing trees need to be cleaned and cleared for the safety and productivity of the 2.5 acres section of the farm with Macadamia nut trees.
- To maintain an archivally safe environment for the artifacts and archival objects housed at the farm, a new room-unit air-conditioner is needed to replace our ten year old broken unit.
- To maintain our food ways program and to treat artifacts with proper integrated pest-management practices, by initially freezing collections, we are in need of a new energy efficient refrigerator/freezer. Our present refrigerator is not functioning and has been taken out of use. We use a refrigerator to store foods for our interpretive program and the freezer is used to treat artifacts.
- KHS will devote additional interpretative staff hours, veterinarian, ferrier (for the donkey), and groundskeeper hours to facilitate and upkeep this initial investment.

Consultant Guided Work and Staff Hours Increases

- Consultant projects, much needed to provide proper access to archival collections, increased training and staffing for regular program hours again for our living history programs, and processing, recording, and transcribing projects for time-sensitive oral history projects and records projects would be planned and internally prepped in the first two quarters, and executed successively in the final quarterly increments.
- After years of having to refuse collection acquisitions and just merely maintaining and preserving backlogged collections, we need consultant guided work with Dr. Tom Woods (Living History Museum Programs Consultant), Dolly Strazar (Consulting Collection Manager), and Menzi Behrnd-Klodt, J.D, C.A., (Certified Archivist) or other comparable experts, to complete three needed projects. We need supplemental training of our historical interpreters, to process approximately 80-cubic feet of backlogged crucial archival material, including collections supporting our living history programs and those with key KHS organizational records, as well as historically significant collections on ranching industries in Kona, and, finally, to execute oral histories processing, description and transcription. Finding aids will also be produced.
- These projects will require staff and volunteer hours as well, but will provide more opportunities for public access to collections, and more opportunities for visitors and residents to enjoy expanded hours to our programs and contribute to our financial health through admissions fees, research services, museum kiosk sales, and increased membership.
- Operating with scaled back hours for our historical interpreters, for several years, a half-time Executive Director, and decreased hours for our Programs and Collection Director, minimal hours for our Lead Interpreter, minimal hours for our Archival Technician (Collections Assistant), and too few Historical Interpreter and other key staff hours, we now need to restore hours to these crucial staff members in order to sustain and grow the organization. If these staff increases are made, and this project is funded, we have diverse revenue streams which will be put in place and enabled to grow to support our restored staffing in the near future.

Marketing and Publishing

- Increased marketing is absolutely vital to our organization's sustainability. Toward this end we need to increase staff hours for our Sales and Marketing Associate and allocate targeted advertising resources to reach potential visitors, researchers, and Society members and donors. This includes key visitor-publication ad space, as well as other media spots such as Big Island TV, and radio spots.
- An aggressive social media and online marketing campaign will accompany the funded marketing and KHS will provide Executive Director hours and other direct marketing with tour bus, concierge, school, and other outreach resources to increase membership, draw visitors, and increase sales.
- Reprint successful and educational KHS publications from past including *A Guide to the Kona Districts* Brochure, *A Guide to Old Kona* and *Keahi's Special Bread Day*.

2. and 3. Projected Annual Timeline and Quality Assurance Evaluation Methods

The Kona Historical Society's *Kona Coffee Living History Farm and H.N Greenwell Store Museum Sustainable-Stewardship Project: Project Reinstatements to 2007 Levels* will begin on July 1, 2013 and will be completed on June 30, 2014 according to the following timeline:

July-August Organizational meetings held with staff and management team. Project goals set and prepared in writing. Site maintenance work begins. Volunteer and intern planning and contact calls made. Signage updates and installation begins. Animal and garden care strategy meeting with key staff in conjunction with planned funded maintenance. Equipment needed for all proposed projects purchased. Equipment installation performed if needed.

September-October Library and archive cleaning and maintenance performed. First intern and volunteer MLIS graduate student training begins. Collections sorting, storing and housing begins. Climate-control system for archive cleaned and serviced. Marketing outreach increase begins for programs already in place. Phase I : pertinent staff hours increased. Site maintenance continues. Increased farm yield and products processing and sales planning meeting with management and key staff. Social media and other marketing outreach by key staff. Initial preparation for Oral History project started.

November-December Consulting projects planned and scheduled in connection with experts. Second volunteer and intern archive collections sorting, storing and housing project happens. Site maintenance and improvements completed. Phase II: remaining pertinent staff hours increased. Retail museum kiosk move, merchandising, and basic internal staff training completed in early November. Marketing increased, targeted

advertising in advance (Nov. and early Dec.) of high-season tourism and school holiday breaks run. Monitor progress of project against original timeline and goals and patron feedback.

January-February Oral History project continued. Sales of educational farm products started. Animal, garden, archival collection care at KCLH Farm measured through analysis (culled from member surveys, veterinarian, archivist, and other expert solicited opinions, staff and management simple feedback form). Continued marketing. Staff’s status, hours availability, and training needs and desires assessed.

March-April Consultant project: records and archival back-logged collections processed. Volunteer coordination and staffing allocated appropriately for project. Retail kiosk and online sales analyzed through sales figures analysis. Membership numbers and trends analyzed. Gate counts of library and archive use analyzed. Continued marketing.

May-June Intensive historical interpretation supplemental training performed by consultant. Project analysis performed through surveys, customer comments cards review and sales figures, membership numbers, patron gate counts, and trends previously gathered as well as figures from May and June. End of fiscal year report. Project completion meeting and report synthesizing above information.

4. Effectiveness Measures Reported to State

Project completion report with all project analyses, evaluation data, and consultant reports and/or finding aids, as well as 1st quarter planning goals document and a representative sampling of member, visitor and staff feedback forms will be provided at time of project completion upon State’s request.

III. Financial

Budget

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.

See attached budget

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2014.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$100,000	\$75,000	\$75,000	\$25,153.46	\$275,153.46

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2014.

N/A

(Additional individual tasks related to overall proposed project, e.g. additional marketing, farm animal and garden sponsors or patronage, intern and volunteer program expansion, which may potentially be funded by members and donors, have not yet been assigned. KHS will, however, be supplementing the State of Hawai'i's potential funding of \$275,153.46 with large staff hour, maintenance, marketing and other funds and resources, thereby requiring an outlay in this project term of approximately \$650,000 for operations combining KHS and Grant-in-Aid contributions).

4. The applicant shall provide a listing of all state and federal tax credits it has been granted within the prior three years. Additionally, the applicant shall provide a listing of all state and federal tax credits they have applied for or anticipate applying for pertaining to any capital project, if applicable.

N/A

IV. Experience and Capability

A. Necessary Skills and Experience

KHS was founded in 1976, and since that time has received over fifteen state and national honors and awards including the National Preservation Honor Award from the National Trust for Historic Preservation. Its two primary facilities are on the National and State registers for historic places. KHS was awarded the first Smithsonian Museum affiliate status in the State of Hawai'i and to-date hosts the only permanent National Endowment for the Humanities exhibits in the State of Hawai'i. Our organization has board members and an executive director with decades of experience in non-profits and local cultural and historical knowledge, and additional senior staff with advanced degrees and experience in libraries, special collections, exhibit and archival and preservation work as well as project and collections management, farm and ranching experience, and university teaching. Our historical interpreters bring local, cultural, academic and language skills to our organization, with dedicated and invested staff and community volunteers providing a rich and highly qualified well of individuals from which we can draw for this proposed project.

B. Facilities

KHS has two locations: a two acre parcel in Kalukalu-Kona where the H.N. Greenwell Store and homestead (c. 1875) hosts the *H.N. Greenwell Museum, Jean Greenwell Library and Archives*, Portuguese Bread Oven, and KHS headquarters; and *The Kona Coffee Living History Farm*, a seven acre working coffee and macadamia nut farm first homesteaded in 1900 serves as an open air museum with a farm house, Japanese style bath house (*furo*), coffee drying roof platform (*hoshidana*), coffee pulping mill (*kuriba*), kitchen gardens, and farm animal home. As nationally and state registered historic sites, these facilities are not subject to ADA stringent requirements, but all accommodations that can be made (such as adequately sized entry-doors, accessible restroom facilities, and accessible paths) have been provided. The KCLHF also has a golf-cart and staff driver available for patrons wishing to tour the farm but not able to navigate the paths and terrain on their own.

V. Personnel: Project Organization and Staffing

A. Proposed Staffing, Staff Qualifications, Supervision and Training

Jill Olson is the Executive Director of Kona Historical Society and one of the founding members of the organization. With over 35 years of non-profit experience at Kona Historical Society, many sector and industry awards, and valuable local knowledge combined with love of and dedication to Hawai'i, she is a phenomenal resource for this project.

Ku'ulani Auld is Director of Programs and Collections Manager and Coordinator of Educational Programs for all KHS sites. With years of institutional knowledge and experience, prodigious cultural knowledge, and as a fifth generation Kona rancher, Ku'ulani brings invaluable insights and experience to this project.

Joy Holland comes to KHS from Hamilton Library at University of Manoa, where she worked as a Preservation Archivist, combining archival project management, collection management duties, and special collections experience, with a college instruction, public relations, office management and paralegal and office administration career history. Joy is from Kona originally and has worked as an interpreter in several KHS programs since Sept. 2012, including the *Kona Coffee Living History Farm*, the *Portuguese Bread Oven Program*, museum retail, and archival and collections maintenance. Joy brings a variety of expert skill sets to this project.

Mary Prevez is Tour Coordinator and Lead Interpreter at the *Kona Coffee Living History Farm*. She has worked with many school groups in this capacity for over two years, and is a long-time Kona resident, coffee farm owner, and alumna of UH Hilo.

Ann Kern is Tour Coordinator and Lead Interpreter for the *H.N. Greenwell Store Museum* and has worked with tour and school groups for over ten years, and serves as a marketing associate for KHS.

Consultants

Dr. Tom Woods (30 years experience in historic site and living history museum planning and development), Dolly Strazar (extensive collection management and archive project direction), and Menzi Behrnd-Klodt, J.D, C.A., (certified archivist, decades of archive project consulting and expert publication and instruction).

Interpreters are all trained in an intensive and lengthy (approximately 40 hours) training program designed by expert Dr. Tom Woods.

B. Organization Chart

The applicant shall illustrate the position of each staff and line of responsibility/supervision. If the request is part of a large, multi-purpose organization, include an organizational chart that illustrates the placement of this request.

See the attached organizational chart

VI. Other

A. Litigation

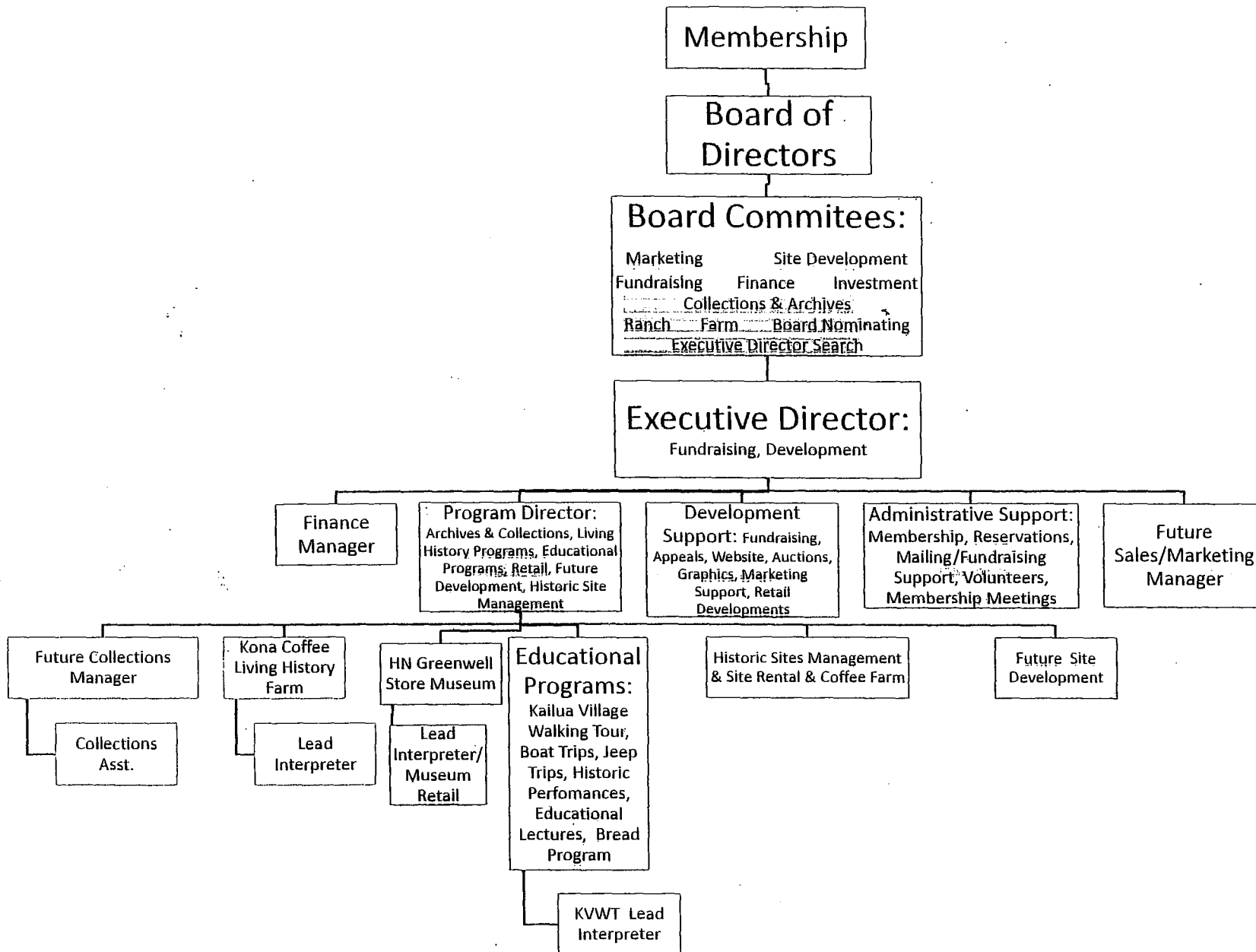
The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgement. If applicable, please explain.

N/A

B. Licensure or Accreditation

The applicant shall specify any special qualifications, including but not limited to licensure or accreditation that applicant possesses relevant to this request.

N/A



BUDGET REQUEST BY SOURCE OF FUNDS

(Period: July 1, 2013 to June 30, 2014)

Applicant: Kona Historical Society

BUDGET CATEGORIES	Total State Funds Requested (a)	(b)	(c)	(d)
A. PERSONNEL COST				
1. Salaries	\$90,637.20			
2. Payroll Taxes & Assessments (6.6%)	\$5,982.00			
3. Fringe Benefits (calculated at 11%)	\$9,970.10			
TOTAL PERSONNEL COST	\$106,589.30			
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island (HA Coach 2 staff, 3x)	\$1,538.76			
2. Insurance	\$61,600.00			
3. Lease/Rental of Equipment (Pitney Bowes)	\$650.00			
4. Lease/Rental of Space	0			
5. Staff Training (Consultant, Dr. Tom Woods)	\$7,175.00			
6. Supplies	\$11,200.00			
7. Telecommunication (landline & cell)	\$8,580.00			
8. Utilities	\$10,900.00			
9. Printing	\$5,260.00			
10. Copier Supplies	\$4,000.00			
11. Maintenance Contract Copier	\$1,741.60			
12. License & Permits Bulk Mail	\$200.00			
13. Postage	\$3,575.00			
14. Landscape Maintenance	\$10,200.00			
15. Archives Processing (consultant Behmd-Klodt)	\$7,756.46			
16. OralHistory process (consultant Dolly Strazar)	\$6,895.00			
17. Marketing & Advertising(B.I. TV & publications)	\$16,280			
18. Livestock Feed	\$400.00			
19. Tree, Plant, Native Forest Clean-up, Trimming	\$1,460.00			
20. Smithsonian Affiliation & Profes. Assoc. Dues	\$830.00			
21. Children's Program Supplies-- 12 washboards	\$335.40			
TOTAL OTHER CURRENT EXPENSES	160,241.82			
C. EQUIPMENT PURCHASES	\$8,322.34			
D. MOTOR VEHICLE PURCHASES	0			
E. CAPITAL	0			
TOTAL (A+B+C+D+E)	275,153.46			
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	\$275,153.46	Jill Olson		
(b)				
(c)				
(d)				
TOTAL BUDGET	\$275,153.46	323-3222 Phone 1/29/13 Date		

BUDGET JUSTIFICATION PERSONNEL - SALARIES AND WAGES

Applicant: Kona Historical Society

Period: July 1, 2013 to June 30, 2014

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Executive Director	\$50,000.00	\$47,500.00	50.00%	\$ 23,750.00
Program Director	\$45,760.00	\$38,850.00	22.00%	\$ 8,547.00
Bookkeeper	\$41,600.00	\$13,520.00	40.00%	\$ 5,408.00
Sales & Marketing Associate	\$24,960.00	\$6,240.00	100.00%	\$ 6,240.00
Farm Manager	\$30,160.00	\$16,500.00	50.00%	\$ 8,250.00
Historical Interpreter-- H.N Greenwell Store Site	\$25,000.00	\$8,840.00	100.00%	\$ 8,840.00
Historical Interpreter-- Kona Coffee Living History Site	\$25,000.00	\$14,340.00	33.00%	\$ 4,732.20
Archives--Collections Management Assistant/Archives Technician	\$26,000.00	\$11,700.00	100.00%	\$ 11,700.00
Archives--Transcription Technician	\$31,200.00	\$7,500.00	100.00%	\$ 7,500.00
Volunteer Coordinator	\$28,000.00	\$21,000.00	27.00%	\$ 5,670.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
TOTAL:				90,637.20
JUSTIFICATION/COMMENTS:				
Volunteer coordination and training and additional hours for consultant guided projects expected. KHS expects to cover all personnel hours for this expense.				

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

BUDGET JUSTIFICATION--EQUIPMENT & MOTOR VEHICLES

Applicant: Kona Historical Society

Period: July 1, 2013 to June 30, 2014

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
Sound System Speaker, Microphone	1.00	\$169.99	\$ 169.99	
Digital Camera 1 Canon Powershot SX260 HS Digital Came	1.00	\$299.99	\$ 299.99	
Digital Video Recorder Sony HVR-HD1000U Digital High Definition	1.00	\$1,525.00	\$ 1,525.00	
Digital Tape Recorder Zoom H1 On-Camera DSLR Audio Kit	1.00	\$187.95	\$ 187.95	
Cash Register Sharp XE-A507 Cash Register with Barcode	2.00	\$399.99	\$ 799.98	
Refrigerator Sears Kenmore 18.2 cu. Ft. top freezer refrig	1.00	\$449.99	\$ 449.99	
Air-Conditioner Room-unit Sears Model 70181 Room Air Co	1.00	\$399.99	\$ 399.99	
Archival Supplies Acid-free folders, Acid-free boxes, gloves, p	222.00	\$2,039.45	\$ 2,039.45	
Vacuum Cleaner HEPA Tiger archivally-safe wet/dry vacuum	1.00	\$2,450.00	\$ 2,450.00	
TOTAL:	231		\$ 8,322.34	8,322
JUSTIFICATION/COMMENTS: These items are needed for described Oral Histories, Archival Processing, and deferred farm maintenance and clean up, and museum maintenance & clean-up				
TOTAL \$8322.34				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ 0.00	
N/A				
TOTAL:				
JUSTIFICATION/COMMENTS:				

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS AND SUBSIDIES PURSUANT TO
CHAPTER 42F, HAWAII REVISIED STATUTES**

The undersigned authorized representative of the applicant certifies the following:

- 1) The applicant meets and will comply with all of the following standards for the award of grants and subsidies pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant or subsidy is awarded;
 - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
 - c) Agrees not to use state funds for entertainment or lobbying activities; and
 - d) Allows the state agency to which funds for the grant or subsidy were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant or subsidy.
- 2) The applicant meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is incorporated under the laws of the State; and
 - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant or subsidy is awarded shall be conducted or provided.
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is determined and designated to be a non-profit organization by the Internal Revenue Service; and
 - b) Has a governing board whose members have no material conflict of interest and serve without compensation.

Pursuant to Section 42F-103, Hawaii Revised Statutes, for grants or subsidies used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant or subsidy was awarded and disposes of the land in fee simple or by lease, the organization shall negotiate with the expending agency for a lump sum or installment repayment to the State of the amount of the grant or subsidy used for the acquisition of the land.

Further, the undersigned authorized representative certifies that this statement is true and correct to the best of the applicant's knowledge.

Kona Historical Society

(Typed Name of Individual or Organization)



(Signature)

1/29/13

(Date)

Allen Wall

President

(Typed Name)

(Title)