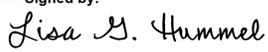


## Application Submittal Checklist

*The following items are required for submittal of the grant application. Please verify and check off that the items have been included in the application packet.*

- 1) Hawaii Compliance Express Certificate (If the Applicant is an Organization)
- 2) Declaration Statement
- 3) Verify that grant shall be used for a public purpose
- 4) Background and Summary
- 5) Service Summary and Outcomes
- 6) Budget
  - a) Budget request by source of funds ([Link](#))
  - b) Personnel salaries and wages ([Link](#))
  - c) Equipment and motor vehicles ([Link](#))
  - d) Capital project details ([Link](#))
  - e) Government contracts, grants, and grants in aid ([Link](#))
- 7) Experience and Capability
- 8) Personnel: Project Organization and Staffing

Signed by:  
  
\_\_\_\_\_  
AUTHORIZED SIGNATURE      Lisa Greenwell Hummel, Board President      PRINT NAME AND TITLE      1/13/2026      DATE



STATE OF HAWAII  
STATE PROCUREMENT OFFICE

**CERTIFICATE OF VENDOR COMPLIANCE**

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer Affairs (DCCA).

**Vendor Name:** KONA HISTORICAL SOCIETY

**DBA/Trade Name:** KONA HISTORICAL SOCIETY

**Issue Date:** 05/22/2025

**Status:** **Compliant**

Hawaii Tax#: [REDACTED]

New Hawaii Tax#: [REDACTED]

FEIN/SSN#: [REDACTED]

UI#: XXXXXX0371

DCCA FILE#: 30769

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

**Status Legend:**

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

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

The undersigned authorized representative of the applicant certifies the following:

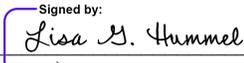
- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawai'i Revised Statutes:
  - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant 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 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.
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawai'i 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 is awarded shall be conducted or provided; and
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawai'i 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.
- 4) The use of grant-in-aid funding complies with all provisions of the Constitution of the State of Hawaii (for example, pursuant to Article X, section 1, of the Constitution, the State cannot provide "... public funds ... for the support or benefit of any sectarian or nonsectarian private educational institution...").

Pursuant to Section 42F-103, Hawai'i Revised Statutes, for grants used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant 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 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.

Lisa Greenwell Hummel, Kona Historical Society Board President

\_\_\_\_\_  
(Typed Name of Individual or Organization)

Signed by:  (Signature)	01/14.2026 (Date)
Lisa Greenwell Hummel (Typed Name)	<del>XXXXXXXXXX</del> Board President (Title)

## Statement of Public Purpose

The applicant shall specify whether the grant will be used for a public purpose pursuant to Section 42F-102, Hawaii Revised Statutes.

The Grant we have submitted is primarily for funding the salaries of several positions at the Kona Historical Society (KHS). KHS is a world-renowned organization dedicated to preserving Kona's unique historic and cultural stories from the mid-1800's to current times. The Society maintains several distinct archival collections, including a manuscript collection that details the history of Kona agriculture, coffee orchards, ranching, church and missionary activities, civic organizations, and small businesses. Other collections include a Visual Images Collection of still photos and moving pictures; an oral history collection; a map collection; place names of Kona database; and the Hawaiian Kingdom Property Tax Records from 1859 to 1890. The Public is encouraged to visit all the archival records. The Society has a website, a newsletter, and Facebook presence, and operates the Greenwell Museum/Store and the Kona Living History Coffee Farm. Visitors have the opportunity to attend a wide array of educational and entertaining events, exhibits, tours, and self-guided hikes. The additional staff will allow KHS to enhance the visitor experience of everyone, including our resident visitors and those who come to us by airplane or cruise ships. The funding would be used for salaries for three vacant positions that are critical to the successful operations of the Society.

## Application for Grants

*If any item is not applicable to the request, the applicant should enter "not applicable".*

### **I. Certification – Please attach immediately after cover page**

**1. Hawaii Compliance Express Certificate (If the Applicant is an Organization)**

If the applicant is an organization, the applicant shall submit one (1) copy of a Hawaii Compliance Express Certificate from the Comptroller of the Department of Accounting and General Services that is dated no earlier than December 1, 2025.

**See attached Compliance Express Certificate**

**2. Declaration Statement**

The applicant shall submit a declaration statement affirming its compliance with [Section 42F-103, Hawaii Revised Statutes](#).

**See attached Declaration Statement signed by Foundation Board President**

**3. Public Purpose**

The applicant shall specify whether the grant will be used for a public purpose pursuant to [Section 42F-102, Hawaii Revised Statutes](#).

**See attached Statement of Public Purpose**

### **II. Background and Summary**

This section shall clearly and concisely summarize and highlight the contents of the request in such a way as to provide the State Legislature with a broad understanding of the request. Please include the following:

**1. A brief description of the applicant's background**

Kona Historical Society (KHS), a 501c3 non-profit organization is requesting funding from the State of Hawai'i Grant In Aid Program to help revitalize our H.N. Greenwell Store Museum, our Kona Coffee Living Farm and our interactive visitor program. The Kona Historical Society mission is to preserve the history of Kona to enrich, inspire, and inform our community and visitors. We do this through collecting, preserving, researching, interpreting, and disseminating the history of Kona. KHS is recognized as a non-profit, tax-exempt, charitable organization established in the State of Hawaii on April 19, 1976.

In 2025, KHS has gained significant financial ground through grants, foundational support, and an integral expansion of our staff. As we came out of 2020-2023 with financial and staffing needs, we were able to utilize our grants and community support to place KHS on a strong and innovative path. We secured funding and located individuals for our Executive Director and a Digital Content Manager. With the CLIR grant to assist in Digitizing our 'Hidden Voices', our online presence will continue to grow and allow KHS to reach a broader audience.

Today, Kona Historical Society is a Smithsonian Affiliate with the only permanent National Endowment for Humanities exhibits in Hawaii with the H.N. Greenwell Store Museum in

Kealahou and the Kona Coffee Living History Farm in Captain Cook. Over the past three decades, the Society has garnered dozens of awards and commendations for its unique museums, two national and state registered buildings, public programs, and research archives. We fulfill our mission to collect, preserve, and share Kona's stories and unique sense of place through our many programs, both online and in-person. Many of these programs are free to visitors and students, thanks to our thriving community of members. The Kona Historical Society connects past, current, and future generations to Kona and to Hawaii's history while inspiring an appreciation for its heritage.

During the 1980s, the Kona Historical Society (KHS) Board focused on creating a storage area for the library and collections. Currently, KHS maintains eight distinct Collections including:

**\*Jean Greenwell Research Collection** which is the foundation for the Kona Historical Society's archives. The archive has grown and now includes collections of historical photographs, unpublished diaries, journals, letters, family records and memorabilia, land documents, and selected Kona newspapers and articles. Records of local coffee enterprises, ranches, community clubs, and ethnic organizations including correspondence, minutes of board and committee meetings, financial records, and publications are part of this collection.

**\*Hawaiian Kingdom Property Tax Records** for the years 1859, 1875, 1881, 1885, 1888, and 1890 have been entered into a research database at the Kona Historical Society archives. The tax records can be used to understand many aspects of Kona's history including social issues, such as illness, death, and resident mobility into and out of Kona; ethnic land ownership and leasing; and the evolving ethnic participation in the various Kona industries-ranching, fishing, merchandising, and plantation development-during the critical period of 1850-1900.

**\*Manuscript Collection** includes significant primary material, dating from around 1850 to 1990. The collection illustrates the history of Kona agriculture, coffee, ranching, and beef production; and its churches and missionary activity, civic organizations, and small businesses.

**\*Visual Images Collection** is comprised of both still photographs and moving images. Between 1980 and 1988 the prints, negatives, and slides in the Photograph Collection were organized, arranged by subject, and made accessible to the public.

**\*Photograph Collection** holds over 50,000 images depicting such subjects as ethnic culture, geography, agriculture, religion, and education in Kona between 1790 and 1994. The Moving Images Collection includes approximately 15,000 feet of restored film depicting Kona between 1930 and 1960, videotapes, and DVDS.

**\*Oral History Collection** includes approximately one hundred hours of taped oral history interviews on topics related to life in Kona between 1900 and 1960, and described such topics as ranching, agriculture, coffee, ethnic lifestyles and diversity, employment, and avocations.

**\*Map Collection** consists of over 150 maps of the North and South Kona districts, including the mauka ranch lands; most are reproductions, with original hand-drawn maps.

**\*Place Names of Kona** is the electronic database that brings together the research of Dorothy Barrere, Lloyd Soehren, and Jean Greenwell. With each researcher using different source materials, they were able to pool their extensive knowledge to create this compilation of the place names used by the Hawaiians to describe the Kona environment. The Society provides living history programs, digital education programs, field trips, virtual experiences, and exhibits

at its historic sites -the H.N. Greenwell Store Museum in Kalukalu and the Kona Coffee Living History Farm in Captain Cook. Other programs include Portuguese Stone Oven Baking Program, off-road educational jeep trips, Hanohano O Kona Lecture Series, and other special programs of historical and cultural interest.

A vital focus of the Kona Historical Society is to reach out to the underserved and ethnic groups in the area. There are many Japanese, Chinese, Portuguese, Marshallese, and other Polynesian families who live and work here. Many of these families work in the agricultural industry as small-scale producers and are socially disadvantaged or traditionally underserved as far as educational resources go. KHS has made a concerted effort to engage this population in the events, presentations and exhibits that are offered. Their families' Legacy and Heritage is intricately tied to the history and culture of this area; thus, opportunities to learn about what drew their ancestors here; how those early settlers lived and prospered; and what that means to the families of today are all important outcomes for KHS.

## **2. The goals and objectives related to the request**

Kona Historical Society brings together in South Kona a wealth of information available to all of us so we too can learn about the culture, history, and landscapes we find so fascinating. The Kona Coffee Living History Farm and the Greenwell Museum/Store has drawn visitors from all walk of life - from the casual traveler on the way to Volcano who makes a quick detour to visit the facility to the devoted History buff who plans to spend days or weeks in the archives maintained by KHS. The Konawaena Elementary through High School is a short distance from the Museum and keiki of all ages visit the museum and often volunteer to help at special events. Researchers from around the country come to study in the archives to supplement their research papers with information from tax records, oral histories, maps and photographs. (We have recently been made aware that an academic will have his dissertation published by Oxford University Press in 2025, and one chapter in the monograph centers on his research in our Archives. Dr. Guy Mount researched in our archives for his dissertation, "Slavery's Empire: Reconstruction in the Black Pacific")

Our goals and objectives for our request:

- Expand recently received funding so that we can fully fund positions needed to have the museum, the living history farm, and the visitor programs 100% operational for our community.
- As a finalist for the 2026 CLIR grant and "Digitizing Hidden Voices, we will use GIA monies to continue the online activities and digital educational programs to enhance community access started in 2020 and that were extremely successful.
- Building on our recent hires of a new Executive Director and Digital Content Manager, we would use GIA monies to ensure enough hired staff to support the local school fieldtrips and fall, spring, and summer workshops.
- Establish a strong Development Department to help with fundraising so we can continue to elevate our long term sustainability.
- Expand our robust and extensive financial connections within our island community.
- Expand exhibits from the living history farm to fully represent the culture and environment of Hawai'i Island history.

- Expand our outreach efforts to reach an even larger percentage of our local community.
- Digitize collections that are gems in 'hidden history'. Making certain that these collections representing the diversity of Kona are secured and part of public record and public access.
- Connect our digitized and online resources with state museum and databases for individuals on other islands and around the world to have access.
- Ensure the safe and environmental secure holding area for all of our archive collections.

**The objectives of this request are to:**

- Utilize our new Digital Content Manager to develop additional online curriculum for our local schools that illustrates local history, culture and diversity.
- Enhance school trips to the museum and to the living farm.
- Create and implement Fall, Spring, Summer educational workshops for local school students and schools.
- Continue and expand our collaborative community efforts with Aloha Theatre and the Paniolo Cowboy Society, Kamehameha Schools, the International Coffee Festival and other Hawai'i community partners.
- With our CLIR grant, continue to digitize portions of the archive collection so that our local population, tourists, and Hawaiian and worldwide academics have access.
- Develop an extensive multi-year fundraising and development campaign with newly hired Development staff
- Assist our new Executive Director to develop a strong 5 year plan with our foundation board.
- Enhance community events and presentations. Taking the example of outside community events during COVID and making them regular gathering points for the community on a monthly basis.
- Solidify the connection with the Kona Beekeeping association so that we can collaborate on the hosting of the history of Kona Beekeeping exhibit.
- Have staff continue to secure the manuscript and image collection in safe spaces and guarantee access to public.
- Engage in outreach events to our local schools and community groups to demonstrate the holding in Kona Historical Society.

**3. The public purpose and need to be served;**

The Kona Historical Society focuses on arts, culture, history and is an affiliate of the Smithsonian Institute responsible for stewarding the only two permanent National Endowment for the Humanities exhibits in the State of Hawaii. The Kona Historical Society preserves the history of Kona to enrich, inspire, and inform our community and visitors. We do this through collecting, preserving, researching, interpreting, and disseminating the history of Kona. The Kona Historical Society fulfills our mission to collect, preserve, and share Kona's stories and unique sense of place through our many programs, both online and in-person. Most of these programs are free to visitors and students.

The jewel underlining all the KHS programs is the archival collections and museum artifacts unique to Hawaii and a vital part of the history of South Kona. The history of this area was written by the multi-ethnic groups who lived here, working in the coffee orchards, or in the fields, or working as paniolo on the cattle ranches located on the slopes of Mauna Loa and Hualalai. The communities these families lived in were small, often made up of only a few families who shared resources among themselves. Our rich archives tell the stories of Kona's past through collections of historical photographs, unpublished diaries, journals, letters, family records and memorabilia, land documents, and selected Kona newspapers and articles.

To accommodate the changing circumstances of education, Kona Historical Society has designed a series of virtual field trips, free of charge, and has moved many of our programs online so that visitors and students can participate virtually. Spend your Mondays with Maile Melrose, join the Kona Nightingales for story time and so much more! In addition to the historical exhibits into the past, the Greenwell Museum/Store is the site for cultural festivals, arts and crafts displays, and a place where we can celebrate our musical heritage with live music and entertainment. As noted above, an important focus for all our activities is to reach out to the South Kona underserved communities by providing free exhibits, special projects for keiki, and a regular on-line presence to encourage and sustain all of us in this challenging time of social distancing and diminished services throughout most communities.

The three-acre Living History Coffee Farm lies a short distance south of the Greenwell Store/Museum and is the only such farm in the nation. The property is publicly accessible State of Hawaii Legacy Land Reserves and also contains a portion of the Kona Field System running through it. The Kona Field System is a unique network of stonework constructed in the 1600's which delineated various agricultural fields beginning at the ocean shorelines and extending to the upper forested woodlands. In the time before Captain Cook arrived, most of the people lived along the coast in the area called the Kahakai or Coastal Zone which was dry and consisted primarily of grasses used to thatch roofs and as fuel for fires. Above the coast is the lowland dry plains known as the kula lands which still receive salt spray. At an elevation of ca. 1,000 feet is the kalu'ulu where the 'ulu or breadfruit groves thrive. The main Agricultural area, known as the 'apa'a, is where the rainfall is sufficient for growing the major food crops of kalo, 'uala, kô (sugar cane), ki (ti leaf), banana, and uhi (yams). The highest zones (2,000 feet and above) were the 'Ama'u (ferns and taro) and Wet Forest or Cloud Forest called Wao akua or realm of the gods, where the hardwood trees grew that were used for constructing canoes and homes as well as growing bananas and plantains. This is also the area where the brilliantly colored birds lived whose feathers were used to construct the colorful helmets and attire that the chiefs wore.

At the Kona Coffee Living History Farm, visitors can learn about the history of coffee growing in Hawaii and have an opportunity to see how a families' life revolved around the cycle of coffee growing, harvesting, and preparing the beans. The exhibits at the Farm contain the actual machinery used one hundred years ago, including the conveyer belt system for sorting the beans, to the roof top system for drying the beans. The families who worked in the coffee orchards involved everyone in the family in the work, from the tiniest child to the oldest kupuna. The families normally maintained their home right at the farm and worked from sunup to sunset or all night depending on the season. This site as well as the Greenwell Store/Museum are perfect for wandering back in time! In spite of the various challenges, the Kona Historical Society strives to stay true to our Mission of Preserving the History of Kona so our Community and Visitors can be enriched, inspired, and informed by connecting past, current, and future generations to Kona's history and inspiring an appreciation for its heritage.

KHS' public purpose has been renewed and refocused over the past 3 years, and we are emerging with expanded offerings of our work to the public.

#### **4. Describe the target population to be served**

The targeted audience for the work of the Kona Historical Society includes both residents of Hawaii Island and the State at large as well as tourists who visit the Island, and academics from around the world.

The population we serve includes everyone who is inspired by the Hawaiian story, history, and culture. We welcome students of all ages from around the Island and from neighboring Islands. We have designed a virtual story time on Facebook to entertain keiki with recitations of books such as Good Night Hawaiian Moon. These stories and other presentations are targeted at the historically underserved families, especially now with the isolation and lack of needed resources families are experiencing. Virtual field trips to special places are available as are several video presentations that are available for free, including "Aloha 'Āina: Relationships Between People and Place Through Time;" "Preserving a Kona Story, featuring Kona Coffee Living History Farm Interpreter Pauline Nishida-Miller," and "Stories from Kauleoli", which is about the Ala Kahakai National Historic Trail. Parents and teachers find programs useful for students, whether it is a guided educational activity or simply a chance to try something new in the virtual classroom. We have quantitative data from exit surveys and program surveys indicating that students, teachers and parents have greatly enjoyed and benefited from KHS events.

KHS has programs available to educate, entertain, and engage our diverse group of Hawaiian residents and tourists. In 2025, we have gained significant financial ground through grants, foundational support, and an integral expansion of our staff. And as always, our Hawaiian residents continue to support Kona Historical Society and we are excited to see the future of this amazing organization.

#### **5. Describe the geographic coverage**

Kona Historical Society is located on two sites with the H.N. Greenwell Store Museum in Kealahou and the Kona Coffee Living History Farm in Captain Cook in a Ahupua'a of Kalukau and the District of South Kona. We serve all of Hawai'i Island with our permanent locations, and through our expansion online in general and especially through our innovative online outreach during COVID, we serve all of the Hawai'i Islands and everyone around the world interested in Hawaiian history and culture. The Kona Living History Coffee Farm attracts visitors of Japanese descent whose ancestors came to South Kona a century ago to work in the coffee fields. The docents who greet visitors at the Coffee Farm are both older Japanese women who have family ties to this land. Academics from around the world come to the Jean Greenwell Research Collection to take advantage of the resources there. We welcome interns who are studying Hawaiian history, culture and agriculture as well as visitors and residents who wish to research family connections in the extensive archive documents and tax records from mid-1800's to more current time frames.

With this national recognition as a Smithsonian Affiliate with the only permanent National Endowment for Humanities exhibits in Hawaii, and with the H.N. Greenwell Store Museum in Kealahou and the Kona Coffee Living History Farm in Captain Cook, KHS's physical presence is felt on Hawai'i Island and around all of the Hawaiian Islands.

With the innovative steps and expansion of KHS into a virtual presence, KHS continues to provide both online and in person educational and environmental offerings. Our advancing online programs and online archives has elevated the presence of KHS around the world. Additionally, working with our local universities, museums, and online databases, KHS history and culture is available to more individuals and ever before. Lastly, the Kona Coffee Living History Farm has been placed on the State and National Register of Historic Places won numerous prestigious awards and designated a “Partner Place” by the National Trust for Historic Preservation.

### **III. Service Summary and Outcomes**

The Service Summary shall include a detailed discussion of the applicant’s approach to the request. The applicant shall clearly and concisely specify the results, outcomes, and measures of effectiveness from this request. The applicant shall:

#### **1. Describe the scope of work, tasks and responsibilities**

The Kona Historical Society is overseen by a Volunteer Board of Directors with Lisa Greenwell Hummel currently serving as President and assisted by a Vice-President and a Treasurer. There are eight additional members of the Board of Directors. The Kona Historical Society Staff of eleven is led by our new Executive Director Sandy Butler and Ku'ulani Auld as the Collections Manager. Our recent hire of Sandy is extremely beneficial as she has long standing relationships with Hawaii Island educational community. As a previous school administration, she is working closely with our board and our longstanding staff.

The eleven paid staff members that are:

- Executive Director: Provides leadership to and manages the efforts of site staff to ensure appropriate support of all departments. Supervises the development of operations-based financial modeling. Retains a diverse, highly qualified staff and volunteers by providing career coaching, growth, and personal development for workers. Ensures that services and funding relationships are robust enough to meet or exceed strategic goals and objectives.
- Digital Content Manager: is responsible for collecting, digitizing, and organizing our online presence. (interviewing)
- Operations/Finance Director: is responsible for all finance, development and operations related duties.
- Operations/Fundraising Assistant: Performs administrative, and customer service duties that support the overall effort of each department including constituent/volunteer management, fundraising, collection of analytical data, and creating program statistics in support of grant reporting.
- Public Program Manager: Manages the execution of all museum public programs, oversees public and school programs. In collaboration with the Collections Manager, ensures routine maintenance and repair of the historic landscape and structures with consideration for principles of historic preservation. Works with the Executive, Operations, and Archive team to develop programming and exhibits for the historic sites.

- Collections/Archives Manager: Develops and puts into practice appropriate collections management policies. Supervises and/or performs object registration, accessioning and cataloging. Oversees and performs basic object care and conservation.
- Collections/Archives Technician: Responsible for assisting Collection manager with all duties noted above.
- Three Farm Interpreters: These three staff work at the Kona Coffee Living History Farm, are well-trained in living history interpretation, and provide visitors with an authentic experience.
- Landscape Maintenance: Responsible for mowing, planting, watering, and nurturing the plants in the two areas - the area around the Greenwell Store/Museum and the Kona Coffee Living History Farm.
- Bread Baker: Is responsible for maintaining the oven, lighting the fire, preparing the dough, baking bread, interacting with visitors while sharing the traditional art of baking Portuguese bread in a wood-fired oven.
- Bread Baker Assistant: Assist Baker in all duties and oversees customer relations during Portuguese Stone Oven Baking Program.

**2. Provide a projected annual timeline for accomplishing the results or outcomes of the service**

The following is a projected timeline

- Needs Assessment — Completed October 2025
- Budget Development — Completed November 2025
- Grant Application — Completed January 2026
- Human Resource and Hiring Planning -January-February 2026
- Secure Funding — June 2026
- Stakeholder Engagement — July 1, 2026 — July 30, 2026
- Human Resource and Hiring Planning Adjusted - July 2026
- Staff Employed and Direct work on stated Objectives- August 2026-July 2027
- Feedback and Evaluation — March-April 2027
- Feedback and Evaluation (Second Round) —May- July 2027
- Project Reporting —July/August 2027

**2. Describe its quality assurance and evaluation plans for the request. Specify how the applicant plans to monitor, evaluate, and improve their results**

We will initiate a systematic process for monitoring and assessing performance of new employees. We have performance metrics and will establish clear, measurable, achievable and relevant goals for our new hires. These will be tracked against key performance indicators for their specific roles. The Executive Director will be responsible for the quality assurance and evaluation of all employees and the Foundation Board will be responsible for the Executive Director.

As part of our Quality Assurance, we have a comprehensive onboarding process that includes training, an understanding of KHS policies, procedures and job responsibilities. There will be regular meetings with new hires to assess performance check-ins as well as addressing any areas of concern. In an aim to improve employee retention, regular feedback from immediate supervisor will assist in new employees feeling valued and part of the KHS culture. We will have orientation feedback through surveys and direct conversations to evaluate the quality and effectiveness of our onboarding process.

Evaluation will include: direct observation, project reviews, self-assessments as well as mentor and peer assessments. As we have direct interaction with the public, visitor feedback will also be gathered as a measure of evaluation of product and employee performance.

Long-term development of our staff into the KHS culture is essential. We have staff mentorship and cross curricular experience and training. With this, staff feel invited to participate in all areas of KHS offerings. We will employ feedback from new hires, satisfaction surveys, and engagement metrics to assess retention and employee engagement in team activities. Additionally, as KHS's request is primarily for funding salaries, the quality assurance and evaluation will also be determined by our ability to increase the types and subjects of our exhibits, events, and tours.

We plan to closely track the numbers of visitors to our facilities and develop surveys to distribute to attendees at events so that we can evaluate each new program. With the ability to hire additional staff, we anticipate that the programs, videos, tours, and special events that were so popular in the past can be revitalized and updated to align with what visitors tell us they want to see now. With additional funding for salaries and benefits, KHS will be able to attract outstanding candidates to the positions that are currently vacant.

Since the Society was founded forty-five years ago, the Kona Historical Society has always been unconditionally committed to their programs, resources, and to the stewardship of their properties. The numerous awards given to the Society exemplify the outstanding organization it is, having achieved the recognition of the Smithsonian Society as a "Partner Place," the National Endowment for the Humanities, Historic Hawaii Foundation, the National Trust for Historic Preservation (which awarded KHS with its prestigious "National Preservation Honor Award", among others. KHS spearheaded the formation of the "Alliance for Hawaii Island History and Cultural Preservation Organizations" so that organizations with a similar focus can interact and exchange ideas. Our current staff already has outlined several innovative ideas for inspiring new programs and events; they are hopeful that the future of the Kona Historical Society is brighter than it has been for years!

We have expanded and grown our traditional services while creating a new and innovative online presence to serve the local, state and international community. With a bit more help from this GIA grant we are confident in our continued public service.

3. List the measure(s) of effectiveness that will be reported to the State agency through which grant funds are appropriated (the expending agency). The measure(s) will provide a standard and objective way for the State to assess the program's achievement or accomplishment. Please note that if the level of appropriation differs from the amount included in this application that the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.

To measure the effectiveness of the additional staff, we will set up databases to track each type of event, tour, program, demonstration, or video/multi-media presentation. We will collect various statistics on type of program offered, including the targeted audience, the amount of advance advertisement, the cost of the event, and the number attending, as well as demographic information such as whether the attendee is a resident or visitor to the island, how they heard about the event, and if the event met expectations. To engage the public, the experiences that we offer need to be diverse and educational. We have success with theatrical performances and hope to resume in-person performances at outdoor venues. These kinds of activities take a great deal of work and planning, so the increase in staff is vitally needed.

To further measure the effectiveness of staff, we will track funding and support cultivated by both the Development Director and the Executive Director. We will measure the quantity and quality of sources placed online through our digitalization, as well as tracking the use of these items placed online.

We will gauge our impact by evaluating the DD's ability to bring in additional funding while also gauging the DCM's ability to organize and make accessible our growing digital content. Measurable assessments for both the DD and the DCM are vital to our sustainability and are an integral piece of our overarching charge to broaden and diversity our audience. With the digital programming and increased on site community events, we will create a more welcoming society so that all visitors feel included and are an active part of KHS.

#### **IV. Financial**

##### **Budget**

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
  - a. Budget request by source of funds ([Link](#))
  - b. Personnel salaries and wages ([Link](#))
  - c. Equipment and motor vehicles ([Link](#))
  - d. Capital project details ([Link](#))
  - e. Government contracts, grants, and grants in aid ([Link](#))
2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2027.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
50,000	50,000	50,000	9,224	159,224

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2027.

- \*Clarence C.T. Ching Foundation-Received for 2025, applied for 2026-27
- \*Kosasa Cultural Arts Grant -Received for 2025-2026, applying for renewal 2027
- \*Legacy Land Grant -Received 2025; applying for renewal 2027
- \*Atherton Foundation -Received 2025; applying for renewal 2027
- \*CQ Yee Hop Foundation – Received 2025
- \*Name withheld Foundation Capital Grant – Received 2025; applying for renewal 2027
- \*Cooke Foundation -Pending 2026-2027
- \*CLIR Grant – Pending 2026-2027

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.

Not Applicable

5. The applicant shall provide a listing of all federal, state, and county government contracts, grants, and grants in aid it has been granted within the prior three years and will be receiving for fiscal year 2027 for program funding.

**Federal**

None in last 3 years

**State:**

A building award for a barn-type facility was awarded, but not funded as we have changed construction to be more in alignment with community needs.

2023-2025 a two-year state GIA of \$250,00

**County:**

2024-2025 a \$8,500 Waiwai

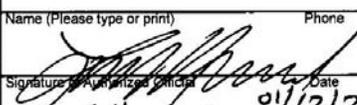
6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2025.  
\$1,002,242.00

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2026 to June 30, 2027

Appr

Kona Historical Society

BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
<b>A. PERSONNEL COST</b>				
1. Salaries	159,224			160,000
2. Payroll Taxes & Assessments				
3. Fringe Benefits				
<b>TOTAL PERSONNEL COST</b>	<b>159,224</b>			<b>160,000</b>
<b>B. OTHER CURRENT EXPENSES</b>				
1. Airfare, Inter-Island				
2. Insurance				
3. Lease/Rental of Equipment				
4. Lease/Rental of Space				
5. Staff Training				8,000
6. Supplies				45,000
7. Telecommunication				
8. Utilities				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
<b>TOTAL OTHER CURRENT EXPENSES</b>				<b>53,000</b>
<b>C. EQUIPMENT PURCHASES</b>				
<b>D. MOTOR VEHICLE PURCHASES</b>				
<b>E. CAPITAL</b>				90,000
<b>TOTAL (A+B+C+D+E)</b>				<b>303,000</b>
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	159,224	Name (Please type or print) _____ Phone _____		
(b) Total Federal Funds Requested		 Signature of Authorized Official _____ Date 01/12/26		
(c) Total County Funds Requested				
(d) Total Private/Other Funds Requested		Name and Title (Please type or print) <b>LISA G. HUMMEL</b> <b>BOARD PRESIDENT</b>		
<b>TOTAL BUDGET</b>	<b>159,224</b>			

**BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES**

Period: July 1, 2026 to June 30, 2027

Applicant: \_\_\_\_\_ Kona Historical Society \_\_\_\_\_

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Development Director	60000	\$60,000.00	35.00%	\$ 21,000.00
Public Programs Manager	50000	\$50,000.00	70.00%	\$ 35,000.00
Executive Director	65000	\$65,000.00	40.00%	\$ 26,000.00
Archive Specialist	33515	\$33,515.00	70.00%	\$ 23,460.50
Archive Manager	24006	\$24,006.00	50.00%	\$ 12,003.00
Museum Interpreters (3)	50400	\$50,400.00	65.00%	\$ 32,760.00
Operations Assistant	38000	\$38,000.00	0.00%	\$ -
Landscape Maintenance	18000	\$18,000.00	0.00%	\$ -
Bread Baker	8320	\$8,320.00	0.00%	\$ -
Digital Content Manager	60000	\$60,000.00	15.00%	\$ 9,000.00
				\$ -
				\$ -
				\$ -
				\$ -
<b>TOTAL:</b>				<b>159,223.50</b>
<b>JUSTIFICATION/COMMENTS: all of our other positions will be funded via other sources</b>				

## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2026 to June 30, 2027

Applicant: Kona Historical Society

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
NONE			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
<b>TOTAL:</b>				
<b>JUSTIFICATION/COMMENTS:</b>				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
NONE			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
<b>TOTAL:</b>				
<b>JUSTIFICATION/COMMENTS:</b>				

**BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS**

Period: July 1, 2026 to June 30, 2027

Applicant: Kona Historical Society

FUNDING AMOUNT REQUESTED							
TOTAL PROJECT COST	NONE	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
		FY:2024-2025	FY:2025-2026	FY:2026-2027	FY:2026-2027	FY:2027-2028	FY:2028-2029
PLANS							
LAND ACQUISITION							
DESIGN							
CONSTRUCTION							
EQUIPMENT							
	<b>TOTAL:</b>						
<b>JUSTIFICATION/COMMENTS:</b>							

**GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID**

App:

Kona Historical Society

Contracts Total: (350,000)

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)</b>	<b>CONTRACT VALUE</b>
1	Hawaii State GIA	2022-2025 (Ended)		Hawaii	250,000
2	Hawaii State GIA 2018 (Capital Improvements)	Not Implemented			(600,000)
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27		10			Application for Grants

## **V. Experience and Capability**

### **1. Necessary Skills and Experience**

The applicant shall demonstrate that it has the necessary skills, abilities, knowledge of, and experience relating to the request. State your experience and appropriateness for providing the service proposed in this application. The applicant shall also provide a listing of verifiable experience of related projects or contracts for the most recent three years that are pertinent to the request.

Kona Historical Society is celebrating forty-five years of serving the Community of South Kona and beyond and has become a well-respected organization. The Executive Directors and staff members throughout the history of the organization have been exemplary in their commitment to fulfilling the mission of preserving the history and culture of the South Kona community. The exhibits, archives, events and on-line offerings have grown in popularity and in significance.

An example of the achievements and awards the Society has received is listed above. The historical interpreters bring local, cultural, academic, and language skills to the organization while the staff and the many volunteers provide additional skills that serve the organization well. KHS has accepted awards from numerous Grant providers and has always fulfilled the high expectations of the awarding agencies. Awards were received from the Hawaii Community Foundation, Hawaii Tourism Authority, County of Hawaii, the Freeman Foundation, among many others over the past years.

Several of the staff and members of the Board of Directors have been elected to other Community Non-Profit Boards, thus maintaining a connection with other related institutions. The Grants that KHS has received in the last three years are described above under section 5. A testament to KHS resilience is the innovative interpretation of programming during the past 3 years. While our facilities were shut down, we initiated online offerings for our community and for our local schools. These online offerings served the community in an extremely positive manner during a challenging time. As a result of these efforts, we are in line to receive private funding to assist in the digitization of 'hidden voices'. This funding will assist in the digitization, and KHS staff, with our new Digital Content Manager, will place KHS resources online through our own website as well as through our state archival collections.

The Federal grants assisted with the Hawaiian Music presentations as well as providing funds for the Archival collection staff and storage. Hawaii State awards included help with operating costs as well as additional assistance with the Music presentation. Over 3 years ago, Hawaii County awards involved funding assistance for outreach, for a new video on "Preserving a Kona Story"; funding from CARES ACT and for digitizing Hawaiian Language and History archives. The unparalleled skills of our staff have served KHS well in the past. As we move into a different future, we are excited to present innovative new programs, exhibits, and events,

always staying true to our mission but embracing new technologies and methods that will enthrall our visitors of tomorrow and beyond.

Kona Historical Society has been a viable public entity for decades and over the past 3 years we, like many non-profits are finding our balance in this new economy. The work we completed and expanded during COVID greatly benefits our community and our own educational outreach. We look forward to growing and continuing our public service.

## **2. Facilities**

The applicant shall provide a description of its facilities and demonstrate its adequacy in relation to the request. If facilities are not presently available, describe plans to secure facilities.

From small beginnings, the Society has built a strong foundation at the facility where the Greenwell Museum/Store is located. The staff is housed in the building behind the old store. All the archived records are stored so that they are protected from damage and are easily accessible. This site has a restroom accessible to the public. The Portuguese Bread Oven is set up at this site. There is also a covered area for outdoor meetings and events. A few miles south, the Kona Coffee Living History Farm has a small shop/visitor greeting center at the entrance. The three-acre property houses the coffee machinery structure, the coffee bean drying roof platform called an hoshidana, a coffee pulping mill called a kuriba, a kitchen, a farmhouse, a Japanese style bath house called a furo, and a pasture for the donkeys. There is a facility caretaker who oversees the gardens, buildings, and landscape. Future plans call for a large facility that can be used as a community center as well as a place to highlight special exhibits, musical events, and special projects.

Over the last year, KHS, has received a substantial a capital grant from an anonymous Hawaii funder for \$100,000 to care for our buildings and lands. Additionally, we have secured funding from Legacy Land Conservation to continue to care for the land as we grow our public service.

## **VI. Personnel: Project Organization and Staffing**

### **1. Proposed Staffing, Staff Qualifications, Supervision and Training**

The applicant shall describe the proposed staffing pattern and proposed service capacity appropriate for the viability of the request. The applicant shall provide the qualifications and experience of personnel for the request and shall describe its ability to supervise, train and provide administrative direction relative to the request.

The current staff of the Kona Historical Society has worked extremely hard over the past three years to keep the organization functioning in spite of the extreme challenges that the Covid pandemic has caused. Please review the attached Organizational Chart that outlines the

positions that are currently staffed. For each position, the person filling the position has exemplary qualifications. For example, the Public Program manager has a Masters of Arts in Museum Studies as well as a Master of Business Administration. She worked at the John F. Kennedy University managing installation of exhibits. The Collections Manager has a Masters of Arts in Museum Studies with an emphasis on Collection Management. This staff member has extensive experience working at the Stanford University Museum where she collaborated with the Director and Curator in developing new exhibits. Our newly hired Executive Director has been an administrator of a Hawaii Island school for more than 10+ years. She will be working with our foundation to take KHS strongly into our next 5-year plan. KHS is fortunate to have her lead our organization toward a more community serving future. The three Museum Interpreters are well-versed in the history and culture of the organization and are adept at bringing the exhibits to life while interacting with the public. The staff at KHS are all completely dedicated to the Society and to seeing that the future of the organization remains vibrant and strong. Our Digital Content Manager will be integral in the innovative online approach. The Archive manager is a past Executive Director of KHS and combine with the experience and fortitude of our foundation President, we are moving forward in services and in our hiring process.

## **2. 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 organization chart that illustrates the placement of this request.

See Attached Organizational Chart

## **3. Compensation**

The applicant shall provide an annual salary range paid by the applicant to the three highest paid officers, directors, or employees of the organization by position title, not employee name.

We used the salaries Excel Spreadsheet on the Budget Justification - Personnel Salaries and Wages form to list the salaries of the staff.

## **VII. Other**

### **1. 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.

Not Applicable - The applicant does not have any pending litigation or any outstanding judgments.

**2. Licensure or Accreditation**

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

The applicant is 501 (c) 3 charitable organization. No other accreditation relevant to request.

**3. Private Educational Institutions**

The applicant shall specify whether the grant will be used to support or benefit a sectarian or non-sectarian private educational institution. Please see [Article X, Section 1, of the State Constitution](#) for the relevance of this question.

Not Applicable. We will not use funds for support or benefit of private educational institutions.

**4. Future Sustainability Plan**

The applicant shall provide a plan for sustaining after fiscal year 2027 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2027, but
- (b) Not received by the applicant thereafter.

If the Kona Historical Society is fortunate to receive the requested Grant In Aid, we are anticipating immediately filling the Development Director position. We have included a request to fund 40% of our Executive Director, 35% of our new Development Director, 70% of our Public Programs Manager, and 70% of our part time positions of Archive Specialist and 50% Archive Manager, as well as 65% of our part time Museum Interpreters and 15% for our new Digital Content Manager position. With this kind of boost to our operating funds, KHS will be able to provide all services to the community and increase community involvement with KHS programs.

We expect that our increased visitors (both in person and online) will continue to expand and our operating income will increase again this year as we return to regular operations and a regular income stream.

A strong Executive Director working with a newly hired Development Director will greatly assist in our community outreach for education and for fundraising. To further support our efforts, we will also be applying for additional grants to cover costs of special exhibits and

Applicant: **Kona Historical Society**\_\_\_\_\_

events. In regards to overall sustainability, after forty-five years of operation, the Kona Historical Society has stood the test of time.

The Board of Directors of the Kona Historical Society, working collaboratively with the Administrative Team are focused on revising the strategic plan to address our current challenges and to move forward with a development program which will bring in sufficient resources for future years. All of us at the Kona Historical Society are united in our dedication to revitalizing the organization by remaining true to our mission and vision. We so appreciate your consideration of this request and invite you to visit our Living History Coffee Farm and the Greenwell Store/Museum to enjoy a step back in time. Mahalo!

# KONA HISTORICAL SOCIETY

## ORGANIZATIONAL CHART

2026

