



**KONA
HISTORICAL
SOCIETY** 卐

Preserving Kona's Stories

P.O. Box 398
Captain Cook,
Hawai'i 96704

T 808.323.3222
F 808.323.2398

khs@konahistorical.org
www.konahistorical.org

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President

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Vice President

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January 30, 2014

State Capital, Rm. 208
Senate House Committee on Ways and Means
Honolulu, HI 96813
Attn: Rod Becker

Aloha, Mr. Becker:

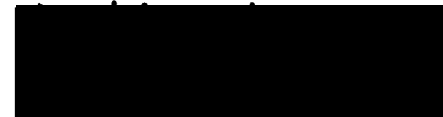
Re: Grant-in-Aid - Fiscal Year 2014-2015

Enclosed is the original Grant-in Aid Application for Fiscal Year 2014-2015 from the Kona Historical Society. We are grateful for your consideration.

If you have any questions, please contact Joy Holland Cesca at 323-3222.

Sincerely,

Kona Historical Society



Joy Holland Cesca
Executive Director

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.

House District _____

Senate District _____

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

Log No: _____

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

Dba: _____

Street Address: 81-6551 Mamalahia Hwy, Kealahou, HI 96750

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

2. CONTACT PERSON FOR MATTERS INVOLVING THIS APPLICATION:

Name JOY HOLLAND

Title Executive Director

Phone # 808-323-3222

Fax # 808-323-2398

e-mail joy@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 TO KONA HISTORICAL SOCIETY FOR THE KHS HAWAII ISLAND MUSEUM OUTREACH PROJECT, WHICH IS DESIGNED TO 1. INCREASE ITS VOLUNTEER PROGRAM AND THE COMMUNITY STAKE IN ITS MUSEUMS AND HISTORICAL PROJECTS; 2. DESIGN ADDITIONAL HAWAII SCHOOL CURRICULUM MATERIALS CENTERED AROUND ITS TWO SITES IN COLLABORATION WITH PARTNER PRE-SCHOOLS, ELEMENTARY, AND HIGH SCHOOLS; 3. TO PROVIDE DEEP DISCOUNTS TO SCHOOL CHILDREN, MILITARY FAMILIES, AND SENIORS IN ORDER TO PROVIDE A SERVICE AND SOCIAL OUTLET FOR POPULATIONS IN NEED OF CULTURAL EXPERIENCES; 4. TO SUPPORT ACADEMIC OUTREACH AND VISITOR EDUCATION WITH WORKSHOPS AND CONFERENCE PRESENTATIONS IN HAWAII AND ON THE MAINLAND; 5. TO DESIGN AND INSTALL A MOBILE EXHIBIT INFRASTRUCTURE FOR PHOTOGRAPHIC AND ARTIFACT EXHIBITS TO CO-EXIST WITH ITS LIVING HISTORY PROGRAM ALREADY RESIDING IN THE SAME SPACE, AND TO, 6. PERFORM NECESSARY CARE TO KHS'S TWO NATIONAL AND STATE REGISTERED AND HISTORIC SITES, WHICH THE ORGANIZATION CARES FOR ENTIRELY ON ITS OWN. THESE SITES INCLUDE A 7-ACRE WORKING AND PRODUCING JAPANESE FAMILY COFFEE FARM, WHICH IS PART OF KHS'S OUTDOOR INTERACTIVE KONA COFFEE LIVING HISTORY D.UCHIDA MUSEUM.

4. FEDERAL TAX ID #: _____

5. STATE TAX ID #: _____

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2015: \$ 375,000

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 \$ _____

TYPE NAME & TITLE OF AUTHORIZED REPRESENTATIVE:

[Redacted Signature]

AUTHORIZED SIGNATURE

JOY HOLLAND, EXECUTIVE DIRECTOR

NAME & TITLE

1/30/14

DATE SIGNED

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

**The Kona Historical Society 2014
*KHS Hawai'i Island Museum Outreach Project***

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. KHS is the recipient of dozens of awards and commendations for its museums, National and State registered historic structures, and its historic public programs, including the recipient this year, of a 2013 Historic Hawai'i Foundation award. Kona Historical Society 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.

Over three decades, these local contributions, so integral to the larger tapestry of Hawai'i's history, have been disseminated by KHS locally and statewide to provide resources for all of Hawai'i Island and the State through multiple living history programs, extensive museum and archival collections, publications, academic collaboration, lecture series, and community outreach efforts. 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, Hawai'i Island, and Hawai'i State subject matter. 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 Hawai'i visitors, *kama'aina* and school children.

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 our Kona Nightingale donkey, Charlie, and our Barred Rock chickens), Japanese food ways, 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 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 pre-WWII historical and cultural context. With Kona Coffee as a major visitor interest, and a commercial product identified with Hawai'i's image and appeal, we provide an authentic and rich cultural program completely unique in the world to bolster this industry in Hawai'i. 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* to remote and historic parts of the island, *Historic Boat Tours* guided along the historic-site-peppered Kona Coast, *Dramatic Historical Performances*, and *Historic Kailua Village Walking Tours* are additional programs offered by KHS to Society members, Hawai'i visitors, and community members as part

of its vision to connect “*past, current, and future generations*” and to inspire an appreciation for Hawai‘i’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. At the same time, we try to eschew 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 to Kona Historical Society for the ***KHS Hawai‘i Island Museum Outreach Project***, which is designed to 1. Increase its volunteer program and the community stake in its museums and historical projects; 2. Design additional Hawai‘i school curriculum materials centered around its two sites in collaboration with partner pre-schools, elementary, and high schools; 3. To provide deep discounts to school children, military families, and seniors in order to provide a service and social outlet for populations in need of cultural experiences; 4. To support academic outreach and visitor education with workshops and conference presentations in Hawai‘i and on the Mainland; 5. To design and install a mobile exhibit infrastructure for photographic and artifact exhibits to co-exist with its living history program already residing in the same space, and to, 6. Perform necessary care to KHS’s two National and State registered and historic sites, which the organization cares for entirely on its own. These sites include a 7-acre working and producing Japanese Family coffee farm, which is part of KHS’s outdoor interactive Kona Coffee Living History D.Uchida Museum.

This project is also designed as a means to improve the appearance, safety, and quality of KHS sites, and allow the all-important initial staff allocation necessary to develop a robust volunteer program, which will increase financial capacity rapidly and decrease dependency on external funding. This grant will also allow KHS to continue to create increasingly sustainable programs and diverse streams of income by supplementing the needed financial resources for our key site and equipment maintenance and upgrades, crucial training, prioritized collections care and processing, and focused outreach campaigns and membership drives, which will all foster a higher profile for KHS and increase visitor and local engagement and patronage.

This project's budget is \$375,000.00

Project goals and objectives include the following:

Goals

- To upgrade, introduce and expand authentic and periodic programs for school children, visitors and island residents, with special attention to pre-school and elementary school, senior, and other high-need community offerings.
- To devote staff resources for Volunteer Coordination to increase our volunteer recruitment and training for areas of our organization that have the greatest need for organizational support, and, as a second stage to develop a long-term plan for volunteer docent trainings to support what are now paid historical interpreter positions.
- To develop and produce additional interpretative signage at both sites
- To improve the cultural and historic sites located in our Kalukalu and Kealakekua locations in Kona.
- 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 through collaboration on projects, free community lectures with information on how to care for family collections, posters and presentations at state and national conferences on Hawai'i history and sustainability matters, and Big Island non-profit *hui*.
- To increase diverse income streams through cost-saving, sustainable site and program improvements.

Objectives

- To train, strategically plan for, and allocate staff Volunteer Coordinator hours to develop a robust volunteer program;
- Develop additional school curriculum for school groups in concert with identified partners
- To perform much needed landscape maintenance at both of our historic sites, including tree trimming and pasture trimming and native forest clean up, historic structure cleaning and repairs,

- 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 and update guest processing technology.
- To hire expert consultants for mobile exhibit space development, archival collections preservation and conservation assessment, and living history staff training and enrichment.
- 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

With the island of Oahu hosting the largest segment of Hawai'i's population, and with so many cultural and fine arts organizations being concentrated in these areas, it is understood that many of the State's limited resources would need go to support the best applications of these rich organizations. However, we are aware of the competitiveness of these precious funds, and want to emphasize that Kona Historical Society's outreach and impact in the State of Hawai'i and, more specifically, on the island of Hawai'i is dramatic.

Much of the historic events of Hawai'i's Chiefdom, Kingdom, Territory, and State history played out on Hawai'i Island, and specifically along Kona's coast, and this history developed through a lens of family histories, photos, documentary and oral commercial histories, and events in this district on the island of Hawai'i. Kona Historical Society not only maintains two National and State registered historic sites and structures, and preserves an archival collection unique in Hawai'i, but it is also a host to school groups from deserving schools on Hawai'i Island, and many regularly visiting neighbor island schools as well. Our publications, lectures, conference presentations, archival and photographic resource sharing, and visitor programs provide historic and economic enrichment to the State. Just one area of our historic stewardship, Kona Coffee's

commercial and cultural impact, is a key area of interest for the entire State, not just the Big Island. Having an award winning, Smithsonian affiliated museum and historic site devoted to the development of this commercial industry, commends our beautiful State and history to visitors and developing young student minds who visit and will visit.

We humbly ask the Legislature for support at this pivotal time to build on efforts KHS has made in the last year to develop a crucial step toward program expansion, outreach, and diverse exhibits and presentations and publications to even further increase our “reach” throughout the State and to the mainland too. Although so many treasures exist in our beautiful museums that deserve care, some collections do not focus on the variety of 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 Hawai‘i’s culture. These collections need attention, and local love for them will not guarantee their safety. We want to create a new footprint at Kona Historical Society that creates a “Kona Museum” presence for this island and its visitors and neighbors.

Although KHS serves as a local repository for Big Island residents, and for 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, we also provide a social service that is crucial, we believe, for the development, enrichment, and healthy engagement of young minds in their community. A recent article in the New York Times, “Art Makes You Smart,” (By BRIAN KISIDA, JAY P. GREENE and DANIEL H. BOWEN Published: November 23, 2013) references a social science study that concluded there is a salutary and beneficial impact that art and cultural museum experiences have on children’s social development. This success is particularly measurable in remote areas, or when serving at risk populations, according to a companion piece on the study at EducationNext.org. This research supports our observations that these cultural services we provide help, support, and sustain a healthy community, and undoubtedly prevent social problems that arise for at-risk kids in culturally and artistically anemic environments.

In the past, our organization has also 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 improve our exhibit facet at our organization in the coming year with all of our rich program offerings, we first need to address the pragmatic issue of financial support of our operations this year.

4. Target Population to be Served

The target population to be served is Patrons visiting from neighbor islands, the mainland and other parts of Hawai'i Island, Kona residents, and local and neighbor-island elementary and secondary school groups, including underserved and low-income pre-K-12 students and groups, volunteers and interns learning new skills and finding new connections to their community, including, 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. It also will impact academic and cultural academics and colleagues attending conferences in Honolulu, on the Mainland, and in specific mission and profession related areas.

II. Service Summary and Outcomes

1. Scope of work, tasks, and responsibilities

This funding, if awarded, would help Kona Historical Society increase student, volunteer, and visitor programs, provide much-needed jobs to Hawai'i residents, increase 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, expand our museum "footprint" into exhibit events, and protect and preserve registered historic buildings and rare archives and treasures.. Initial preparations would be underway for Kona Historical Society's *KHS Museum Outreach Project 2014* By July 2014.

Project Work and Responsibility Components

Admin

- Volunteer coordination training. Recruitment, training, and development of volunteer assets in areas most needed at the organization initially. Later development of docent training and development of volunteer/docent program.

H.N. Greenwell Museum Site Maintenance and Repair

- Exhibit infrastructure planning and production. Consultant will be enlisted and expert staff and Board will participate.
- Long-deferred tree and plant trimming, chipping, and clean-up needed for successful interpretative signage to be created.
- 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 installation (already subsidized), 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 need attention.
- Intensive maintenance and cleaning is needed and collections sorting and storing is overdue 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.
- 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

- Development of additional school program curriculum with partner schools.
- 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 groundwork, 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 nightingale 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.

- 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.
- KHS will devote additional interpretative staff hours, veterinarian, farrier (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 a Living History Museum Programs Consultant, a Consulting Collection Manager, and 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, and to develop and install mobile exhibit capacity in our historic store to co-exist with our Living History Program.
- 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.

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

The Project will begin on July 1, 2014 and will be completed on June 30, 2015.

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. Coordinator training occurs. Signage updates and installation begins. Animal and garden care strategy meeting with key staff in conjunction with planned funded maintenance. Equipment needed for all propose 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.

Phase I: pertinent staff hours increased. Site maintenance continues. Increased farm yield and products processing and initial exhibit infrastructure development performed.

November-December Consulting projects planned and scheduled in connection with experts. Volunteer and intern archive collections training. Curriculum development begun, partner contacts confirmed. Site maintenance and improvements completed. Phase II: remaining pertinent staff hours increased.

Monitor progress of project against original timeline and goals and patron feedback.

January-February Initial exhibit installation. 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 projects for staff training and enrichment, archival projects, and exhibit opening. Volunteer coordination and staffing allocated appropriately for project. Volunteer program internal assessment. Gate counts and customer feedback used.

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
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\$200,000.00	\$75,000.00	\$75,000.00	\$25,000.00	\$375,000.00
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3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2014:

- County of Hawai'i Nonprofit Grant
- Hawai'i Council for the Humanities
- State Foundation for Culture & the Arts
- Caroline Shipman Foundation
- Hawai'i Community Foundation
- Institute of Museum and Library Services
- And other private family foundations
- Commercial sponsors for project related events

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.

“Credit for Small Employer Health Insurance”

\$2,312.58 for 2010,

\$1,702.88 for 2011

\$2,826.69 for 2012.

We will apply for the 2013 one in November 2014.

5.

Unrestricted Current Assets:

Regular Savings -	\$26,911
Checking	\$25,186
Stocks	\$5,925
Fidelity Investment	\$ 44,115
 Total	 \$102,137

This total does not include retail assets, which are part of retail stock, or agricultural assets, which produce yearly crop.

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 an Executive Director with an advanced degree in Library Science with an emphasis in Museum and Special Collections and Archives. KHS has board members with decades of experience in non-profits and local cultural and historical knowledge, and additional senior staff with advanced degrees and experience in finances, humanities, art 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

Joy Holland Cesca has been the Executive Director of Kona Historical Society (KHS) since Winter of 2013. She has a B.A. in Classical Languages and Literature from Occidental College, a Post Baccalaureate Certificate in Classics from UCLA, a graduate background in Classics at University of Virginia, and a Masters in Library and Information Science at University of Hawai'i with a course-work emphasis in Archives and Special Collections. Joy previously worked at Hamilton Library at University of Hawai'i in Special Research Collections first when a graduate student as a Collections Assistant, and then as a Preservation Archivist. She has college teaching experience in both library instruction and in the Latin language, and has enjoyed working with patrons, student groups, and community collections through career positions over the years, both in Hawai'i and on the Mainland. Joy's previous work experience brings a diversity of administrative, operational, educational and artistic skills from the independent film and dance industries to her work for Kona Historical Society. Joy has been associated with KHS since the Fall of 2012, and worked in numerous roles before assuming her present post in early 2013.

Ku'ulani Auld is Director of Programs and Collections Manager. Alum of UH Hilo, and trained in Living History Museum delivery, Ku'ulani also has taken extensive Institute of Museum and Library Science workshop training, as well as WETSPAS disaster preparedness course work. Ku'ulani integrates specialized museum education with hands-on experience. 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.

Pixie Navas , is Assistant Program Director and a graduate of Sullins College. An experienced archival technician and consultant, and a multi-generational Hawai'i Island rancher, and lifetime resident, Pixie brings a wealth of cultural knowledge and a respected local historian background to this project.

Ramona Amoguis, Development Director, has developed and implemented Kona Historical Society's annual fundraising events and secured donations and financial support from high profile individuals, foundations and corporations. She has also has coordinated the organization of special educational events, community & web-based marketing and social media connections, and has an extensive career background in the hospitality industry.

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

The following, *or comparably qualified* consultants will be employed:

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),

Menzi Behrnd-Klodt, J.D, C.A., (certified archivist, decades of archive project consulting and expert publication and instruction).

Additional Staff

Additional project staff will include staff with advanced degrees in financial and Humanities field, with practical administrative experience in college administration, educational, and artistic and historic preservation training.

Volunteers and stakeholders have held community positions and elected posts on Hawai'i island and in the State.

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 judgment. 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, 2014 to June 30, 2015)

App Kona Historical Society

BUDGET CATEGORIES	Total State Funds Requested (a)	(b)	(c)	(d)
A. PERSONNEL COST				
1. Salaries	90,637			
2. Payroll Taxes & Assessments	5,982			
3. Fringe Benefits	9,970			
TOTAL PERSONNEL COST	106,589			
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island	1,539			
2. Insurance	61,600			
3. Lease/Rental of Equipment	650			
4. Exhibit Fixtures and artifact preparation	65,000			
5. Staff Training (with Consultant)	7,175			
6. Supplies	11,200			
7. Telecommunication	8,580			
8. Utilities	10,900			
9. Airfare mainland (1x Exec. D)	1,500			
10. Printing	5,260			
11. Maintenance Contract Copier	1,741			
12. License and Permits Bulk Mail	200			
13. Postage	500			
14. Landscape and Crop Maintenance	10,200			
15. Archives Processing	9,044			
16. Oral History Processing	2,000			
17. Exhibit Infrastructure Consulting	5,000			
18. Exhibit Installation	7,000			
19. Marketing and Advertising	32,000			
20. Events materials	19,000			
TOTAL OTHER CURRENT EXPENSES	260,089			
C. EQUIPMENT PURCHASES	8,322			
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	375,000			
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	375,000	Joy Holland	808-373-3022	
(b)		Name (Please type or print)	Phone	
(c)			1/30/14	
(d)		Signature of Authorized Official	Date	
TOTAL BUDGET	375,000	Joy Holland, Executive Director		
		Name and Title (Please type or print)	EXECUTIVE DIRECTOR	

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

BUDGET JUSTIFICATION--EQUIPMENT & MOTOR VEHICLES

Applicant: Kona Historical Society

Period: July 1, 2014 to June 30, 2015

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				

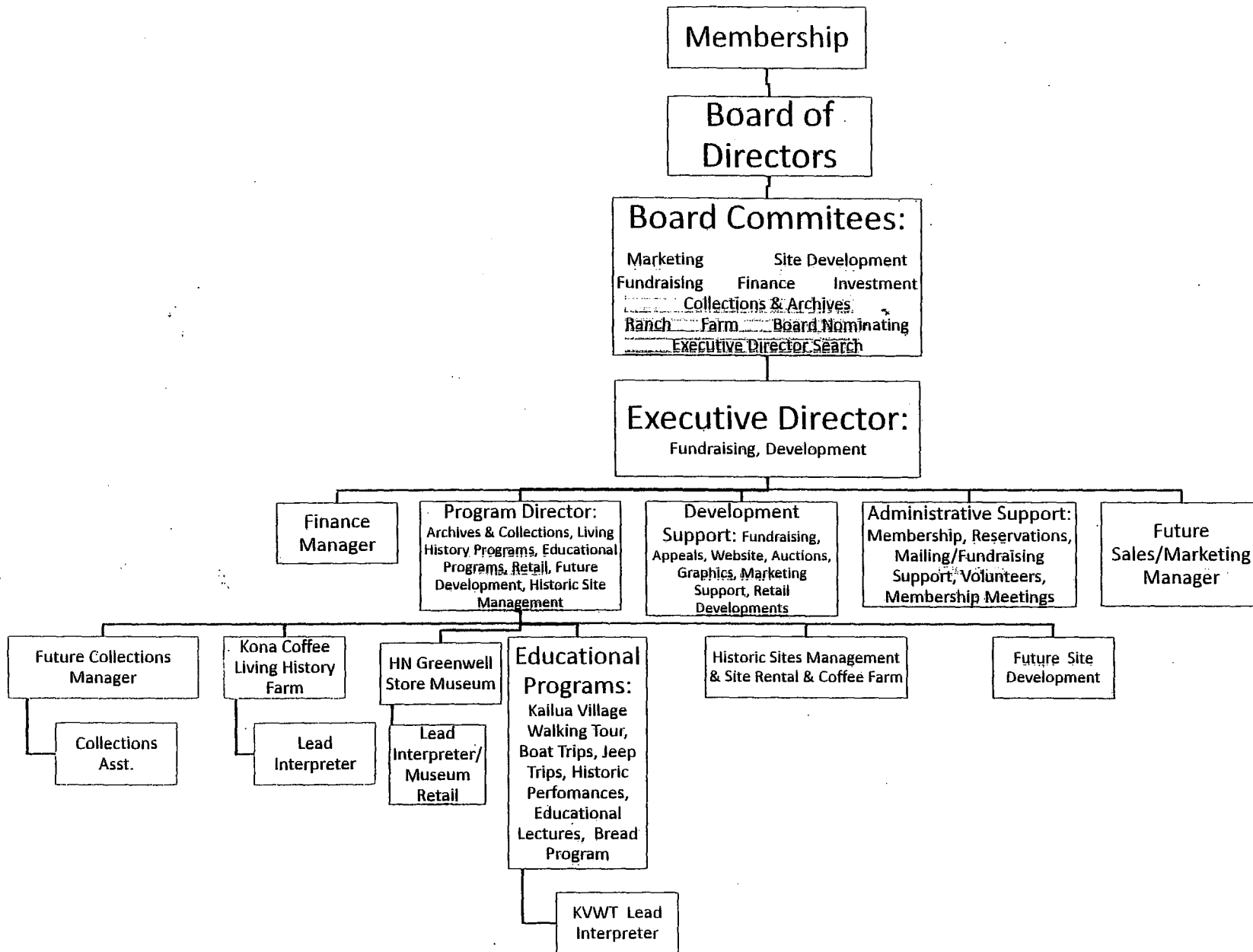
DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ 0.00	
N/A TOTAL:				
JUSTIFICATION/COMMENTS:				

BUDGET JUSTIFICATION PERSONNEL - SALARIES AND WAGES

Applicant: Kona Historical Society

Period: July 1, 2014 to June 30, 2015

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.				



**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS AND SUBSIDIES PURSUANT TO
CHAPTER 42F, HAWAI'I REVISED STATUTES**

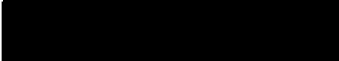
The undersigned authorized representative of the applicant certifies the following:

- 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, 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 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, 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 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, 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.

Pursuant to Section 42F-103, Hawai'i 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.

JOY HOLLAND
(Typed Name of Individual or Organization)



(Signature)

1/30/14
(Date)

JOY HOLLAND
(Typed Name)

EXECUTIVE DIRECTOR
(Title)