

**KONA  
HISTORICAL  
SOCIETY** 

*Preserving Kona's Stories*

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

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**Officers**  
Allen Wall  
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Ethan Olins  
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William "Buddy" Norwood  
Hannah Springer

**Executive Director**  
Joy Holland

**Program Director**  
Ku'ulani Auld

Senate Committee on Ways and Means  
State Capitol, Rm. 207  
Honolulu, HI 96813  
Attn: GIA

Aloha Senate Committee on Ways and Means,

Enclosed please find 1 (one) original GIA application for Kona Historical Society for the Fiscal Year 2017. We greatly appreciate the opportunity to submit the following application which, if granted, will enable us to continue to serve our community and Hawai'i Island visitors through engaging programming and meaningful experiences.

Mahalo nui loa for your time and consideration and we look forward to hearing from the Committee.

Sincerely,

  
Joy Holland  
Executive Director  
Kona Historical Society

House District \_\_\_\_\_

Senate District \_\_\_\_\_

**THE TWENTY-EIGHTH LEGISLATURE  
APPLICATION FOR GRANTS  
CHAPTER 42F, HAWAII REVISED STATUTES**

Log No: \_\_\_\_\_

For Legislature's Use Only

Type of Grant Request:

GRANT REQUEST - OPERATING

GRANT REQUEST - CAPITAL

"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.

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

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:

Mailing Address: P.O. 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 INCORPORATED IN HAWAII
- FOR PROFIT CORPORATION INCORPORATED IN HAWAII
- LIMITED LIABILITY COMPANY
- SOLE PROPRIETORSHIP/INDIVIDUAL
- OTHER

**6. DESCRIPTIVE TITLE OF APPLICANT'S REQUEST:**

KONA HISTORICAL SOCIETY'S "KONA MUSEUM" CULTURAL AND COMMUNITY PROGRAMMING PROJECT

- PERFORM EXTENSIVE ARCHIVAL, MUSEUM COLLECTION, AND EXHIBIT PRESERVATION, PREPARATION AND PLANNING IN KHS'S FIRST YEAR OF POSSESSING A GALLERY TO CREATE CULTURAL VALUE FOR THE COMMUNITY;
- INCREASE VOLUME AND/OR QUALITY OF ORAL HISTORIES, FREE LECTURE SERIES, CULTURAL CARE WORKSHOPS, AND SPECIAL EVENTS THAT PARTICULARLY SHARE EDUCATIONAL AND HAWAIIAN OR OTHER CULTURAL KNOWLEDGE THROUGH EXHIBIT ACCESS, ONLINE ACCESS, PERFORMANCE ACCESS, OR BY ADDING TO RESEARCH MATERIALS HOUSED AND PRESERVED FOR THE COMMUNITY;
- INCREASE THE QUALITY AND ADD NEW TYPES OF PROGRAMMING TO COINCIDE WITH NEW EXHIBITS BUT ALSO ENGAGE COMMUNITY VOLUNTEERS, STUDENTS, & INTERNS IN SERVICE & CAREER PROGRAMS.

4. FEDERAL TAX ID #: \_\_\_\_\_

5. STATE TAX ID #: \_\_\_\_\_

**7. AMOUNT OF STATE FUNDS REQUESTED:**

FISCAL YEAR 2017: \$254,437

**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 \$254,437  
 FEDERAL \$214,800  
 COUNTY \$26,700  
 PRIVATE/OTHER \$239,975

JOY HOLLAND, EXECUTIVE DIRECTOR  
NAME & TITLE

1/22/16  
DATE SIGNED



**Twenty-Eighth Legislature  
Application For Grants  
Chapter 42F, Hawaii Revised Statutes  
State of Hawaii  
Grant in Aid**

**Fiscal Year 2017 (July 1, 2016 to June 30, 2017)**

**Kona Historical Society's "Kona Museum" Cultural and  
Community Programming Project**

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

**I. 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;

**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 2015 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 within Hawai'i. Over three decades, these local contributions have been shared 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, exhibits, special events and historic field trips, community and neighbor island outreach efforts, and now a formal exhibit gallery for rotating exhibits, Kona Historical Society, and the Kona Museum provides important cultural and educational opportunities to its constituents, which allow residents and visitors alike to benefit from this small but high-impact cultural organization.

Kona Historical Society is already in the process of becoming “The Kona Museum,” with a true, small, sustainable, solar panel powered, “white cube” gallery structure available for rotating exhibits covering topics of both general history and fine arts. The topics of exhibition there reflect the culture and contributions of the many ethnicities and commercial pioneers who call Hawaii and Kona home, including, Native Hawaiians and early 19<sup>th</sup> century immigrants, and the historic events and local stories which played out here on Hawaii island. There is no museum like this in Kona, or truly even on the island

2. The goals and objectives related to the request;

One of our key goals and objectives with this request, is to find ways to leverage our new exhibit capacity into programming and community engagement opportunities that add value and financial worth to our non-profit. In terms of development, but also educational and cultural resource sharing, we are confident that this proposed grant project will position us to help the State of Hawaii in preserving its history, engage visitors in meaningful ways, and provide *kama'aina* with resources not currently available on Hawaii Island.

Kona Historical Society’s “Kona Museum” Cultural and Community Programming Project will:

- Perform extensive archival, museum collection, and exhibit preservation, preparation and planning in KHS’s first year of possessing a gallery to create cultural value for the community;
- Increase volume and/or quality of oral histories, free lecture series, cultural care workshops, and special events that particularly share educational and Hawaiian or other cultural knowledge through exhibit access, online access, performance access, or by adding to research materials housed and preserved for the community;
- Increase the quality and types of programming to coincide with new exhibits, but also engage community volunteers, students, interns in service & career programs;

Toward this end, we have already done a tremendous amount on a shoestring, with no exhibit facility for many years. Imagine what we can do with some assistance as we install our new programs: *Kona Historical Society’s* library and archives house one of the most regionally significant and largest photographic collections in any Hawaii Island repository. In addition to its renowned photographic holdings with over 70,000 historically significant photos, slides, and other image formats, the archive also houses over 200 maps, many rare and out-of-print books, unique historical records, manuscripts, pamphlets and oral history interviews, and many films and videotapes of Kona, Hawaii Island, and Hawaii State subject matter. The collections housed at KHS provide a valuable community resource for Native Hawaiians and the community in general for reference and research with special collections and archival materials available, in most cases, nowhere else.

One of a kind documents, records, and manuscripts from *Kona Historical Society's* collections have provided seminal research background materials for the development of the Hawaiian culture themed National Historical Park, *Kaloko-Honokohau*, The National Historic Trail: *Ala Kahakai*, The historic areas stewarded by *Kamehameha Schools*, a Native Hawaii trust organization for the education of Native Hawaiian Children, and areas which are in development for educational and Native Hawaiian cultural practicing purposes: Keauhou, Kahalu'u, and Hualalai. KHS's archival collections are regularly consulted for environmental and cultural impact studies of development projects including studies on boundary fences, highway projects, and a National Scenic Byway and accompanying signage that was created through KHS's extensive involvement and research materials. Important authoritative books on Hawaiian place names and Hawaiian beach names (names now falling into complete disuse and disappearing from common parlance) have been written with KHS archival resources. The Native Hawaiian cultural program at the *Keauhou Sheraton* was developed with KHS resources, and the development and naming of streets after indigenous Hawaiian birds, and the cultural impact studies for a large scale residential development project, *Hokulia*, was all performed through KHS archival resources. Additionally, our archive is frequently an educational resource or partner to other island and statewide museums and historical organizations. KHS has contributed a major and prominent photographic collection, from the Howard Pierce Collection to the Lyman Museum in Hilo, Hawaii, and ranching reports and oral histories have helped numerous other organizations dedicated to telling the stories of the Native Hawaiian people and the significance of the place, including the *Paniolo Preservation Society* in its nascent stages. And finally, KHS archives regularly provide reference services for Native Hawaiian genealogical research, with sources that are sometimes only available at this site, typically at no cost.

3. The public purpose and need to be served;

With a well-known, Bishop Museum affiliate botanical garden closing this month in our area, Kona Historical Society's two sites provide crucial and much needed cultural sustenance, educational opportunities, and public programming important to the social and emotional and intellectual health of people in Kona and on Hawaii Island. We are now, more than ever, crucial to the cultural life of our region.

This project is going to increase strides we have already been making with our constituents and visitors over the last four years: it will allow us to provide, honest, authentic, cultural programming, preserve important cultural and green landscapes in the State of Hawaii, allow us to continue to steward two National and State Registered Historic Places and Structures, and increase the quality of sites and programming, as well as number of patrons and school groups served.

We humbly ask the State Legislature to consider granting us this Grant in Aid for the fiscal year of 2017. The Legislature's generosity in the past has allowed us to

increase our reach and scope, and stabilize in many key ways which has improved the stewardship that the 10 acres of Legacy Land we steward, the Historic Registered Buildings, the community programs we oversee, and the museum objects we protect and display receive. We should be a “success story” for how one can leverage state grants to increase capacity and provide more for the community. We are just in this coming fiscal year building a museum asset which has not existed on Hawaii Island, and with this new asset comes attendant development, programming, equipment, and operational expenditures required. Having said that, we are confident that we have a solid and clear-eyed business plan and understanding of how we need to operate to stay lean, and provide only the most needed, wanted, and culturally enriching services that our community needs.

A year of support for this program proposal will put us in a solid position for the future.

Kona Historical Society has done a tremendous amount of capacity building over the past two years, and although our budget is still modest, our capacity, care, and efficacy is excellent, and we are well regarded in our field. This operational support would provide the one-time boost to launch a sustainable, income generating, social and educational service and support to our new Kona Museum gallery. We have over the past year accumulated the organizational funds and matching funds from private foundations to build a small, green, financially sustainable, “white cube” gallery. There is nothing like this in Kona, or even on Hawaii Island.

4. Describe the target population to be served; and

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, and community volunteers wanting to increase their civic engagement.

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, and interns from colleges from various locations.

## **II. 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;

Install Collection staff for new projects. Install, train, new program staff and volunteers. Professional training for exhibit and new programming related duties will occur for Volunteer Coordinator, lecture staff, Archival Technician, Museum Technician, and curation and program staff. Gallery asset's rotating exhibits installed, intern programs and community volunteer development for staffing and related programs. Prepare and outfit current archive space and in process gallery space with proper tools and equipment to teach staff, volunteers, and interns programs supporting public exhibits. Develop exhibit and volunteer and new program plans in writing. Start process of new free-lecture content additions, volunteer, school, exhibit museum program development to accompany brand new function of exhibiting archival and museum objects at our historic sites. Create apparatus for interns volunteers and museum professional collaboration/teaching relationship.

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

The project will occur over 4 quarters to coincide with payment disbursement, or as requested by the administering State agency. The first quarter will be devoted to exhibit preparation, lecture, volunteer, intern, and museum program planning (both in personnel allocation, in starting preparation, and in drafting formal plans in each area); the second quarter will include installation of exhibits, execution of first programs, and re-assignment of duties for existing qualified staff. The third quarter will be devoted to training additional professional staff and volunteers, and finalizing the writing of exhibit and volunteer management plans. The third quarter will also be devoted to volunteer and intern training and new program execution. The fourth quarter will be devoted to curation and analysis and reporting.

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

Quarterly reports on progress of collection and curatorial drafted plans, management assessments, public reception of exhibits and programs in program evaluation forms, online feedback forums, and numbers in attendance, stakeholder feedback will also be performed.

4. 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.

Monitor progress of project against original timeline and goals and patron feedback, provide credentials of professional staff, numbers of volunteers and interns sourced, number of programs installed, qualitative and quantitative patron and member feedback on new programming. Actual press and P.R. collected, links to shared online content, and/or catalogs, or other materials created from exhibits and new programs.

### **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.

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2017.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
152,663.00	63,608.25	25,444.00	12,722.00	254.437.25

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2017.

- County of Hawai`i Nonprofit Grant



- CPEP (County of Hawaii Product Enrichment)
- 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
- Numerous private family foundations
- Commercial sponsors for project related events
- Crowd funding for discrete project related expenses

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.

Tax Credits Grants

- 2012 Credit for Small Employer Health Insurance Premium  
2013 Credit for Small Employer Health Insurance Premium  
2014 Ineligible, after inquiry (new bundled HR company policy)

5. The applicant shall provide a listing of all federal, state, and county government contracts and grants it has been and will be receiving for program funding.

Government Grants

- COH Non-Profit Grant: Living History Program Operations
- County Product Enrichment Program (2016): Hands on History, County of Hawaii
- State Foundation for Culture & Arts (SFCA) (FY2016) State of Hawaii

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2015.

Unrestricted Asset Balances

Dec 31, 15

Operating Cash	
Total Petty Cash Accounts	560.00
Total Checking	47,677.73
Total Unrestricted Savings	68,859.14
Investment/Stocks	
Total Unrestricted Investment	40,238.16
Accounts Receivable	

Total Unrestricted Accounts Receivable	18,324.48
Total Unrestricted Grants/Donor Receivables	<u>0.00</u>
	* 175,659.51

#### IV. Experience and Capability

##### A. 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 was founded in 1976, and since that time has received dozens of State, National, and private 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.

KHS's Executive Director has a Masters in Library Science with an emphasis in Special Collections and Archives, and experience working in Rare Books and Museum Collection environments. Additionally, she has a career background in Executive and Arts Administration. KHS' Board of Directors possess decades of experience in non-profits and have prodigious local cultural and historical knowledge, while additional KHS senior staff members assigned to this project have advanced degrees and experience in finances, humanities, art and preservation work, as well as project and collections management, farm and ranching experience (both of our sites have rural components and interpretative elements pertaining to ranching and farming), Hawaiian and place-based cultural knowledge, 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.

In the past 4 years there have been numerous exhibits, public events, archival projects, and cultural and oral histories that have been executed in similar fashion to this proposed FY2017 GIA project, *Kona Historical Society's "Kona Museum" Cultural and Community Programming Project*. Operationally, the current leadership of Kona Historical Society, has overseen major exhibitions,

restorations, large operational transitions, major fundraising projects and construction projects. Additionally, the Executive Director has access to highly qualified consultants and leaders in collections in the State of Hawaii, and Gallery consultants, from whom she has retained commitments to assist this project.

**B. 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.

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 (which will serve exhibits in our gallery), 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. There is also a gallery facility in progress of planning and construction slated to be built this year.

**V. Personnel: Project Organization and Staffing**

**A. 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.

**Proposed Staffing, Staff Qualifications, Supervision and Training**

**Joy Holland** 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 WESTPAS 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.

**Mina Alison**

Mina Alison is Curator and the incoming Gallery Director for the Kona Museum gallery at KHS. With a background in Museum Studies, and extensive experience in working on exhibits, archaeological, and museum objects, in museums in New York, San Diego, and Hawaii, Mina also has a background Native Hawaiian programming and educational programming. Born and raised in Kailua, O'ahu, her connection to Kona goes back to her paniolo great-grandfather Willie Thompson, a man who continues to be a great source of inspiration. With a background in oral history interviews, research, and teaching, Mina has earned a BA in Anthropology and French from University of San Diego, and also completed graduate studies in Museum Studies at New York University.

**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.

**Gavin Miculka**

Gavin has a BS in Recreation, Park & Tourism Sciences, and a Masters of Applied Anthropology. His academic and professional background has emphasized heritage tourism, historic preservation, and resource interpretation. He has extensive experience in developing, presenting, and supervising interpretive programs at various historic sites, including those with renowned living history programs. After years of working with the National Parks and other heritage sites, Gavin now applies specialized knowledge and skills to create unique and interactive experiences for visitors.

**Ramona Amoguis**

Hawaii has been Ramona's home for 27 years. Her experience includes the hospitality industry and education, and she holds degrees in Animal Science, Culinary Arts and Early Childhood Education. All of these educational backgrounds have been employed at KHS, with its 10 acres of land, farm, cultural, and other steward responsibilities. In 2005, she created the Portuguese Oven Bread program and has managed many KHS events including festivals, 2011's Palaka Party fundraiser, and the 2014 online auction. Designs and produces development materials, newsletters, announcements, and assists Executive Director with fund development activities and management.

**Donna Starr**

Donna has a BA in English and MA in Higher Education Administration, both from UC Santa Barbara. She has over 25 years of diversified experience in both public and private University settings as Administrator and Academic, including achievements as Chair of Graduate Management Program, Core Faculty, Dean of Administrative Services, and Chief Financial Officer. She has broad experience in grant development and research, project and financial management, strategic planning, public relations, and team leadership. Works with Executive Director to produce grant proposals, requests for funding, and letters of inquiry.

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

SEE ATTACHED.

**C. Compensation**

Annual salaries of the three highest paid officers or employees and their position

<u>Employee/Officer</u>	<u>Position/Title</u>	<u>Annual Salary</u>
Joy Holland	Executive Director	\$50,003.20
Ku'ulani Auld	Program Manager	\$44,252.00
Brianne Atwood	Director of Finance	\$36,400.00

**VI. Other**

**A. Litigation**

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

N/A

**B. Licensure or Accreditation**

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

N/A

**C. 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.

N/A

**D. Future Sustainability Plan**

The applicant shall provide a plan for sustaining after fiscal year 2016-17 the activity funded by the grant if the grant of this application is:

- (1) Received by the applicant for fiscal year 2016-17, but
- (2) Not received by the applicant thereafter.

The program proposed herein is intended to engage volunteers, members (we are a membership organization with attendant dues although our programs are open to the community), and to increase patron giving incentives with increased “free,” educational, community, and cultural programming.

Although we have budgeted conservatively for increased program income resulting from these programs, (it should increase our operational budget up to a quarter more). Additionally, we will have increased opportunities for community partnerships, sponsorships by businesses and supportive museum patrons, large giving opportunities at new venues with increased value programming, and beyond. We also have some private funds to help us with this transition as we

establish our first full cycle of new programming related to our new exhibit function at both of our sites. We do not anticipate a dependence on GIA operational funds, but rather see this as a very important foundation to responsible, sustainable functioning for our community as an independent organization.

Since we are small and independent, we simply do not have the personnel resources or reserves to start a large number of new programs, outfit a major structure and program, and run all of our regular programs in one year without some operational assistance. With The Amy Greenwell Garden slated to close in our area, Kona Historical Society is the last private cultural organization in our region, and the only museum of its kind in all of West Hawaii. This grant will help us to continue to serve this community and part of the State with cultural offerings.

**E. Certificate of Good Standing (If the Applicant is an Organization)**

If the applicant is an organization, the applicant shall submit one (1) copy of a certificate of good standing from the Director of Commerce and Consumer Affairs that is dated no earlier than December 1, 2015.

SEE ATTACHED.

## BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2016 to June 30, 2017

Applicant: 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	99,237	88,000	15,000	70,000
2. Payroll Taxes & Assessments	9,200	8,800		7,000
3. Fringe Benefits	5,000			3,000
<b>TOTAL PERSONNEL COST</b>	<b>113,437</b>	<b>96,800</b>	<b>15,000</b>	<b>80,000</b>
<b>B. OTHER CURRENT EXPENSES</b>				
1. Airfare, Inter-Island (3-4 flights x2)	1,800			600
2. Insurance (Liability, Board, Other)	30,000			35,000
3. Lease/Rental of Equipment	2,000			875
4. Site Maintenance/Repair	11,800	4,000	800	16,000
5. Staff & Volunteer Training, Coordination	19,000	25,000	5,000	15,000
6. Supplies (Program, Archival, Event)	9,000	7,000	2,000	5,000
7. Telecommunication	4,000			4,000
8. Utilities	4,000			5,000
9. Landscape & Historic Crop Maintenance	11,500	2,000	1,000	5,000
10. Printing	3,400	500	200	3,500
11. Postage	2,500			2,000
12. Archival, Museum, Historic Consultant	8,000	10,000		2,000
13. School Program Supplies & Student Fees	8,000		2,000	10,000
14. Office Supplies	1,000		500	2,000
15. Professional Dues/Subscrip./Affiliation	2,000	1,000		1,000
16. Exhibit Expenses	8,000	16,500		10,000
17. Archival/Exhibit Processing/Research	6,000	40,000	200	11,000
18. Oral Histories	2,000	2,000		
19. Lecture Series Equipment & Materials	3,000			9,000
20. Publication & Advertising				15,000
<b>TOTAL OTHER CURRENT EXPENSES</b>	<b>137,000</b>	<b>108,000</b>	<b>11,700</b>	<b>151,975</b>
<b>C. EQUIPMENT PURCHASES</b>	<b>4,000</b>	<b>10,000</b>		<b>8,000</b>
<b>D. MOTOR VEHICLE PURCHASES</b>				
<b>E. CAPITAL</b>				
<b>TOTAL (A+B+C+D+E)</b>	<b>254,437</b>	<b>214,800</b>	<b>26,700</b>	<b>239,975</b>
<b>SOURCES OF FUNDING</b>		Budget Prepared By:		
(a) Total State Funds Requested	254,437	Joy Holland	808-323-3222	
(b) Total Federal Funds Requested	214,800		Phone	
(c) Total County Funds Requested	26,700		1/22/16	
(d) Total Private/Other Funds Requested	239,975	Signature of Authorized Official		
		Date		
<b>TOTAL BUDGET</b>	<b>735,912</b>	Joy Holland, Executive Director		
		Name and Title (Please type or print)		



## BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

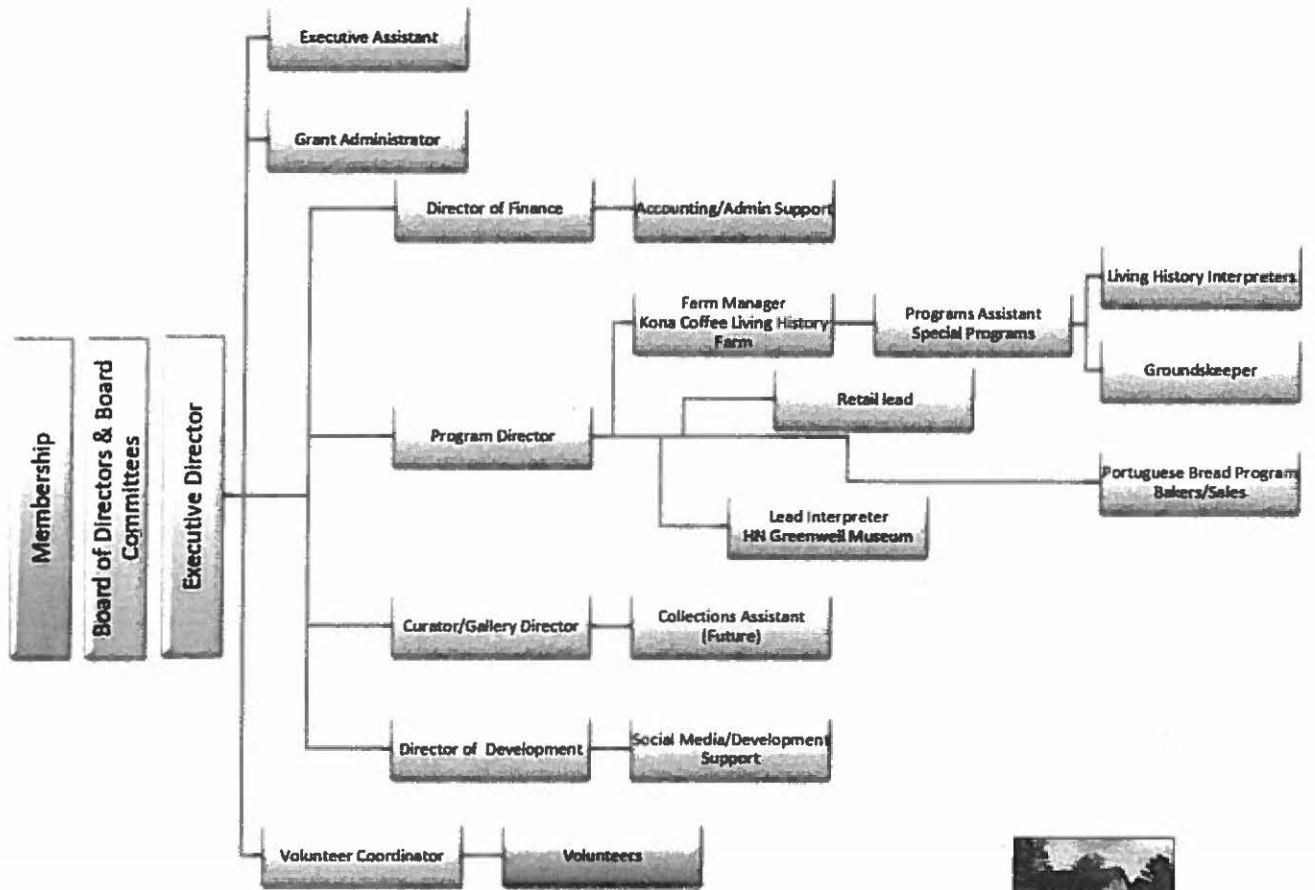
Period: July 1, 2016 to June 30, 2017

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)
Executive Director (Archival, Collection, Program Duties)	1.00	\$50,003.20	25.00%	\$ 12,500.80
Program Director	1.00	\$41,860.00	50.00%	\$ 20,930.00
Finance Director	1.00	\$36,400.00	25.00%	\$ 9,100.00
Curator	1.00	\$31,200.00	50.00%	\$ 15,600.00
Archival Technician	0.75	\$30,160.00	50.00%	\$ 15,080.00
Farm Museum Manager	1.00	\$35,360.00	50.00%	\$ 17,680.00
Historical Interpreter	0.5	\$11,440.00	25.00%	\$ 2,860.00
Historical Interpreter	0.5	\$11,440.00	25.00%	\$ 2,860.00
Historical Interpreter	0.5	\$10,504.00	25.00%	\$ 2,626.00
				#N/A
				#N/A
				#N/A
				#N/A
				#N/A
				#N/A
<b>TOTAL:</b>				#N/A
<b>JUSTIFICATION/COMMENTS:</b>				Subtotal:99,236.80
Salaries related to programs, events, collections, and administration				Total: \$99,237

Section V. Personnel: Project Organization and Staffing

B. Organizational Chart



KONA HISTORICAL SOCIETY

KHS

Dec 31, 15

**ASSETS**

**Current Assets**

**Checking/Savings**

**Operating Cash**

Total Petty Cash Accounts 560.00

Total Checking 47,677.73

Total Unrestricted Savings 68,859.14

**Investment/Stocks**

Total Unrestricted Investment 40,238.16

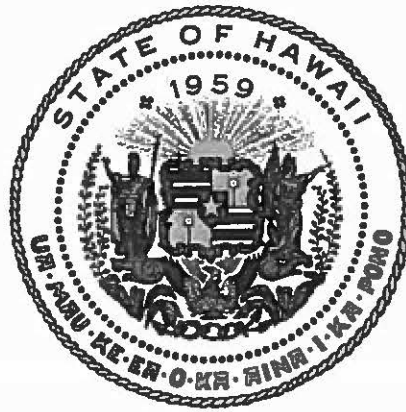
**Accounts Receivable**

Total Unrestricted Accounts Receivable 18,324.48

Total Unrestricted Grants/Donnor Receivables 0.00

**Inventory**

Total Inventory Balances 175,659.51



**Department of Commerce and Consumer Affairs**

**CERTIFICATE OF GOOD STANDING**

I, the undersigned Director of Commerce and Consumer Affairs of the State of Hawaii, do hereby certify that

**KONA HISTORICAL SOCIETY**

was incorporated under the laws of Hawaii on 04/19/1976 ;  
that it is an existing nonprofit corporation; and that,  
as far as the records of this Department reveal, has complied  
with all of the provisions of the Hawaii Nonprofit Corporations  
Act, regulating domestic nonprofit corporations.

IN WITNESS WHEREOF, I have hereunto set  
my hand and affixed the seal of the  
Department of Commerce and Consumer  
Affairs, at Honolulu, Hawaii.

Dated: January 20, 2016



**Director of Commerce and Consumer Affairs**