

House District(s) \_\_\_\_\_

Senate District(s) \_\_\_\_\_

THE TWENTY-NINTH 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 FOUNDATION ON CULTURE & THE ARTS

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

1. APPLICANT INFORMATION:

Legal Name of Requesting Organization or Individual:  
Kona Historical Society

Db/a:  
Street Address:

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 GALLERY & KONA MUSEUM

- Engineering plans (Civil, Mechanical, Electrical) completed;
- Structural and architectural drawings completed;
- Extensive analysis and review (process took over 18 months) – including mapping, site dig, preservation plan, monitoring plan, and cultural assessment of site by archaeological firm and State Historic Preservation Dept. approval;
- Contractor estimate completed;
- Submitted packet for review to County of Hawaii now needs Project Manager follow up once matching funds from GLI or other source awarded;
- Gallery Consultants secured – professional gallerists report and additional in-kind services procured;
- Project Manager funds part of GIA capital request
- 1/3 funding awarded or on hand for exterior and interior build-out
- 2/3 funding in request stage including GIA
- KHIS navigated external delays including required reports and SHPD delays, and has subsequently fundraised additional funds to address new estimate and higher construction costs in interim.

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

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

7. AMOUNT OF STATE FUNDS REQUESTED:

FISCAL YEAR 2019: \$ 1,092,000

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 \$1,092,000

FEDERAL \$0

COUNTY \$0

PRIVATE/OTHER \$ 336,178

JOY HOLLAND, EXECUTIVE DIRECTOR

01/18/18

JAN 13 2018  
8:21 PM

House District(s) \_\_\_\_\_

Senate District(s) \_\_\_\_\_

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- *Gallery Consultants secured-professional gallerists report and additional in-kind services procured.*
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- 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 \$1,092,000

FEDERAL \$ 0

COUNTY \$ 0

PRIVATE/OTHER \$ 1,336,178

JOY HOLLAND, EXECUTIVE DIRECTOR  
NAME & TITLE

01/18/18  
DATE SIGNED

## Application for Grants

*Please check the box when item/section has been completed. 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) is a community based, non-profit 501 (c)(3) Arts, Culture & Humanities organization. It is a Smithsonian Museum affiliate, with the only two permanent National Endowment for the Humanities exhibits in the State of Hawai'i. and 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 past year, of two 2017 Historic Hawai'i Foundation awards, two Legislative commendations, and a National 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 District and its rich cultural heritage within Hawai'i. Over four decades, important local contributions have been shared by KHS on-island and statewide to provide resources for *kama'aina* and visitors in engaging and inspiring ways. Through multiple living history programs, extensive museum and archival collections, publications, academic collaborations, a lecture series, a growing exhibit program, special events, and historic field trips to remote parts of Hawaii, KHS has played a valuable and irreplaceable role on Hawaii Island. Community and neighbor island outreach efforts in concert with school groups, online and educational efforts, extends KHS's impact beyond an institution typically in its budget category, or with its modest staff. Kona Historical Society continues to provide important cultural and educational opportunities to its constituents in a way in which no other museum or cultural organization on Hawaii Island currently is able to, contributing to its reputation as a small but high-impact, and high-quality museum & cultural organization.

2.  The goals and objectives related to the request;

The construction of a small, 19<sup>th</sup> century period looking Kona ranch structure, with board and batten construction, but with environmentally green features, modern "white cube" appearance, and climate controlled features on the interior at Kona Historical Society is the goal of this project. Matching funds, preservation plans, an archaeological dig, preservation analysis, engineering and architectural plans, and professional contractor consultation has



already occurred. This project can be hammer ready in short order, but delays between requests, requirements due to our historic site's special considerations, and construction estimates typically resulted in rising construction costs, hence a project that was once wholly funded by private foundations and KHS resources now needs some additional funding to get this crucial project launched. (Less than 1000 sqft of gallery space, with an additional ~300 sq ft, of retail space and additional outdoor lanai space for events and programs), we are trying to now approach development of this site with an eye toward "self-sustaining" streams of income, while retaining our plan of long term development. We are starting this by providing a place for our communities on this island and in this state, especially to KHS-subsidized visiting school groups, to see the photos, collections, art work, and artifacts which help to anchor them to their cultures and communities. The Kalukalu (KHS site) will still include historic structures and living history activities, but through this gallery, there will be a step toward a true general museum on the island of Hawai'i.

Although the island of Hawai'i has many wonderful small specialty societies, archives, and museums, it does not have a true general museum or art gallery. Many specialize in natural history, astronomy or some other niche. Hawai'i island students and public history buffs are accustomed to going to art shows in hair salons, or historic photographic exhibits in church halls. This capital project will start with a sustainable way to provide cultural, artistic, and public historical experiences to local and visiting students, residents, and guests in a place, which already is a site of registered and national historic significance, and where we host weekly public programs, such as our free-to-the-public Portuguese Stone Oven baking program. This capital (gallery) project is intended to provide a vital service in the arts and humanities right away and to enrich our community in a responsible way that we can fiscally and operationally execute. Through matching funds, budgeted savings, and current in-kind and asset resources we know that we are able to execute this project over the timeline of 12 months starting with the State's Fiscal Year (which is staggered 6-months from KHS's, providing valuable planning time). This project will serve a minimum of 30,000 visitors and up to 40,000 more in online exhibit visitors, local school children, college students, visiting students from neighbor islands, local residents, and visitors, all starved for these types of artistic and historic experiences. We anticipate that engagement and impact to grow as we start to share some of our exhibits and cultural offerings from the gallery online.

3.  The public purpose and need to be served;

Kona Historical Society served over 60,000 patrons each year over the last two years since it has last applied for a Grant in Aid from the State of Hawaii. Over 20,000 of those patrons were through direct program engagement at our two sites *each year* (The Kona Historical Society, H.N. Greenwell Historic Store Museum, Portuguese Stone Bread Oven, Kona Coffee Living History Farm, NEH Exhibits). Additionally, programming, festival performances, and outreach activities at off-site locations, such as at West Hawaii Civic Center, at community colleges on-island, and other locations, provided venues in which KHS served more patrons than each preceding year. These numbers were added to 33,000

additional patrons through web activities, online resources, and archived publications and materials (at KHS, The Hawaiian & Pacific Collection at UH Manoa, and elsewhere).

These numbers tally a population over a quarter the size of the entire Island of Hawaii, demonstrating the high use and value that Kona Historical Society has to its local and visiting communities. In particular alignment with KHS's mission were expanded numbers and increased quality of school group programs in 2016 and in 2017, with new activities such as "mochi making," "lauhala demonstrations," "native forest plant identification," and new programs designed to create student engagement with historical photo exhibits. With numbers exceeding three thousand Pre-K-12 school children--more than ever before--and additional volunteer and college student volunteers and interns, and thousands more visiting children with their families, KHS is supplementing the educational and cultural experiences of our children in Hawaii, and providing museum experiences which West Hawaii is sorely lacking.

KHS is committed to providing these experiences for local families and children, while also presenting an authentic representation of Hawaii to visitors. With the recent closures of two museums in Kona, KHS is now the only museum of its type offering the array of activities, which it does, serving all of West Hawaii. Hands-on activities supplement traditional exhibit and archives, and gardens engagement. Each year we are finding ways to hone what we offer to be of highest value to our communities with the most sustainable plan to continue to offer them both financially and with staff resources currently available.

Our motto has been that, the challenges that we face are often the precise conditions, which allow our creative thinking and adaptability. We have over several years slowly solved business plan inefficiencies and what is common to small non-profits, which are continued expansions of program offerings, staff, and events. We have only asked for GIA's and other larger grants when we had the capacity and resources to build upon this operational support and leverage it into better fundraising, program income, and mission-aligned opportunities. This holds true for requests for this CAPITAL REQUEST as well. While we want to offer a tremendous amount to our patrons-- and while we are willing to do more than what we might do in a strict "for-profit" scenario where specialization is important, we do understand that doing too much can often come at the expense of doing things in a sustainable manner. KHS feels a strong obligation to ensure that the State's investment in our organization has been smartly built upon with its own capacity and development building, and is not taken for granted—or even applied for every year. This gallery is a crucial part of our future plan for sustainability and fundraising abilities.

We are the only museum of our kind in our region, and we function in a role that really no other museum on our island does. We have an urgent responsibility to our mission and to the children and patrons on Hawaii Island to provide educational, cultural, and artistic resources that are not offered by anyone else. The State of Hawaii's assistance with awarding the GIA to KHS truly serves its constituents in meaningful ways.

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

5.  Describe the geographic coverage.

This project is inclusive of visitors from neighbor islands, the continent of the United States, and international locations as well as, and with special dedication to school groups, visitors, and community members from North and South Kona, Ho'okena, and Na'alehu as well as 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;

Engage Project Manager; Executive Director counsels PM on progress and completion of elements so far; Acquire additional estimates as needed to conform to State of Hawaii requirements; Engage qualified contractor (from one presented or another) to commence work; Anticipated 3 month construction time; provide staff time allocation and planning to accommodate up to three additional months of unplanned for construction delays; Staff and volunteer design and planning of interior build-out; best practices for archival "tight envelope" conditions oversight performed; Gallery (in-kind) consulting from Melissa Morgan Gallery for final elements of PM.

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

Quarter 1	Quarter 2	Quarter 3	Quarter 4
<ul style="list-style-type: none"> <li>• Finalize County requirements including permits</li> <li>• Engage PM</li> </ul>	<ul style="list-style-type: none"> <li>• Complete reports and plans</li> <li>• Engage Contractor</li> </ul>	<ul style="list-style-type: none"> <li>• Construction</li> <li>• Landscaping</li> </ul>	<ul style="list-style-type: none"> <li>• Interior Buildout</li> <li>• Report to State</li> </ul>

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

KHS has been working on this Capital project for 6 years factoring in land purchase time lines. Meticulous, professional, contractors, historical preservation professionals, architects, draftsmen, and project managers have been sourced and consulted and stand ready to get the construction phase underway. The Project Manager will be expected to present a progress report and final report outlining grant compliance concerns and best practices for this type of museum project.

These evaluation measures will be coupled with traditional measures of licensed, bonded, contractor construction projects (inspections, engineering oversight, County compliance). The State of Hawaii will be provided all requested elements (plans, reports, permits, and so forth).

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.

KHS will monitor budget, ledgers, timelines, historic preservation guidelines, engineering reports, and all other progress and culminating documents. Photos, press, and inspections will be provided to the State as part of final report.

### **III. 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](#))

SEE ATTACHED.



2.  The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2019.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$592,000			\$500,000	\$1092,000

3.  The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2019.

Cooke Foundation  
 Atherton Foundation  
 Hokulia Fund  
 Hazen Foundation  
 LeBurta Atherton Foundation  
 Anonymous Foundation  
 Other private foundations  
 Private sponsorships "Donor Wall"  
 Other

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

N/A

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 2019 for program funding.

N/A

6.  The applicant shall provide the balance of its unrestricted current assets as of December 31, 2017.

\$107,959.05\*

\*Please note, this amount does not include other pending receivables for operating grants awarded. These are cash assets only.



#### **IV. 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 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, cultural heritage management, project management, Pacific region knowledge, 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.

Several KHS employees serve on the Boards of Directors of prominent Hawaii non-profits. This includes a Hawaiian language immersion school (located in South Kona), community boards (in South Kona and Kailua), Hawaii Council for the Humanities (serving every island), State culture and arts grant panels (serving every island every year), museum associations (HMA serving every island and held on neighbor islands in alternating years), and library and archive associations (serving every island but with especial emphasis on Oahu).

##### **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.

KHS has two locations: 1. A 3.3 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 also hosts temporary exhibits), Portuguese Bread Oven, and KHS headquarters; and 2. The Kona Coffee Living History Farm, a 5.5 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 which has been in progress of planning and construction slated to be built in 2018-2019. The Kalukalu location is the site of the construction project.

**V. 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.

**Proposed Staffing**

<u>Paid Staff &amp; Project Manager</u>	
Regular Full-Time	8
Regular Part-Time & Part Time	5
Project Manager	1
 <u>Volunteers—IN KIND</u>	
2018 Volunteers	10

**Staff Qualifications**

**Joy Holland:** Joy has been the Executive Director of Kona Historical Society (KHS) since Winter of 2013. She is responsible for oversight of all areas of operations, development, finance, and collections for two Smithsonian-affiliated museum sites on the National and State Register of Historic Places. She also is in charge of collection oversight for KHS’s museum library and archive. She has a B.A. in Classical Languages and Literature from Occidental College, a Post Baccalaureate Certificate in Classics from UCLA, and a Masters in Library and Information Science at University of Hawaii at Manoa, with course work emphasis in Archives and Special Collections. Joy previously worked at Hamilton Library at University of Hawai’i in Special Collections, as a Preservation Archivist (APT) and a Special Research Collections Assistant. She has college teaching experience in both library instruction and the Latin language. Joy’s work experience brings a diversity of administrative, educational and artistic skills from her career

history in the film and dance industries to her work for KHS, and she serves on the Board of Directors of The Hawaii Council for the Humanities (NEH State Partner), and the on the Board of Directors of The Association of Hawaii Archivists.

**Ku'ulani Auld:** Serves as Director of Programs. Ku'ulani is an alum of UH Hilo, and trained in Living History Museum delivery, Ku'ulani has also taken extensive Museum and Library 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.

**Gavin Miculka:** Serves as the Director of Interpretation. He has a BS in Recreation, Park & Tourism Sciences from Texas A & M University and a Masters of Applied Anthropology from the University of Maryland. His academic and professional background has emphasized heritage tourism, historic preservation, museum management and resource interpretation. Gavin has extensive experience in developing, presenting and supervising interpretation and education programs at various historic sites, including those with renowned living history programs. Gavin applies specialized knowledge and skills to create and manage interactive and meaningful experiences for both community members and visitors.

**Mina Ellison:** Mina Ellison, has a background in Museum Studies and serves as the Curator for the Kona Historical Society and its museums and (forthcoming) gallery. Born and raised in Kailua, O'ahu, Mina's 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 has also completed graduate studies in Museum Studies at New York University. She is committed to furthering the mission of KHS to preserve and perpetuate Kona's rich legacy.

**Pixie Navas:** Pixie Navas serves as the Archival Technician and Cultural Historian for KHS. She is a graduate of Sullins College. An experienced archival technician and cultural consultant to local educational institutions, as well as a multi-generational Hawai'i Island rancher and lifetime resident, Pixie has been an employee of KHS for nearly 20 years. A respected cultural historian and adept archival technician, she brings a wealth of cultural knowledge to this project. Her comprehensive familiarity with cultural and local traditions helps to provide archival and historical context to exhibits, living history, articles, web content, and KHS programs. Pixie works to foster community involvement and engagement and provides dedicated reference and research guidance to local and academic patrons.

**Brianne Atwood:** Brianne Atwood serves as the Finance Director and oversees grant compliance. Brianne worked as an International Consultant in the field of Public and Non-Profit Health and Finance throughout the Asia Pacific region for over 10 years. She has extensive experience in Project Management, Finance Administration, Informatics, Auditing, Grant Administration, Program Design and Policy Development. She has worked as a Systems Analyst and Developer on many Financial Management and Budgeting Information Systems Projects. She maintains a



dedication to the Pacific region and its people. Ms. Atwood studied Anthropology at UH Manoa and holds a PMP certificate in Project Management. She is working to complete her graduate studies in Applied Anthropology focusing on Sociocultural Empowerment in Development Projects.

**Dance Aoki:** Serves as the Interim Director of Development. She also has a background at KHS as a Volunteer Coordinator and has been at KHS since March of 2016. She has experience as a radio producer, print journalist and communications consultant for nonprofit organizations and community programs. Dance studied Creative Writing and Theatre at the University of South California and has a B.A. in English. She has a Master of Arts in Social Entrepreneurship and Change from Pepperdine University with a focus on storytelling for nonprofit or charitable organizations. Dance has worked as a producer and technical assistant for the podcast and radio news program “Beyond the Fence” for KPRG Public Radio Guam and as the host of “Soul Sessions”, a radio program featuring soul, funk and rhythm and blues music. She is a published playwright, with work recently featured in Honolulu’s Second Annual One-Minute Play Festival and Aloha Theatre.

### **Supervision and Training**

- Cultural activities and school group interpreter training will take place in the Summer 2018 window of July 1-September 30. The lead KHS staff on this includes the Director of Interpretation and a Programs Assistant/Farm Museum Assistant Manager, who is a certified teacher. A contractor from a pool of certified teachers, or of graduate level student consultants/interns from the UHH MA Cultural Heritage Management program, or comparable, will also be engaged in this project training. The Director of Programs and Cultural Historian will also be involved in the curriculum development in adjusting content to both KHS sites and visitor age groups.
- Exhibit strategic planning, preparation, and installation specification outlines will be overseen and approved by the Executive Director and Acting Collection Manager, with the Curator planning, prepping and supervising staff for exhibit elements of this project including daily supervision of preparator, docent, greeter, and exhibit school group staff. Content creation and panel description will be performed primarily by Curator with input from the Program Director, Cultural Historian and the Acting Collection Manager, but may include discrete training of volunteers as well. The time anticipated for this training is July 1-August 15, with some foundational work supported by KHS in the Late Spring on 2018.
- Other project-specific interpretive training will be provided by the Program Director, Director of Interpretation, and the Cultural Historian. This training will include living history activities, tours, and outreach activities and events.

## **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.

3.  **Compensation**

The applicant shall provide the annual salaries paid by the applicant to the three highest paid officers, directors, or employees of the organization by position.

**Annual Compensation:**

Employee Name	Title/Position	FTE	Annual Salary/Wage
Joy Holland	Executive Director	1.0	50,000
Brianne Atwood	Finance Director	1.0	41,200
Ku'ulani Auld	Program Director	0.75	35,880

**VI. 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.

The Kona Historical Society has no pending litigation or outstanding judgments to disclose.

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 Kona Historical Society has no licensure or accreditation to relate relevant to this 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.

The Kona Historical Society will not use this grant to support or benefit a sectarian or non-sectarian private educational institution.

4.  **Future Sustainability Plan**

The applicant shall provide a plan for sustaining after fiscal year 2018-19 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2018-19, but
  - (b) Not received by the applicant thereafter.
- GIA Capital support allows for venue which is an integral part of Development, Membership, and Board Fundraising Initiatives (already planned for 2018-2019) due to the visible public programs, exhibits, and publications produced through grant;
  - Continue to leverage business sponsorships, community support during our grant project year

Kona Historical Society has increased its operating budget, slowly, and steadily over the past 5 years about 25%. Although like many small museums lacking endowments (and actually even like ones who have hefty endowments, as analysis of Hawaii museum 990's will reveal, or a survey of professional literature on museum finances in general) KHS has worked arduously to maintain a balance between the three tent poles of: program income, grants, and unstipulated giving. Over the course of the past year, we have learned through professional service and financial analysis that KHS has actually been quite unusual in maintaining a "black" or positive net-operating position. Kona Historical Society has learned over time how to budget and schedule fundraising events to offset potential late grant disbursements or unpredictable Hawaii visitation numbers. We are on track-- but given the responsibility we have to steward ~10 acres of State of Hawaii Legacy Land, animals, botanicals, two Historic Places and structures on the National and State Register, a regionally significant archive & library with collections nowhere else, and two NEH exhibits-- our positive position is exceptional. Our sustainability plan is to control growth, increase membership and staff resources applied to "giving" recruitment, and to diversify and seek out operating as well as project grants and leverage our new beautiful gallery asset to acquire sponsorships and stakeholder. Our plan is to grow development and Board fundraising capacity in the present and intervening year after GIA support.

5.  **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, 2017.

SEE ATTACHED

6.  **Declaration Statement**



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

SEE ATTACHED

7.  **Public Purpose**

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

The grant will conform to public purpose outlined in 42F-102

1. The applicant is the Kona Historical Society;
2. Purpose

KONA HISTORICAL SOCIETY'S *GALLERY & KONA MUSEUM*

- *Engineering plans (Civil, Mechanical, Electrical) completed;*
- *Structural and architectural drawings completed;*
- *Extensive analysis and review (process took over 18 months)—including mapping, site dig, preservation plan, monitoring plan, and cultural assessment of site by archaeological firm and State Historic Preservation Dept. approval;*
- *Contractor estimate completed;*
- *Submitted packet for review to County of Hawaii now needs Project Manager follow up once matching funds from GIA or other source awarded;*
- *Gallery Consultants secured--professional gallerists report and additional in-kind services procured;*
- *Project Manager funds part of GIA capital request*
- *1/3 funding awarded or on hand for exterior and interior build-out  
2/3 funding in request stage including GIA  
KHS navigated external delays including required reports and SHPD delays, and has in interim.*



## BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2018 to June 30, 2019

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 Dir./ Acting Collection Manager	1.00	50,000	18 %	\$ \$0
Program Director	0.75	35,880	22 %	\$ \$0
Finance Director	1.00	41,600	11 %	\$ \$0
Curator	1.00	32,760	21 %	\$ \$0
Collections Assistant/Archive Tech	0.50	20,709	31 %	\$ \$0
Cultural Historian	0.50	20,709	31 %	\$ \$0
Director of Interpretation	1.00	35,880	0 %	\$ \$0
Program Assistant/ Special Programs	0.75	20,280	0 %	\$ \$0
Volunteer Coordinator	1.00	35,360	16 %	\$ \$0
Historical Interpreters/Edu. Demonstrators (12 Employees)	5.00	155,480	0 %	\$ \$0
Bakers/Educational Demonstrators (2 Employees)	0.25	13,000	27 %	\$ \$0
Development Director	0.50	18,720	21 %	\$ \$0
Development Support/Social Media	0.50	18,720	0 %	\$ \$0
Lecture, Workshop and Educational. Coordination	0.50	15,080	0 %	\$ \$0
Executive Asst./Member Benefits	1.00	15,080	0 %	\$ \$0
Grant Administrator	0.33	11,232	0 %	\$ \$0
<b>TOTAL:</b>				<b>\$ 0</b>
<b>JUSTIFICATION/COMMENTS:</b>				



## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2018 to June 30, 2019

Applicant: **KONA HISTORICAL SOCIETY**

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
Exhibit Panels & Hanging display fittings/hardware	6.00	\$2,000.00	\$ 12,000.00	0
Exhibit Panels & Hanging display fittings/hardware	4.00	\$2,875.00	\$ 11,500.00	5500
Folding Tables (x 4)	4	\$350.00	\$ 1,400.00	1400
Chairs ( x 34)	34	\$20.00	\$ 680.00	680
Exhibit Showcases	4	\$3,500.00	\$ 14,000.00	7270
Display Stand/Easels	2	\$500.00	\$ 1,000.00	1000
Square Point of Sale System (Stand, Reader & Register)	1	\$498.00	\$ 498.00	0
Flat Screen 55"	1	\$850.00	\$ 850.00	650
Fabric/Clothing Stands	2	\$500.00	\$ 1,000.00	500
Speakers/Sound system (wireless)	1	\$250.00	\$ 250.00	0
<b>TOTAL:</b>	<b>53</b>		<b>\$ 43,178.00</b>	<b>17,000</b>

**JUSTIFICATION/COMMENTS:**

Tables, Chairs and Display screen to facilitate education events and Audio Visual education videos for display of Archival Video Productions. Stands, showcases, easels and Fabric display stands for the display of 3D art, manuscripts, fabrics and artifacts. Audio equipment will enable announcements and audio accompaniments for exhibits. Point of Sale system to facilitate patron entrance charges and sales.

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
N/A			\$ -	
<b>TOTAL:</b>				

**JUSTIFICATION/COMMENTS:**

## BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2018 to June 30, 2019

Applicant: KONA HISTORICAL SOCIETY

<b>FUNDING AMOUNT REQUESTED</b>						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2014-2017	FY: 2017-2018	FY:2018-2019	FY:2018-2019	FY:2019-2020	FY:2020-2021
PLANS	34000	0	0	0	0	0
LAND ACQUISITION	0	0	0	0	0	0
DESIGN	10000	0	0	0	0	0
CONSTRUCTION	206000	0	1075000	1060000	0	0
EQUIPMENT	12000	0	17000	14178	0	0
<b>TOTAL:</b>	<b>262000</b>	<b>0</b>	<b>1092000</b>	<b>1,074,178</b>	<b>0</b>	<b>0</b>
<b>JUSTIFICATION/COMMENTS:</b> Isemoto bid reflects the core construction, which includes grading, retaining walls, septic, parking prep, paving and basic interior and exterior finishing. Additional contracting will be made to provide the build out of retail space, downstairs storage and preparatory workspace. Additional construction costs also include landscaping, architectural design changes and environmentally sustainable green features.						

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

Applicant: KONA HISTORICAL SOCIETY

Contracts Total: -

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S. / State / Haw / Hon / Kau / Mau)</b>	<b>CONTRACT VALUE</b>
1	N/A				
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
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29					
30					



Contractor's License No. ABC1036

- MAIN OFFICE: 648 PIILANI STREET, P.O. BOX 4889, HILO, HAWAII 98720  
PHONE (808) 935-7194 FAX (808) 961-6417
- KONA BRANCH: 74-5039B QUEEN KAAHUMANU HWY., P.O. BOX 3189, KAILUA-KONA, HI 98740  
PHONE (808) 329-8051 FAX (808) 329-3261

ESTABLISHED 1926

An Equal Opportunity Employer

August 23, 2016

Kona Historical Society  
82-6199 Mamalahoa Highway  
Captain-Cook, HI 96704

ATTN: Joy Holland  
RE: Kona Historical Society – New Gallery Building

**FINAL PRICING – Isemoto Contracting Co., Ltd**

Having received more specific cost information since our "Budgetary Proposal" of 8/10/2016, Isemoto Contracting Co., Ltd is pleased to present our "FINAL PRICING PROPOSAL" for the Kona Historical Society – New Gallery Building. We will hold at:

One Million, Fifty Thousand Dollars and no/100 (\$1,050,000.00)

**\*\* Conditions: Colored concrete floors in lieu of polished concrete.**

Thank you for allowing us the opportunity to participate.

Should you have any questions, please contact us at (808) 935-7194 or via email at [dwaynet@isemotocontracting.com](mailto:dwaynet@isemotocontracting.com)

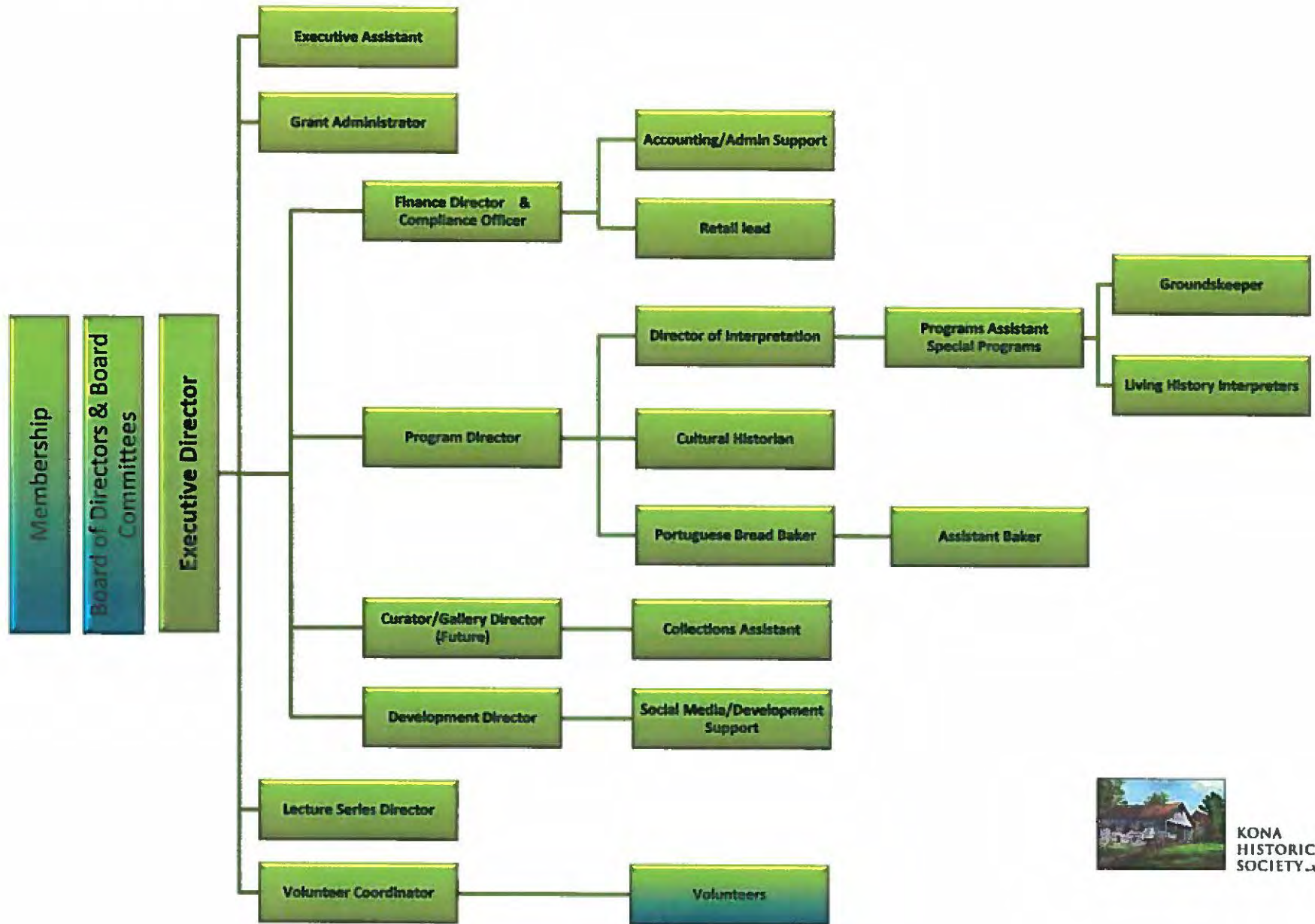
Very Truly Yours,  
Isemoto Contracting Co., Ltd



Dwayne Tawata  
Project Manager



## 2. Organization Chart



KONA  
HISTORICAL  
SOCIETY



**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

**Vendor Name: KONA HISTORICAL SOCIETY**

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

**Issue Date: 01/17/2018**

**Status: Compliant**

Hawaii Tax#: [REDACTED]

New Hawaii Tax#: [REDACTED]

FEIN/SSN#: [REDACTED]

UI#: No record

DCCA FILE#: 30769

**Status of Compliance for this Vendor on issue date:**

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

**Status Legend:**

<b>Status</b>	<b>Description</b>
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	The entity is compliant with DLIR requirement
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

6. Declaration Statement

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, Hawaii Revised Statutes:
  - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant 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, Hawaii Revised Statutes:
  - a) Is incorporated under the laws of the State; and
  - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided.
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
  - a) Is determined and designated to be a non-profit organization by the Internal Revenue Service; and
  - b) Has a governing board whose members have no material conflict of interest and serve without compensation.

Pursuant to Section 42F-103, Hawaii Revised Statutes, for grants 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.

KONA HISTORICAL SOCIETY  
 (Type Name) \_\_\_\_\_  
 \_\_\_\_\_  
 (Signature) \_\_\_\_\_  
 \_\_\_\_\_  
 (Date) 1/18/17  
 \_\_\_\_\_  
Joy Holland \_\_\_\_\_  
 (Typed Name) \_\_\_\_\_  
Executive Director \_\_\_\_\_  
 (Title)