



**KONA
HISTORICAL
SOCIETY** 卐

Preserving Kona's Stories

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January 22, 2020

Senate Committee on Ways and Means
State Capitol, Room 208
Honolulu, HI 96813

Aloha mai kakou,

I am submitting the attached page as an amendment to Kona Historical Society's application for the Hawaii State Grant in Aid for Fiscal Year 2020 to 2021. This page corrects an error that we found on the Budget Request By Source of Funds; the (d) columns and rows now match, and the Total Budget amount has been updated to add up correctly on the bottom line.

Thank you so much for your consideration and all you do for the State of Hawaii through this Grant in Aid program.

Sincerely,

Dance Aoki
Executive Director

Officers
William "Buddy" Norwood
President

Ethan Olins
Treasurer

M.E. Greenwell
Secretary

Directors
Stephanie Ackerman
Balbi Brooks
Carol Greenwell
Lisa Hummel
Sally Inkster
Shane Akoni Nelsen
Dylan Nonaka
Hannah Springer
Mike Vitousek
Wade Yasuda

Advisory Board Member
Joy Holland

Executive Director
Dance Aoki

Program Director
Ku'ulani Auld

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2020 to June 30, 2021

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)
A. PERSONNEL COST				
1. Salaries	90,000	25,000	6,000	305,000
2. Payroll Taxes & Assessments	8,050			30,356
3. Fringe Benefits	2,126			36,788
TOTAL PERSONNEL COST	100,176	25,000	6,000	372,144
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island (3 -5 interisland)	1,500	0	0	0
2. Insurance (Liability, Directors & Officers)	4,500	0	0	7,782
3. Lease/Rental of Equipment (Festival)	2,500	0	0	4,500
4. Lease/Rental of Space (Collections)	1,000	0	0	500
5. Staff & Volunteer Training	5,000	10,000	500	25,000
6. Supplies (Program and Operations)	3,500	9,000	200	15,000
7. Telecommunication (Between two sites)	2,000	0	0	5,520
8. Utilities (For two museum sites)	2,000	0	0	7,700
9. Moving Collections to and from Storage	3,000	0	0	2,000
10. Collections Equipment	1,000	0	0	5,000
11. Project Consultants and Contractors	5,000	20,000	200	12,000
12. Professional Affiliation Dues	4,000	0	0	2,300
13. Native Forest Exhibit Expenses	10,000	0	0	17,000
14. School Program Development	8,000	0	1,000	40,000
15. Publications & Content (Digital & Print)	2,000	0	500	1,000
16. Advertising & Publicity	0	0	0	2,500
17. Lecture & Workshop Costs (Supplies, Etc)	1,500	0	500	2,500
18. Postage	2,000	0	200	200
19. Printing	2,324	0	0	1,000
20. Security & Safety	1,000	0	900	7,124
21. Maintenance for Collections (Archive Facility)	18,000	0	0	13,500
TOTAL OTHER CURRENT EXPENSES	79,824	39,000	4,000	172,126
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	180,000	64,000	10,000	544,270
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	180,000	DANCE ADKI EXECUTIVE DIRECTOR (808)323-3222		
(b) Total Federal Funds Requested	64,000	Name (Please type or print) Phone		
(c) Total County Funds Requested	10,000	Signature of Authorized Official Date		
(d) Total Private/Other Funds Requested	544,270	DANCE ADKI, EXECUTIVE DIRECTOR 1/22/2020		
TOTAL BUDGET	798,270	Name and Title (Please type or print)		

**THE THIRTIETH LEGISLATURE
APPLICATION FOR GRANTS
CHAPTER 42F, HAWAII REVISED STATUTES**

Type of Grant Request:

Operating Capital

Legal Name of Requesting Organization or Individual: DbA:

Kona Historical Society

Amount of State Funds Requested: \$ 180,000

Brief Description of Request (Please attach word document to back of page if extra space is needed):

- Revitalization of a permanent botanical collection at the Kalukalu Native Forest Exhibit, scheduled for completion in December, 2020, emphasizing preservation of native plants and associated cultural traditions.
- Organization of ranching and coffee collections to enhance accessibility of resources through public programs.
- Expansion of educational programs, including 'aina-based service projects, and living history experiences.
- Refreshment of preservation initiatives, museums nterpretation training and protective maintenance for historical sites.

Amount of Other Funds Available:

State: \$ 30,000

Federal: \$ 0

County: \$ 0

Private/Other: \$ 63,000

Total amount of State Grants Received in the Past 5 Fiscal Years:

\$ 1,041,942

Unrestricted Assets:

\$ 1,282.202

New Service (Presently Does Not Exist): Existing Service (Presently in Operation):

Type of Business Entity:

- 501(C)(3) Non Profit Corporation
- Other Non Profit
- Other

Mailing Address:

PO Box 398

City:

Captain Cook

State:

Hawaii

Zip:

96704

Contact Person for Matters Involving this Application

Name:
Dance Aoki

Title:
Executive Director

Email:
dance@konahistorical.org

Phone:
(808)323-3222

Federal Tax ID#:

██████████

State Tax ID#

██████████

Authorized Signature

Dance Aoki Executive Director

Name and Title

1/16/2020

Date Signed

received
1/17/2020

10:40am

Application Submittal Checklist

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

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



AUTHORIZED SIGNATURE

DANCEADKI EXECUTIVE DIRECTOR 1/16/2020

PRINT NAME AND TITLE

DATE



**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

CERTIFICATE OF VENDOR COMPLIANCE

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

Vendor Name: KONA HISTORICAL SOCIETY

DBA/Trade Name: KONA HISTORICAL SOCIETY

Issue Date: 01/16/2020

Status: Compliant

Hawaii Tax#: W40406554-01

New Hawaii Tax#:

FEIN/SSN#: XX-XXX7275

UI#: No record

DCCA FILE#: 30769

Status of Compliance for this Vendor on Issue date:

Form	Department(s)	Status
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:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	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

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS 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 pursuant to Section 42F-103, Hawai'i Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant is awarded;
 - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
 - c) Agrees not to use state funds for entertainment or lobbying activities; and
 - d) Allows the state agency to which funds for the grant were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant.
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawai'i Revised Statutes:
 - a) Is incorporated under the laws of the State; and
 - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided.
- 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 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
(Typed Name of Individual or Organization)


(Signature)

1/16/2020
(Date)

Dance Aoki
(Typed Name)

EXECUTIVE DIRECTOR
(Title)

Application for Grants

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

I. Certification – Please attach immediately after cover page

1. 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, 2019.

2. Declaration Statement

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

3. Public Purpose

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

II. Background and Summary

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

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

The Kona Historical Society (KHS) is a community based, nonprofit 501(c)3 arts, culture & humanities organization and affiliate of the Smithsonian Institute responsible for stewarding the only two permanent National Endowment for the Humanities exhibits in the State of Hawaii. Along with its two historic buildings listed on the State and National Registries of Historic Places, the Society has been acknowledged with national awards for numerous historical public programs and preservation projects.

Kona Historical Society was founded in 1976 on Hawaii Island for the purpose of collecting, preserving, and sharing the history of the North and South Kona Districts and the rich cultural heritage represented within their boundaries. Over four decades important local contributions have been shared by KHS on-island and statewide to provide educational and cultural resources for kama'aina and visitors in engaging and inspiring ways. Through two living history programs, archival, botanical and zoological collections, historical publications, academic collaborations, an award-winning lecture series, immersive excursions to hard-to-reach landscapes, special concerts and events that highlight Kona's and Hawaii's special places and musical contributions, as well as a growing educational program providing thousands of students from across the State of Hawaii with access to an engaging historical field trip experience, KHS has played a valuable and irreplaceable role on Hawaii Island. Community and neighbor island outreach efforts, the increasing number of student attendance, and expanding online patronage have enhanced the Society's

capacity for impact across an ever-diversifying audience that includes local, state-wide, national and international patrons. The Society relies on the incredible goodwill of the community, its donors and volunteers, along with efficient management of resources and lean administrative staff, to ensure these programs thrive while operating on a budget of a much smaller museum. Kona Historical Society continues to provide important cultural and educational opportunities to its constituents in a way no other humanities organization on Hawaii Island is currently able to do, contributing to its reputation as a small, but high-impact, high-quality cultural institution.

2. The goals and objectives related to the request;

Our goals with this project strengthen the infrastructure we've built through our exhibit, educational and outreach capacity so that we can serve more students, local patrons and visitors while also addressing preservation needs. In order to strengthen our ability to serve our mission, we must capitalize on these areas of growth, while also confronting critical areas that call for improvement.

The protection of our historic sites and archives is of utmost importance, and through previous grants, we have been able to accomplish some goals, but Other critical goals could not be accomplished because they were only feasible once the organization had the capacity to hire staff with a high level of museums experience, education and professional qualifications. Consulting experts from the Conservation Center for Art and Historical Artifacts, Historic Hawaii Foundation and others helped us to rehouse a significant portion of fragile archival materials, purchase archival equipment, and perform critical maintenance to archival facilities and portions of historic buildings, including stabilizing of the roof of our historic Farmhouse.

For more than a decade, Kona Historical Society has been working to combat the missteps of untrained staff and improve the conditions of archive facilities. As budget constraints forced leadership to make difficult decisions regarding the allocation of limited resources, revenue generating programs were given privileged support as program admission fees supported the weight of most of the organization, while HVAC systems were temporarily halted in one of the archival facilities and irrigation to the living botanical collections was halted until grant funds could once again be a substantial part of the funding strategy. While other organizations suffered under financial constraints and eventually closed, Kona Historical Society was able to keep its doors open and fulfill its mission, if only with a fraction of the support it needed.

Since that time, organizational finances have stabilized and the Society has been able to expand and strengthen its organizational infrastructure through widened streams of revenue from increased admissions, educational and group tours, fundraising and grant awards, all of which ensure the sustainability of planned preservation initiatives. In addition, this strengthened institutional infrastructure has given the Society the capacity to recently hire a Collections Manager with a depth of experience and knowledge to start these projects, and to focus our attention on the botanical, zoological, and archival collections that now need specialized care.

Now that the human capacity to lead improvements is in place, we need additional support to launch and execute those initiatives to preserve our historic buildings and archival facilities, which will in turn support our ability to welcome more patrons to our sites, make our programs more accessible to our school communities, strengthen and revitalize our permanent exhibits and collections, and increase the size and scope of historical publications produced by the Society to provide greater public access to historical content through digital platforms, such as our website, social media, and podcasts. The Grant in Aid will help us achieve the following specific goals:

- Revitalization of a permanent botanical collection at the Kalukalu Native Forest Exhibit, partially under way with the support of private grant funding. Once fully funded, the revitalized exhibit is scheduled for completion in December, 2020, emphasizing the endemic, indigenous and Polynesian

introduced plants and their traditional usage and value to Native Hawaiians that have shaped the history of cultural practices and contribute to the resilience and preservation of Hawaiian traditions throughout eras of political, economic and historical change.

- Organization of Kona Ranching and Kona Coffee collections to enhance accessibility of historical resources for the benefit of the public through their contributions to lectures, workshops, and historical content published through the organization's website, printed books and materials, audio podcasts, and streaming video.
- Expansion of our educational programs to increase capacity to serve more students with curriculum that meets identified needs shared by West Hawaii school communities, including educational projects geared towards students of all ages that can include cultural and historical workshops, participatory living history experiences, and educational internships.
- Refreshment of preservation initiatives, including improvements to living history interpretation training and delivery, and implementation of strategies to protect historical sites based on professional consultations, assessments, and best practices.

3. The public purpose and need to be served;

The Kona Historical Society, a 501c3 museum, archive, and steward of historic sites, has, over several decades, provided public space, free or deeply discounted school and other educational programs and lectures throughout the years, exhibits, historic field trips, cultural festivals, access to unique and significant Hawaii collections and artifacts, stewardship and financial care of two State of Hawaii and Nationally registered historic sites and structures, and approximately 10 acres of publicly accessible State of Hawaii Legacy Land reserves, including endemic native forest exhibit. The jewel resource underpinning all these programs is a regionally significant library with archival collections and museum artifacts unique in Hawaii, and precious to Hawaiian history, Japanese American history, and local culture that is in urgent need of professional care.

These resources have provided our Hawaii Island communities, the State, and visitors from all over the world with educational, cultural, and social benefits in a region that has been depleted of educational, entertaining museum experiences in recent years. With the recent closures of two museums in Kona, the Society is now the only museum of its type serving an array of activities to the communities of all West Hawaii. Hands on activities, such as mochi making, lauhala demonstrations, and native plant identification, supplement traditional exhibit and archive activities, immersing patrons in an unforgettable, sensory experience of Kona's history and traditions. Additionally, special events such as the Annual Farm Fest, a monthly lecture series, and off-site outreach and pop-up exhibits have extended the Society's reach sharing Kona's stories with communities across the Kona districts, Hawaii Island, the State of Hawaii and beyond, through partnerships with the Hawaii Museums Association, Hawaii Public Radio, and school communities like Stanford University in Palo Alto, California who helped us digitize a portion of Japanese language newspapers published by Kona businesses in our collection, and the Crafton Hills College in Yucaipa, California who welcomed our exhibit "Ku'u Lei Makamae: My Precious Lei" to their campus in 2019.

The success of the Society's programs requires close attention and care given to our archives, which we do to the best of our abilities, even if those abilities are limited due to challenges we face as a small, rural museum. We must work much harder to achieve high standards of professional museums practice compared to other, similar museums who have access to readily available resources and partnerships in urban, more densely populated areas. Leveraging our relationships with partners in the academic and museum field on-island, including the Daughters of Hawaii and the Lyman Museum, and our national partners like the Smithsonian Institute and the National Endowment for the Humanities, the Society is able provide educational resources of national and international significance well beyond its budgetary capabilities. Sharing resources with these partners enriches the entire community, enhancing the programs we provide despite limited administrative staff and lean operational bandwidth. Through these programs and our growing field trip program, the Society serves thousands of students every year, working with schools from preschool to the college level to provide rare and unique learning opportunities that will tie

students to their communities and culture and give visitors a clear-eyed view of what Hawaii's rich, complex, and multi-ethnic community truly looks like.

While we have been creative and adaptable to the conditions of operating a heritage museum that provides rich cultural and educational content in an isolated, rural area, and we have been entrepreneurial in streamlining business practices, the Society's ongoing partnership with the State through the Grant in Aid program has played a significant role in building its strength to stand on its own. Now, KHS must focus its attention on the areas of greatest need: revitalization of our permanent botanical exhibit, greater accessibility to our Kona Ranching and Kona Coffee exhibits through strategic preservation initiatives, and the development of our educational capacity to meet growing demand from the community.

The Society is the only museum of its kind in the region, and the urgency to fulfill the goals of our mission affects the children, families and patrons on Hawaii Island who rely on us to provide educational, cultural and artistic resources that are not offered by anyone else.

4. Describe the target population to be served;

The target population to be served is a diverse group of patrons visiting from neighbor islands, the mainland and other parts of Hawaii Island, Kona residents, and local and neighbor-island elementary and secondary schools groups, including underserved and low-income preK-12 students and groups, volunteers and interns.

5. Describe the geographic coverage.

The 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 with outreach expanding to schools and community groups from Waikoloa, Kohala, Waimea, Hamakua, Hilo, Puna, and Volcano areas of Hawaii Island. It will also 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.

III. Service Summary and Outcomes

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

1. Describe the scope of work, tasks and responsibilities;

The Programs Team, consisting of the Programs Director, Collections Manager and Programs & Volunteer Coordinator, and contractors with expertise in native species will coordinate the revitalization of the portion of Kona Historical Society's botanical collection representing the Kalukalu Native Forest Exhibit, which will be permanently on display alongside the H.N. Greenwell Store Museum to illustrate the relationship between Kona's historical ranching homesteads and the landscapes of their ahupua'a, where native plants were stewarded by Hawaiian families for generations. In 2019, Kona Historical Society was able to revitalize 30% of the permanent, living exhibit. This Grant in Aid will support the revitalization of the remaining 70%, which includes the removal of invasive and foreign plant species overtaking the acreage, and replanting native species such as alahe'e, koa, 'ohia, a'ali'i, pohinahina and native fern species such as kupukupu and palapalai. Strategic maintenance plans will be executed, supplies ordered, and volunteer service days and service-learning curriculum coordinated to support the completion of the exhibit revitalization. Curriculum for activities available to field trips will be enhanced by the 'aina-based service

learning opportunities presented by the Forest Exhibit and additional programming to meet the needs of an array of student groups will be developed by the Programs Team with the help of an Education Assistant, based on the results of an Educational Needs Assessment currently under way. Major collections will be professionally organized, including the Kona Ranching and Kona Coffee collections that contain priceless photographs, maps and oral histories with leadership of Collections Manager and assistance from Archive Technician as a foundational step in making collections more accessible to researchers, academics, students and the community through public programs, lectures, publications, annual festival and outreach initiatives. With the Native Forest Exhibit revitalized, and critical collections organized in our archival facilities in anticipation of the forthcoming Kona Museum Gallery, we will refresh our preservation initiatives, namely improvements that can be made to our physical sites to protect our historic structures, and refreshments to our training for program staff to preserve Kona's stories and traditions through living history and historical interpretation.

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

Quarter 1 FY2021

July 1 to September 30

- 75% removal of invasive species from Native Forest Exhibit and 50% replanting of native species: trees trimmed, plants removed, ordering native plants and supplies
- Analyze results of Educational Needs Assessment.
- Field trip program planning expands upon service-learning resources during forest revitalization, expanded curriculum developed.
- Implementation of strategic maintenance plan for the Forest Exhibit.

Quarter 2 FY 2021

October 1 to December 31

- 100% removal of invasive species from Native Forest Exhibit and 75% replanting of native species
- Develop interpretive signage for Native Forest Exhibit.
- Organization planning for botanical, zoological and traditional archival collections, volunteers trained in preparation to execute organization project.
- Expanded curriculum finalized, staff trained for new programs.
- Community Festival and Outreach execution

Quarter 3 FY 2021

January 1 to March 31

- 100% of replanting, install signage for Native Forest Exhibit
- Expanded educational programming evaluated by teachers.
- Grand opening of Native Forest Exhibit, ongoing strategic maintenance implemented
- Development of content for publication, lectures and outreach
- Protection historic buildings and critical archival collections with maintenance

Quarter 4 FY 2021

April 1 to June 30

- Produce appropriate materials, including training manuals, to ensure sustainability of collection's organization
- Produce reports and curriculum
- Publication of digital content on website
- Report to SFCA

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

Kona Historical Society learns from qualitative and quantitative data collected through evaluation surveys at program delivery points over the course of the year. We also use key performance indicators, including marketing metrics collected on website and social media platforms, as well as review sites such as Yelp.com, TripAdvisor and Google Reviews. In addition, Kona Historical Society will apply the following logic model to test, evaluate and adjust the program according to milestones and measures of success as outlined by expected outputs and outcomes.

Inputs	Activities	Outputs	Short-Term Outcomes	Long-Term Outcomes	Impact
Sufficient staff with expertise and leadership skills to implement the revitalization of the Forest Exhibit	Removal of invasive plants, replanting of native species, installation of interpretive signage in the Native Forest Exhibit	Accountability procedures created for the management of collections, including , zoological and archival collections.	Highest and most cost-effective standards of professional preservation strategies upheld	Archival materials sustainably preserved for future generations	Increased appreciation for Kona’s unique history, culture and sense of place
Sufficient assistance from external consultants, experts and supporters to support staff through implementation	Kona Ranching and Kona Coffee collections organized according to best practices and professional collections management standards.	Increased opportunities to experience the connection between Kona’s natural landscape, it’s history, and the stories of its people	Collections accessible to the community, researchers, students and visitors using best industry practices, innovative procedures and latest tools	Native forest species are preserved, and cultural traditions perpetuated as exhibit thrives supported by ongoing strategic maintenance plan, service projects and educational experiences.	
Students, teachers, patrons, visitors, volunteers and participants to share Kona’s stories and unique sense of place.	`Aina-based service-learning curriculum added to suite of activities available to students through field trips.	Strengthened capacity to welcome more visitors from the community, schools and beyond.to protected historic sites.	Greater visibility in the community through positive word-of-mouth reviews and advocacy from visitors, students and community members.	Long-term sustainability initiatives prove successful with buy in from community.	
Rich collections, including botanical, zoological, and archival material that share Kona’s Ranching and Coffee history.	Preservation strategies implemented to protect historical structures and archival facilities from hazards such as pests, humidity and other emergencies	Greater satisfaction reported through evaluations of educational and living history programs and service-learning projects			
	Training strategies implemented to improve program staff ability to preserve Kona’s stories and unique sense of place	Increased original content available online, increased partnerships and cross-promotion, and increased social media engagement			

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.

On a monthly basis, KHS monitors participation data against projections, and revenue received against the annual budget. Program effectiveness is monitored quarterly through participant feedback and is improved through employee evaluation and professional development.

KHS will monitor the progress of the project against its original timeline, goals and patron feedback, volunteer recruitment and participation, number of programs implemented, qualitative and quantitative patron and member feedback on programming. Printed press and publicity collected, social media and website engagement, and additional content developed in concert with and in addition to existing programming. For example, our living history programs are often the source material for documentaries, fictional films, and promotional materials for Hawaii Tourism Authority. Examples of this material can be collected and easily shared with the State.

IV. Financial

Budget

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
 - a. Budget request by source of funds ([Link](#))
 - b. Personnel salaries and wages ([Link](#))
 - c. Equipment and motor vehicles ([Link](#))
 - d. Capital project details ([Link](#))
 - e. Government contracts, grants, and grants in aid ([Link](#))
2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2021.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$108,000	\$54,000	\$18,000	0	\$180,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2021.

Hawaii Tourism Authority
County of Hawaii
Hawaii State Foundation on Culture and the Arts
Freeman Foundation
Alexander and Baldwin Foundation
Atherton Foundation

Cooke Foundation
Hawaii Community Foundation
Hokulia Community Fund
West Hawaii Fund
T.C. Ching Foundation
Ironman Foundation
National Endowment for the Humanities
Caroline Shipman Foundation
Institute for Museum and Library Services
Ama Olukai Foundation
Other private foundations

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 2021 for program funding.

SEE ATTACHED

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2019.

Current Unrestricted Assets: \$1,282,202

V. Experience and Capability

1. Necessary Skills and Experience

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

Kona Historical Society 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 Affiliation in the State of Hawaii and to-date hosts the only permanent National Endowment for the Humanities exhibits in the State of Hawaii.

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 project. In addition, several KHS employees serve on the Boards of Directors of several community nonprofits, providing a connection and leadership for our neighborhood and cultural institutions.

Kona Historical Society is responsible for the management and execution of several project-based grants worth hundreds of thousands of dollars every year, adhering to meticulous accounting and reporting standards required by such granting organizations as the Hawaii Community Foundation, Hawaii Tourism Authority, County of Hawaii, Freeman Foundation, and other grantors.

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.

Kona Historical Society manages two physical museum sites: First, a 3.3 acre parcel in Kalukalu, South Kona, where the H.N. Greenwell Store and homestead (c. 1875) hosts the H.N. Greenwell Store Museum Exhibit, Jean Greenwell Library and Archives, Portuguese Bread Oven, the Native Forest Exhibit and Operational Headquarters for KHS. This location is also preparing for the construction of a gallery facility currently awaiting permits for building and grading. Second, 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, or furo, a coffee drying roof platform called a hoshidana, coffee pulping mill called a kuriba, kitchen gardens, and pasture with stables that house two donkeys as part of the Kona Nightingale program.

VI. Personnel: Project Organization and Staffing

1. Proposed Staffing, Staff Qualifications, Supervision and Training

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

Collections Manager Julie Kamiyama has worked many years as a registrar accessioning, deaccessioning, cataloging and documenting objects. She has handled a variety of collections and has experience planning and executing large-scale projects during her time working at the Los Angeles County Museum of Art. She has extensive experience rehousing objects, organizing and maintaining storage facilities and providing access to collections. While at the Cantor Arts Center, a Stanford University Museum, she worked with the Director, curators, donors, vendors and all staff to process new acquisitions, cared for objects properly through proper housing and storage, and maintained accurate record keeping and organization. Her educational background includes an M.A. in Museum Studies with an emphasis in Collections Management from John F. Kennedy University, and a B.A. double majoring in Art History and Archaeology and Classical Humanities from the University of Missouri. Julie will provide leadership, supervise and train volunteers and a future Archive Technician to support the execution of this project during the second quarter of the fiscal year.

Public Programs Manager Audrey Blair has a Master of Arts in Museums Studies and a Master of Business Administration also from John F. Kennedy University, with a specialization in Education and Interpretation. She has worked with a wide variety of communities during her role as Operations Manager for the Habitot Children's Museum in Berkeley, California, coordinating weekly educational and cultural events alongside partnering organizations and developing Science, Technology, Engineering and Math (STEM) curriculum in educational museums programs. She has managed the care and installation of exhibits at John F. Kennedy University and participated in program evaluations at the San Francisco Museum of Modern Art. Audrey will supervise and train

Museums Program Staff and an Educational Assistant in the execution of this project during the second quarter of the fiscal year.

Program Director Ku`ulani Auld is an alumnus of UH Hilo, and trained in Living History Museum delivery, extensive professional development in Museum and Library Management, as well as WESTPAS disaster preparedness. Ku`ulani integrates specialized museum education with hands-on experience. With years of institutional knowledge and experience, prodigious cultural knowledge as a fifth generation Kona rancher, and a deep connection to the development of the Kona Ranching collections, Ku`ulani brings invaluable insights and experience to this project, and she will provide intensive leadership, supervise the entire Programs Team, ensure quality of training, and maintain continuity throughout the year.

Executive Director Dance Aoki is responsible for maintaining and growing the financial foundation of Kona Historical Society, forging a new Strategic Plan and executing this future plan efficiently and effectively, inspiring and leading Kona Historical Society's incredibly talented team of museum professionals and serving Kona Historical Society's mission in concert with its Board of Directors. She is passionate about leading this organization from within, sharing a vision of preservation and stewardship of Kona's stories and unique sense of place alongside her community. Dance's background in nonprofit management, journalism and film development, as well as her educational credentials with a Bachelors from the Univeristy of Southern California in English and a Masters in Social Entrepreneurship and Change from Pepperdine University have given her well-rounded experience to plan and executive sustainability initiatives for programs that benefit the public good with the help of an incredible team of museums professionals collaborating to steward the organization's mission. Dance will work with Kuulani to ensure that appropriate training is being budgeted appropriately and scheduled throughout the year, and that project goals are executed in alignment with the Society's mission.

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

SEE ATTACHED.

VII. Other

1. Litigation

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

In 2018, KHS experienced the tragic loss of one of our heritage donkeys when the owner of a neighboring agricultural property accidentally shot and killed the donkey with a personal firearm. Kona Historical Society is currently cooperating with the County Prosecutor and Victims Assistance Unit to resolve this issue out of court.

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.

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.

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

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2020-21 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2020-21, but
- (b) Not received by the applicant thereafter.

Building on a stable three-cornered pyramid of sustainable fiscal support, Kona Historical Society's funding strategy for the future is as follows:

The Programs Team will continue to provide excellent educational, cultural and historical programming to a variety of audiences at our two historic sites, leveraging our excellent reputation in the community and with business partners in the tourism industry to expand revenue streams from admission sales and develop efficiencies for sales in our gift shop to support operations. In addition, our Programs Team will make historical content more accessible through the improved organization of the archives to develop marketability of content driven revenue, such as printed publications and digital content.

The Executive Director will coordinate with Kona Historical Society's Board of Directors and Community Engagement and Fundraising staff to prioritize Fund Development goals through best practices in philanthropy, strengthening membership, donor relations and grant-writing for local foundations and individual funders. The Executive Director will also work in concert with Finance Staff to manage financial controls throughout the organization and empower staff to participate in the financial health of Kona Historical Society.

Finally, the Executive Director will continue to write grant proposals for governmental agencies at the Local, County, State and National level and advocate for stronger relationships with government agencies, community organizations, and national institutions to better serve the community by expanding our shared resources, enhancing our accessibility, supporting critical public initiatives, and showcasing to wider audiences the incredible impact our community, culture and traditions have had on local, state and national history.

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2020 to June 30, 2021

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)
A. PERSONNEL COST				
1. Salaries	90,000	25,000	6,000	305,000
2. Payroll Taxes & Assessments	8,050			30,356
3. Fringe Benefits	2,126			36,788
TOTAL PERSONNEL COST	100,176	25,000	6,000	372,144
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island (3 -5 interisland)	1,500	0	0	0
2. Insurance (Liability, Directors & Officers)	4,500	0	0	7,782
3. Lease/Rental of Equipment (Festival)	2,500	0	0	4,500
4. Lease/Rental of Space (Collections)	1,000	0	0	500
5. Staff & Volunteer Training	5,000	10,000	500	25,000
6. Supplies (Program and Operations)	3,500	9,000	200	15,000
7. Telecommunication (Between two sites)	2,000	0	0	5,520
8. Utilities (For two museum sites)	2,000	0	0	7,700
9. Moving Collections to and from Storage	3,000	0	0	2,000
10. Collections Equipment	1,000	0	0	5,000
11. Project Consultants and Contractors	5,000	20,000	200	12,000
12. Professional Affiliation Dues	4,000	0	0	2,300
13. Native Forest Exhibit Expenses	10,000	0	0	17,000
14. School Program Development	8,000	0	1,000	40,000
15. Publications & Content (Digital & Print)	2,000	0	500	1,000
16. Advertising & Publicity	0	0	0	2,500
17. Lecture & Workshop Costs (Supplies, Etc)	1,500	0	500	2,500
18. Postage	2,000	0	200	200
19. Printing	2,324	0	0	1,000
20. Security & Safety	1,000	0	900	7,124
21. Maintenance for Collections (Archive Facility)	18,000	0	0	13,500
TOTAL OTHER CURRENT EXPENSES	79,824	39,000	4,000	172,126
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	180,000	64,000	10,000	544,270
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	180,000	DANCE AOKI (808)323-3222		
(b) Total Federal Funds Requested	64,000	Name (Please type or print) Phone		
(c) Total County Funds Requested	10,000	Signature of Authorized Official Date		
(d) Total Private/Other Funds Requested	549,270	DANCE AOKI 1/16/2020		
TOTAL BUDGET	803,270	Name and Title (Please type or print)		
		DANCE AOKI EXECUTIVE DIRECTOR		

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2020 to June 30, 2021

Applicant: Kona Historical Society NOT APPLICABLE

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
NOT APPLICABLE			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				
JUSTIFICATION/COMMENTS:				

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

BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2020 to June 30, 2021

Applicant: Kona Historical Society

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2018-2019	FY: 2019-2020	FY:2020-2021	FY:2020-2021	FY:2021-2022	FY:2022-2023
PLANS	0	0	0	0	0	0
LAND ACQUISITION	0	0	0	0	0	0
DESIGN	0	0	0	0	0	0
CONSTRUCTION	0	0	0	500000	0	0
EQUIPMENT	0	0	0	0	0	0
TOTAL:	0	0	0	500,000		
JUSTIFICATION/COMMENTS: We were awarded a Capital Improvement Project in FY 2018-2019, but we have not received those funds.						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: Kona Historical Society

Contracts Total: 630,000

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S. / State / Haw / Hon / Kau / Mau)	CONTRACT VALUE
1	Community Enrichment Program, Hanohano O Kona: Wahi Pana Lecture Series	1/1/2020 - 12/31/2020	Hawaii Tourism Authority	State of Hawaii	30,000
2	Construction of a Gallery and Museum	7/2/2019 - 12/31/2022	Department of Accounting and General Services	State of Hawaii	600,000
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KONA HISTORICAL SOCIETY



Organizational Chart 2020

