

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

Type of Grant Request:

Operating Capital

Legal Name of Requesting Organization or Individual: Db:

Kona Historical Society

N/A

Amount of State Funds Requested: \$ 413,320.00

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

Please see attached.

Amount of Other Funds Available:

State: \$ 0

Federal: \$ 0

County: \$ 0

Private/Other: \$ 0

Total amount of State Grants Received in the Past 5

Fiscal Years:

\$ 26,000 (Note: '18 GiA of \$600,000 not recd)

Unrestricted Assets:

\$ 157,114.83

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: State: Zip:

Captain Cook HI 96704

Contact Person for Matters Involving this Application

Janet R Britt

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Janet Britt

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Federal Tax ID#:

[REDACTED]

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[REDACTED]

Ka'ulani Auld

Authorized Signature

Exec. Director, Kona Historical Society

Name and Title

1/26/2022

Date Signed

The Thirtieth Legislature
Application for Grants
Chapter 42F, Hawaii Revised Statutes

Brief Description of Request for Kona Historical Society

The Kona Historical Society (KHS), a 501 (c)(3) non-profit organization, is requesting funding from the State of Hawaii Grant In Aid Program to help revitalize our visitor program, following three years of restrictions due to the Covid pandemic. Not only did our visitors no longer come, but we were unable to offer the special on-site programs and tours at the Kona Coffee Living History Farm and at the Greenwell Store/Museum which were always well-attended by school children and community residents. These programs formerly provided funding for our on-going operations. To assure that the Kona Historical Society can move into 2022 with new educational jeep tours, exhibits, event offerings, special musical evenings or public talks, there are several crucial positions that must be staffed, including a Development Director; a Facility Manager; and a Bookkeeper – these positions are all new hires. We are also requesting funding for one year for salaries of Executive Director, Operations Director, Collections Manager, and Public Programs Manager so that those positions, which are critical to the organization, will be reliably funded. In addition, we request funding for 50% of the salaries of six of our current staff. The total salary request is \$283,720.00 for current staff and \$109,600.00 for new hires. Also included in the request is \$20,000.00 for a used Polaris ATV which is needed at the Kona Coffee Living History Farm to haul supplies, tools, plants, equipment and assist staff with accessing the property.

The total Grant In Aid Request for the Kona Historical Society is \$413,320.00,

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

Ku'ulani Auld
PRINT NAME AND TITLE

Jan. 17, 2022
DATE



Department of Commerce and Consumer Affairs

CERTIFICATE OF GOOD STANDING

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

KONA HISTORICAL SOCIETY

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

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

Dated: January 18, 2022

Director of Commerce and Consumer Affairs



**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'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, Hawaii'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, Hawaii'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, Hawaii'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)

Ku'ulani Auld
(Signature)

Jan. 17, 2022
(Date)

Ku'ulani Auld

Director

(Typed Name)

(Title)

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

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Applications for grants

§42F-102 Applications for grants. Requests for grants shall be submitted to the appropriate standing committees of the legislature at the start of each regular session of the legislature. Each request shall state:

(1) The name of the requesting organization or individual;
Kona Historical Society, a 501 (c)(3) non-profit organization

(2) The public purpose for the grant;

The Grant we have submitted is primarily for funding the salaries of several positions at the Kona Historical Society (KHS) which have not been filled due to the steep downturn in visitor numbers due to the Covid 19 pandemic. The funding would be used for salaries for three vacant positions that are critical to the successful operations of the Society. These positions include: a bookkeeper, a Development Director and a Facility Manager for a total new salary request of \$109,600.00. The remaining salary request is to cover the salaries of the four critical staff – Executive Director, Operations/Finance; Collections, and Public Programs. KHS is a world-renowned organization dedicated to preserving Kona’s unique historic and cultural stories from the mid-1800’s to current times. The Society maintains several distinct archival collections, including a manuscript collection that details the history of Kona agriculture, coffee orchards, ranching, church and missionary activities, civic organizations, and small businesses. Other collections include a Visual Images Collection of still photos and moving pictures; an oral history collection; a map collection; place names of Kona database; and the Hawaiian Kingdom Property Tax Records from 1859 to 1890. The Public is encouraged to visit all the archival records. The Society has a website, a newsletter, and Facebook presence, and operates the Greenwell Museum/Store and the Kona Living History Coffee Farm. Visitors have the opportunity to attend a wide array of educational and entertaining events, exhibits, tours, and self-guided hikes. The additional staff will allow KHS to enhance the visitor experience of everyone, including our resident visitors and those who come to us by airplane or cruise ships.

(3) The services to be supported by the grant;

The services to be supported will be funding to cover salaries of staff positions which are vacant as well as four staff members, plus 50% of the salaries of the remaining eight staff. An additional request is for an ATV to be used at the Living History Farm.

(4) The target group; and

The targeted audience for the work of the Kona Historical Society includes both residents of Hawaii Island and the State at large as well as tourists who visit the Island.. The population we serve includes everyone who is inspired by the Hawaiian story, history, and culture. We welcome students of all ages from around the Island and from neighboring Islands.

(5) The cost of the grant and the budget. [L 1997, c 190, pt of §3; am L 2014, c 96, §6]

The Grant In Aid amount we are asking for is \$413,320.00.

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, 2021.

2. Declaration Statement

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

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](#).

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:

Forty-five years ago in November 1975, Sherwood Greenwell and Jean Greenwell organized a small group of Kona residents who shared a respect and concern for the community they had lived in for so long. As a large influx of new people moved in and began tearing down old structures to build new ones, this group was concerned that the history told in the old structures and landscapes were rapidly disappearing. From this small group, the Kona Historical Society was formed.

Sherwood Greenwell, the group's first president, used his Kealakekua Ranch office as the headquarters for the fledgling organization. Sherwood's secretary, Jill Olson, was the first employee. In 1978, the Greenwell Store was donated to the Society by Jack, Henry, and Norman Greenwell. In 1979-81, the Greenwell Store was carefully restored to become a museum for the Kona Historical Society; the Store/Museum was placed on the Hawaii State and National Register of Historic Places in 1997. Eventually, the Greenwell Store/Museum was set

up to imitate what a similar structure would look like in 1890 with tools, livestock equipment, canned goods and other necessities that residents of the late 1800's would need in their daily lives. The Greenwell Store/Museum is still the site of many "Talk Stories", programs, and events that are sponsored by the Kona Historical Society in present times.

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

- **Jean Greenwell Research Collection** which is the foundation for the Kona Historical Society's archives. The archive has grown and now includes collections of historical photographs, unpublished diaries, journals, letters, family records and memorabilia, land documents, and selected Kona newspapers and articles. Records of local coffee enterprises, ranches, community clubs, and ethnic organizations including correspondence, minutes of board and committee meetings, financial records, and publications are part of this collection.
- **Manuscript Collection** includes significant primary material, dating from around 1850 to 1990. The collection illustrates the history of Kona agriculture, coffee, ranching, and beef production; and its churches and missionary activity, civic organizations, and small businesses.
- **Visual Images Collection** is comprised of both still photographs and moving images. Between 1980 and 1988 the prints, negatives, and slides in the **Photograph Collection** were organized, arranged by subject, and made accessible to the public.
- **Photograph Collection** holds over 50,000 images depicting such subjects as ethnic culture, geography, agriculture, religion, and education in Kona between 1790 and 1994. The **Moving Images Collection** includes approximately 15,000 feet of restored film depicting Kona between 1930 and 1960, videotapes, and DVDs.
- **Oral History Collection** includes approximately one hundred hours of taped oral history interviews on topics related to life in Kona between 1900 and 1960, and described such topics as ranching, agriculture, coffee, ethnic lifestyles and diversity, employment, and avocations.
- **Map Collection** consists of over 150 maps of the North and South Kona districts, including the mauka ranch lands; most are reproductions, with original hand-drawn maps.

- ***Place Names of Kona*** is the electronic database that brings together the research of Dorothy Barrere, Lloyd Soehren, and Jean Greenwell. With each researcher using different source materials, they were able to pool their extensive knowledge to create this compilation of the place names used by the Hawaiians to describe the Kona environment.
- ***Hawaiian Kingdom Property Tax Records*** for the years 1859, 1875, 1881, 1885, 1888, and 1890 have been entered into a research database at the Kona Historical Society archives. The tax records can be used to understand many aspects of Kona's history including social issues, such as illness, death, and resident mobility into and out of Kona; ethnic land ownership and leasing; and the evolving ethnic participation in the various Kona industries—ranching, fishing, merchandising, and plantation development—during the critical period of 1850-1900.

The initial intent of the Society was to preserve the history of the Kona area after contact with European explorers. In the 1990s, the Society decided to take a leadership role in collecting and representing the written, photographic, oral, and material records of Kona's history with an emphasis on that post-contact period. Because other museums and cultural institutions were already interpreting the Hawaiian pre-contact period, the Society felt there was a tremendous need to preserve Kona's post-contact history which was not being told anywhere else in the community. Specifically the Society focused on stories about coffee farming, ranching, the family-run stores that once lined the old cart trail, and the stories of everyday life of the many ethnic communities who arrived on our island to work and make homes for their families. During this time, the Directors created a living history site to help tell these stories, which centered on work and social life in Kona from the 19th and 20th centuries. This resulted in the creation of the Kona Coffee Living History Farm, the Society's first living history site which opened to the public in November 1999. The Kona Coffee Living History Farm has been placed on the State and National Register of Historic Places, won numerous prestigious awards, and has been designated as a "Partner Place" by the National Trust for Historic Preservation.

Today, the Kona Historical Society (KHS) is a community-based, 501(c)(3) nonprofit organization and Smithsonian Affiliate that maintains a membership of close to 1,000 members. Membership levels vary from an individual or family membership (\$45-\$65) up to the Patron level (\$1,000). Due to Kona's affiliation with the Smithsonian Institute, for an additional \$20 an Affiliate Membership can be added to an Individual, Family or Partner membership. This additional cost provides each member with a subscription to Smithsonian Magazine and access to all Smithsonian Affiliate Museums. Smithsonian membership is automatically included in Associate and Patron Memberships.

Membership in Kona Historical Society is one of the important ways the Society funds their programs. But no one has to be a member to enjoy all the exhibits, the presentations and the archives that are the mainstay of the organization. The Society provides living history programs, digital education programs, field trips, virtual experiences, and exhibits at its historic sites - the H.N. Greenwell Store Museum in Kalukalu and the Kona Coffee Living History Farm in Captain Cook. Other programs include Portuguese Stone Oven Baking Program, off-road educational jeep trips, Hanohano `O Kona Lecture Series, and other special programs of historical and cultural interest.

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

2. The goals and objectives related to the request;

Were you born in Hawaii? Or like many of us, you somehow came to this island and its magic drew you in and now you live here! Is your family part of a many-generational group whose ancestors arrived here hundreds of years ago, whether to work in the fields or to manage the land? or because your family saw these Islands as the answer to prayers of a place to call home. Are you of Hawaiian or Polynesian descent? Asian? Portuguese? Or are you of Caucasian ancestry? However you answered these questions, I expect you too are fascinated by the history, culture, and diversity of this land that is our ohana now. Kona Historical Society brings together in South Kona a wealth of information available to all of us so we too can learn about the culture, history, and landscapes we find so fascinating. The Kona Coffee Living History Farm and the Greenwell Museum/Store has drawn visitors from all walk of life – from the casual traveler on the way to Volcano who makes a quick detour to visit the facility to the devoted History buff who plans to spend days or weeks in the archives maintained by KHS. The Konawaena Elementary through High School is a short distance from the Museum and keiki of all ages visit the museum and often volunteer to help at special events. Researchers from around the country come to study in the archives to supplement their research papers with information from tax records, oral histories, maps and photographs. Unfortunately, due in part to the advent two years ago of the Covid-19 viral pandemic and the consequent cessation of tourism to the Island, the Kona Historical Society has had a very difficult time keeping this extraordinary facility functioning. Please review the organizational chart – there are six positions that are currently vacant, including the Development Director; the Facility Manager; the Programs Coordinator; and the Curator. Without staff in these positions, the Kona Historical Society is severely hampered in its ability to provide the tours, exhibits, events, and support to visitors that has always been a hallmark of the group . As it is, some previous

members of the staff had to find other means to support their families, as there was no funding to pay them. So, the Kona Historical Society is asking for the State of Hawaii to help us get back on our feet by funding some of the positions that are necessary to go forward as well as helping with current staff salaries. Now that the tourists are back, along with the cruise ships, these visitor want to take advantage of the programs and tours that are offered. But with a much diminished staff, the exhibits, programs and ability to assist visitors has been extremely hard to maintain at the level needed to provide outstanding and memorable experiences. Consequently, the Kona Historical Society is asking the State of Hawaii for a Grant in Aid of \$413,320.00, which will provide us with the funding required to reinvigorate our programs and develop new and exciting exhibits. Included in the request is \$20,000.00 for a used Polaris ATV which is needed at the Kona Coffee Living History Farm.

3. The public purpose and need to be served;

The Kona Historical Society focuses on arts, culture, history and is an affiliate of the Smithsonian Institute responsible for stewarding the only two permanent National Endowment for the Humanities exhibits in the State of Hawaii. The Kona Historical Society preserves the history of Kona to enrich, inspire, and inform our community and visitors. We do this through collecting, preserving, researching, interpreting, and disseminating the history of Kona. The Kona Historical Society fulfills our mission to collect, preserve, and share Kona's stories and unique sense of place through our many programs, both online and in-person. Most of these programs are free to visitors and students. The jewel underlining all the KHS programs is the archival collections and museum artifacts unique to Hawaii and a vital part of the history of South Kona. The history of this area was written by the multi-ethnic groups who lived here, working in the coffee orchards, or in the fields, or working as paniolo on the cattle ranches located on the slopes of Mauna Loa and Hualalai. The communities these families lived in were small, often made up of only a few families who shared resources among themselves. Our rich archives tell the stories of Kona's past through collections of historical photographs, unpublished diaries, journals, letters, family records and memorabilia, land documents, and selected Kona newspapers and articles. To accommodate the changing circumstances of education in the face of the coronavirus (COVID-19) pandemic, Kona Historical Society has designed a series of virtual field trips, free of charge, and has moved many of our programs online so that visitors and students can participate virtually. Spend your Mondays with Maile Melrose, join the Kona Nightingales for story time and so much more! In addition to the historical exhibits into the past, the Greenwell Museum/Store is the site for cultural festivals, arts and crafts displays, and a place where we can celebrate our musical heritage with live music and entertainment. As noted above, an important focus for all our activities is to reach out to the South Kona underserved communities by providing free exhibits, special projects for keiki, and a regular on-line presence to encourage and sustain all of us in this challenging time of social distancing and diminished services throughout most communities.

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

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

4. Describe the target population to be served; and

The population we serve includes everyone who is inspired by the Hawaiian story, history, and culture. We welcome students from the schools around the Island and from neighboring Islands. We have designed a virtual story time on Facebook to entertain keiki with recitations of books such as Good Night Hawaiian Moon. These stories and other presentations are targeted at the historically underserved families, especially now with the isolation and lack

of needed resources families are experiencing. Virtual field trips to special places are available as are several video presentations that are available for free, including “Aloha ‘Āina: Relationships Between People and Place Through Time;” “Preserving a Kona Story, featuring Kona Coffee Living History Farm Interpreter Pauline Nishida-Miller;” and “Stories from Kauleoli”, which is about the Ala Kahakai National Historic Trail. The hope is that parents and teachers will find programs useful for students, whether it is a guided educational activity or simply a chance to try something new in the virtual classroom. As Visitors come back to our Island, we hope to have programs available to educate, entertain, and engage this diverse group of people. And as always, our Hawaiian residents who have supported Kona Historical Society through good times and bad, will be there to see us into the future of this amazing organization.

5. Describe the geographic coverage.

Although we are located in the ahupua‘a of Kalukalu and the District of South Kona, the Kona Historical Society’s influence is not only Hawaii Island wide, but includes the entire State of Hawaii, and extends to the mainland United States and several other countries who are also involved in preserving the heritage of their communities and who collaborate with the staff of KHS. The Kona Living History Coffee Farm attracts visitors of Japanese descent whose ancestors came to South Kona a century ago to work in the coffee fields. The docents who greet visitors at the Coffee Farm are both older Japanese women who have family ties to this land. Academics from around the world come to the Jean Greenwell Research Collection to take advantage of the resources there. We welcome interns who are studying Hawaiian history, culture and agriculture as well as visitors and residents who wish to research family connections in the extensive archive documents and tax records from mid-1800’s to more current time frames.

III. Service Summary and Outcomes

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

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

The Kona Historical Society is overseen by a Volunteer Board of Directors with Lisa Greenwell Hummel currently serving as President and assisted by a Vice-President and a Treasurer. There are eight additional members of the Board of Directors. The Kona Historical Society Staff of eleven is led by Ku‘ulani Auld as the Executive Director. As shown on the

Organizational Chart, several of the positions are currently unfilled, which is the impetus for this Grant in Aid application. The eleven paid staff members that remain are:

- **Executive Director:** Provides leadership to and manages the efforts of site staff to ensure appropriate support of all departments. Supervises the development of operations-based financial modeling. Retains a diverse, highly qualified staff and volunteers by providing career coaching, growth, and personal development for workers. Ensures that services and funding relationships are robust enough to meet or exceed strategic goals and objectives.
- **Operations/Finance Director:** Is responsible for all finance, development and operations related duties.
- **Operations/Fundraising Assistant:** Performs administrative, and customer service duties that support the overall effort of each department including constituent/volunteer management, fundraising, collection of analytical data, and creating program statistics in support of grant reporting.
- **Public Program Manager:** Manages the execution of all museum public programs, oversees public and school programs. In collaboration with the Collections Manager, ensures routine maintenance and repair of the historic landscape and structures with consideration for principles of historic preservation. Works with the Executive, Operations, and Archive team to develop programming and exhibits for the historic sites.
- **Collections Manager:** Develops and puts into practice appropriate collections management policies. Supervises and/or performs object registration, accessioning and cataloging. Oversees and performs basic object care and conservation.
- **Collections Technician:** Responsible for assisting Collection manager with all duties noted above.
- **Three Farm Interpreters:** These three staff work at the Kona Coffee Living History Farm, are well-trained in living history interpretation, and provide visitors with an authentic experience.
- **Landscape Maintenance:** Responsible for mowing, planting, watering, and nurturing the plants in the two areas – the area around the Greenwell Store/Museum and the Kona Coffee Living History Farm.
- **Bread Baker:** Is responsible for maintaining the oven, lighting the fire, preparing the dough, baking bread, interacting with visitors while sharing the traditional art of baking Portuguese bread in a wood-fired oven.
- **Bread Baker Assistant:** Assist Baker in all duties and oversees customer relations during Portuguese Stone Oven Baking Program.

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

Depending on the results of our Grant in Aid application, we anticipate updating job descriptions and developing new ones for positions we have not been able to fill for several years. Once we are able to announce the openings, we hope to hire the additional personnel as soon as possible. According to current census data, the average income for this area decreased from 2019 by 3.43%, whereas the population increased 1.8% to 1,923 residents. The largest ethnic group in this area is Asian (35.5%) followed by people identifying with 2+ ethnic groups in their lineage (27.5%). Caucasians make up 25.3 %, whereas Pacific Islanders make up only 3.9% and Hispanic 3.92%. Many of the residents of our area can be considered to be on the socially disadvantaged spectrum so any job availability at our facility would be very appealing. At the most optimistic, we hope to have candidates interviewed by early summer and offers for employment made prior to the beginning of the school year – the time of year when our programs are especially in demand.

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

Since KHS's request is primarily for funding salaries, the quality assurance and evaluation plans for our request will be determined by our ability to increase the types and subjects of our exhibits, events, and tours. We plan to closely track the numbers of visitors to our facilities and develop surveys to distribute to attendees at events so that we can evaluate each new program. With the ability to hire additional staff, we anticipate that the programs, videos, tours, and special events that were so popular in the past can be revitalized and updated to align with what visitors tell us they want to see now. With additional funding for salaries and benefits, KHS will be able to attract outstanding candidates to the positions that are currently vacant. Since the Society was founded forty-five years ago, the Kona Historical Society has always been unconditionally committed to their programs, resources, and to the stewardship of their properties. The numerous awards given to the Society exemplify the outstanding organization it is, having achieved the recognition of the Smithsonian Society as a "Partner Place," the National Endowment for the Humanities, Historic Hawaii Foundation, the National Trust for Historic Preservation (which awarded KHS with its prestigious "National Preservation Honor Award", among others. KHS spearheaded the formation of the "Alliance for Hawai'i Island History and Cultural Preservation Organizations" so that organizations with a similar focus can interact and exchange ideas. Our current staff already has outlined several innovative ideas for inspiring

new programs and events; they are hopeful that the future of the Kona Historical Society is brighter than it has been for years!

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.**

To measure the effectiveness of the additional staff, we will set up databases to track each type of event, tour, program, demonstration, or video/multi-media presentation. We will collect various statistics on type of program offered, including the targeted audience, the amount of advance advertisement, the cost of the event, and the number attending, as well as demographic information such as whether the attendee is a resident or visitor to the island, how they heard about the event, and if the event met expectations. To engage the public, the experiences that we offer need to be diverse, educational, and in particular, they need to be FUN! We have always had remarkable success with theatrical performances and hope to resume in-person performances at outdoor venues. These kinds of activities take a lot of work and planning, so the increase in staff is vitally needed. We want to continue to provide internet programs such as the books that are read to keiki, but as we continue to struggle with Covid protocols, we want to include activities that are safe, healthy, but can be enjoyed in person. As the year goes on, we will adjust to the changes in the protocols recommended by the CDC.

IV. Financial

Budget

See Excel Spreadsheets attached after narrative.

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) None
 - e. Government contracts, grants, and grants in aid (Link)

- The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2023.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$118,330	\$98,330	\$98,330	\$98,330	\$413,320

- The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2023.**

The only request for funding that is on-going is the \$600,000 Grant In Aid for the construction of a barn-type community center. Due to the impact of Covid, the plans for this facility have been changed to more align with the Community’s needs, so the grant has been extended through early 2024. No funds will be released until the construction is 50% underway.

- 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.**

There are no federal or state tax credits granted to the Kona Historical Society in the last three years, nor are there any anticipated for a capital project.

- 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 2023 for program funding.**

Please note: Our understanding of the question above is to list all the Grants received in the past three years. We have no grants outstanding that will be received in 2023.

FEDERAL:

- National Endowment for the Arts;** Kehau, Music and Mo’olelo. Period: Jan. 1, 2022 – Dec. 31, 2022. Total award is \$10,000 with \$5,000 distributed in May and \$5,000 distributed in December 2022.
- National Endowment for the Humanities:** Storage Improvements. Period: Sept. 1, 2021 – Aug. 21, 2022. Total Award is \$10,000 to be distributed in May 2022.
- National Endowment for the Humanities:** American Rescue – Collection Assistant. Period: Oct. 1, 2021 – Sept. 30, 2022. Total award is \$50,000 with \$25,000 to be distributed in March 2022 and \$25,000 to be distributed in November 2022.

STATE:

- **State Foundation for Culture and Arts:** Kehau, Music and Mo'olelo, Budget: Final \$6,000 to be distributed in Feb. 2022.
- **Hawaii Council for Humanities:** General Operating Costs. Period: Oct. 15, 2021 – July 1, 2022. Total Award is \$20,000 with \$18,000 to be distributed in April 2022 and \$2,000 to be distributed in August 2022.
- **Hawaii State Grant in Aid:** Total Amount Awarded is \$600,000 that was to be used for the construction of a barn-type facility, but due to the impact of Covid, the plans for this facility have been changed to more align with the Community's needs. The grant has been extended through early 2024. No funds will be released until the construction is 50% underway.

COUNTY:

- **County of Hawaii:** Outreach Program, 2019: \$5,400.00
 - **County of Hawaii:** Experiencing Kona's Traditions: \$5,500.00
 - **County of Hawaii Department of R&D Innovations:** \$25,000 for digitizing and sharing Native Hawaiian language and History
 - **Hawaii Council for the Humanities:** Preserving a Kona Story: \$5,300.00
 - **Hawaii Council for the Humanities:** CARES ACT: \$15,000.00
6. **The applicant shall provide the balance of its unrestricted current assets as of December 31, 2021.**

The Total balance of unrestricted assets as of December 21, 2021, is \$157,114.83.

V. Experience and Capability**1. Necessary Skills and Experience**

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

Kona Historical Society is celebrating forty-five years of serving the Community of South Kona and beyond and has become a well-respected organization that has had continual growth until the Covid pandemic essentially shut down the community for two years. The Executive Directors and staff members throughout the history of the organization have been exemplary in their commitment to fulfilling the mission of preserving the history and culture of the South Kona community. The exhibits, archives, events and on-line offerings have grown in popularity and in significance. An example of the achievements and awards the Society has received is listed above in Section III, number 3. The historical

interpreters bring local, cultural, academic, and language skills to the organization while the staff and the many volunteers provide additional skills that serve the organization well. KHS has accepted awards from numerous Grant providers and has always fulfilled the high expectations of the awarding agencies. Awards were received from the Hawaii Community Foundation, Hawaii Tourism Authority, County of Hawaii, the Freeman Foundation, among many others. Several of the staff and members of the Board of Directors have been elected to other Community Non-Profit Boards, thus maintaining a connection with other related institutions. The Grants that KHS has received in the last three years are described above under section 5. The Federal grants assisted with the Hawaiian Music presentations as well as providing funds for the Archival collection staff and storage. Hawaii State awards included help with operating costs as well as additional assistance with the Music presentation. Hawaii County awards involved funding assistance for outreach, for a new video on "Preserving a Kona Story"; funding from CARES ACT and for digitizing Hawaiian Language and History archives. KHS used the experience of closure from Covid to review and revise some of our strategic goals while charting a new path forward. The unparalleled skills of our staff has served KHS well in the past. As we move into a different future, we are excited to present innovative new programs, exhibits, and events, always staying true to our mission but embracing new technologies and methods that will enthrall our visitors of tomorrow and beyond.

2. Facilities

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

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

VI. Personnel: Project Organization and Staffing

1. Proposed Staffing, Staff Qualifications, Supervision and Training

The applicant shall describe the proposed staffing pattern and proposed service capacity appropriate for the viability of the request. The applicant shall provide the qualifications and experience of personnel for the request and shall describe

its ability to supervise, train and provide administrative direction relative to the request.

The current staff of the Kona Historical Society has worked extremely hard over the past three years to keep the organization functioning in spite of the extreme challenges that the Covid pandemic has caused. Please review the attached Organizational Chart that outlines the positions that are currently staffed. For each position, the person filling it has exemplary qualifications. For example, the Director has years of professional development in Museum and Library Management and has obtained cultural knowledge as a fifth generation Kona rancher. The Public Program manager has a Masters of Arts in Museum Studies as well as a Master of Business Administration. She worked at the John F. Kennedy University managing installation of exhibits. The Collections Manager has a Masters of Arts in Museum Studies with an emphasis on Collection Management. This staff member has extensive experience working at the Stanford University Museum where she collaborated with the Director and Curator in developing new exhibits. The three Museum Interpreters are well-versed in the history and culture of the organization and are adept at bringing the exhibits to life while interacting with the public. The staff at KHS are all completely dedicated to the Society and to seeing that the future of this organization remains vibrant and strong.

2. Organization Chart

The applicant shall illustrate the position of each staff and line of responsibility/supervision. If the request is part of a large, multi-purpose organization, include an organization chart that illustrates the placement of this request.

See attached organizational chart.

3. Compensation

The applicant shall provide an annual salary range paid by the applicant to the three highest paid officers, directors, or employees of the organization by position title, not employee name. We used the salaries Excel Spreadsheet on the Budget Justification - Personnel Salaries and Wages form to list the salaries of the staff. Since we are requesting support funding to cover salary expenditures, all the staff positions and salaries are listed.

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.

There is no litigation to which the Kona Historical Society is a party.

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 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 for the relevance of this question.

If successful in receiving this Grant, the funds will NOT be used to support a sectarian or non-sectarian private educational institution.

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2022-23 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2022-23, but**
- (b) Not received by the applicant thereafter.**

If the Kona Historical Society is fortunate to receive the requested Grant In Aid, we will immediately advertise for the three positions that we seek candidates to fill – that is the Bookkeeper, the Development Director and the Facility Manager. We have included a request to fund 50% of the salaries of current staff, since the almost three years with few visitors has severely impacted the funds received from admissions to the Museum and the Living History Farm as well as to the educational jeep tours, the exhibits, the event offerings, the special musical evenings or public talks on subjects that the general public has indicated they would like to attend. With this kind of boost to our operating funds, we expect that the visiting public will be eager to attend KHS events and our operating income will increase within the next year. We will also be applying for additional grants to cover costs of special exhibits and events. After forty-five years of operation, the Kona Historical Society has stood the test of time. Due primarily to the challenge of the Covid Pandemic resulting in few visitors for almost three years, KHS was motivated to seek funding from the State Grant In Aid opportunity. The Board of Directors of the Kona Historical Society, working collaboratively with the Administrative Team, are focused on revising the strategic plan to address our current challenges and to move forward with a development program which will bring in sufficient resources for future years. All of us at the Kona Historical Society are united in our dedication to revitalizing the organization by remaining true to our mission and vision. We so appreciate your consideration of this request and invite you to visit our Living History Coffee Farm and the Greenwell Store/Museum to enjoy a step back in time. Mahalo!

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2022 to June 30, 2023

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	393,320	0	0	80,040
2. Payroll Taxes & Assessments	0	0	0	
3. Fringe Benefits	0	0	0	
TOTAL PERSONNEL COST	393,320			80,040
B. OTHER CURRENT EXPENSES				
1. Airfare, Inter-Island	0	0		
2. Insurance	0	0		
3. Lease/Rental of Equipment	0	0		
4. Lease/Rental of Space	0	0		
5. Staff Training	0	0		
6. Supplies	0	0		
7. Telecommunication	0	0		
8. Utilities	0	0		
9				
10				
11				
12				
13				
14				
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16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES				
C. EQUIPMENT PURCHASES	20,000			
D. MOTOR VEHICLE PURCHASES		0		
E. CAPITAL		0		
TOTAL (A+B+C+D+E)	413,320			80,040
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	413,320	Kona Historical Society 808-323-3222		
(b) Total Federal Funds Requested		Name (Please type or print) Phone		
(c) Total County Funds Requested	0	<i>Ku'ulani Auld</i> 1-18-22		
(d) Total Private/Other Funds Requested	80,040	Signature of Authorized Official Date		
TOTAL BUDGET	493,360	Ku'ulani Auld Executive Director		
		Name and Title (Please type or print)		

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2022 to June 30, 2023

Applicant: Kona Historical Society Current Staffing

POSITION TITLE	FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Executive Director	54000	\$54,000.00	100.00%	\$ 54,000.00
Operations (Finance/Development) Director	52000	\$52,000.00	100.00%	\$ 52,000.00
Collections Manager	54000	\$54,000.00	100.00%	\$ 54,000.00
Public Programs Manager	43680	\$43,680.00	100.00%	\$ 43,680.00
Collections Assistant	38000	\$38,000.00	50.00%	\$ 19,000.00
Operations Assistant	38000	\$38,000.00	50.00%	\$ 19,000.00
Landscape maintenance	16000	\$16,000.00	50.00%	\$ 8,000.00
Bread Baker	9360	\$9,360.00	50.00%	\$ 4,680.00
Bread Baker Assistant	8320	\$8,320.00	50.00%	\$ 4,160.00
Museum Interpreters, 3	50400	\$50,400.00	50.00%	\$ 25,200.00
				\$ -
				\$ -
				\$ -
				\$ -
TOTAL:				283,720.00
JUSTIFICATION/COMMENTS: To ensure that KHS has salary for the four main staff members, we are requesting 100% for them and 50% salary for rest.				

BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2022 to June 30, 2023

Applicant: **Kona Historical Society**

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
Polaris 1000 ATV	1.00	\$20,000.00	\$ 20,000.00	0
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:	1		\$ 20,000.00	

JUSTIFICATION/COMMENTS An ATV is needed to at the Living History Farm to transport equipment, tools, plants, etc. around the three acre property.

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
NONE			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				

JUSTIFICATION/COMMENTS:

BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2022 to June 30, 2023

Applicant: **Kona Historical Society** _____

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY: 2020-2021	FY: 2021-2022	FY: 2022-2023	FY: 2022-2023	FY: 2023-2024	FY: 2024-2025
PLANS			0			
LAND ACQUISITION			0			
DESIGN			0			
CONSTRUCTION			0			
EQUIPMENT			0			
TOTAL:			0			
JUSTIFICATION/COMMENTS:						
Kona Historical Society is not requesting any funding for Capital Projects.						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: Kona Historical Society _____

Contracts Total: 762,200

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	Construction of Facility	Jan 2018-Jan 2024	State Grant In Aid	State of Hawaii	600,000
2	Kehau: Music and Mo'olelo	Jan 2022-Dec 31, 2022	Nat'l Endowment for Arts	U.S	10,000
3	Preservation/Access to Collection- storage improvement	Sept. 2021-August 31, 2022	Nat'l Endowment for Humanities	U.S.	10,000
4	American Rescue Plan	Oct. 1, 2021-Sept. 30, 2022	Nat'l Endowment for Humanities	U.S.	50,000
5	Kehau, Music and Mo'olelo	Feb. 2022	State Foundation for Culture/Arts	State of Hawaii	6,000
6	General Operating Funds	Oct. 15, 2021-July 1, 2022	Hawaii Council for Humanities	State of Hawaii	20,000
7	Community Outreach	received 2019	Hawaii County Outreach	County of Hawaii	5,400
8	Experiencing Kona's Traditions	received 2020	Hawaii County	County of Hawaii	5,500
9	Digitizing/Sharing Native Hawaiian Language/History	received 2020	Dept. R & D Innovations	County of Hawaii	25,000
10	Preserving a Kona Story	received 2020	Hawaii Council for Humanities	County of Hawaii	5,300
11	Cares Act	received 2020	Hawaii Council for Humanities	County of Hawaii	15,000
12	Kehau: Music and Mo'olelo	received 2021	Hawaii Council for Humanities	County of Hawaii	10,000
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Note: The \$600,000 2018 Grant in Aid has not been funded and will not be until 50% of the construction has been completed. Due to Covid, the type of facility has been revised to reflect the needs and values of the Community.

KONA HISTORICAL SOCIETY

ORGANIZATIONAL CHART

2022

