

IOLANI PALACE COMPLEX: SOME DIRECTIONS FOR THE FUTURE

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FOREWORD

This report *Iolani Palace Complex: Some Directions for the Future* was written pursuant to the Conference Committee Report for Senate Bill No. 535, H.D. 1, C.D. 1, of the Eighth Legislature, Regular Session of 1975, which states in part:

Iolani Palace is the nation's only royal palace, and upon the completion of its restoration it is expected to be a significant attraction for visitors as well as residents. The question remains as to who should operate the Iolani Palace complex. While funds are currently budgeted in the department of land and natural resources to staff Iolani Palace, there are other proposals to be considered, including the proposal of the Friends of Iolani Palace to operate the palace. There are a number of important financial and other considerations, but the legislature lacks a complete analysis of the alternatives. Therefore, your Committee requests the legislative reference bureau to conduct an analysis of this issue and to report to the 1976 regular session.

During the course of the Bureau's study it became evident that there are numerous basic issues relating to the restoration and operation of the Iolani Palace Complex that are unresolved. In the absence of basic policy decisions concerning these issues the question of "who should operate the Iolani Palace Complex" could not be responsibly answered. The study, therefore, required an audit perspective to address concerns such as what has been done, how it was done, the status of the project to date, and what should be done.

The gathering of the data required the cooperation and assistance of numerous individuals and organizations to whom the Bureau wishes to extend its sincere gratitude. The Bureau would also like to especially acknowledge the Friends of Iolani Palace and the Department of Land and Natural Resources for their invaluable assistance and cooperation during the entire study period. Finally, the Bureau would like to extend special thanks to the Jet Hawaii, Inc., NTA Pacific, Inc., Japan Travel Bureau, Tokyu Tourist Corporation, and Kintetsu International Express for their assistance in administering an Iolani Palace visitor interest survey to the Japanese visitors to Hawaii.

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Director

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PART I
INTRODUCTION AND BACKGROUND

Chapter 1

INTRODUCTION

This is a report on the study of the management and operation of Iolani Palace. It was conducted pursuant to the Conference Committee Report for Senate Bill No. 535, H.D. 1, C.D. 1 (Act 195), of the Eighth Legislature, Regular Session of 1975, which states in part:

Iolani Palace is the nation's only royal palace, and upon the completion of its restoration it is expected to be a significant attraction for visitors as well as residents. The question remains as to who should operate the Iolani Palace complex. While funds are currently budgeted in the department of land and natural resources to staff Iolani Palace, there are other proposals to be considered, including the proposal of the Friends of Iolani Palace to operate the palace. There are a number of important financial and other considerations, but the legislature lacks a complete analysis of the alternatives. Therefore, your Committee requests the legislative reference bureau to conduct an analysis of this issue and to report to the 1976 regular session.

The Bureau's study report was initially programmed for completion and submission during the Regular Session of 1976. Two major constraints encountered by the Bureau's researchers, however, necessitated additional time to complete the report. One constraint was the difficulty experienced by the Bureau in obtaining basic data, the other being the need for legislative guidance on key policy issues relating to the Palace Complex and its operation. Senate Resolution No. 403, S.D. 1, which addresses these matters is appended hereto as Appendix A.

OBJECTIVES OF THE STUDY

The objectives of the study were:

- (1) To assess the planning process and master plan developed for the restoration, operation, and management of Iolani Palace.
- (2) To evaluate the various operation and management proposals for Iolani Palace.

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- (3) To make specific recommendations for the operation and management of Iolani Palace as indicated by the findings.

SCOPE OF THE STUDY

The study focused primarily on Iolani Palace restoration and planning activities of the state parks, outdoor recreation, and historic sites division of the department of land and natural resources and the Friends of Iolani Palace. The department of accounting and general services was examined insofar as its activities had a bearing on the restoration, operation, and management of Iolani Palace.

METHODOLOGY AND CONDUCT OF THE STUDY

The preparation of the report encompassed approximately 20 months from July 1975 to February 1977. The study concentrated on activities and events which transpired from the inception of the Iolani Palace restoration project in 1968 up to December 1976.

The field work for this study included the following:

- (1) Interviews with persons both in and out of government who were involved in some way with the planning and restoration of Iolani Palace;
- (2) Interviews with museum and historic site professionals from both the mainland and Hawaii;
- (3) Examination of records and documents maintained by the state parks, outdoor recreation, and historic sites division of the department of land and natural resources, and the Friends of Iolani Palace;
- (4) Surveys of museums and historic sites on the mainland; and
- (5) Surveys of mainland and Japanese visitors and Hawaii residents.

TERMINOLOGY

As used in this report, the abbreviations "FIP", "IP", "DLNR", "BLNR", "state parks division", and "DAGS", refer

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respectively to the Friends of Iolani Palace; Iolani Palace; department of land and natural resources; board of land and natural resources; state parks, outdoor recreation and historic sites division of the department of land and natural resources; and department of accounting and general services.

ORGANIZATION OF THE REPORT

The study is presented in five parts.

Part I includes an introduction to the study and some background and history of Iolani Palace.

Part II discusses the restoration of Iolani Palace.

Part III presents the Bureau's findings relating to the planning process for the restoration, operation, and management of the Iolani Palace Complex.

Part IV presents the Bureau's study recommendations.

Part V contains the appendices.

Chapter 2

AN OVERVIEW

INTRODUCTION

Some 20 months ago when the Bureau began this study, the question to which an answer was sought was "Who should operate the IP Complex?" Accordingly, a tentative study outline was formulated based upon certain basic assumptions concerning the restoration. During the course of the study and after extensive review and evaluation of numerous documents, it became clear that such basic assumptions were without foundation. The Bureau's research has revealed, for example, that many policy decisions relating to the restoration and operation of the IP Complex, which should have been made at the inception of the restoration project, had in fact not been rendered. For example, policies addressing such basic questions as "what" constitutes the IP Complex and "what are the purposes and functions of the IP Complex" have not been established. The study further revealed that policies addressing other operational issues such as should there be an admission charge, should the operation be required to be self-sustaining, should there be a gift shop or snack bar, or what programs and services are to be provided, and many others have not been formulated. In view of the many unanswered questions surrounding the restoration and operation of the IP Complex, it became obvious that the question posed relating to "who should operate the IP Complex" could not be responsibly answered in this report. Given the absence of these essential basic policies, no framework or criteria exists for assessing and evaluating alternative proposals for the IP operation. In turn, the determination or recommendation of the appropriate management system is effectively precluded.

The importance of the establishment of policies to provide the necessary framework to assess, evaluate, and determine the appropriate operational mechanism can best be illustrated in the following examples.

A policy determination that the priority group shall be the visitors to Hawaii would conceivably favor the selection of a private group operation over a state-run operation. This is because the development of a tourist-oriented program may require activities that a public agency might find somewhat compromising, e.g., promotional activities, negotiating with tour operators, the paying of commissions, joining with private nonprofit or profit-making organizations to plan coordinated tours and the like. Similarly, policy decisions

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to operate the IP Complex on a seven-day week basis including evening operations would again favor the selection of a private group because of the greater flexibility of the private group in negotiating wages and setting working hours.

On the other hand, a policy decision that the IP Complex be operated either as part of an integrated state system of historic sites or as an integral part of the department of education's Hawaiiana and Hawaii History curriculum might favor the selection of a state-run operation. In this case the public agency would be in a better position to coordinate the statewide program and interact with other state agencies.

In the absence of basic policies which precluded the determination of "who should operate the IP Complex", the study took on some aspects of an audit. This was done to determine what has been done, how was it done, and the status of the restoration so that appropriate recommendations concerning the restoration project could be rendered.

In the following sections we present a synopsis of the Bureau's study of the IP Complex Restoration Project.

STATUS OF THE RESTORATION PROJECT

Two entities, the department of land and natural resources (DLNR) and the Friends of Iolani Palace (FIP), are involved in the restoration of the IP Complex. The DLNR has been entering into contracts with the FIP for the restoration of the IP Complex. Starting with the initial contract in 1969 for the preliminary planning for the restoration, the DLNR has negotiated eight successive contracts with the FIP. To date, the eight contracted phases have totaled \$5.9 million. With only a few exceptions, most of the restoration work has been on the IP itself. Upon the conclusion of Phase VIII, IP is expected to be almost completely restored. Partial restoration work on Iolani Barracks will also have been initiated. Beyond Phase VIII, additional work is needed to complete the restoration or renovation of other facilities including the grounds of the IP Complex. Recent estimates for completing the remaining work is approximately \$2.1 million.

Should the legislature decide that IP be opened in July 1977, the following facilities will be available for public view and use. The Palace restoration should be essentially complete and available for public viewing. Only two of the rooms in the Palace (the kitchen located in the basement and the Throne Room on the first floor),

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however, will be better than 90 per cent furnished. The extent to which the remainder of the rooms will be furnished is not known at this time. Public restroom facilities will not be completed but the staff restroom facilities in the Palace basement will be completed.

INCREASED COSTS AND DELAYS IN THE RESTORATION PROJECT

According to the 1970 Phase I Planning Report for the restoration of the IP Complex, the restoration was proposed to be completed in two years and at a cost of \$2.5 million. Since then, there have been considerable cost increases and delays in the restoration project. Total expenditures to date amount to \$5.9 million. An estimated \$2.1 million in additional funds will be required to complete the IP Complex. However, depending on how soon and how much is made available for completing the work, the estimate might still not be the bottom line figure.

Some factors contributing to the delays and increased costs in the restoration work include the following:

- (1) The nature of restoration work which is very time consuming. It requires careful and painstaking work which includes among other things, documentary research; systematic removal of modern day or recent additions to the building; careful piece by piece dismantling of the Palace; careful preservation, restoration, or reconstruction of pieces; and the assembling of the pieces.
- (2) The incremental phasing of the restoration project over a longer time period. The decision to separate the project into incremental phases evolved because of the enormous cost implications of the project and the State's fiscal constraints during this period. As the project was extended over the years an inflationary spiral has been driving the material and construction costs upward.
- (3) Delays in the execution of contracts between the FIP and DLNR. Delays in the execution of some of the contracts have necessitated the trimming of the original scope of the work programmed for the affected contract phase and required renegotiation with the subcontractors. This resulted in part of the restoration work

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being pushed into the next higher inflationary contract period.

- (4) Delays in the delivery of funds for new contracts have on several occasions caused interruptions and delays in the progress of the restoration project. In one instance, when the restoration project ran out of funds, the FIP had to advance its own funds to carry the project. It has been reported that the excessive delay in the delivery of the Phase VII funds was the major factor in the IP not being opened in time to coincide with the nation's bicentennial year in July 1976.

LACK OF POLICIES

Basic policies necessary for guiding the restoration and eventual operation of the IP Complex have neither been recommended nor established by the department of land and natural resources under whose jurisdiction the IP Complex program falls. The areas in which policies have not been established include:

- (1) Definition of the IP Complex. This involves the delineation of the physical area and the facilities which are visualized as comprising the restoration project. This encompasses determinations regarding the actual areas on the IP grounds that will be restored, the buildings and other facilities to be restored or renovated and what their specific functions would be, and the artifacts and furnishings that are to be included in the completed facilities of the Complex.
- (2) Acquiring the necessary resources. This encompasses determination of the manner in which resources necessary for the restoration are to be obtained; how funding requirements are to be determined; policies on the seeking of federal or private funds; and standards relating to the type and quality of materials to be utilized. In addition, policies relating to the manner in which artifacts and other historic objects of the Palace are to be acquired have not been established. This includes criteria to determine whether and under what conditions, historic objects should be purchased, replicated, borrowed, or replaced with substitute period pieces.

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- (3) The purpose of the restoration. This includes determinations regarding the priority audience to be served by the completed IP Complex, the program emphasis of the Complex, i.e., whether education, research, entertainment, or a combination of these; the story to be told by the Palace; and whether the IP Complex will be linked to the statewide historic sites program, be part of a civic center program, or operate independently.
- (4) Operations of the IP Complex. This includes determinations in such areas as staffing requirements; hours of operation; whether admission fees should be charged and, if so, the price structure; whether a gift shop or a snack bar, or other similar commercial activities will be permitted; and whether the IP Complex operation will be required to operate on a self-sustaining basis.

In the absence of definitive policies, guidelines for the development of plans could not be provided and adequate planning could not take place. As a consequence widely differing plans and proposals particularly for the operations were formulated; many policy decisions were inherent in the plans and proposals formulated; and as plans were implemented the policies inherent in the plans became de facto policy decisions.

The need for policy decisions and guidelines to plan for the operation of IP was communicated to the DLNR by the FIP. These requests, however, went unheeded, and policy decisions were not rendered.

The FIP, therefore, assumed much of the responsibility for planning for the operations of IP. Some of the FIP initiatives include the contracting of a well-known museum expert to develop an interpretive and operations program; organizing a docent training program; organizing a committee to study the feasibility of a gift shop for the IP Complex; organizing a traffic committee to study the problem of passenger loading and unloading from buses, parking, and other vehicular traffic problems; organizing an acquisition program for Palace items and raising funds for Palace items research and refurbishing purposes.

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LACK OF A MASTER PLAN

A master plan provides the overall implementation guidelines for the total restoration project. It provides a structure by which all components of the project can be identified, priorities identified and ordered, required financial resources determined, and implementation developed.

There is no master plan for the restoration of IP Complex. While various plans have been developed, none of the plans taken individually or collectively constitutes a master plan. Also none of the plans has been officially adopted by the department of land and natural resources.

In the absence of a master plan, the restoration has been proceeding on a piecemeal basis rather than from a conscious preplanning effort. Restoration decisions are being made as they become necessary during the contract formulation phases of the project. It is being done without a clear notion of what the IP Complex project looks like in totality. For example, the DLNR officials were unable to articulate, except for the IP and Iolani Barracks, what facilities and areas on the grounds are to be restored or renovated; how the restored facilities are to be utilized; and the program and services to be offered. Other problems occurring in the absence of a master plan include the following: the DLNR is unable to anticipate other basic needs of the restoration; the DLNR is not in a position to give a reasonable estimate of the final costs of the completion of the total project, nor what would be the costs of operations, nor what can be reasonably anticipated as possible revenue contributions to the operations; restoration alternatives are not and cannot be meaningfully considered under current practices; and upon the implementation of the restoration contract during each phase, the unapproved plans become de facto plans.

OTHER PLANS AND PROPOSALS

One of the primary objectives of the restoration project is to restore and preserve the IP. However, the physical restoration is not an end in itself. Equally important is the story that the restored facility is intended to tell and the manner in which that story will be told. It becomes important, therefore, that the components of the restoration and operation of the IP are identified, developed, and integrated into a common plan.

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Official IP operating plans have not been developed. In the absence of these plans the restoration architect did not have much of the basic information needed for developing the detailed architectural report for the restoration of IP. Therefore, an operations scheme had to be assumed in developing the report. While the report was originally intended as a historical report with some general recommendations regarding the physical restoration of IP, the report is now being used as the basis for the physical restoration of IP.

Decisions made in such a manner have resulted in a facility which precludes the consideration of possible alternative ways of displaying the Palace. In addition, the facilities as restored might not fully meet the requirements of how the facility is to be eventually interpreted, thereby requiring physical adjustments, or if this is not feasible, a less desirable way of interpreting may have to be used.

PROGRAM, SERVICES AND OPERATION PLANS

Various plans and proposals for the operations of IP Complex have been formulated. None, however, has been adopted as the official plan for the operation of IP Complex. The various plans and proposals vary widely in content, scope, and detail. Some of the proposals are tourist-oriented while others are directed towards residents and school groups. Some stress education (both formal and informal) as their major thrust while others also include certain entertainment aspects. Other widely varying services are proposed in the different plans. Proposals differ in regards to the days and hours of operation. One plan proposes a five-day a week operation while another a seven-day a week operation. Staffing requirements when identified also differ with a low of 10 to a high of 71. Various methods of touring the Palace have been proposed including:

- (1) Guided tours of small groups conducted by specially trained docents;
- (2) Stationing docents at various strategic points to answer questions and direct people along a predetermined route;
- (3) Use of pre-taped interpretive talks installed at key points throughout the Palace.

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Operational budget requirements also vary. The DLNR estimates a total operating expense of \$266,000 while the FIP proposal estimates a first year budget requirement of \$519,400.

The foregoing illustrates that the cost for the program and the scope of the IP program can vary widely depending on the program emphasis services to be provided. It is therefore imperative that policy decisions be rendered so that definitive plans for the actual operations of IP can be developed and a realistic budget for the operations developed.

OTHER POLICY ISSUES

Self-Sufficiency. Based on the Bureau's study concerning the question of self-sufficiency, it appears highly unlikely that the IP Complex can become self-sufficient. This conclusion is based upon: results of surveys conducted by the Legislative Reference Bureau, review of various reports, and interviews with several museum experts with museum-operating experience. Virtually no museum or historic site is currently operating on a self-sustaining basis. A study by the American Association of Museums found that most museums rely on a combination of private and public funds for support.

Assuming the Complex cannot be self-sufficient, what should be the extent of state assistance to its operations? The answer to this question is affected by five subsidiary policy issues which, while in a sense, are separate issues also have ramifications upon the issue of self-sufficiency. Each of these are interrelated in that it will affect either the revenues or expenditures of the operation. These issues are as follows:

Group to be served. Should the operation be geared towards residents, tourists, or both? If geared towards local residents, fees charged would have to be at a level which will encourage repeat visits. "Free admission" days may have to be considered. If geared to tourists, extensive promotion activities and discounting to tour operators would have to be considered. Also bus loading and loading areas must be provided.

Admission charges. If a decision is made to impose admission charges, other policy decisions on the amount of charges and what to charge must be made. Higher fees would limit attendance while moderate fees would provide income as well as some degree of control over attendance.

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Decisions concerning this issue, however, should not be done without considering the quality of services and program offered.

The quality of services. This issue is related to the question of what program and services are to be provided and how services are to be provided, including the type of tour to be offered. Decisions concerning this issue will have an impact on the number, type, and quality of staff required and will therefore affect the expenditures of the operation.

The parking issue. Existing plans call for the banning of all parking and vehicular traffic on the IP grounds. If parking is banned on the grounds, provisions may have to be made for the state workers presently utilizing the 190 parking spaces on the grounds. Also plans must be developed to provide parking and bus loading and unloading facilities for potential visitors.

Supplementary revenues-museum/gift shop. A museum/gift shop has the potential to provide supplementary revenue as well as to provide a means to extend the educational value of the IP Complex. While a museum gift shop has been proposed for the IP Complex no final decision has been made as to whether there should be such a shop. If a decision is made to have one, then other decisions such as the shop location, how the gift shop is to be operated, and the type of merchandise to be sold must be made.

RECOMMENDATIONS

Major study recommendations include the following:

- (1) An Ad Hoc Commission be established to recommend the policies that should be adopted.
- (2) The Ad Hoc Commission be delegated the responsibility of overseeing the operation of the IP Complex during the interim while the recommendations for the long-range administration of the IP Complex are being formulated.
- (3) Upon the adoption of policies, priority be given to the development of a master plan for the IP Complex.

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- (4) A joint interim legislative committee be established to furnish general legislative guidance and to review the progress of the Ad Hoc Commission.

Chapter 3

BACKGROUND

The Iolani Palace Complex is an eleven-acre site set in the heart of the Capitol District in downtown Honolulu. The area is bounded by Richards, King, and Likelike Streets and the State Capitol Mall. There are several structures located within its boundaries: Iolani Palace, Iolani Barracks, the Coronation Stand, the former Royal Tombs, and the Kana'ina Building. Current plans call for the restoration of the facilities and grounds of the Complex to the period of the Monarchy. Although the Archives Building (Kekauluohi Building) is also located within the confines of the above boundaries, it is not generally considered a part of the Iolani Palace Complex restoration project.

IOLANI PALACE COMPLEX ZONING AND AUTHORITY

The Complex is zoned as B-2 Community Business District (sections 21-810 through 815, City and County of Honolulu, Comprehensive Zoning Code) and is located under the classification of the Historic, Cultural, and Scenic District No. 1, the Hawaii Capitol District as defined by City and County Ordinance No. 3947, as amended (TMK 2-1-25:2). The site is listed in both the National and Hawaii Registers of Historic Places. Its use is dictated by the rules and regulations pursuant to the National Preservation Act of 1966, as amended, and the provisions of Act 104, Session Laws of Hawaii 1976, relating to Historic Preservation.¹

While the DLNR apparently has the authority for and control of facilities and grounds of the IP Complex pursuant to Act 254, SLH 1967, there appears to be some confusion on the part of DLNR on the extent of its authority. Act 254, SLH 1967, establishes "a comprehensive program for historic preservation, and presentation" and transfers "(a)ll state historic areas and buildings" under DAGS for maintenance purposes to DLNR. In addition, Act 254 requests a joint report by DAGS and DLNR to the Fourth Legislature on historic areas and buildings to be transferred. Pursuant to this request a Joint Report of Transfer of State Historic Areas and Buildings (Governor's Message 13, 1968 Regular Session) was submitted by DAGS and DLNR. It lists (1) Hulihee Palace--Kailua, Kona, Hawaii; (2) Royal Mausoleum--Nuuanu, Oahu, Hawaii; (3) Iolani Palace and Barracks--Honolulu, Oahu, Hawaii, as historic areas and buildings to be transferred on July 1, 1968 to the

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department of land and natural resources. The report remained silent on the transfer of other facilities in the Complex and the IP Complex grounds itself.²

In practice, however, DLNR has assumed authority over all facilities and grounds of the Complex except for the Kana'ina Building, the Archives Building, and the parking (Lot F), which are maintained and controlled by DAGS. The DLNR maintains that until DAGS transfers the two buildings and the parking area over to them, DLNR has no authority or control over the facilities. DAGS' position, however, differs from that of DLNR as indicated below.

In a recent DAGS letter, concern was expressed for the relocation of the current occupants of the buildings and alternate parking areas for Lot F "if and when the department of land and natural resources exercises their jurisdictional prerogative".³ This statement appears to imply that the authority for the buildings and grounds used for parking is vested in DLNR and not in DAGS.

A survey response from DAGS indicates there are no plans to vacate the Kana'ina Building or the parking area. Until such time when notification from DLNR is received or when alternate facilities are available, DAGS will continue to be "tenants at will".⁴ It appears therefore that DAGS will continue to retain use and control of the Kana'ina Building and parking area in the foreseeable future although current restoration plans call for the utilization of the facilities as part of the IP Complex restoration.

HISTORIC BACKGROUND

Iolani Palace. The first Iolani Palace was built in 1845 and was the home of five monarchs: Kamehameha III, Kamehameha IV, Kamehameha V, Lunalilo, and Kalakaua. In 1878, the first Palace was razed and on December 31, 1879, the cornerstone for the second Iolani Palace laid. More than \$343,595 was spent to build the Palace which was completed in 1882. Only two monarchs, Kalakaua and his successor, Queen Liliuokalani, occupied the new Palace. January 14, 1893 marked the overthrow of the Monarchy and in June of the same year, Iolani Palace was officially designated as the Executive Building. The Palace retained its name of the Executive Building until 1935 when it was redesignated as Iolani Palace by Joint Resolution of the 1935 Legislature of the Territory of Hawaii.

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The Palace has been used as the seat of government by the provisional government (1893-1894), the Republic of Hawaii (1894-1898), the Territory of Hawaii (1900-1959), and finally the State of Hawaii (1959-1969). During the period of its occupancy by the various governments, the structure underwent a number of repairs and renovations. By the late 1960's, many supplementary structures had been added to the original Palace. These structures offered protection to the building from the elements and are credited with saving the Palace from ruin.

Iolani Barracks. The Iolani Barracks was originally located at the present site of the State Capitol Building. It was built between 1870 and 1871 to house the Royal Guard, also known as the Household Troops, the militia units of the provisional government. Subsequently, after annexation, it was used by the U.S. Army. During the territorial period, the Barracks was used to headquarter the Hawaii National Guard and later as office and storage space.⁵

The Barracks was rebuilt at its present location on the mauka-ewa side of the Palace in mid-1965 when construction began on the State Capitol Building. The structure is presently occupied by the restoration project staff and used as temporary offices. Future plans for the Barracks project its use as a museum to relate the history of the Royal Guards and to house the Guards and the Royal Band.

The Coronation Stand (Bandstand, Keliiponi Hale). The Coronation Stand was built in 1883 for the coronation of King Kalakaua and Queen Kapiolani. The \$9,000 structure was originally erected in front of the King Street steps of the Palace; shortly thereafter, it was moved to its present makai-ewa location on the grounds. Over the years, the Stand has been rebuilt and used by the Royal Hawaiian Band for its concerts on the Palace grounds.

Old Royal Tomb. The grounds contain, in addition, the site of the former royal cemetery created in 1825 "to house the remains of King Liholiho and Queen Kamamalu, the first Hawaiian chiefs to receive a Christian burial". In 1865, when the tombs were filled to capacity and in need of repair, the royal remains were moved to the Nuuanu Mausoleum. The Old Royal Tomb area in the Palace Complex was fenced in 1930. Rumors are that some remains still lie in the tomb.⁶

Fountain. The fountain for an artesian well, once used to provide water for the Palace, is located on the mauka side of the Palace. Though no longer in use, it was often used to supplement water supplies long after the Palace was linked to city water mains.⁷

BACKGROUND

Gardens. Sometime between 1883 and 1918 a parterre garden was planted on the makai-Waikiki side of the grounds. By 1918, however, "the grounds assumed very much their present park-like aspect of large trees and green lawn".⁸

Walls and Fence. The Palace Complex grounds are surrounded by a wall which was originally eight feet high. Because the height afforded protection to members of the Wilcox revolution in 1889, it was lowered to a height of three and one-half feet. In 1891, a green fence with gold tips was added to the top of the walls. Work to restore the walls and fence is contemplated in later phases of the Complex restoration project.⁹

LEGISLATIVE ACTIONS RELATING TO IP COMPLEX

Through the years the Hawaii State Legislature has enacted several legislative measures dealing with the Iolani Palace Complex. Much of this has been in the form of appropriations for capital improvement projects for the Complex. More recently, during the Eighth Legislative Session, the following legislation pertaining to the Complex were adopted.

HCR 69, HD 1. The 1975 Legislature adopted House Concurrent Resolution 69, House Draft 1, entitled "Requesting the Leasing of Iolani Palace for the Purpose of its Care and Administration". Two policy concerns are reflected in the resolution. First, the resolution requests the State to enter into contract with the Friends of Iolani Palace for its care and administration. Second, it states that the Complex is to be essentially self-supporting and self-sustaining. Furthermore, concern was expressed in Senate Standing Committee Report 1269-76 on HCR 69 for the need to "provide opportunities for state residents to visit the Palace on a free admission basis". The concerns in the resolution remain unfulfilled pending investigation of management alternatives for the Iolani Palace Complex.

HCR 58. House Concurrent Resolution 58, SLH 1975, requests that equipment for the Royal Guards be stored in Iolani Barracks. Twenty-four files and forty-eight uniforms and helmets belonging to the Guards are to be placed in the Barracks. In the past the Barracks was the home of the Royal Guards who were charged with protecting Iolani Palace and making appearances at public functions. The request was made on the basis that the Barracks would be the most appropriate home for the equipment of the Royal Guard. Current plans indicate probable fulfillment of the legislative request upon restoration of the Barracks.

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Position Additions and Deletions. Act 195, SLH 1975, relating to the state budget, appropriated funds and 18.30 positions for program number LNR 801, Historic and Archaeological Places, under which Iolani Palace falls. Of this number, nine positions were allocated to the DLNR for the Palace Complex operation. Because the Palace had not been completed and ready for operation in 1976, Act 226, SLH 1976, also relating to the state budget, deleted the nine positions allocated for the Palace Complex operations.¹⁰

Chapter 4

RESTORATION CHRONOLOGY (A BRIEF HISTORY OF EVENTS LEADING TO THE RESTORATION OF IOLANI PALACE)

The concept of restoring the Palace had been discussed for at least two decades before the actual restoration began. In the course of its research the Bureau found numerous references to restoring the Palace to the Monarchy period. "Restoration of the palace and removal of the government offices have been prime considerations in civic center and capitol site projects since the end of World War II, when enthusiasm began to grow for the eventuality of Hawaii's statehood."¹ During the 1950's and 1960's the preservation and restoration of the Palace were prominent issues discussed in many reports relating to the Honolulu Civic Center site and reports relating to the proposed site for the new capitol building.

One plan for the new capitol proposed continued use of the Palace by the addition of wings to the building. In 1953 the Territorial Commission on Historical Sites objected to this plan, and one commissioner stated: "The Commission's plans for Iolani Palace do not envision a lifeless museum, but rather a restoration, to reclaim and preserve as such the only royal palace in America."² Another preliminary plan suggested constructing a new building to replace the Palace and stated:

*The significant parts of the present building, i.e., the Throne Room and the Portrait Lobby, could be reconstructed in a wing of the new building. This wing could be designed as historical monument and a tourist attraction, possibly including a restoration of the Royal Chambers and perhaps a model of the present Palace reflecting the way of life around the Palace during the monarchy.*³

The final report on this preliminary plan concluded:

Iolani Palace . . . has served as the seat of Government of Hawaii for 76 years. The building that preceded Iolani Palace, on the same site, housed five Hawaiian Kings over a period of 33 years so that the present Palace site has been

IOLANI PALACE COMPLEX

the center of Hawaii's government for over a century.

The historical significance of Iolani Palace requires that its future utilization be an important consideration in determining the site for the new capitol building.

It is recommended that Iolani Palace be retained and restored as a historic monument, refurnished as a royal museum, and the building and grounds developed as a major tourist attraction.⁴

In 1959 "the role and area of the Civic Center were devised".⁵ In 1964 a Civic Center Policy Committee was formed, and the governor and mayor jointly appointed a Citizen's Advisory Committee to assist with the planning of the Hawaii Capitol District and with the development of a civic center master plan. This plan was to include the Iolani Palace Complex.

A special report on the Honolulu Civic Center Master Plan was submitted to the governor and mayor in 1965. The cover page states that:

. . . This Special Report outlines the Master Plan for 1965 to 1985, describes the way the Plan was prepared, and demonstrates the need for legislation.⁶

The section of the master plan entitled "Policies and Programs 1965-1985" calls for the preservation, marking, restoring, or remodeling of buildings and sites that:

. . . have historical value because of their association with the Hawaiian monarchy, the Mission, and events or figures prominent in the political, social, economic, and cultural evolution of Hawaii; . . .⁷

and in the "Goals and Objectives" section states:

Iolani Palace and Iolani Barracks should be used as a center for Hawaiian history and cultural life.⁸

In order to fully grasp the potential effects of the master plan upon the restoration of Iolani Palace, it is necessary to quote extensively from the section entitled "The Master Plan":

RESTORATION CHRONOLOGY

The Master Plan for the Civic Center is a plan not only for growth and change, but also a plan for preservation. As the governmental center of Hawaii and Honolulu for many years, the Civic Center contains many of the great buildings and sites in the State. Many of these are valuable to the community in terms of history, architecture, natural beauty, or economics. . . .

One of the major objectives of the Civic Center Plan is to preserve and enhance the buildings and sites that embody and express the history of Hawaii. The criteria used for establishing the historical value of a building or a site in the Civic Center are outlined below. A building or a site that meets one of these criteria is considered to have an irreplaceable value to the whole community.

- 1. Structures, objects or sites used regularly by the Hawaiian monarchy for residential, burial, ceremonial and administrative purposes.*
- 2. Structures, objects or sites associated with the founding of the Missions, Mission activities and burials.*
- 3. The structures, objects or sites associated with significant events in the political and social evolution of Hawaii and Honolulu.*
- 4. Structures, objects or sites associated with the lives of the leading figures in the religious, cultural, governmental, social and economic development of Hawaii, when those places express important characteristics of the individual and the times.*
- 5. Structures, objects or sites with historical, architectural, or environmental value which illustrate and complement the qualities, aspirations and achievements of Hawaii's past up to and including the year 1940.*

Preservation may take one of the following forms:

- 1. A historical marker.*

IOLANI PALACE COMPLEX

2. *Remodeling for new use.*
3. *Restoring to its historical condition.*
4. *Maintaining existing buildings and protecting from future encroachments.*

It is understood that any recommended remodeling (Item 2) would include restoration (Item 3) and protection (Item 4).

In a sense every building in the Civic Center has historical value. Many have been used for important purposes and all, in some way, express some facet of their times. For this reason a continued evaluation should be made on the buildings in the Civic Center area so that those associated with the important events of today will be recognized and protected.⁹

The master plan recommended for historic preservation buildings and sites in the civic center including those contained in the Iolani Palace Complex.

For the Iolani Barracks, the master plan proposed:

This building should have the exterior restored to its original state, but the interior will be remodeled as a museum or other use as determined by the (Citizen's Advisory Committee).¹⁰

and for the Palace:

The building will be restored and furnished as the Royal Palace, but the basement rooms may be remodeled for current use.¹¹

In addition the master plan listed the Bandstand, Guard Stone, Old Royal Tomb, Kapuaiwa Building, and the Gates and Fences of the Royal Palace as requiring preservation.

The building construction program proposed in the master plan calls for the restoration and landscaping of Iolani Palace and Iolani Barracks during the years 1965 to 1970.¹²

A report produced in 1967 discusses the composition of the civic center and states that: "Iolani Palace, the former seat of the State government, will display possessions of the old monarchy."¹³

Despite the numerous reports, plans, and recommendations dating from World War II in reference to Iolani Palace,

RESTORATION CHRONOLOGY

it appears that little actual restoration transpired until the mid-1960's. In 1929, while the territorial government occupied the Palace, the legislature voted to appropriate funds "to install steel framing within the masonry walls to shore the building up".¹⁴ Ten floor-to-ceiling columns were installed in the basement in 1930.¹⁵ In 1938 the Throne Room was restored. "However, the other Palace rooms have been turned to the needs of modern government. . . ." ¹⁶ By the mid-1960's, the building had badly decayed.¹⁷

It was in 1964 that concrete action toward translating the conceptual plan to a working reality first became evident. This development seems to have been inspired by the concerned involvement of the Junior League of Honolulu.¹⁸ "At the suggestion of the Citizen's Advisory Committee on the Hawaii State Capitol Complex Master Plan, the League, in May of 1965, retained as a consultant Charles Peterson. . . ." ¹⁹

Peterson visited the Palace and issued a report which contained three major recommendations:

1. The establishment of an Iolani Palace Commission "concerned with the Palace, the Barracks and their setting".²⁰ Essentially, a policy and program recommendation commission, the membership would be comprised of various officials representing state and private departments and organizations, and would be appointed by the governor.
2. The establishment of a private organization "to do things that governments find difficult or impossible . . . to work hand in hand with the State of Hawaii in recreating a Palace which will at the same time be an educational exhibit and a lively institution. . . ." ²¹ The organization was to be designated the Friends of Iolani Palace, and was to form several working committees.
3. The establishment of an Iolani Palace Historical Register "to share source material as quickly as possible. . . ." ²²

Based upon the Peterson report, the Junior League voted to finance the publication of the Iolani Palace Historical Register and the expense of research focusing on the period between 1879 and 1895. A research committee was formed in 1966 and, working closely with the state archivist, searched through "old inventories, government records, and newspapers in an effort to assemble an accurate picture of the Palace when King Kalakaua reigned".²³ The League also sponsored a 28-minute, 16mm film entitled "Iolani Palace, Hawaii's Past Today".

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The committee spent almost three years to produce a "bulky book containing facts, copies of documents, and photographs which attempt to provide the answers to the questions which would be asked by restorationists, together with files of information gathered from Hawaiian newspapers of the period between 1879 and 1895, a photographic file of furniture and artifacts of the Kalakaua period, maps and photographs of the Palace grounds, and a scale model of the Palace itself".²⁴ The completed research was turned over to the State.

In 1965 the Friends of Iolani Palace was formed and began to meet with the Civic Center Policy Committee to discuss the functions and responsibilities of the Iolani Palace Commission and the Friends of Iolani Palace,²⁵ and prepared an organizational chart describing the operations of both the Commission and the Friends. In August 1966, a Charter of Incorporation and By-Laws were filed establishing the Friends as a nonprofit corporation, setting forth the following purposes of the organization:

*. . . The purpose of this corporation is exclusively the doing of charitable, scientific and educational works of historic and cultural benefit, restoring and refurbishing Iolani Palace, and encouraging research and interest in Hawaiian history and culture, particularly as they relate to the Iolani Palace.*²⁶

It was during this time that the Iolani Palace Barracks was dismantled "stone by stone" and "reassembled on the Palace grounds".²⁷ The Barracks had been "used only as a storage place for voting machines when plans for the new capitol forced its move to the Palace grounds".²⁸

The Friends and the Civic Center Policy Committee continued to develop plans for an Iolani Palace Commission. However, at the January 1967 meeting of the Board of Directors of the Friends, the governor reportedly stated that he was "opposed to the appointment of an Iolani Palace Commission" and that the Friends Board of Directors, in conjunction with the comptroller of the department of accounting and general services should "formulate the guidelines and policy to be followed".²⁹

The Friends continued to work with the department of accounting and general services, refocusing their efforts from a commission concept to restoration planning. Until July of 1968 historic sites came under the authority of the department of accounting and general services, at which time

RESTORATION CHRONOLOGY

it was transferred to the department of land and natural resources.³⁰

In 1968 the state parks division of the department of land and natural resources hired a museologist as a museum consultant to work, in conjunction with the Friends, on the restoration planning for Iolani Palace and Iolani Barracks. The museum consultant predicted:

Major work should be completed about 4 years from the time we are allowed to begin. To reach this desired goal we must be able to have assurance of the programmed cash flow, the ability to focus the skills of competent personnel, adequate tools and adequate administrative support. Without these basic requirements, it will be extremely difficult to restore the Palace even over a much longer time span. This kind of work must be done with care and accuracy so that the historical aura of the Palace will be intact and unequivocal and so that its message may be delivered with distinction. Only the highest standards of research, craftsmanship, interpretation and operations can be considered adequate for this unique historic site.³¹

An architectural firm was retained by the department of land and natural resources to "prepare working drawings for a 'reasonably authentic' reproduction of the Barracks when it was built in 1870-71".³²

According to one report, the original architectural drawings and plans for the Palace have never been found; therefore, the "restorers will have to determine on their own what the original was".³³

In 1969 a planning contract was executed between the DLNR and the FIP in the sum of \$60,000.00 setting forth the scope of work as follows:³⁴

1. The development of a report compiling pertinent information relating to the restoration, preservation, furnishing, administering and management for public use and appreciation of Iolani Palace and grounds.
2. The development of a detailed plan for the area by area restoration of the structure of Iolani Palace.
3. The development of a plan for the furnishing of Iolani Palace, including the locating, identifying, and authenticating of historical artifacts

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and objects which were in Iolani Palace during the 1883 to 1893 period.

4. The development of an effective visitor program for the Iolani Palace Complex, including plans for visitor controls, reception and orientation, information and interpretive services, display and presentation services and movement through the Complex and a public relations program.

On May 1, 1970, *A Report: Iolani Palace Restoration Project Planning, Phase I*, was submitted to the State.

Subsequently, authorization for continued restoration of the Palace and Barracks was given by the governor:

The Governor has announced that reconstruction of the Iolani Barracks roof and restoration of Iolani Palace will go hand-in-hand under the guidance of the Friends of Iolani Palace;³⁵ and

. . . Restoration of the Palace and the Barracks will be under the guidance of the Friends of Iolani Palace.³⁶

In 1970 a Restoration Committee was appointed by the Friends to administer the restoration project on a day-to-day basis, the museum consultant for the DLNR was appointed Project Director, and the architectural firm hired by the DLNR for the Barracks project was retained by the Friends as an architectural consultant.³⁷

Thus, restoration of the Iolani Palace Complex had begun.

PART II
RESTORATION OF IOLANI PALACE COMPLEX

INTRODUCTION

Part II discusses in general the restoration of Iolani Palace Complex.

Chapter 5 presents a brief discussion of the organizations involved in the restoration of the Iolani Palace Complex.

Chapter 6 reports on the work accomplished and current status of the restoration project.

Chapter 7 discusses some problems relating to the restoration.

Chapter 5

ORGANIZATION FOR THE RESTORATION OF IOLANI PALACE COMPLEX

Two entities, the state department of land and natural resources (DLNR) and the Friends of Iolani Palace (FIP), a nonprofit corporation, are involved in the restoration of the Iolani Palace Complex (IP Complex). The following sections describe the organizational structure, functions, and their respective roles in the restoration project.

DEPARTMENT OF LAND AND NATURAL RESOURCES (DLNR)

Until July 1968, the maintenance of all state historic sites and facilities came under the jurisdiction of the department of accounting and general services. In 1968, the legislature transferred the historic sites program, including the jurisdiction over the IP Complex to DLNR.¹

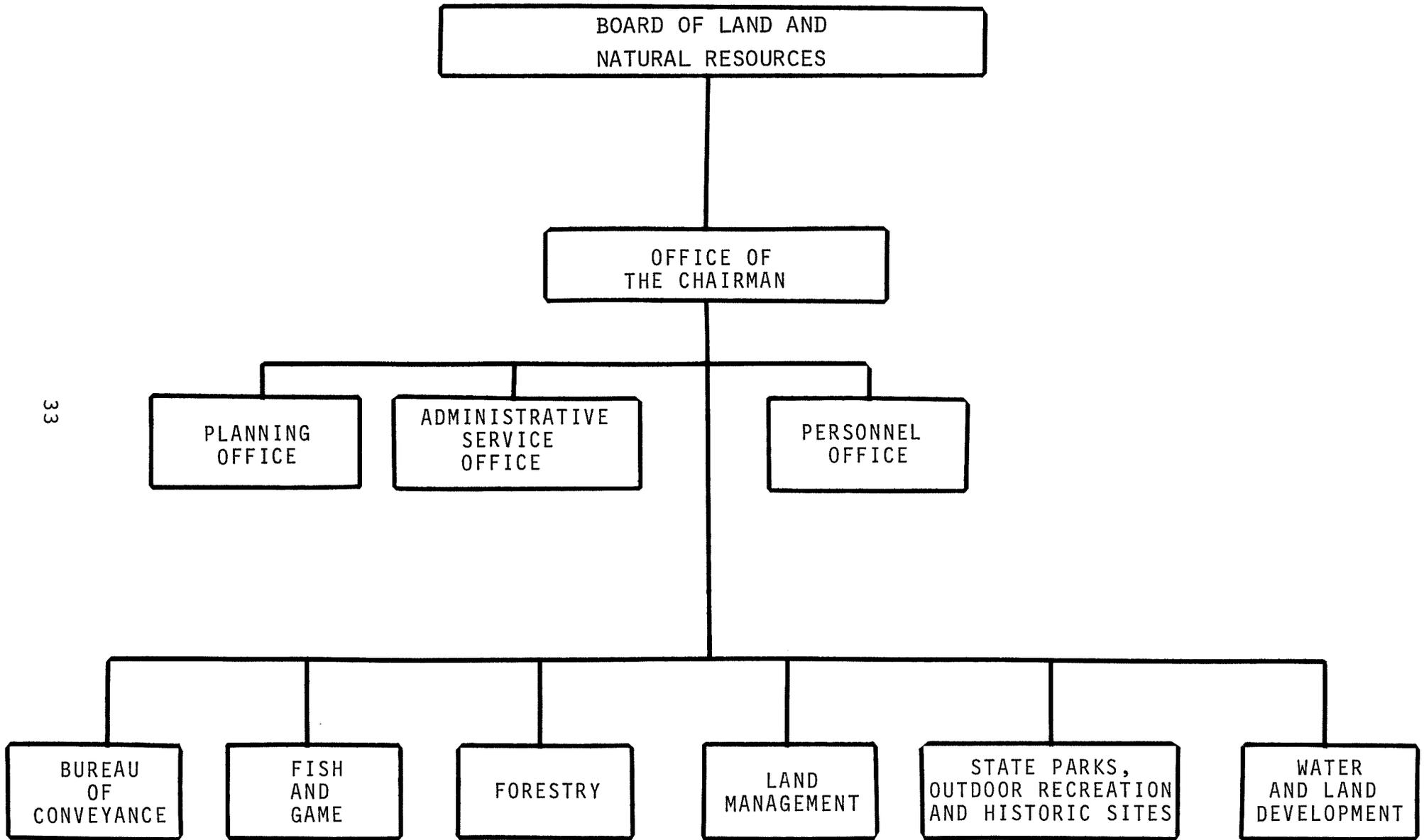
The DLNR is headed by an executive board known as the board of land and natural resources. The board is composed of six members appointed by the governor, who also selects a chairman of the board from among its members.² The chairman serves as the full-time salaried executive officer of the DLNR and is a member of the governor's cabinet. The organizational structure of the DLNR is presented in Exhibit 5.1.

Within DLNR, the division of state parks, outdoor recreation, and historic sites is the organizational entity responsible for the historic sites program as well as the state parks program. As part of its function, the division "plans, acquires, develops and manages a state park system including recreation, cultural, historical, and archaeological resources for public access and enjoyment; establishes and maintains an evaluated inventory and register of historical, cultural, scientific and archaeological sites; provides for the protection, enhancement and preservation of natural and historical resources to meet future needs for recreation and for cultural enrichment".³

Some of the historic sites maintained by the division include Russian Fort on Kauai; Hikiau Heiau Historic Site Monument on Hawaii; and Iolani Palace, the Royal Mausoleum State Monument, State Capitol Grounds, Washington Place

Exhibit 5.1

ORGANIZATION CHART FOR
DEPARTMENT OF LAND AND NATURAL RESOURCES



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Note: Adapted from Plan of Organization, State of Hawaii, July 1975, p. 9.

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Monument (Governor's Mansion), Halekii-Pahana State Monument, Puu O Mahuka Heiau State Monument, and the Ulu Po Heiau State Monument on Oahu. Exhibit 5.2 shows the organizational structure of the division.

The DLNR has been entering into contracts with the FIP for the restoration of the IP Complex. Starting with the initial contract in 1969 for the preliminary planning for the restoration, the DLNR has negotiated eight successive contracts with the FIP.

In initiating the contract procedure, the department submits a restoration budget to the legislature. Upon receiving the funds, the department negotiates with the FIP on the scope of the work to be done. Following the execution (finalization) of the contract, the department releases funds at predetermined intervals of work. The department monitors the progress of the work through on-site inspections, reviews of weekly or bi-weekly progress reports from the FIP, and attendance by a liaison officer at the FIP's restoration committee meetings.⁴

THE FRIENDS OF IOLANI PALACE (FIP)

The FIP was organized in August 1966 as a nonprofit corporation with the following purposes as set forth in the by-laws:

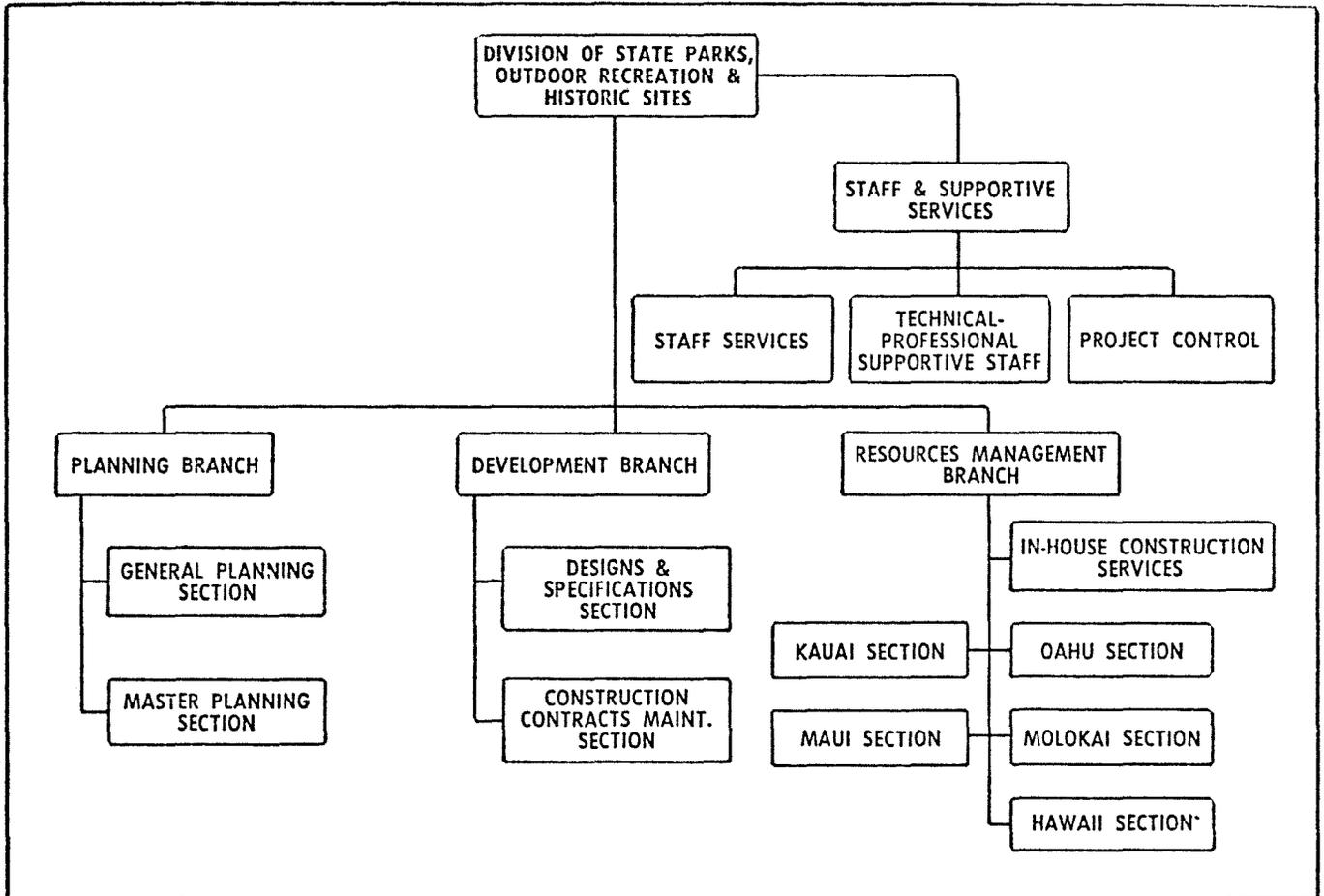
*The purpose of this corporation is exclusively the doing of charitable, scientific and educational works of historic and cultural benefit, restoring and refurbishing Iolani Palace, and encouraging research and interest in Hawaiian history and culture, particularly as they relate to the Iolani Palace.*⁵

The FIP has a membership and a board of directors. Presently, there are close to 1,500 members. Membership is open to any person upon the payment of dues.

The board of directors is composed of 30 members elected by the membership from a list of nominees chosen by a nominating committee. The board of directors appoints from among its directors, its executive officers, including a president, vice presidents, secretary, treasurer, and such other officers it deems necessary. The board also has the authority to name standing committees and to appoint committee members. Exhibit 5.3 shows the current organizational structure of the FIP.

ORGANIZATIONAL CHART

*Division of State Parks,
Outdoor Recreation & Historic Sites*



Source: *1968-1969 Report to the Governor, Department of Land and Natural Resources, State of Hawaii, p. 28.*

ORGANIZATION FOR THE RESTORATION

In August 1969, the FIP under a \$60,000 contract with the DLNR initiated what was to become known as Phase I of the restoration of IP Complex. The Phase I contract called for planning the restoration and formulating the concepts for future funding, staffing, and use of the IP Complex. Following Phase I, the FIP has played an even more active role in the restoration and to date has entered into eight successive contracts with DLNR.

The restoration project is administered on a day-to-day basis by the restoration project committee. The committee meets on a bi-weekly basis to review the work accomplished, consider future work schedules, consider policy and personnel matters, and distribute funds for the restoration. The committee is aided in the restoration work by a consulting architect, technical director (position is presently vacant and is temporarily filled by the chairperson of the restoration committee), curator, an in-house staff of craftsmen, and various outside subcontractors.

The FIP also has an active acquisition committee which researches the artifacts and furnishings of the Monarchy period and attempts to obtain them through gifts or purchase.

Chapter 6

CURRENT STATUS OF THE RESTORATION PROJECT

INTRODUCTION

The Iolani Palace Complex consists of the area bounded by King, Richards, Likelike Streets, and the State Capitol Mall. Existing plans call for the restoration and/or reconstruction of the following facilities in the Complex: the Iolani Palace, Iolani Barracks, the Kana'ina Building, Coronation Stand, the Old Royal Tomb, Fences and Gates, the removal of parking and replacement with carriage roadbed, and other landscaping.

This chapter briefly outlines some of the physical restoration plans for the restoration and the current status of the project.

THE RESTORATION PLANS

Civic Center Master Plans. The Civic Center Complex, of which the Iolani Palace Complex is a part, has been the subject of three master plans prepared by Warnecke and Associates in 1965, 1967, and 1968. The design objectives of all three master plans indicate the need to "preserve, mark, restore, or remodel buildings and sites that have historic value because of their association with the Hawaiian Monarchy".¹

It has been the intent of these plans to place the Palace park at the center of interest in the Capitol District.² The 1965 Civic Center Master Plan proposes restoration and furnishing of the Palace and exterior restoration and interior remodeling of the Iolani Barracks,³ as well as the demolition of the Archives Building.

The 1968 Civic Center Master Plan provides more detailed recommendations for the future of the Iolani Palace Complex. Plans call for Iolani Palace to be restored and furnished to its appearance during the Monarchy period; Iolani Barracks to be used as a museum and as headquarters for the Royal Guard; parking to be removed from the Palace grounds; grounds and fence to be restored; and the Complex to be lighted.⁴ Although the Kana'ina Building (Old Attorney General Building) was not considered in the 1965 plan, the

CURRENT STATUS OF THE RESTORATION

1968 master plan calls for the demolition of the building along with the Kekauluohi Building (Archives Building). The department of land and natural resources reports that the 1968 master plan is one of the guides being followed in planning for the IP Complex restoration.⁵

Iolani Palace Restoration Project Report. When the legislative and executive offices were relocated from the IP to the new capitol building in 1968-1969, the stage was set for the restoration of the IP Complex. As an initial step for the restoration project, the FIP under contract with DLNR commissioned George Moore to develop the master plan for the IP Complex. On May 1, 1970, Moore presented *A Report: Iolani Palace Restoration Project, Planning, Phase I* (hereafter referred to as the Phase I Planning Report) to the State.

The report serves as one of the "conceptual guides" being utilized for the restoration of IP. The basic concept underlying the interpretive approach in developing the plan is that:

Iolani Palace should be preserved, restored, developed, and operated as a Living Restoration dedicated to the public appreciation and contextual understanding of the latter days of the Hawaiian Monarchy. As a Living Restoration it must serve first and foremost as an organ of communication, an informal extension of the educational system. It is proposed that this can be best achieved by providing the visitor with an experience keyed to convey a slice of time. Within the Palace the visitor should be able not only to see the material things that surrounded the Monarchy, but be able to view activities and happenings that relate to a Monarch's life in the Complex. At various times, activities could be scheduled for the Palace kitchen, the Chamberlain's suite, the King's suite, or the Throne Room. The only restrictions upon this kind of living presentation would be those imposed by accuracy and collection conservation standards. Back-up for these live demonstrations and activities can be provided by a control system which will give finite control over every electrical ending in the Complex and can supply security and fire detex, visitor access controls, accounts keeping, reference and record retrieval, and other requirements. It is suggested that this integration of living happening and technimation with person-to-person interpretation by visitor aides will provide the

IOLANI PALACE COMPLEX

*accurate, flexible, ever-changing background which will make the Palace Complex not only instructive but outstanding.*⁶

In addition to the basic concept, the report presents some of the preliminary work done, outlines an approach and methodology for the restoration, refurbishment, and public utilization of IP and estimates the time and funding requirement for the restoration.

While the demolition of the Kana'ina Building was called for in the 1968 Civic Center Master Plan, the Phase I Planning Report recommends that the Kana'ina Building be used to "house education and curatorial offices, classrooms, and production-design facilities which should not be located in the Palace".⁷ Other recommendations in the report necessitating immediate physical work include roof repair of the Palace and banning of parking from the grounds. In the area of program and services, the report suggests that an interpretative approach be taken to display the Complex by employing guides (vs. taped tours) and by providing live demonstrations of events which might have occurred in the Palace during the Monarchy. The report also proposes educational objectives for both children and adults who would utilize the Palace Complex.

In concluding, the report emphasized the "necessity of reaching agreement on the basic concept without delay, and of moving immediately into Restoration Phase II (the physical restoration)".⁸

*Iolani Palace Restoration Architectural Report.*⁹

Subsequent to the presentation of the Phase I Planning Report, the FIP commissioned Geoffrey Fairfax, an architect and planner, to develop an architectural guide for the restoration of IP. The report, submitted in March of 1972, details the methods and materials to be used for both the interior and exterior restoration of the IP and provides specifications for the hardware, light fixtures, plumbing fixtures, telephone, and annunciator system to be installed in IP. It also contains some basic historical research data which appear to have been the basis for the architectural decisions made in developing the plan. In addition, the report also makes the following recommendations relating to other facilities in the IP Complex:

- . . . (1) to retain the Kana'ina Building "to house the administrative offices for the restored Palace operation . . . the public restrooms, gift shop, and orientation center for the Palace visitors";
- (2) to landscape the grounds; (3) to add a parterre

CURRENT STATUS OF THE RESTORATION

garden; (4) to remove the Archives Building; and (5) to restore the bandstand (Coronation Stand) for use by the Royal Hawaiian Band.¹⁰

Iolani Barracks Plans. In 1968, the DLNR prepared an interpretive plan for Iolani Barracks entitled *Iolani Barracks Working Report for Completion of Reconstruction and a Plan for Museum Use*. According to the plan, the Barracks is to be restored to the time period of its original construction between 1871-1872. Plans for completing the reconstruction are to be based on the evidence available in documents, photographs, drawings, and narrative accounts.¹¹ The Royal Guard and Band are to be housed in the Barracks and presentations in its museum are to reflect their history and the events associated with the structure.¹²

Based on the interpretive plans, specifications detailing the reconstruction of the Barracks were prepared by Geoffrey Fairfax in 1970. The intent of the *Specifications for Iolani Barracks Reconstruction* report is "to convert the interior of the building into a modern gallery for the display of artifacts, etc. and to restore the exterior of the building as accurately as possible to its original appearance".¹³ With minor modifications, the 1970 Iolani Barracks specifications report will be used to guide the complete restoration of the Barracks.

Kana'ina Building Plan. *Specifications: Kana'ina Building Renovation* was prepared by Geoffrey Fairfax in 1973. The plan details the physical renovations for the Kana'ina Building. Many of the architectural decisions made in designing the renovation were based on the program, service, and use recommendations of Dr. Edward P. Alexander. Blueprints for the building show an orientation center, gift shop/concession area, public restroom facilities, and space for staff office. While the original plans called for the renovation of the building in June 1976, no work has been initiated as of this writing.^{14,15}

RESTORATION STATUS

As noted previously, the Iolani Palace Complex restoration is being conducted by the Friends of Iolani Palace (FIP) under contract with the state department of land and natural resources (DLNR). Each contract between DLNR and the FIP constitutes a restoration phase. Thus far, beginning with the development of the Iolani Palace restoration plan in 1970 (Phase I), there have been eight restoration phases. Exhibit 6.1 summarizes the duration, costs, and work conducted in each phase.

Exhibit 6.1

SUMMARY OF RESTORATION PHASES

<u>Phase No.</u>	<u>Cost</u>	<u>Duration of Phase</u>	<u>Description of Work</u>	<u>Status</u>
I ^a	\$ 60,000	Aug. 69 - May 70	Development of planning report	Completed
II ^a	\$ 459,500	Oct. 70 - Jan. 72	<ul style="list-style-type: none"> . Removal of extraneous building elements . Interim waterproofing . Test restoration of central bedroom . Iolani Barracks roof . Iolani Palace complete survey . 50% of architectural drawings . Termite treatment . Beginning millwork refinishing 	Completed
III ^a	\$ 360,000	May 72 - Nov. 73	<ul style="list-style-type: none"> . Basement basic structural . Underslab electric service lines . New elevator shaft and elevator . Continue millwork refinishing . Refiguring basement and central core of structure . 87% of architectural drawings . 100% of structural, mechanical, and electrical drawings . Research 	Completed
IV ^b	\$1,176,650	Dec. 72 - Dec. 74	<ul style="list-style-type: none"> . Complete all drawings for restoration of Palace building . Prepare drawings for remodeling Kana'ina Building for future use in operation of Iolani Palace Complex . Prepare an interpretive plan covering visitor circulation patterns, choice of methods of supplying visitor information . Complete major basement work . Excavate and waterproof moat walls 	Completed

<u>Phase No.</u>	<u>Cost</u>	<u>Duration of Phase</u>	<u>Description of Work</u>	<u>Status</u>
			<ul style="list-style-type: none"> . Rebuild mauka and makai cast iron exterior stairs . Install new attic structural framing . Re-roof main slate roof and flat roof areas, excluding towers . Construct skylights . Fabricate and purchase lighting fixtures . Repair perimeter wall and repair and paint perimeter fence, including gilt work . Continue removing, sanding and repair of original millwork, fabricating new millwork where necessary 	
V ^c	\$ 828,000	June 74 - May 75	<ul style="list-style-type: none"> . Completion of basement construction work . Rebuilding of six towers, including slate roofing and iron railings . Completion of mechanical work . Continue removing, sanding, and repair of original millwork, fabricating new millwork where necessary . Continue interpretive planning and preparation to include orientation film script, brochures research and drafts, initial interpretation and restoration of selected contents 	Completed
VI ^d	\$ 787,000	Feb. 75 - Aug. 75	<ul style="list-style-type: none"> . Electrical system and service . Plumbing . Basement basic structural . Security and fire systems (partial 1st and 2nd floors) . Plastering (plain, 1st and 2nd floors) . Plastering (ornate, 1st and 2nd floors) . Painting (1st floor) . Flooring (1st floor) . Remove, repair, and sand original millwork, fabricate new millwork where restoration not possible 	Completed

<u>Phase No.</u>	<u>Cost</u>	<u>Duration of Phase</u>	<u>Description of Work</u>	<u>Status</u>
VII ^e	\$1,330,000	Mar. 76 -	<ul style="list-style-type: none"> . Complete basic air-conditioning . Attic partitioning and attic toilet . Interior painting (2nd floor) . Interior flooring (2nd floor) . Lanai flooring (2nd floor) . Metal railings at roof tops . Repairs to exterior cornice . Exterior plaster - repairing, cleaning . Cast iron column refinishing . Cast iron railing refinishing . Lanai floor tile (1st floor) . Basement construction work . Fabricate and restore lanai mirrors and lights . Fabricate hardware, plumbing, and light fixtures . Casework . Continue fabricating, finishing, and installing millwork . Continue general labor relating to restoration . Continue interpretive planning; preparation of selected contents 	In progress
VIII ^f	\$ 950,000	Aug. 76 -	<p>Complete restoration of Palace</p> <ul style="list-style-type: none"> . Complete finishing and reinstalling 2nd floor millwork . Flat plastering (basement) . Wood flooring (basement) . Acoustical tile ceiling (basement exhibition area) . Painting (basement) . Casework (basement) . Millwork (basement) . Dumbwaiter (basement) . Palace moat: install new lintels and door under mauka stairs . Palace moat: install sump pump and drains . New topping on moat slab . Fabricate portable ramp 	In progress

<u>Phase No.</u>	<u>Cost</u>	<u>Duration of Phase</u>	<u>Description of Work</u>	<u>Status</u>
			<ul style="list-style-type: none"> . Balance air-conditioning system and diffusers . Electrical including chandeliers . Complete fabrication and installation of basement hardware and period plumbing fixtures . Repair and restore antique vault door . Repair and restore window valances, pier tables and mirrors, canopy and lanai scones . Additional paint removing, repair, finishing of millwork; and completing installation of security contacts . Partial restoration of Barracks 	
IX ^g	\$ 650,000		. Complete restoration of Barracks	Planned
X(?)	\$?		<ul style="list-style-type: none"> . Grounds and landscaping . Site utilities . Refinish roadbed . Gates and perimeter fence . Tomb . Coronation stand . Kana'ina Building renovation 	Proposed

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- a. *Friends of Iolani Palace, Iolani Palace Complex Restoration Project, Progress Report II (Honolulu: 1974), p. 4.*
- b. *Contract No. 3116, Phase IV, Exhibit I and Exhibit II.*
- c. *Contract No. 4652, Phase V, Exhibit.*
- d. *Contract No. 5591, Phase VI, Exhibit I.*
- e. *Contract No. 6310, Phase VII, Exhibit II.*
- f. *Contract No. 7255, Phase VIII, Exhibit I.*
- g. *Anticipated Budget Request for 1977-79 biennium per DLNR staff.*

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As indicated in Exhibit 6.1, the seven phases following the Phase I planning study involve the development of plans and drawings for the restoration and use of the Iolani Palace Complex and the physical restoration work. With the exception of a drawing for the renovation of Kana'ina Building (Phase IV), the construction of a roof for Iolani Barracks (Phase II), and additional work on Iolani Barracks (anticipated in Phase VIII), most of the planning and restoration work has been on the IP. Upon the conclusion of Phase VIII, which is estimated to take place in February 1977, IP is expected to be completely restored. Partial restoration work on Iolani Barracks including the laying of underground utilities, floor slabs, and the restoration of the Royal Guard Room should also have been completed. To date, the eight contracted phases have totaled \$5,951,150 (see Exhibit 6.2 for summary of costs).

Exhibit 6.2

SUMMARY OF RESTORATION COST

Phase I	Contract No. 12030	\$ 60,000
II	No. 569	459,500
III	No. 2317	360,000
IV	No. 3116	1,176,650
V	No. 4652	828,000
VI	No. 5591	787,000
VII	No. 6310	1,330,000
VIII	No. 7255	<u>950,000</u>
<i>Total I to VIII</i>		<i>\$5,951,150*</i>

**Includes reimbursable grants of \$100,000 each for Phases II, III, and IV provided by the U.S. Department of Housing and Urban Development under Title VII of the Housing Act of 1961, as amended.*

Beyond Phase VIII, additional work is needed to complete Iolani Barracks, the Kana'ina Building renovation, site utilities installation, landscaping and formal garden placement, roadbed refinishing, gates and perimeter fence restoration, Royal Tomb restoration, and Coronation Stand restoration. The most recent estimated cost for the completion of the entire IP Complex is approximately \$2.1 million. Exhibit 6.3 provides a breakdown of costs for the future construction work.

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Exhibit 6.3

ESTIMATED COST TO COMPLETE
THE RESTORATION OF IP COMPLEX*

<u>Item</u>	<u>Estimates for Anticipated Bid Date of Aug. 1, 1977</u>
Iolani Barracks (for use as a museum)	\$ 627,000
Coronation-Bandstand	101,200
Kana'ina Building (orientation center, public restrooms)	484,000
Fence and Gates (repair, fabricate, finish)	258,500
Site Utilities (installation)	68,750
Roadbed (removal, replacement)	236,500
Landscaping	<u>374,000</u>
<i>TOTAL</i>	\$2,149,950

**Estimated by G. Fairfax, October 1976.*

The cost projection in Exhibit 6.3 is based on the assumption that a lump sum funding of \$2.1 million will be made by the State and that the bids will be submitted prior to August 1, 1977. Any extension of the project beyond that date would increase the cost of the project due to inflationary pressures.

Interviews with state officials reveal that the request for Phase IX funds to the legislature will amount to approximately \$650,000 for the 1977-79 biennium. The funds, if appropriated, will be used to complete the restoration of Iolani Barracks.¹⁶ Funds to complete the remaining work will be requested at a later date and contracted for in future phases. The projected number of additional phases beyond Phase IX and therefore the estimated date of completion of the entire Complex has not been determined.

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Because of the uncertainties with respect to the total anticipated costs required for the full restoration effort and the uncertainties as to the amount and manner of funding support forthcoming from the legislature, even an informed estimate of what might be ultimately required in the way of funding support for the restoration must be accepted with caution. There appears little doubt that the total cost of the remaining restoration work will likely exceed the current total projected cost of \$2.1 million.

RESTORATION OF ARTIFACTS AND FURNISHINGS

The restoration of the Iolani Palace Complex encompasses more than the physical restoration of Iolani Palace and the reconstruction of other facilities. It also includes the acquisition (or possible replication) and restoration of furnishings, artifacts, historic objects, paintings, draperies, and carpets to furnish the completed Palace, Barracks, and other structures in the Complex.

An initial estimate has been made that approximately one-fourth of the significant original IP furnishings is in the possession of the State or the FIP, or possibly available from various collections in Hawaii.¹⁷ The State owns a substantial share of the first floor furnishings and historic objects, including the Throne Room and Dining Room chairs; replica thrones; mirrors and chandeliers; most of the original Palace portraits; collections of china, crystal, silverware, and many other smaller items.¹⁸ The FIP, under an on-going acquisitions program, has acquired, mostly by donations and some purchases, original Palace artifacts valued at about \$250,000.¹⁹ The Bishop Museum also has a substantial collection of original furnishings and artifacts; however, no formal negotiation has been initiated to see whether the items will be available for Palace use.

Despite the availability of these collections, much more research, acquisition, and restoration will be necessary to adequately furnish the Palace.²⁰

Acquisition and Restoration Costs. The total cost for acquiring the necessary furnishings and other artifacts to completely furnish the Palace is not known at the present time. Also unknown at present is the total cost of restoring the state and FIP-owned collections.

Some answers are expected to be found when Dr. Anthony E. Werner of the Pacific Regional Conservation Center, contracted by the State, concludes his inventory of all

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state-owned furniture. The inventory which will include authentication and cost of restoration was scheduled for completion in November, 1976.²¹ Dr. Werner was also commissioned by the Friends of Iolani Palace, using its own funds, to conduct an inventory of Friends-owned furniture. Both inventories are for the stand-up furniture only and will not include paintings and other miscellaneous artifacts.²²

While the total cost for renovating or restoring the artifacts is not known, past cost estimates on selected portions of the collection indicate that the costs will be quite substantial. This is illustrated by the examples presented below.

In 1974, Harry H. Schnabel²³ was engaged as a consultant to make recommendations on carpets, drapes, and selected furniture upholstery for the Palace. Based on his study, a cost of \$254,450 was estimated for the acquisition and restoration. Exhibit 6.4 is a breakdown of Schnabel's cost.

Exhibit 6.4

PROJECTED ESTIMATES FOR DRAPERIES, UPHOLSTERY, AND CARPETS FOR IP

Throne Room carpet reproduction	\$ 80,310
Purchase of other carpets	55,521
Draperies	56,916
Selected upholstered furniture reproduction	38,544
10% contingency	<u>23,159</u>
<i>Total</i>	\$254,450

Source: Harry H. Schnabel, Jr., Projected Estimates for Draperies, Upholstery and Carpet for Iolani Palace, October 23, 1974, p. [30].

In March of 1976, an estimate was made by the FIP for the cost of restoring and installing *state-owned* IP furniture and artifacts for *the first floor* of the Palace. The estimated total amounted to \$73,148. It was, however, noted in the addendum of the report "that many of the state-owned artifacts have been stored under the worst possible conditions, which after careful thought, could result in their restoration costs increasing in some instances, as much as 20-30%".²⁴

In 1974, Clements Robertson, the conservator at the St. Louis Art Museum, estimated the cost of restoring the 40

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state-owned paintings which were once displayed in the Palace. The estimated restoration cost was \$65,000. Thus far, the State has completely restored three of the paintings at a cost of approximately \$15,000.²⁵ This indicates that the actual cost of restoring the paintings will be much more than the original estimate.

Furnishing and Artifact Restoration Status. To date, little or no furnishing and artifact restoration have taken place. However, with the completion of the restoration of IP scheduled for early 1977, more attention is being directed to this important area. For example, the State and the FIP are in the process of conducting an inventory of, and estimating the cost of restoring the stand-up furniture in their respective collections. The FIP is currently preparing a complete inventory of items on hand and a room-by-room furnishing and artifact (both authentic and non-original items) placement plan. The plan is expected to be completed in January or February, 1977. In addition, funds have been obtained by both the FIP and the State for the acquisition and restoration of the artifacts. The FIP currently has \$40,000 and has applied for matching federal funds and the State has set aside \$50,000 from Phase VIII restoration funds to furnish the Palace. The State's \$50,000 will be supplemented by an additional \$50,000 matching grant from the federal government's National Park Service. In addition, approximately \$50,000 has been retained by the State from earlier restoration phase funds for the restoration of paintings. As indicated earlier, \$15,000 of this fund has already been expended for the restoration of three state-owned paintings.

ANTICIPATED STATUS OF IP COMPLEX RESTORATION — JULY 1977

Should the legislature decide that IP be opened in July 1977, the following facilities will be available for public view and use. The Palace should be completely restored to the Monarchy period of 1882-1893 and available for public viewing. Only two of the rooms in the Palace (the kitchen located in the basement and the Throne Room on the first floor), however, will be better than 90 per cent furnished.²⁶ Whether, or to what extent, the remainder of the rooms will be furnished is not known at this time. Some of the paintings which were once displayed in the Palace will be restored and ready for display. Public restroom facilities will not be completed but the staff restroom facilities in the Palace basement will be completed. Work on the completion of Iolani Barracks restoration will probably be in progress

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by the July opening. Construction work on the Coronation Stand, roadbed, landscaping, fence and gates, and the Kana'ina Building will most likely not begin before July 1977.

Chapter 7

SOME PROBLEMS RELATING TO THE RESTORATION PROJECT

The restoration project has been beset with problems, leading to delays and increased costs. This chapter discusses some of the factors that have contributed to cost increases and delays.

ESCALATING COST OF THE RESTORATION PROJECT

According to the Phase I Planning Report for the restoration of the IP Complex, the restoration was to have been completed in two years, at a cost of \$2.5 million.¹ When the Friends of Iolani Palace submitted their second progress report to the department of land and natural resources in December 1974, the project had been going on for five years and was operating on Phase IV and Phase V funds. By then the new target date for completion was expected to be no earlier than July 1976, and the estimated total cost had gone up to \$6.8 million.²

Since then, there have been considerable delays in the restoration project and the restoration still remains incomplete seven years after the initial contract was awarded. Total expenditures to date have amounted to \$5 million, with an additional \$1 million also appropriated in Phase VIII. An estimated \$2.1 million in additional funds will be needed to complete the Complex. The completed Complex will therefore cost an estimated \$8.1 million, an increase of over 324 per cent from the original estimate of \$2.5 million. As pointed out in the previous chapter, the additional \$2.1 million estimated fund requirement necessary for completing the project has probably been understated. Furthermore, this figure does not include the costs of acquiring, restoring, or replicating the artifacts to be displayed in the restored Palace, as such costs have yet to be determined.

The following are two of the major factors contributing to the delay and increased costs in completing the restoration project.

Nature of the Restoration Project. Unlike the construction of a new building or the reconstruction of an old one, the very nature of restoration requires careful architectural research. Documentary research must go hand in hand with physical evidence gathered by "the systematic removal of later building additions and the collecting of

SOME PROBLEMS

samples of plaster, paint, and other artifacts.... Numerical identification must be set up to identify all artifacts...."³ This careful, painstaking work must be done in tandem with decisions being made on how to carry out the restoration process. Physical and historical research on the artifacts and furnishings must also undergo this time-consuming process so as to enable the adequate and accurate furnishing of the restored Palace.

The Phasing of the Restoration. The decision to separate the project into phases evolved because of the enormous cost implications, and the State's fiscal constraints due to the imposition of an austerity program by the state administration. The restoration project is thus being incrementally phased according to the funds available to the department rather than by a logical restoration increment.⁴ As the project is being stretched out over these many years, an inflationary spiral is driving construction and material costs upward.⁵ The phasing process has also necessitated the splitting of certain discrete segments of the restoration over several phases. An example is the installation of the air-conditioning and building automation system, which was spread over Phases IV, V, VI, VII, and VIII.

OTHER MISCELLANEOUS PROBLEMS

The following section discusses other miscellaneous problems that have hampered the progress of the restoration project.

Contract Procedures. The excessive time involved in preparing, reviewing, and finalizing the restoration contracts between the State (DLNR) and the FIP has meant many delays and frustrations. After funds are appropriated by the legislature, there are over 20 prescribed steps involved in the process of initiating and executing the restoration contracts. After the DLNR informs the FIP of the amount available for the next phase, the FIP then submits a contract within the scope of those funds. Often this has proved a difficult task, because the architectural consultant had already established the work needed to be done, and in many cases had already begun negotiations with subcontractors. They have, in some instances, had to trim the scope of that particular phase and have had to renegotiate with the subcontractors.⁶

Delays in Delivering Funds. At various times, when appropriated funds for a new contract were not made available to the Friends, the contract then in progress had to be

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stretched out in order to provide continuity to the construction work.⁷ This delay severely hampered the progress of the project. After striving for a partial opening for July 1976 to coincide with the nation's bicentennial year, the FIP announced in early 1976 that delays in receiving appropriated Phase VII funds had made it impossible to have anything opened to the public by July 1976.⁸

In several instances where the restoration project ran out of funds, and, funds from the next phase had not yet been received, the FIP has advanced its own funds to carry the project.⁹ Phase VII funds experienced the longest delays in being released.¹⁰ When these funds were finally released, the Friends were able to replace \$10,000 of their own funds which had been advanced to meet the payroll.¹¹

This delay in providing funds has been a source of embarrassment to the FIP as the contracting agent. Earlier this year a major subcontractor, after several unsuccessful attempts to collect two progress payments for Phase VII work, sent a registered letter to the Friends threatening to stop all work, dismantle all scaffolding, and terminate their contract if not paid within seven days. The contractor further would have demanded \$100,000 to start up again. To forestall this action, the FIP appealed to the governor and other state officials to hasten the release of their funds, whereupon some overdue funds were released, and the FIP was able to pay the subcontractor before the deadline.¹²

Unanticipated Expenses. When the Phase VII contract was being finalized, a clause was inserted requiring the FIP to insure the Palace. Although all other state-owned buildings are self-insured, the State, upon advice of the attorney general's office, requested that the Friends obtain a standard fire insurance policy on the building and its contents to cover the period during which they were working on the Palace.¹³ This unexpected expense diverted \$3,500 for the appraisal and \$9,161 for the first year's premium from Phase VII restoration funds. In this instance, the expenditure reduced the money available for the in-house staff of workers.¹⁴

The various problems discussed have hampered the progress of the project and have contributed to, and have resulted in, escalation in costs. Despite these problems, however, it is generally agreed that the FIP has done a very creditable job of restoring Iolani Palace in a historically accurate and tasteful manner.

PART III
PLANNING FOR THE RESTORATION, OPERATION, AND
MANAGEMENT OF IOLANI PALACE COMPLEX

INTRODUCTION

This part is concerned with the planning processes and plans developed for the restoration, operation, and management of the Iolani Palace Complex. It focuses on the nature of a restoration project and the need for plans to guide the restoration (chapter 8); the inadequacies and problems relating to the planning process and plans developed (chapter 9); the program and operation plans developed (chapter 10); and identifies some policy issues and problems that need to be addressed and resolved (chapter 11).

Major findings and conclusions include the following:

- (1) There is a lack of established policies to guide the development of plans for the restoration, management, and operation of IP Complex, and unless these policies are formulated the planning for the restoration, operation, and management of the IP Complex cannot proceed expeditiously.
- (2) There is apparently no approved "master plan" to guide the restoration of IP Complex. In the absence of a master plan, the restoration is being done on a piecemeal basis.
- (3) Many plans, including the program, services and operations plans, needed to define the physical facility requirements of the restored IP Complex have not been developed. Consequently, there is no assurance that the restored facilities will be able to meet the requirements for the eventual operations of the IP Complex.

Chapter 8

PLANNING FOR A RESTORATION PROJECT

This chapter briefly discusses the nature of a restoration project and the need for planning guidelines.

THE NATURE OF A RESTORATION PROJECT

A restoration project is unlike the construction of a new building or the renovation of an old one. It requires careful architectural research and documentation; painstaking removal of modern day or other recent additions to the building; careful piece by piece dismantling, study, and documentation of the historic facility; and careful preservation, repairing, restoration, or reconstruction of the pieces. This careful painstaking work must be done in tandem with decisions being made on how to carry out the restoration process and how the restored facility will eventually be interpreted to the public. Physical and historical research on the artifacts and furnishings must also undergo this time-consuming process so as to be able to adequately and accurately furnish the restored facility.

The Hawaiian Historical Society has identified six steps in the restoration process.¹ These are sequential elements that must be followed in order that the restoration can proceed efficiently and effectively. They include:

1. Research and analysis of available data. A thorough research inventory and analysis must be made of all available data on the building to enable the planners to assess what must be done.
2. Formulation of concepts and objectives. "Concepts" are generalized ideas of what the restoration should be. They must be developed from and related to background studies and research conducted in step 1 above. Such basic concepts should serve as the guidelines for the restoration.
3. Definition of restoration problems, the work necessary to restore the Palace, and the Palace's future operations and programs.

PLANNING FOR A RESTORATION

4. Preparation of restoration plans and programs. The staff must lay out the plans and programs to meet the problems identified.
5. Determination of priorities, projection of cost and time estimates. Priorities and time and cost projections must be laid out for the entire restoration project.
6. Formulation of an overall master plan. This plan ties together all the aforementioned elements for the entire restoration project. It should include a physical site plan, plans for the eventual operations and programs for the restored building complex and the routing of visitors through the IP Complex.

NEED FOR POLICIES AND A MASTER PLAN

The final element in the restoration process enumerated above points to the need for the development of a comprehensive master plan and other specific plans. However, before any plans can be developed, specific guidelines and policies must be developed. These guidelines and policies are needed to provide the necessary framework or principles under which plans can be developed. The magnitude of expenditures for the restoration dictates that the plans developed be comprehensive to insure that the resources allocated to the restoration are effectively utilized. The plans should be oriented toward identifying all the components of the restoration, designing, and developing the various components, articulating the relationship between components, defining the necessary resources, and establishing the sequence and timing of required action.

Some of the specific components necessary for the restoration project therefore include:

1. Specific policies which provide basic principles to guide the planning effort for the restoration and operation of the restored IP Complex.
2. A master plot plan locating as accurately as possible the various historical structures and landscaping features, both existing and to be restored.

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3. The physical restoration plan for the various facilities, showing what is to be done, together with realistic cost and time projections. Any deviations made during the restoration process should be explained and documented.
4. The plans for visitor and service facilities, including the location of parking and passenger drop-off and pick-up areas, restrooms, service vehicle parking areas, etc.
5. Plans for the acquisition and restoration of IP artifacts, including priorities and cost estimates.
6. Plans for the eventual operation of the restored Complex, the programs to be offered, and the planned pedestrian flow through the Complex.

The need for planning policies and comprehensive restoration and operating plans is obvious. It is needed in order to provide the broad overview for the total restoration process and to provide specific directions for the various entities, so that all will work together toward a common end.

Chapter 9

PLANNING INADEQUACIES

INTRODUCTION

This chapter explores the planning inadequacies encountered in the development of the IP Complex and discusses three major areas of concern: restoration policies and the lack thereof, a master plan for the IP Complex and the lack thereof, and other plans and proposals required for IP.

The importance of the role of planning for the IP Complex is pointed out as well as the effect lack of planning has on the project.

A. RESTORATION POLICIES

Policies provide the framework of principles to be followed in achieving specific goals. The purpose of a policy is to provide guidance which will result in a continuing and consistent pattern of decisions and direction of thought. To be effective, policies also need to be comprehensive. This is necessary to provide overall control, direction, and consistency to the total planning effort and to assure that all required activities are performed, both in fact and in the sequence necessary, to achieve the goals.

Lack of Policies. The Bureau's review of the planning process of the IP Complex restoration project revealed that many basic policies necessary for guiding the restoration and eventual operation of the IP Complex have not been established. This lack of definitive policies is one of the major factors which contributed to the fact that comprehensive and systematic planning for the IP Complex project did not take place.

The Bureau's examination revealed a lack of policies and policy decisions in the following areas:

1. Definition of the IP Complex Restoration Project.
2. Acquisition of the necessary resources.
3. Purpose of the restoration.
4. Operations of IP Complex.

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The lack of policies and the effects are discussed in the following sections.

Definition of the IP Complex. Policies defining the IP Complex restoration project have not been formulated. This involves the delineation of the physical area and the facilities which are visualized as comprising the restoration project. This encompasses determinations regarding the actual areas on the IP grounds that will be restored, the buildings and other facilities to be restored or renovated, and the artifacts and furnishings that are to be included in the completed facilities and Complex. It also encompasses determinations on the use of the facilities including a designation of facility components. For example, if a determination is made to have a gift shop, snack bar, or other similar activities as part of the IP Complex, policy decisions specifying the location should be delineated.

Acquiring the necessary resources. Policies have not been articulated regarding the acquiring of the necessary resources for the restoration. These include:

1. The manner in which the resources necessary for restoring the Palace and other facilities in the Complex are to be obtained. That is, how the funding requirements for the project are to be determined; whether federal or private funds in addition to state funds are to be sought; the standard relating to the type and quality of raw materials to be utilized for the restoration; and the necessary personnel with specialized restoration skills required.
2. The manner in which artifacts and furnishings will be acquired. There is a lack of policies and standards indicating which artifacts are to be acquired for the IP Complex; what criteria are to be utilized in determining whether artifacts should be bought, replicated, or borrowed; and under what conditions period pieces may be substituted. These policies and standards are necessary in order to insure that the Palace will be adequately furnished to meet the program needs of the Palace operation and to insure effective utilization of funds for these purposes.

The purpose of the restoration. Another major area lacking policy decisions relates to the purpose and function of the restoration. This includes determinations regarding the following:

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1. The type of public service to be rendered by the restored facility. The decision must be made on whether the emphasis should be on formal or informal education, research, entertainment, or a combination of these. If a combination is decided upon, the relative emphasis should be so designated.
2. The story to be told by the Palace including the manner in which the story will be told.
3. The target group or audience that is to be served by the completed IP Complex. Whether the target audience is to be tourists, residents, or school groups will have an effect on the interpretive program to be developed, admission price structure, and other operational concerns.
4. The relationship of the IP Complex to other state historic sites. Should the IP Complex be operated as part of a state system of historic sites, or should it be operated as an independent facility due to its uniqueness? Or should it be promoted as part of a civic center complex tour, to be part of a program featuring the IP Complex, the State Capitol, Washington Place, City Hall, Kawaiahao Church, the Mission Houses, etc.? Any tie-in with other facilities will require much organization, coordination, and promotion.
5. Whether the IP Complex grounds will continue to remain a public park. If it is decided to charge an admission fee to enter the grounds, this will preclude the use of the grounds for free band concerts, or as a lunch and rest area for nearby office workers, etc. as it is now being used.

Operation. Policies determining the scope of operation have not been formulated. These include:

Self-sufficiency. If the operators are required to operate on a self-sufficient basis, this will have an impact on their admission fee policy, the quality of services to be provided, staffing, etc. They may have to spend a large part of their efforts in obtaining grants and gifts to meet their budget requirements. This issue is covered in detail in chapter 11.

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Staffing. The staffing policy will depend not only on the type of tour to be offered, but also on the number of visitors expected and on the hours of operation. An in-depth guided interpretive tour will require a large corps of well-trained docents. A policy on the use of volunteers will also have an impact on the staffing requirements. Also affecting the staffing policy is the requirement to adequately support the building automation system already installed. A decision will be required on how the system is to be handled after museum hours.

Hours of operation. Museum hours, whether the Complex is to be open seven days a week and holidays to be observed, will have to be decided upon.

Use of IP Complex for special occasions and other non-museum purposes. Guidelines must be set up regarding the use of IP Complex for non-museum purposes. Various reports have recommended the use of the Complex for such purposes as receptions for visiting world leaders¹ and for state receptions, luncheons and dinners.² Nevertheless, the Alexander report warns that "[s]uch use, however, should take place only on important and rare occasions and should not be accorded commercial organizations. The usual rule should be that modern symbolic uses should not interfere with regular visitation and that the building fabric and furnishings must be protected from harm on such occasions."³

Admission fees. Policy decisions must be made regarding admission fees, i.e., whether admission fees should be charged, and if so, the price structure. If admission is charged, should periodic "free days" be allowed for Hawaii residents, whose tax dollars are paying for the restoration? Should one admission ticket include the viewing of all facilities or should there be a separate charge for the different facilities? The impact of these decisions is covered more fully in chapter 11.

Gift shop; snack bar. Decisions must be rendered on whether a museum gift shop, snack bar, or other similar commercial activities will be permitted, and if permitted, the location, the manner of operation, a designation of who is to operate, the relationship of the facility to the operation of the IP Complex, and the kinds of merchandise to be offered.

Consequences of the Lack of Policies. The effects of undertaking the restoration in the face of the lack of policy guidelines are predictable.

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First, since no definitive guidelines could be given in the development of plans, the plans developed are thus inadequate. This can best be illustrated by discussing the Phase I Planning Report.

The contract between DLNR and the FIP for the Phase I Planning Report requested the FIP to prepare plans for the restoration and furnishing of Iolani Palace and for an effective visitor program for the Complex, the objective of the plans being "to provide complete guidelines for the restoration of the structure, furnishings and setting of Iolani Palace, insofar as it's feasible, to their appearance during the period 1883-1893, and for their presentation and interpretation for greatest possible public appreciation, enlightenment and enjoyment."⁴ However, except for the clause requesting that the IP be restored to its appearance during the period 1883-1893, no policy guidelines were given by DLNR to the FIP for developing the planning report. The only guidelines given were contained in the section defining the scope of the work, in which the FIP is asked to develop site plans, operational plans, and plans for locating, identifying, and authenticating the furnishings, art work, and other items which were in Iolani Palace. In short, the FIP were asked to plan the restoration, operation, and management of the State's most important historic treasure without any policy directions. Under these adverse conditions it is not surprising that the FIP could not do an adequate job. The plan developed has not been officially approved by the BLNR and is not being used as the master guide for the restoration, operation, and management of the IP Complex.⁵

It should also be noted that the Bureau's review of the development of other plans, e.g., the program and services plans, shows that no guidelines were given.

Second, in the absence of policy guidelines and policy decisions, widely differing plans are formulated. This is discussed in further detail in chapter 10.

Third, in the absence of definitive planning policies, planners must make certain policy assumptions in developing their plans. The policy assumptions made, however, may not be acceptable to others and as a result, the plans developed are not acceptable. This is illustrated by following the development of the operation plans developed by the FIP. In September 1974 Col. Walter Judd, then chairman of the FIP Restoration Committee, formulated a tentative IP operations plan based on the recommendations of the 1973 Alexander report. The plans laid out, among other things, a projection of expected visitor attendance and revenues, and a detailed schedule of 96 tours per day, with 16 guides, each

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conducting 6 tours per day. The apparent policy assumptions made in developing this plan were that (1) the IP operation was to be self-sustaining, and (2) the primary target audience was to be visitors to Hawaii. The plan was severely criticized by the DLNR as not providing sufficiently for the residents of Hawaii, whose tax dollars were supporting the restoration project. The FIP subsequently developed a conceptual plan for the operation of IP, which then provided almost exclusively for the residents of the State, including the school group. While the plan was submitted to the department in August 1975, to date there has been no official DLNR reaction to the plan.

Fourth, in the absence of policy guidelines, plans are implemented and become de facto policy decisions.

In 1972 Fairfax prepared the *Iolani Palace Restoration Architectural Report*, which provided some detailed recommendations for the restoration of the IP, including installation of a sophisticated building automation system. In the absence of specific policies regarding how the restored Palace is to be presented to the public, some assumptions were made by Fairfax. "Such a system assumes that not only would there be docent guides, but that each gate of the Palace, if not locked, would have a guard in the uniform of the Royal Guard, besides at least one roving guard within the grounds during hours of operation. These guards would also have the small transistor radios and be able to respond to any break in security that might occur."⁶ The plans as recommended by the architect have subsequently been implemented, together with the building automation system. With the installation of this system it has been reported that the entire Palace has been "architecturally designed to be used in a specific manner"⁷ and cannot be used any other way. "Given the technical restoration decisions which have already been implemented, if the plan is not followed, the Palace (including the artifacts) will very rapidly disintegrate and all restoration work will have been in vain."⁸ The installation of this system therefore precludes the consideration of other alternative means of presenting Iolani Palace for public viewing, and any operations plan developed must now conform to the requirements of the building automation system installed.

DLNR's Role in the Formulation of Policies. Both the Hawaii State Constitution and the *Hawaii Revised Statutes* are silent on the restoration of IP and the purpose for the restoration. An examination of the State's Planning, Program, and Budgeting documents (PPB) revealed that the restoration and operation of IP have been assigned to Program Area VIII relating to Culture and Recreation. It is included

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in Program LNR 801, "Historical and Archeological Places", under the management responsibility of the department of land and natural resources, division of state parks, outdoor recreation and historic sites.

The objective cited for this program is "[t]o enrich the leisure time of people of all ages by preserving, protecting, and making accessible for appreciation and study places of historical or archeological significance." Therefore, other than for the aforementioned objective statement, it appears that no policy statements were formulated to provide guidelines for the restoration and eventual operation of the IP Complex.

Act 254, Session Laws of Hawaii 1967, provided DLNR the responsibility for developing a comprehensive historic preservation program to include "plans to acquire, restore, and preserve historic areas, buildings and sites significant to Hawaii's past" and transferred IP from the department of accounting and general services to the department of land and natural resources. The Act further provided that "[a]ll state projects and programs relating to historic preservation and restoration shall come under the authority of the department of land and natural resources."

In light of the absence of specific restoration and operation policies for IP and the DLNR's statutory responsibility for the restoration program, it would be reasonable to expect that the department would establish such policies. However, as evidenced by the lack of such policies, these steps were not taken by the department.

Department officials have taken the position that the department itself "does not have the authority to make policy decisions", and that "it is the prerogative of the Board of Land and Natural Resources to do so".⁹ While the board is indeed the policy-making body, the departmental staff as the entity responsible for implementing the restoration program must bear some of the responsibility for developing policies. Areas for which the department should be responsible include: (1) identifying the issues relating to IP and identifying the areas where policy decisions are needed, and (2) articulating the need for decisions to the board.

FIP Requests for Policy Decisions. The need for policy decisions and guidelines to effectively restore and plan for the operation of Iolani Palace was recognized by and communicated by the FIP to the DLNR. The following are some notable examples:

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The future operation of the restored Palace will be greatly dependent upon the decisions that are made now and the facilities that are planned for. As a result, certain basic decisions must be studied and planned for immediately, in order that the best possible operation and interpretation may be achieved. The primary decision now is how the visitor is to be conducted through the Palace and how the Palace is to be interpreted to him.

Iolani Palace Restoration
Architectural Report,
March 1, 1972

It appears that the latest appropriate timing for State of Hawaii decision [on IP operation] is July 1973 to permit necessary lead-time for planning, budgeting, staff considerations, etc.

Iolani Palace Restoration
Project Progress Report I,
November 1, 1972

An early decision is needed from the State of Hawaii on who will operate the Iolani Palace Complex.... A follow-up letter was forwarded to the Chairman of the Department of Land and Natural Resources, August 8, 1974 asking for a decision on this matter. No decision in principle or otherwise has been received by the Friends. Time is of essence, as considerable coordinations must be effected with our visitors industry who plan and prepare tour packages at least a year ahead of time.

Iolani Palace Restoration
Project Progress Report II,
December 15, 1974

We would like to do more to get ready for the actual operation, but we cannot without the decision being made by the State whether we are to be assigned the responsibility.... There are innumerable details that must be solved. But they can be solved once the decision concerning responsibility for operation is made.

Letter from Acting President,
FIP to Board of Land and
Natural Resources,
December 12, 1975

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Interviews with FIP members revealed that these requests, however, went unheeded, and no decisions were rendered. The president of the FIP reported that she has been in correspondence with DLNR since at least 1973 in an attempt to get them to agree in principle about the restoration and the operation of the Complex, with little luck. All of the plans done for or by the Friends have been submitted to the board of land and natural resources and the department itself, but there has been no official action taken with respect to any of them. As a consequence, there is no officially accepted master plan.¹⁰

A former chairman of the FIP Restoration Committee reported that whenever the Friends asked DLNR for decisions regarding such issues as the operation of the Palace, admission fees, staff, etc., the response was always "we will decide next year", yet such decisions were never made.¹¹

A third member of the FIP believes that a major problem has been that "no one in the state government has been doing any planning or decision making with respect to historic sites.... The procrastination in the decision making process makes it impossible to catch up."¹²

FIP Initiatives. In the absence of definitive decisions from the DLNR, the FIP realized the need to prepare for the operation of the IP Complex and assumed much of the responsibility for the planning. Some of the FIP initiatives include:

1. Contracting with a consultant to develop an interpretation and operations program. Dr. Edward P. Alexander, Director of Museum Studies, University of Delaware, and past Director of Interpretation and Vice-President of Colonial Williamsburg, came to Honolulu in December 1972 and rendered a report, *An Interpretation Plan for Iolani Palace*. Following Dr. Alexander's recommendations, an FIP member subsequently developed a detailed operations plan for the IP Complex. This plan was forwarded to the DLNR in September 1974.
2. Organizing a docent training program. In late 1975 the then Director of the Iolani Palace Restoration Project began a docent training program for volunteers interested in becoming guides for the Iolani Palace Complex. The group was given basic tours and lectures by staff members, a bibliography of books to be studied, and genealogical charts of the Hawaiian Monarchy. Lectures by Hawaiian scholars and other training sessions were also scheduled.

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3. Appointing a museum gift shop committee to study the feasibility of a gift shop within the Iolani Palace Complex. The committee concluded that a gift shop should be established, and made recommendations concerning its location, operations and type of merchandise to be sold.
4. Appointing a traffic committee to study the problems of passenger loading and unloading from buses, parking, and vehicular traffic. State and city officials and members of the visitor industry were invited to participate. A bus parking proposal was submitted, but no official action taken.
5. Organizing of an active acquisitions program for Palace items. Over \$365,000 in appraised value of artifacts, crystal, silver, china, furniture, and other items has been collected for display at IP.
6. Raising of funds from private trusts, firms, and individuals. These funds were used for the refurbishing of furnishings and for research of materials regarding original Palace furniture.

In spite of the existence of these plans and proposals, no official decisions or approval of them have been forthcoming from DLNR.

DLNR's Requests to the Board. A review of the minutes of the board of land and natural resources meetings from January 1969 to December 1976 revealed that except for the items noted below, few, if any, issues and/or requests for policy decisions have been presented to the BLNR by the departmental staff. Thus, the board was not asked to render or provide any of the specific policies identified earlier in the chapter; that is, policies and policy decisions relating to the definition of the Iolani Palace Complex, acquisition of resources, purpose of the Iolani Palace, and the operations of the Iolani Palace Complex, which as indicated previously, are of utmost importance in effectively guiding the restoration and eventual operations of the Complex.

The only Iolani Palace matters brought before the board include the following:

- (1) Fiscal matters, including requests for permission to negotiate contracts with the FIP for the restoration of IP.

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- (2) Request for approval of "Iolani Palace Restoration Project, Progress Report II". Upon the recommendation of the chairman of the department, the report, except for the budget portion, was approved by the board. (*Minutes, BLNR meeting, January 24, 1975*)
- (3) Consideration of the "Preliminary Operations Plan for Iolani Palace" prepared by Col. Judd of the FIP. No action was taken by the board, for "more time was needed to consider this matter". (*Minutes, BLNR meeting, July 25, 1975*)
- (4) Consideration of alternatives for administration and operations of the Iolani Palace Complex after restoration. No decisions were rendered by the board on this matter in two separate meetings. (*Minutes, BLNR meetings, December 5, 1975 and December 12, 1975*)

Note in items 3 and 4 above that the board was asked to render decisions on the operations and management structure of the Iolani Palace Complex. In view of the lack of many of the basic policies concerning Iolani Palace, it is not surprising that no decisions were rendered by the BLNR.

Recent Legislative Guidelines. Act 104, Session Laws of Hawaii 1976, recodifies the laws relating to the state historic preservation program. The Act establishes some broad policies relating to the historic preservation program which may affect the restoration and operations of Iolani Palace. It states in part:

The historic and cultural heritage of the State is among its important assets and that the rapid social and economic development of contemporary society threatens to destroy the remaining vestiges of this heritage.... It is in the public interest to engage in a comprehensive program of historic preservation at all levels of government to promote the use and conservation of such property for the education, inspiration, pleasure, and enrichment of its citizens.

Senate Resolution No. 403, S.D. 1, was adopted by the Senate of the Eighth Legislature in 1976. It provides the Senate's position on some of the policy issues discussed previously. Senate Resolution No. 403, S.D. 1, which addresses these matters is appended hereto as Appendix A of this report.

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B. A MASTER PLAN FOR THE RESTORATION PROJECT

For the purposes of this study, a master plan is viewed as a means by which a framework is established for the systematic and coordinated development and implementation of realistic plans for the restoration and operation of the IP Complex. The plan provides a structure by which all components of the restoration project can be identified, priorities identified and ordered, alternatives identified and chosen, required financial resources determined, and implementation schedule developed. In short, the master plan provides the overall implementation guidelines for the total restoration project.

A master plan once developed is not a static entity. The master plan must be reviewed periodically. As changes occur in economic conditions, community attitudes, state policy, or other unforeseen happenings, adjustments in the plan can and should be made. That is an essential part of the continuing master planning process.

The sections that follow discuss the Bureau's findings relating to the development of a master plan for the restoration project. Our comments in these sections are derived from a review of various planning documents for the IP Complex and extensive discussions with officials of both FIP and DLNR.

The Iolani Palace Restoration Planning Report.

In 1969, as an initial step for the restoration of the IP Complex, the DLNR executed a \$60,000 contract with the FIP to develop a master planning report for the restoration and eventual operation of the IP Complex. The planning contract set forth the scope of the work as follows:¹³

1. The development of a report compiling pertinent information relating to the restoration, preservation, furnishing, administering and management for public use and appreciation of Iolani Palace and grounds.
2. The development of a detailed plan for the area by area restoration of the structure of Iolani Palace.
3. The development of a plan for the furnishing of Iolani Palace, including the location, identification, and authentication of historical artifacts and objects which were in Iolani Palace during the 1883 to 1893 period.

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4. The development of an effective visitor program for the Iolani Palace Complex, including plans for visitor controls, reception and orientation, information and interpretive services, display and presentation services and movement through the Complex and a public relations program.

On May 1, 1970, *A Report: Iolani Palace Restoration Project; Planning, Phase I*, was submitted to the State. The report presented the basic concepts for the restoration and some of the preliminary work done; outlined an approach and methodology for the restoration, refurbishment, and public utilization of IP; and estimated the time and funding requirements for the restoration project. In concluding, the report emphasized the "necessity of reaching agreement on the basic concept without delay, and of moving immediately into Restoration Phase II (the physical restoration)".

Subsequent to the submittal of the report to the State, the DLNR forwarded the report to the Hawaiian Historical Society for an objective review.¹⁴ The Hawaiian Historical Society's critique of this report pointed out that the planning report was not sufficiently developed.¹⁵ Some of the inadequacies pointed out by the critique included the following:

1. There are serious omissions of much basic planning and research material to substantiate the Report's concepts and plans;
2. There is no effort (except in architectural sections) to report on background studies underway;
3. The "Living Restoration" proposal needs more study and analysis to demonstrate feasibility;
4. Limiting the restoration to 10 years of royal residency would not give a complete history of the Palace and Monarchy and would tend to overemphasize the Europeanized aspect of the Monarchy's history;
5. The report lacks the ingredients of a basic planning study. It also shows a lack of basic planning study in such fundamental areas as visitor-pedestrian flow and organization of an acquisitions program;
6. The report demonstrates a need to determine and schedule priorities for the entire

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project, in light of the Report's emphasis on nonessential equipment and personnel.¹⁶

In the summary of the critique, the Hawaiian Historical Society noted the following:

By its own definition, the Report is intended to represent and conclude the "planning stage" of the Palace restoration project, and urges "moving immediately into Restoration Phase II." This analysis finds that the contents of the Report generally do not support this claim.¹⁷

It further noted:

The Report's impact is that of an introduction to the Palace restoration project. It cannot be considered a comprehensive planning study, since much of the basic planning is yet to be done.¹⁸

Despite the fact that the critique was prepared at the request of DLNR and in spite of the inadequacies noted in the Report, it appears as if the department had already decided to move ahead to Phase II, the physical restoration phase of the project. Copies of the Critique were forwarded to the FIP with no request for a follow-through. At a Restoration Committee meeting, the FIP decided that they "should not go into detail and pick the critique apart, but rather, should urge expeditious action on the Palace restoration".¹⁹ As a matter of fact, less than a month before the Restoration Committee had met to discuss the Critique, the board of land and natural resources had authorized the department to enter into a contract for the initial phase of restoration work on IP Complex.²⁰

Subsequent to the initiation of Phase II, the restoration phase of the project, there has been very little done, officially, to rectify the shortcomings noted in the Critique. The FIP has developed various proposals addressing some of the areas noted by the Critique, e.g., operational plans, development of an artifact inventory, etc.; however, none of the plans and proposals developed has been officially approved by the BLNR. The department itself has been basically concerned with architectural and physical restoration aspects of the report and has done only a "minimal" amount of work on the other deficient aspects noted by the Critique.²¹

Lack of a Master Plan. Despite its inadequacies, the Phase I Planning Report is evidently viewed by the DLNR as one of the basic guides being utilized for the restoration of the IP Complex. All contracts between DLNR and FIP

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subsequent to the Phase I planning contract cite the "provisions, intent and spirit" of the Planning Report as the goal to be achieved. In addition to the Planning Report, the DLNR noted in response to a Bureau survey, that the 1968 *Civic Center Master Plan* and the 1972 *Iolani Palace Restoration Architectural Report* were also being utilized to guide the restoration of the IP Complex.²² In a subsequent interview, DLNR officials added the *Iolani Barracks Working Report for Completion of Reconstruction for a Plan for Museum Use* (1968) and the *Specifications: Kana'ina Building Renovation* (1973) to the list of plans being utilized for the restoration of IP Complex.

The restoration architect, on the other hand, is utilizing his *Iolani Palace Restoration Architectural Report* as the basic guide for the restoration of IP. In addition, he is also utilizing quite extensively the recommendations proposed in *An Interpretation Plan for Iolani Palace, 1973* (the Alexander report). Many of the architectural decisions for the restoration work as well as plans for the development of other facilities on the IP Complex, for example, the *Specifications: Kana'ina Building Renovation*, were based on the interpretation, program, and services recommendations of the Alexander report.²³

The foregoing indicates that various plans are being utilized to guide the restoration project.²⁴ However, it should be noted that none of the plans taken individually or collectively appears to qualify as a master plan for the IP restoration project. Note the following:

The Phase I Planning Report, as previously discussed, has been shown to be inadequate, and could "not be considered a comprehensive planning study, since much of the basic planning is yet to be done".²⁵ In addition, the restoration architect noted that the Planning Report "is not accurate mostly because it was written too early in the planning process".²⁶

The Civic Center Master Plan which has only a one page reference to IP Complex is too brief to qualify as a master plan for IP Complex. A member of the restoration staff notes that the Civic Center Plan "is not the master plan. It was presented in 1968, at a time when there simply was not enough knowledge or information available for it to qualify as a master plan".²⁷

The IP Architectural Report, the Kana'ina Report, and the Iolani Barracks Reports whether viewed separately or as a conjoint entity cannot be considered as being the master plan for the project since the plans detail the restoration

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or renovation of specific facilities, the IP, the Kana'ina Building, and the Iolani Barracks, respectively, and provide little or no details on the other components of the IP Complex.

Of the plans above only the Phase I Planning Report, Civic Center Master Plan, and the IP Architectural Report address, to varying degrees, the disposition or use of the other buildings and facilities on the IP grounds. There are, however, major fundamental differences in the various proposals as illustrated below.

The Civic Center Master Plan recommended the restoration of Iolani Palace and Iolani Barracks, removal of parking, development of the landscaping, and eventual demolition of the Kana'ina Building and the Kekauloahi Building (Archives Building). The Planning Report and the IP Architectural Report concurred in the restoration of the Palace and Barracks, the banning of parking, the development of landscaping details and the eventual demolition of the Archives Building. However, they both recommended the renovation of the Kana'ina Building. The Planning Report recommended that the site of the Archives Building be turned into a conservatory and fernery, and that a gift shop be established in the basement of the bandstand. It further recommended that a concrete, semi-underground structure be constructed as a special restroom building. The renovated Kana'ina Building would then be used to house the curatorial and educational staffs and for other uses relating to the continuing operation of the IP Complex. The IP Architectural Report, however, recommended that the Kana'ina Building be renovated to house the administrative offices for the restored Palace operation and also to contain the public restrooms, gift shop, and orientation center for the Palace visitors.

Accordingly, the argument that all of the plans taken collectively may constitute a master plan for the restoration project lacks merit given the numerous basic inconsistencies in the various plans, as discussed above, as to the disposition and use of the various facilities. Also there appears to be no document which ties together or indicates the relationship between and among the various plans developed. In addition, none of the documents provide a current projection of what facilities or structures are to be demolished, restored, or renovated, or when this will be done, the estimated cost, and the estimated completion date. And finally, none of the plans has been officially approved by the board of land and natural resources.

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Based on the foregoing analysis, the Bureau concludes that there is no master plan for the restoration of IP Complex. This conclusion has been affirmed by recent interviews with DLNR officials.²⁸

Practices and Consequences in the Absence of a Master Plan. In the absence of a master plan, the DLNR and FIP have been restoring the IP on a piecemeal basis, rendering decisions as they became necessary during the contract formulation phases. Briefly the budget and contract formulation processes are as follows:

The dollar ceiling for budget preparation purposes is given to the DLNR by the department of budget and finance. The DLNR in turn determines departmental priorities and designates a projected budget for the IP restoration project. The state parks division, the entity in DLNR responsible for the IP program, then determines the general scope of the work to be done.²⁹ The IP project budget request is incorporated in the executive budget request and presented to the legislature. Apparently, during the budget formulation process, the FIP is not consulted.³⁰

Upon notification of the funds appropriated by the legislature, the FIP is notified of the amount available for the next restoration phase. The FIP then determines the work to be done within the limit of the funds and prepares a contract detailing the scope of the work. Following negotiations and revisions as necessary, the contract is executed between the FIP and DLNR.

As indicated by the foregoing, specific restoration planning and decisions are being made after the funds have been authorized by the legislature; this is being done on an incremental basis dependent on the funds available rather than from a conscious preplanning effort. In the absence of a master plan, the current practice by which the restoration is proceeding has serious shortcomings.

First, the restoration is proceeding without a clear notion of what the total restoration project "looks like" and what is involved with respect to the various components of the IP Complex. Illustratively, interviews revealed that the DLNR officials were unable to articulate, except for the IP and Iolani Barracks, what facilities are to be restored or renovated including the areas on the Palace grounds.³¹ Without knowing the "what", programming, i.e., the laying out and time phasing for the implementation of the restoration project, including the cost, could not be done.

In addition, the DLNR officials were unable to delineate how the restored facilities were to be utilized, what "story"

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would be told about the restored facilities, and the program and services to be offered the visitors. In short, the DLNR could provide no information or projections of the restoration project beyond the scope of the work covered in the approved contracts.

Second, the DLNR is unable to anticipate other basic needs of the restoration. The completion of the restoration project entails more than just the physical restoration of IP and reconstruction of the other facilities. The project also requires the consideration of the artifacts, collections, and furnishings to be displayed in the completed structure. It also requires the consideration of other basic needs if the restored Palace is to be operational. Working on a piecemeal basis in the absence of an overall plan, the DLNR was unable to adequately coordinate the acquisition and restoration of the artifacts, collections, and furnishings with the completion of the IP. While some funds were set aside for painting and furnishing restoration, very little actual restoration work has been carried out (see chapter 6 of this report). The IP will be completely restored and ready for public viewing in early 1977, but it will be only partially furnished. Of the many rooms in IP only the Throne Room and kitchen will be substantially furnished (90 per cent); furnishings for the other rooms will not be ready to any appreciable degree.³² In addition, the program and services to be offered still remain to be decided upon. Public restrooms which were to be located in the Kana'ina Building will also not be ready. Thus, while IP has been nearly completely restored, very little has been done to make IP operational.

Third, under current practices, alternatives are not, and cannot be meaningfully considered. The heart of a comprehensive planning effort is the identification and evaluation of alternative ways, including the least cost ways, to fulfill the facility needs. In the absence of a master plan delineating what is to be restored or other approved plans specifying how the facilities are to be utilized, identification and evaluation of alternatives cannot take place.

The contract formulation procedure utilized for the restoration project also does not lend itself to the consideration of alternatives. The development of the contract requires only the delineation of the work to be done. It apparently requires no analytical document describing alternatives considered or to be considered. In the absence of such documents providing a basis for analysis, the DLNR has no choice but to accept the scope of work specified in the contract. Under such practices, DLNR may not be fully aware of what is being approved nor the consequences of such

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approval. In an interview, a restoration staff member commented "[t]he state has been totally irresponsible from the inception of the project. There has been poor supervision of funds and of the restoration project. They (DLNR) don't know what is being done, nor why it is being done."³³

A case in point is the installation of the costly building automation system. The installation of the system virtually mandates the presence of a large number of guides or docents to ensure proper usage. The system also requires personnel on a twenty-four hour basis to operate the system and to respond to alarms when required. Yet the DLNR budget request for the operation of IP submitted to the legislature grossly understated the need for docents and had no provisions for personnel to operate the building automation system.³⁴

Fourth, unapproved plans become de facto plans. As noted previously, none of the plans developed for the restoration project has been officially approved by the board of land and natural resources. The scope of work for each contract phase is based on one or more of these plans. Thus, upon implementation of the contract these unapproved plans in effect become de facto plans.

Conclusions. The reasons for the lack of a master plan for the restoration are many but basically can be attributed to the absence of definitive policies to guide the planning effort. The lack of policies and the effect on planning has been previously discussed in the policies section of this chapter. Another contributing factor was the premature rushing into the restoration phase of the project. The Phase I Planning Report and the subsequent critique done by the Hawaiian Historical Society could well have served as the basis for the establishment of policies and the development of an excellent master plan. Instead the FIP chose to ignore the critique and urged the commencement of the physical restoration phase of the project.³⁵ The DLNR also ignored the findings in the critique and authorized the restoration to proceed.³⁶ Since the inception of the physical restoration phase, there was no effort to further develop a master plan for the project.

The DLNR officials have stated that the department has been unable to update the master plan or develop other plans because of the lack of resources, including manpower and funds. They further indicated that the programming of the restoration project was not feasible due to the uncertainty of funding levels.³⁷

If the department lacked the resources as stated, it would not be unreasonable to expect the department to have

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immediately initiated steps to obtain the necessary resources to plan the restoration of the State's most important historic treasure. The Bureau's study, however, indicates that such steps were not taken by the department.³⁸ In regards to the programming of the project, the critical issue is not whether the plans are changed or projections altered, due to varying funding levels. What is more important is that a basic plan is articulated so that everyone concerned is aware of the direction, and approximate time period in which the restoration may occur.

It is recommended that upon the development of basic policies concerning restoration and operation of IP Complex, a master plan for the restoration project be developed.

C. OTHER PLANS AND PROPOSALS

The IP is one of the most valuable and treasured historical resources in the State of Hawaii. One of the primary objectives of the restoration project is to restore and preserve IP and other historical facilities on the IP grounds in an historically accurate manner. However, it should be remembered that the physical restoration of the facilities is not an end in itself. Equally important is the story that the restored facilities is intended to tell and the manner in which that story will be told. The physically restored Complex, together with the furnishings and other artifacts to be displayed therein, and the other resources including personnel, are part of the medium of communication of the story. It is part of the goal of the restoration, therefore, to design the restored facilities, to the extent possible, to accommodate the program and services demands projected for them.

Illustratively, depending on whether an unguided (free to browse) or guided (accompanied by docents) tour format is used to display the IP, there may be a greater or lesser requirement for security of the artifacts to be displayed. For example, the selection of an unguided format may conceivably require the installation of numerous built-in display cases and security devices into walls and entry wells of the facility. In addition, special provisions for air-conditioning and humidity control required for the preservation of artifacts may be considered. These requirements then obviously have significant impact on the manner in which the facility is to be restored. It becomes very important, therefore, that all components of the restoration and operation of the IP Complex, including the story to be told, how it is to be told, and by what means it is to be told, are identified, developed, and integrated into a common restoration plan.

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Inadequate Development of Plans. The Bureau's review of the restoration project revealed that an integrated plan for the restoration of the IP Complex as previously described has not been developed. While physical restoration plans have been developed for specific facilities, definitive plans relating to the manner in which the IP and other IP Complex facilities are to be exhibited, linked to each other, and utilized to convey the story of the Monarchy have not been developed. These include plans delineating the program and services to be provided, visitor flow plans, and artifact and furnishing placement plans, which plans, as indicated previously are essential to support the physical restoration work. As a consequence of the above, the physical restoration of the IP Complex is currently proceeding without a clear notion of what the total IP Complex program looks like.

This observation is not intended to imply that no attempts have been made to develop these important plans since many reports have been written recommending a wide variety of programs and services which should be offered by the restored IP Complex (the various proposals are discussed further in chapter 11). However, the study reveals that none of the "plans" proposed has been accepted as the official program, services, and operations plan for the IP Complex.

In the absence of a definitive official plan, many difficulties and problems have been encountered in the physical restoration of the IP Complex. In addition, many potential operations problems may surface because the facilities, as currently being restored, may not be adequate to accommodate the programs and services finally decided upon. Some of these problems are illustrated in the following section.

The IP Restoration Plan. In March 1972 the office of Geoffrey W. Fairfax, A.I.A., developed the Iolani Palace Restoration Architectural Report. This report is now being used as the "master plan" for the physical restoration and development of the Complex, with all blueprints and details for the restoration coinciding with that report.³⁹ Although being utilized as the "master plan", this report was originally intended as a historical report and to provide some general recommendations regarding the physical restoration of Iolani Palace.⁴⁰ Inadequate basis for developing the plans was encountered as the authors of the report experienced some difficulties in developing the report, not being in possession of some basic information such as the manner of operation, the number of people on the staff, etc. The authors further noted that ideally, if the director of the

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IP operation had been available for consultation at that time, a much better job of developing the report could have been done. However, neither the director nor a definitive operations plan was available at that time.⁴¹

The need for decisions relating to operations to facilitate planning is also contained in the report--to wit:

*The future operation of the restored Palace will be greatly dependent upon the decisions that are made now and the facilities that are planned for. As a result, certain basic decisions must be studied and planned for immediately, in order that the best possible operation and interpretation may be achieved.*⁴²

Despite the lack of decisions as described above, the report was used as the basis for the restoration. The report recommended the installation of an elaborate electronic climate control, fire detection, and security system. The climate control system was to be installed in certain rooms to protect artifacts from deterioration, changes in moisture content and contact with pollutants. Other rooms were to be opened to allow visitor and air circulation to the verandas. The fire protection features of the system were to be based on heat sensors and smoke detectors. The heat sensors, smoke detectors, and air-conditioning diffusers and registers were all to be concealed so as not to interfere with the authentic appearance of the building. For this reason, the architect requested a well-prepared interpretative plan and a furnishings plan so that all possible furniture locations and visitor movements could be anticipated in the design of the system. The security system would be based on: sensors under the carpeting surrounding areas from which visitors would be asked to stay away; 2-way radios for contact between docents and the central monitor; wafers embedded in artifacts that would be sensed by antennas; and a microwave detection system for unauthorized movements during off-hours. "Such a system assumes that not only would there be docent guides, but that each gate of the Palace, if not locked, would have a guard in the uniform of the Royal Guard, besides at least one roving guard within the grounds during hours of operation. These guards would also have the small transistor radios and be able to respond to any break in security that might occur."⁴³

Pursuant to the recommendations of the architectural report, the climate control, fire detection, and security system (also known as the building automation system) has been installed, with one change. The air-conditioning system has been installed in all the rooms, and visitor penetration to the verandas will be through the central hallways only.

PLANNING INADEQUACIES

Consequences. As illustrated above, the physical restoration of the Iolani Palace is being done in the absence of a definitive operations plan. Various proposals are still under consideration (see chapter 11).

The installation of the building automation system prior to final determination of a program, services, and operations plan is in effect precluding alternative uses of the Iolani Palace Complex. For example, the installation and use of the system virtually eliminates consideration of the "at-will or free-visit" concept that appears to be implicit in some of the proposals under consideration, including one of the DLNR's proposals.

This view is substantiated by comments made by the architectural staff. The restoration architect in an interview stated that the entire Palace has been "architecturally designed to be used in a specific manner" and cannot be used any other way. "The system all works together", including security, air-conditioning, humidity control, and maintenance.⁴⁴ The supervising architect made a similar comment by stating that the Palace must be used in the manner recommended in the Alexander report (see chapter 11 for details). "Given the technical restoration decisions which have already been implemented, if the plan is not followed, the Palace will very rapidly disintegrate (including the artifacts) and all restoration work will have been in vain."⁴⁵

Kana'ina Building Plan. Plans for the renovation of the Kana'ina Building have been developed; in the absence of definitive approved plans, the Alexander report was used as the basis for the renovation plans. Based on the Alexander report, an auditorium, gift shop, exhibit galleries, public restroom facilities, and offices are being planned. Therefore, once again plans have been developed on the basis of unapproved plans, and despite the fact that policy decisions concerning the gift shop, orientation program, staffing, etc. have not been made.

Conclusions. Many of the plans necessary to support the restoration effort have not been developed. In the absence of these plans the restoration architect did not have much of the basic information needed for developing detailed restoration plans. Therefore, an operations scheme, following an unapproved program, services and operations plan, had to be assumed in developing plans or as the basis for developing the physical restoration plan.

Decisions made in such a manner have resulted in a facility which precludes the consideration of possible alternative ways of displaying the Palace. In addition, the

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facilities as restored might not fully meet the requirements of how the facility is to be eventually interpreted, thereby requiring physical adjustments, or if this is not feasible, a less desirable way of interpreting may have to be used.

SUMMARY

Many policies required to guide the restoration and operation planning for IP Complex have not been established. As a result, definitive plans including a master plan could not be developed. These deficiencies have resulted in the piecemeal restoration of IP Complex and may result in restored facilities that may not meet the requirements of how the facilities are to be eventually utilized. In addition while the IP restoration is almost complete, the Palace will be virtually an empty shell with little or limited artifacts and furnishings.

The deficiencies noted above point to the need for the immediate establishment of policies, and the development of a master plan to help guide and shape the restoration and operation of the IP Complex. The development of other plans such as the operations and artifact acquisition must rely on the policies established for their broad objectives. The preparation of specific plans or the continued restoration without an overall framework of specific policies and an approved master plan is illogical and unsound for an investment of the magnitude of IP.

Chapter 10

PROGRAMS AND SERVICES AND OPERATIONS

INTRODUCTION

This chapter discusses those aspects of the IP Complex relating to the provision of programs and services and operations and fiscal matters relating thereto. The observation is made that in these areas, in addition to the other areas discussed elsewhere in this report, firm policy decisions have yet to be made before the IP Complex can become operational.

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Restored historic sites and buildings are mute. To provide their greatest benefit, interpretive services should be made available. The following sections discuss the various plans and proposals that have been developed for IP.

Reports and Recommendations. In 1965, when Charles E. Peterson, under the auspices of the Junior League of Honolulu, made his recommendations for the restoration of Iolani Palace, he urged the re-creation of a Palace that would be an educational exhibit. He recommended that the Palace continue to be used for ceremonial occasions such as state receptions, luncheons and dinners, and that kahilis, flags, color guards, military bands, and cannon for salutes be available in conjunction with such occasions.¹

The 1970 Phase I Planning Report by George Moore listed as chief among the objectives of their education program the teaching of Hawaiian history, especially the story of the Monarchy.² To carry out this objective, a program for school groups needed to be developed, with teaching kits and pre-visit classroom orientation, the Palace orientation and tour, and post-visit follow-up materials. For other visitors, adult leisure-time activities would focus on the distribution of information, both within the Palace, where people could go to learn and to share information, and externally, through the media, by the publication of books and monographs, and the availability of films, slides, and tapes for use by various groups. The Palace was also envisioned as a resource center for information, training, and assistance to other museums in the State.³

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Project architect Geoffrey W. Fairfax, in his 1972 *Iolani Palace Restoration Architectural Report*, recommended that visitors be taken through the Palace with a docent, and that tour groups be limited in size to maximize the effectiveness of the interpretation. In addition, the stories of the basic history of the Palace, the restoration itself, and the individual members of the royal family, could be told through the use of exhibits in modern well-lighted galleries in basement rooms for which the original uses are uncertain.⁴

The architectural report further recommended installation of a climate control system to prevent deterioration of the artifacts. An electronic fire detection and security system would be tied in with the climate control system. This would entail the use of devices under the carpet to warn of visitors straying into forbidden areas, and wafers embedded in artifacts to sound a warning if they should be picked up.⁵

The FIP subsequently retained the services of Dr. Edward P. Alexander, noted museologist, to develop a plan for operating the Palace. Dr. Alexander's detailed report in January 1973 recommended guided tours in groups of 15 to 20. Visitors would be provided a free leaflet giving the history and floor plan of the Palace. A comprehensive guidebook would be available for purchase. The tour would start with an orientation program of not more than 15 minutes in a 100-seat auditorium in the Visitor Center in the Kana'ina Building, which would also house an exhibit gallery, sales desk, snack bar, and offices. Visitors would then be taken in groups of 15 to 20 on a 30-minute guided tour of the first and second floors. Durable, heavy carpet runners would be used to clearly indicate the tour path. Guides would also serve as guards against vandalism and theft. After the tour of the first two floors of the Palace, visitors would be free to tour the basement, Barracks, and grounds. The basement rooms, viewed through glass or by entry wells, would consist of a chamberlain's suite with financial records, steward's suite with wine racks, servant's furnished room, kitchen, kahili storage room, and craftsmen doing restoration work. The Barracks would house military equipment, uniforms, and musical instruments. The grounds would feature the tomb, gardens, and coronation stand.⁶

At peak visiting hours, stationary guides could be used, but the quality of interpretation would suffer. Another means of handling peak hour crowds would be to take larger groups on each tour, but here again the quality of interpretation would suffer.

Other activities which Dr. Alexander viewed as feasible included concerts, craft demonstrations, restoration activities, and the Royal Guard on view. For rare and important

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occasions such as a visit by a world leader, the Palace could be used for receptions. However, the building must be protected from harm on such occasions, and regular visitation should not be interfered with.

Souvenirs, publications, and reproductions could be offered for sale. Such items should be closely connected with the Palace and should advance its aims.

Research was seen as the basis for restoration and interpretation. A historical researcher should be a part of the permanent staff. Outside research scholars should also be encouraged.

In a document dated September 4, 1974, Colonel Judd, in an "Operations Plan for Iolani Palace Complex", further expanded on certain elements of the Alexander report. Using the Alexander report as a base, Judd provided more detail with respect to staffing, hours of operation, admissions, and flow pattern.⁷ Indeed, the thought and elaboration given to the flow pattern and use of staff indicate that much effort had gone into its development.

The FIP in August 1975 prepared a report entitled *Iolani Palace - A Conceptual Plan for Operation*. The plan emphasized local residents as the primary visitor group. It stated that the primary thrust of IP should be educational, since it was being restored as a living museum. It offered two possible methods of touring the Palace: first, with a guided tour; and second, with guides stationed at various points, giving talks and then directing visitors on a pre-determined route. Other means of carrying out the educational process could include lectures, seminars, workshops, concerts, craft demonstrations, and evening tours. Exhibits for the basement, Barracks, and Kana'ina Building could also be set up for use on the Neighbor Islands. The display "will permit greater in-depth self-interpretation of materials...."⁸ Admission fees would be used to help defray some of the operating expenses, and museum gift shop sales are expected to make a significant contribution.

In their "Five Years Operational Plan" issued in March 1976, the FIP reiterated their position that the basic thrust of their operational program would be educational. They felt that with carefully regulated attendance much of its operations could be self-supporting.

Exhibit 10.1 that follows compares the various plans discussed with respect to what is proposed for the primary program, who is the target group, specifics of programs and services provided, physical facilities contemplated, staffing,

EXHIBIT 10.1

PROGRAM AND SERVICES PLANS AND PROPOSALS

	<u>PROGRAMS AND SERVICES</u>	<u>OPERATIONS</u>	<u>METHOD OF PRESENTATION</u>
Some Recommendations for Iolani Palace, Charles E. Peterson, 5/29/65	<p><u>Primary Program:</u> Educational exhibit</p> <p><u>Target Group:</u> Not specified</p> <p><u>Programs and Services:</u> Ceremonial occasions State receptions, luncheons, and dinners Cannon for salutes, kahilis, flags, color guards, military bands Publication: "Iolani Palace Historical Register" - to share information as quickly as possible</p> <p><u>Physical Facilities:</u> Iolani Palace - to include modern caterers' serving kitchens Iolani Barracks</p>	<p><u>Staffing:</u> Not specified</p> <p><u>Hours of Operation:</u> Not specified</p> <p><u>Admission Policy:</u> Not specified</p>	<p><u>Type of Tour:</u> Not specified</p> <p><u>Flow Pattern:</u> Not specified</p>
A Report: Iolani Palace Restoration Project (Phase I Planning Report, also known as the Moore Report), 5/1/70	<p><u>Primary Program:</u> To tell story of the Monarchy To serve as resource center for information, training and assistance to other museums in State</p> <p><u>Target Group:</u> Not specified</p> <p><u>Programs and Services:</u> Pageants, concerts, receptions, significant public events Permanent exhibits: basic story of Palace Special exhibits: related to cultural environment - Aloha Week, Cherry Blossom Festival, etc. Children's program: previsit slide show, post-visit materials and follow-up Adult education program: leisure-time learning activities - Hawaiian history, collectors, tourists, teachers Programs carried to those unable to visit Carefully designed labels for plants on grounds Dissemination of information: Films, slides, tapes Publications - with help of Hawaii Foundation for History & Humanities, calendar of coming events, news magazine, books and monographs</p> <p><u>Physical Facilities:</u> Iolani Palace Kana'ina Building for curatorial-educational staff Gift shop in basement of bandstand Parterre garden on grounds Establish aviary and fernery Eliminate parking and vehicular traffic from grounds Remove present Archives Building</p>	<p><u>Staffing:</u> For education and public information program: education officer, public information programs officer, document supervisor, children's program assistant, instructional materials coordinator</p> <p><u>Hours of Operation:</u> Not specified</p> <p><u>Admission Policy:</u> Admissions should be charged; fee: \$1 Free to all 1 day/month Free to all children under 12, blind, crippled, students, servicemen</p> <p><u>Other:</u> The control system would control all lights, technimated effects, audio effects, optics, security and fire detectors, visitor guidance, visitor information services, internal program program or staff scheduling, visitor access controls, accounts keeping, reference and record retrieval, collection treatment records, etc.</p>	<p>None specified</p>
Iolani Palace Restoration Architectural Report (Fairfax Report), 3/1/72	<p><u>Primary Program:</u> Living restoration</p> <p><u>Target Group:</u> Not specified</p> <p><u>Programs and Services:</u> Not specified</p>	<p><u>Staffing:</u> Not specified</p> <p><u>Hours of Operation:</u> Not specified</p> <p><u>Admission Policy:</u> Not specified</p>	<p><u>Type of Tour:</u> Guided tour</p> <p><u>Flow Pattern:</u> Not specified</p>

PROGRAMS AND SERVICES

OPERATIONS

METHOD OF PRESENTATION

(continued -
Fairfax Report)

Physical Facilities:
Iolani Palace: first and second floor
tour; galleries in basement
Kana'ina Building: orientation center,
gift shop, offices, public restrooms
Barracks: exterior restored; interior
converted to museum for Royal Guard
Parking and vehicular access to grounds
eliminated
Carriage road and parterre garden on
grounds restored
Bandstand restored

Other:
Electronic fire detection, climate con-
trol and security system. Will use the
following: concealed smoke detectors
and air ducts; wiring in carpets, doors
and walls; wafers, microwave detection;
docents and guards; gates locked or
guarded.

Letter to Restora-
tion Committee
from DLNR staff
member (writing
as interested
private indi-
vidual), 5/14/72

Primary Program:
Historic house interpretation
Target Group: Not specified
Programs and Services: Not specified

Staffing: Not specified
Hours of Operation: Not specified
Admission Policy: Not specified

Type of Tour: Guided tour

Physical Facilities:
Iolani Palace: first and second floor
tour; basement for exhibit rooms;
gift shop
Barracks: orientation center, galleries
Coronation stand:
Bus parking: investigate possibility
of renting parking space along Richards
Street and charge tour companies for
parking there

Other:
Air-conditioning, if any, should be as
natural as possible - maybe just
central hallways and basement

Flow Pattern:
Enter grounds thru Richards
Street gate to Barracks for
orientation museum galleries,
slide show, or film and be
divided into groups for tour.
Guide escorts group to corona-
tion stand, then to IP thru
front doors
To Throne Room, then upstairs,
onto lanai thru mauka window -
rest of tour on lanais, view-
ing at windows and walking thru
lanai end of rooms. This
avoids overcrowding interior
halls and wear and tear on
building; offers more security
for collections; guides will
not have to watch visitors too
closely; can relate IP with
the group and the city.
On second floor, start with
Queen's Bedroom, go around
lanais, ending at King's Bed-
room, into hall thru window,
down stairs, out thru Ewa front
door to lanai and view Blue
Room and dining room from lanai,
down mauka stairs, stop at
Banyan tree and enter basement
at Waikiki end. View exhibit
rooms; guide leaves them at
gift shop across from Chamber-
lain's office.

An Interpretation
Plan for Iolani
Palace,
Edward P. Alexander
(Alexander Report),
1/5/73

Primary Program:
What the Palace should teach:
(1) Hawaiian contributions to history
(2) Everyday life at the Palace
(3) IP architecture, furnishings and
landscape
(4) The restoration process - authen-
ticity; craftsmen at work

Staffing:
Staff to include director, curator,
educational supervisor, historical
researcher, guide supervisor, 25-50
full- and part-time guides, school
supervisor, visitor center supervisor,
business manager, clerical and cus-
tomodial help

Type of Tour:
Orientation program: 15 minutes
or less - movie, slide show
Guided tour of 15 or 20 people:
30 minutes, 1st and 2nd floors
At-will touring of basement,
Barracks and grounds
Alternative methods:
Stationary docent system in peak
periods
Groups of more than 20 in peak
periods

Target Group:
Mainly tourist-oriented (LRB judgment)

Hours of Operation:
8:30 a.m. - 6:00 p.m. (9:30 p.m. when
busy)

Programs and Services:
Research: interpretation based on
research by permanent staff member;
encourage outside research scholars
Uniformed Royal Guard: changing of
Guards ceremony
Band concerts, strolling musicians
Craft demonstrations
Evening programs
Tie-in with nearby attractions: Capitol
District, Bishop Museum, Queen Emma
Palace, Falls of Clyde
Seminars, workshops on Hawaiian history
Use of IP by state government and others:
receptions for world dignitaries - on
rare occasions - should not interfere
with regular visitation

Admission Policy:
Grounds open to public
Palace (include basement) and Barracks:
Paid admission - \$2 adults
\$1 children
50¢ school groups
Residents - 1 free Sunday/month

Flow Pattern:
See film at Visitor Center, then
to front door of IP. Groups of
20 every 5 minutes. Tour of not
more than 30 minutes, 5 minutes
interpretation at front door,
then enter IP; go left thru
Blue Room to dining room for 5
minutes. Upstairs, left into
King's Bedroom for 5 minutes, to
library (Cabinet Room) and Gold
Room (music room), cross hall to
Queen Liliuokalani's Bedroom,
5 minutes regarding imprison-
ment. If possible, out window
thru tower room along lanai,

Other:
Security:
Fire protection by fire resistant
construction, warning system,
extinguishers
Theft and vandalism - guides; items
placed beyond reach of visitors,
wafers, electronic systems at night;

PROGRAMS AND SERVICES

OPERATIONS

METHOD OF PRESENTATION

(continued -
Alexander Report)

Sales desk:
Reproductions and souvenirs
Publications - folders, guidebooks,
series of booklets
Postcards, slides
Printed folder and guidebook: free leaf-
let with each ticket - history, map,
floor plans - serve as guide and
promotion piece; comprehensive guide-
book, 50¢; wholesale to tour companies,
hotels, etc.
Labels and signs: none on first and second
floors except on paintings that had
labels during Monarchy period. Basement,
Barracks, grounds may have labels

gates locked at night
Temperature, humidity and air pollu-
tion - controlled by air-conditioning
system
Collections: avoid substituting period
pieces or reproductions if originals
are known to exist. Make arrangements
with Bishop Museum for their pieces.
Try to acquire items by unconditional
gift or purchase. Full accession and
catalog records.

thru window in hall to left of
staircase. Down stairs, left to
Throne Room, 5 minutes; to cen-
tral hall, exit from back door
of Palace. Durable heavy run-
ners on rugs and floor to indi-
cate tour path.

Physical Facilities:

Kana'ina Building:
Visitor center, ticket and information
desk, 100-seat auditorium, exhibit
gallery, sales desk, snack bar, rest-
rooms and offices
Iolani Palace:
First and second floor tour
Basement:
Period rooms in basement viewed thru
glass on entry wells - Chamberlain's
suite with financial records;
steward's suite with wine racks;
servant's furnished room; kitchen
Other basement rooms viewed thru
windows from moat: Kahili storage
room, restoration craftsmen at work
Exhibit galleries in basement
Barracks:
Military equipment, uniforms, musical
instruments
Officers' and soldiers' rooms
Grounds: tomb, parterre garden, corona-
tion stand

Preliminary
Operations Plan
for Iolani Palace
Complex (Judd
Report), 9/4/74
(developed from
Alexander Report)

Primary Program:

Public appreciation and understanding
of Hawaiian Monarchy

Target Group:

Mainly tourist-oriented

Programs and Services:

Similar as in Alexander Report
Royal Guards: provide security and
color
Guides in distinctive dress

Physical Facilities:

Iolani Palace: tour of first and second
floors; basement - displays (period
history, personalities and restoration)
Barracks: rooms simulating period of
military usage; display galleries
Gift shop: no space in Kana'ina Build-
ing; if entry to Palace basement is
only thru guided groups, shop should
be on Ewa side of Barracks
Kana'ina Building for orientation center
Grounds: closed to vehicles

Staffing:

Staff of 71 persons, including director,
curator, historical researcher,
clerical, sales and custodial staff,
11 Royal Guards, 29 guides, and 2 guide
supervisors

Hours of Operation:

Grounds open 8 a.m. to 5:30 p.m. daily
except Christmas, New Year's, Thanks-
giving

Admission Policy:

Assumption: to be self-sustaining thru
admission fees

Maximum of 1,920 persons a day
1 free day/month for residents
(max. capacity 24,000/yr.)
Free for students
(max. capacity 24,000/yr.)
350 days of paid admission/yr.
1 school group at 8:00 plus one
other time slot

Type of Tour:

Preferred: guided tour of 15-20;
96 tours per day, 16 guides/day
at 6 tours each
Alternative: stationed guides

Flow Pattern:

Same pattern as in Alexander
report:
15 min. - Orientation film
5 min. - Marshal into group-
ings
45 min. - Guided tour
1 hr. 5 min.

1st floor hallway - 5 min.
Blue room, dining
room - 5
King's suite - 5
Front lanai - 5
Queen's suite - 5
Throne room - 5
Basement - 10
Grounds - 5
45 min.

Iolani Palace: A
Conceptual Plan
for Operation,
FIP, 8/75

Primary Program:

Interpretation and preservation of
IP's historic past

Target Group:

Mainly residents and children

Programs and Services:

Recreations: concerts as played in IP,
Kalakaua's coronation, etc.
Lectures, seminars, workshops
Concerts, craft demonstrations, evening
tours

Staffing:

Staff to include 32 persons, including
director, curator, 3 security guards,
1 security chief, 8 full-time guides,
and 7 part-time guides. Should hire
local people.

Hours of Operation: Not specified

Admission Policy:

Admission fee to help defray expenses -
start with \$1 when Complex not fully
operational. Free days for residents.

Type of Tour:

Two ways to tour:
(1) Guided, set tour
(2) Stationary guides - at will

When orientation center open:
professional orientation film;
in meantime guides to perform
this function

Flow Pattern: Not specified

	<u>PROGRAMS AND SERVICES</u>	<u>OPERATIONS</u>	<u>METHOD OF PRESENTATION</u>
(continued - Conceptual Plan)	In second year establish gift shop Special tours and lectures for specialized groups, churches, civic etc. Exhibits and recreations of events Neighbor Islands	Tourists: coordinate so that set numbers can be admitted on a pre-determined schedule Projection of 250,000 visitors per year, or 685 per day.*	
	<u>Physical Facilities:</u> Iolani Palace: first and second floor tour; galleries in basement Kana'ina Building: reception center, auditorium, galleries Barracks: galleries Grounds: burial site, gardens		
Preliminary Cost Estimate for Iolani Palace Operation, DLNR, 12/5/75	<u>Primary Program:</u> Not specified <u>Target Group:</u> Not specified <u>Programs and Services:</u> Not specified <u>Physical Facilities:</u> Iolani Palace	<u>Staffing:</u> Staff of 18 persons, including director, interpretive specialist, 6 guides, 1 guide supervisor, clerical and custodial employees <u>Hours of Operation:</u> 8:00 a.m. - 4:00 p.m., 5 days/week <u>Admission Policy:</u> Not specified	<u>Type of Tour:</u> Guided tour of 20 minutes at 5-minute intervals.** <u>Flow Pattern:</u> Not specified
Interviews with Restoration Architect, 4/1/76, 9/24/76	<u>Primary Program:</u> Not specified <u>Target Group:</u> Not specified <u>Programs and Services:</u> Not specified <u>Physical Facilities:</u> Iolani Palace: first and second floor tour; basement for galleries Kana'ina Building: orientation center, gift shop, public rest-rooms Barracks: Royal Guard museum Grounds	<u>Staffing:</u> Not specified <u>Hours of Operation:</u> Not specified <u>Admission Policy:</u> Will be self-sustaining. Should use admission fees as control mechanism over the number of visitors expected <u>Other:</u> Wafers for small objects, on items in close proximity to audience	<u>Type of Tour:</u> Guided tour of IP, Kana'ina Building, and Barracks At-will thru grounds and IP basement <u>Flow Pattern:</u> 10 groups at same time ok 2-3,000/day extremely realistic with longer hours Will not penetrate any rooms to go into lanais Stay on carpets, doors closed except entry doors--docents watching or leading. Basement completely air-conditioned.

*In a digest of this Conceptual Report, dated 2/20/76, the Friends of Iolani Palace changed its projection, stating: "...should anticipate...no more than 300/day in first 6 months. If we revert to original...of 700,000-1,000,000/year, ...Palace will be interpretively meaningless".

**During an interview with DLNR officials on October 4, 1976, the following alternative method of touring was suggested: taped interpretive talks, with at-will touring. This method would require a staff of 10 people.

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hours of operation, admission policy, and other significant aspects. To the extent that any of the foregoing was not specifically mentioned in a proposal, the notation "not specified" is entered. For purposes of meaningful comparison, the chart has subcategorized key elements under three headings: Programs and Services, Operations, and Method of Presentation.

GENERAL COMPARISON OF PROPOSALS

The preceding exhibit comparing programs and services and plans and proposals illustrates the great diversity in coverage, or lack thereof, contained in thoughts, both written and oral, about the operational aspects of telling the story of the IP Complex.

Generally, except as follows, each of the nine proposals charted are not necessarily related. Bureau research indicates that the Fairfax report (3/1/12) incorporates certain concepts derived from the Alexander report (1/5/73). The Judd report (9/4/74), particularly the details spelled out on flow pattern, was developed based on the Alexander report (1/5/73). In addition, the FIP conceptual plan (8/75) was formulated to respond to certain comments received on the Judd report.

Generally, most proposals (7) have an identifiable primary program and all mention, to a greater or lesser degree, what are the physical facilities involved. The majority of proposals also touch upon the type of tours (7 proposals), programs and services (5 proposals), staffing (5 proposals), and admission policy (5 proposals), although the details of the coverage vary. On the other hand, such critical matters as who is the target group and what are the hours of operation are only delineated in two (three, with one by Bureau attribution) and three, proposals, respectively. Where discussion on flow patterns is given (4 proposals), it is generally presented with much detail. The Judd report, based on the Alexander report, presents an elaborate and thorough consideration of the subject. Finally, in the area of other considerations, where such appears (5 proposals), the discussion generally focuses on security and artifact preservation concerns.

The point to be made by the foregoing charted comparisons is not to select one proposal over another but to indicate that decisions must be finalized, after careful review, discussion and consideration of what is proposed and to be proposed, on each one of the elements listed. The

PROGRAMS AND SERVICES AND OPERATIONS

following discussion on the choice of the manner in which the IP Complex will be interpreted illustrates the importance of the need for final decisions to be made and the effect on the subject in the absence of such decisions.

Interpretation Programs Proposed. Thus far, the various reports have recommended two methods of touring the Palace. The first method would have specially trained docents taking small groups on guided tours. This method would provide a personalized, comprehensive tour of the Palace, but would limit the number of people that could be accommodated. A second method involves stationing docents at various strategic points to answer questions and to direct people on a pre-determined route. Visitors would move at-will with guidebooks in hand. This second method would allow greater numbers to view the Palace, while reducing the number of docents required. However, the interpretation would not be as comprehensive as under the first method. With either method, the docents would act as guards to watch against vandalism and theft.

A third method of interpretation has been proposed. In a recent interview, the DLNR proposed that pretaped interpretive talks be installed at key points throughout the Palace.⁹ This method would require a minimum of personnel. However, this would also be the most impersonal method of interpretation. The security system to be used in connection with this approach was not discussed.

No Decisions Rendered. As early as 1972, the architectural report contained a warning that "the future operation of the restored Palace will be greatly dependent upon the decisions that are made now...certain basic decisions must be studied and planned for immediately, in order that the best possible operation and interpretation may be achieved".¹⁰

Despite this early warning, no decisions have been made regarding the actual operation and management of the Palace. The FIP has offered suggestions on methods of touring the Palace and for a museum gift shop, but has not had the authority to make any firm plans or commitments. The DLNR, taking the approach that it has not been given the authority to do so, has not formulated any plans or guidelines for the management or operation of IP.

Effects of the Lack of Decisions. Despite the lack of decisions regarding the future operation of IP, the restoration project has been carried out and is nearly complete. The extremely costly building maintenance system has already been installed, and a highly sophisticated computer console purchased to monitor the system for temperature and humidity

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deviations, fire, unauthorized movements, and other breaches of security. However, no one connected with the restoration project can say exactly how this system is to be used, and many questions remain unanswered. Will the system be manned by Palace personnel after regular museum hours, or will it be connected with local fire and police departments? What are personnel requirements to operate and maintain the system? What will operating expenses be?

The installation of the building maintenance system virtually mandates the presence of a large number of guides or docents to ensure that the system is properly used. Doors must be kept closed, visitors must remain on the carpet runners, and artifacts cannot be picked up and handled by the curious. The group chosen to operate IP will need to keep these restrictions in mind when planning their interpretive program.

FISCAL ASPECTS OF PROGRAM SERVICES AND OPERATIONS

Cost Projections. In the absence of any definitive plan for operating the IP Complex, divergent cost estimates have been prepared. The DLNR, in a December 1975 budget proposal, estimates a total operating expense of \$266,000, of which \$149,900 would be for salaries. This budget allows for a 20-minute guided tour and a staff of 18, including 2 security guards, 6 guides, and a guide supervisor. A five-year operational plan proposed by the FIP in March 1976 calls for a first-year budget, before the Complex is fully operational, of \$519,400, with \$197,100 for salaries. The annual budget increases each year until after the fifth year, when it would presumably be fully operational, and therefore stabilized to a degree. The budget then would call for \$461,000 in salaries and a total operating budget of \$762,900. The FIP plan starts with a first-year staff of 24, increasing to 32 in the fourth year, when it would have on its staff 12 full-time and 3 part-time guides, and 4 security guards. A comparison of the DLNR and FIP budget estimates is provided in Exhibit 10.2.

It is apparent that the scope of the IP Complex's program and services can vary widely, depending on the emphasis placed on the various services to be rendered. An in-depth interpretive program will require a large staff of well-trained docents, while at-will touring will require a minimum of guides performing a minimal interpretive function. Broadening the scope of the services to be provided to the public will also have an effect on the total level of expenditures.

Exhibit 10.2

COMPARISON OF BUDGET ESTIMATES
DLNR AND FRIENDS OF IOLANI PALACE

	DLNR ^a	FRIENDS OF IOLANI PALACE ^b					
		1st Year	2nd Year	3rd Year	4th Year	5th Year	6th Year
General Operations							
Salaries	\$149,908	\$197,175	\$233,432	\$292,978	\$361,065	\$408,003	\$461,043
Employee Benefits	--	25,633	30,346	38,087	46,938	53,040	59,935
Maintenance - Equipment & Building	6,400	12,000	13,500	15,750	17,572	19,856	22,437
Maintenance - Grounds	4,400	14,700	15,435	16,978	18,942	21,404	24,187
Electricity	60,000	68,000	60,000	63,000	70,290	79,428	89,754
Printing & Publications	11,000	20,000	20,000	5,000	5,000	5,000	5,000
Insurance	--	18,000	15,000	15,750	17,572	19,856	22,437
Other	15,000	21,400	20,075	22,763	25,483	28,795	32,536
Equipment	13,270	32,000	4,500	4,500	5,085	5,745	6,491
Motor Vehicle	6,000	--	--	--	--	--	--
Artifact Restoration	--	84,000	20,000	20,000	22,600	25,538	28,858
Exhibit Design & Construction	--	26,500	35,000	15,000	8,000	9,040	10,215
TOTAL	<u>\$265,975</u>	<u>\$519,408</u>	<u>\$467,288</u>	<u>\$509,806</u>	<u>\$598,547</u>	<u>\$675,705</u>	<u>\$762,893</u>
Number on Staff	18	24	24	28	32	32	32

a. Summarized from data presented in Operating Budget Requirement for Iolani Palace--First Year, DLNR, December 5, 1975.

b. Summarized from data presented in Iolani Palace Complex/Five Years Operational Plan/1 July 1976 - 30 June 1982.

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On the other hand, a realistic appraisal of the budgets described above raises questions as to whether they have been adequately considered. The restoration architect feels that in view of the way IP is being restored, particularly with the installation of the building automation system, the DLNR approach using only six guides would not be workable.¹¹ An interview with a museum expert revealed his feeling that the salaries for a few positions should be higher in order to attract well-qualified applicants.¹² Neither plan appears to provide for the personnel needed to operate and back up the building automation system. The system requires monitoring around the clock, thus necessitating a minimum of 4.2 full-time equivalent employees.¹³ In addition to monitoring the console, another person is needed at all times to back up the system, responding to alarms when required, therefore necessitating additional personnel. Final determination remains to be made on whether the system is to be operated by IP Complex employees or be hooked in to the local fire department or a private alarm company after normal museum hours. In the latter two cases, it is doubtful whether employees of such operations would have the required sensitivity regarding the value of the building and artifacts.

It will be extremely difficult to make an accurate projection of operating costs until basic policy decisions are rendered. Revenues, if any, would depend not only on the admission policy, but also on the availability of automobile and bus parking or passenger discharge areas, promotion, and cooperation with tour operators, among other factors. The level of expenditures will depend to a large extent upon the number of visitors, the type of interpretation program offered, the quality of services rendered, personnel requirements, and the maintenance and utility charges for the building automation system. These considerations point to the need for the rendering of basic policy decisions in order that a realistic budget for operations can be developed.

Chapter 11

SOME POLICY ISSUES

INTRODUCTION

Previous chapters have discussed the importance of certain policy decisions which need to be made and which have not been made. This chapter focuses primarily on the policy issue of self-sufficiency and five subsidiary policy issues which, while in a sense, are separate policy issues also have ramifications upon the issue of self-sufficiency. The discussion that follows also illustrates the interrelatedness of the decisions to be made on each of the five issues since each separate decision made cannot be rendered without consideration of the impact of that decision on the other four issues.

THE PROBLEM OF SELF-SUFFICIENCY

In the past, the legislature has indicated its desire that Iolani Palace be a self-sustaining operation. House Concurrent Resolution 69 (1975), relating to the leasing of IP to the FIP requested that Palace operations be essentially self-supporting and self-sustaining. More recently, Senate Resolution 403, S.D. 1, adopted by the Senate in 1976 stated in part that: "The Iolani Palace Complex shall be as fully self-supporting as is practicable...."

In the course of its study, the Bureau examined the question of whether IP operations could be self-sustaining. The following discussion presents the results of our inquiry.

An expert on historic sites has indicated that the IP Complex could be self-sustaining if admission fees were set at a high level and groups were small. A state subsidy would be necessary, however, if an interpretation program were to be provided.¹ The Friends of Iolani Palace in a testimony have stated that the Complex can be self-supporting and can even show a surplus within the second year of operation.² This was based on a projected visitor attendance of 560 adults and children daily for the first year, assuming the Palace is open seven days a week. In addition, ten school classes a month would be escorted through the Palace during the regular school year. Projected attendance would rise to 750 persons and three school classes a day in the second year, and level off at 1,500 persons and three school

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classes daily in the fourth year. Admission fees would be reduced during the first 18 months prior to the Complex becoming fully operational, then would be set at \$3 for adults and 25 cents for children, with no fees to be charged school groups. The projected surplus is dependent on admission fees only, and is predicated upon the following factors:

1. A daily paid attendance of 1,500 persons.
2. An admission fee of \$3 for adults and 25 cents for children.
3. No commission or discount to tour companies taking visitors to the Palace.

In connection with the third point, it should be noted that field studies indicate that tour operators generally receive a discount or commission ranging from a minimum of 10 per cent to a maximum of 20 per cent.³ With reference to projected operating expenditures, a review indicates that the figures are probably understated. Thorough analysis, however, was not undertaken because certain basic policy decisions, as described below, upon which operating expenditures will depend have not as yet been made.

Other studies strongly suggest that the Complex will not be self-sufficient. The Legislative Reference Bureau's survey of museums and historic sites conducted in 1976 shows that although admission fees are charged at most museums, none of them are able to operate on their admission fee income alone.⁴ To cover expenditures, museums must rely on government grants or subsidies, endowments, contributions, and gift shop and food concession sales. An earlier Legislative Reference Bureau survey revealed that to operate effectively, museums must have either large endowments or heavy tax support.⁵ A study by the American Association of Museums of over 2,000 museums also found that most museums rely on a combination of private and public funds for support.⁶

Bishop Museum, which enjoys an international reputation as a museum and research center for Pacific Basin studies, has had to ask for legislative appropriations in recent years. Despite generous endowments and contributions and the instituting of admission charges, together with an aggressive promotion program, Bishop Museum nevertheless has been operating at a deficit.⁷ Bishop Museum does differ from the way that the Iolani Palace Complex is being conceptualized in that it operates a planetarium-observatory, maintains scientific laboratories and research facilities, and issues popular and scientific publications. However,

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Bishop Museum closely resembles Iolani Palace in that both focus on Hawaiian history and artifacts.

Interviews with two museum experts with museum-operating experience indicate that the Iolani Palace Complex cannot be self-sustaining. Dr. Barnes Riznik, Director of the Grove Farm Plantation and Waioli Mission House on the island of Kauai, and formerly associated with the Old Sturbridge Village in Massachusetts, has stated that he is not aware of any museum or historic site that is presently self-sufficient. Old Sturbridge Village, which was self-sufficient up to a few years ago, is now operating with a slight deficit. Dr. Riznik feels that it would not be fair for the State to expect any group to operate the Complex on a self-sufficient basis.⁸

Dr. Roland Force, former Director of the Bishop Museum, also feels that the IP Complex cannot be self-supporting. He knows of no self-sustaining sites, except a few with large endowments. Under current trends, philanthropy towards this kind of activity is diminishing and museums are suffering financially; government subsidies are becoming more essential in museum operations.⁹

Conclusion. Based on the foregoing, it appears highly unlikely that the Iolani Palace Complex can become a self-sufficient operation. However, to close the discussion at this point would leave the problem unresolved. Therefore, it becomes necessary to consider the following question:

Assuming the Complex cannot be self-sufficient, what is the extent of state assistance to its operations?

This issue involves many policy decisions to be made with reference to the following factors. Generally, these factors affect either the revenue or expenditure side of the picture and may be stated as follows:

1. Should the operations of the IP Complex be geared towards residents or tourists, or both?
2. What should be the structure of admission charges?
3. What should be the level of the quality of services to be provided?

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4. What kind of parking and other accommodations should be provided?
5. What kinds of activities should be engaged in to collect supplementary revenues?

RELATIONSHIP TO THE ISSUE OF SELF-SUFFICIENCY

Each of the issues identified above has some bearing on the question of self-sufficiency. For example, the strategy used to maximize attendance and, consequently, revenues for the target group determined to be given the primary focus of IP operations will differ greatly depending on whether it is the local resident or the tourist. Similarly, the quality of services and programs and how they are to be provided have implications on the expenditure side of a self-sustaining operation. Admission charges, and the level at which they will be set, have an obvious connection as to how much will be raised in revenues. Parking and other accommodations to be furnished patrons, or the lack thereof, will have an effect on patronage, the significance depending on how critically the user feels it is needed. Finally, the use of other supplementary revenue sources may play an important role in achieving a greater degree of self-sufficiency.

However, in addition to self-sufficiency considerations, each of these issues itself brings with it decisions to be made. Final resolution of each issue is further complicated in that each decision made on a given issue, in turn, affects the decision to be made on a related issue as well as raises other issues which must ultimately be resolved. The discussion that follows touches upon selected problems encountered in the five areas.

1. Group to be Served

With the completion of the IP Complex and concurrent with the determination of what services and programs are to be provided by the project comes a decision as to what group should primary focus of the activities be directed. Specifically, should programs and services be geared to residents, tourists, or both?

To the extent that local residents are to be accommodated, provision must be made to take care of the needs and requirements of school and other special interest groups and perhaps to the extent of making "free admission" days available for residents periodically. Presentations should be designed, and fees charged at a level to maintain the

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interests of local residents so that repeat patronage is encouraged. Parking accommodations may have to be provided.

To the extent that emphasis is placed on promoting tourist visits to IP, it appears that promotional activities, both locally and on the mainland, may be called for. In addition, the cooperation of tour operators must be sought. Consideration may have to be given to some type of incentive for tour operators such as discounting block sales of tickets to the IP Complex. If busload visits to the facility are contemplated, scheduling of visits must be coordinated and provision for the loading and unloading of visitor groups worked out.

2. Quality of Services to be Provided

The issue of quality of services to be provided is closely related to and in a large measure will depend on how services will be provided. The various considerations have been previously discussed in chapter 10.

3. Admission Charges

In considering the matter of admission charges, the initial question encountered is whether or not a fee will be charged in connection with IP. With the concern for attaining some degree of self-sufficiency, it is likely that an admission charge will be imposed. The imposition of a charge in connection with IP then raises a host of policy decisions to be made. These decisions can be broadly classified as involving the areas of how much and for what.

Amount of charges. Generally, it can be said that setting fees on the high end of the scale would tend to limit attendance which in turn could lead to lower maintenance and staffing costs. Setting fees at a moderate level would give the management of IP some income to work with and also provide some degree of control over attendance.

Based on the survey of visitors and residents undertaken by the Legislative Reference Bureau in July and August of 1976, most people would not pay more than \$1 for an unguided tour or \$2 for a one-hour guided tour.¹⁰ With respect to residents, the level of charges instituted may have a bearing on repeat visits by them, the higher the admission charges or the lack of an annual pass rate tending to discourage repeat local participation. Moreover, setting the amount of admission should not be done without considering the quality of the services and programs offered.

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What charges are for. The second issue under admission charges suggests a great variety of subissues. For example, should the admission fee cover entry onto the IP grounds, for the provision of a guided or unguided tour, or for any combination of the above?

If there were imposed a grounds admission fee, what, if any, would be the impact of such a policy on the use of the grounds by persons now using the grounds for lunch, park purposes, attending band concerts, promoting charity drives, installation of booths during Hawaiian holiday celebrations and the like.

If a fee were required for access to the IP grounds, such a policy may restrict the ability to derive additional revenues from a museum/gift shop operation for those patrons who do not want or need to enjoy the other facilities because of having been there before or in the recent past, but who want to purchase something from the gift shop specifically. In this connection, for example, similar operations at Sea Life Park, Kahuku Sugar Mill, Waimea Falls Park, Bishop Museum, and the Polynesian Cultural Center provide access to the shops without having to go through the admission procedure.

Despite the difficulties associated with the question as to whether or not an admission fee to the grounds should be imposed, the issue should not be decided against imposition because of the difficulties. If self-sufficiency is a goal, a charge for admission to the grounds, even though modest, could generate revenues by virtue of the volume of users such as tourists who may not have enough time to participate in a lengthy tour of the facilities but who would be satisfied in having their photographs taken in the proximity of Iolani Palace or on the grounds. This use of the grounds aspect becomes especially important if projected plans for the restoration of the grounds come to fruition.

With respect to guided or unguided tours and whether either or both should be provided, consideration must be given to the related issue of who is the target group to be served, i.e., residents, tourists, or both, and if both, under what kind of mix. If local residents are to be encouraged, the charge imposed and the kind of services and programs offered should be such as to promote repeat visits to maximize income. To the extent tourists are to be accommodated, constraints of time the visitor has on his island visit should be taken into account. For example, one response which recurred in the Bureau's survey was that some mainland visitors would pay more for an unguided tour than a structured guided tour for the reason that, because of the

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time factor, the former offered the individual greater flexibility in the use of his time while touring the Iolani Palace.

Conclusion. The issue of admission charges cannot be separated from other related issues such as who is the target group, what is the level of quality of services and programs, what are the means of getting to the site and even, how should the museum/gift shop be operated. The resolution of this and the related problems cited require many policy decisions to be made.

4. The Parking Issue

Existing plans call for the restoration of the IP Complex structures and grounds to the period of the Monarchy. All parking will be banned and vehicular traffic will be prohibited on the grounds. Plans also call for the reconfiguration of internal roadways to the Monarchy period and a coral-like roadbed to replace the current surface.

While these tentative plans have been developed for the Palace grounds, the plans have not been approved and the final implementation decision has not been made. Should these plans, however, be implemented as described, several problems relating to parking and traffic flow emerge which must be addressed and resolved. These are discussed in the following sections.

Alternate parking for state employees. The Iolani Palace Complex is located in the heart of the Capitol District where parking spaces are scarce and in great demand. There are presently 190 parking spaces for state employees and public use in Lot F located within the boundaries of the Iolani Palace Complex. During the legislative sessions, 60 of the 190 spaces are assigned to the legislative staff. If parking is eliminated from the Complex as tentatively planned, these vehicles will have to park elsewhere. To date, no decisions have been made on whether alternate parking will be provided for those being displaced and if alternate parking is to be provided, the location of such alternate parking.

Parking for visitors and tour buses. When IP is open for public viewing, it is anticipated that many visitors will be arriving on tour buses and private automobiles. A recent telephone survey conducted by the Bureau indicates that 75 per cent of resident visitors intend to visit the Palace Complex by car.¹¹ The 1972 FIP survey conducted on tour buses traveling around the Capitol-Palace vicinity indicate the need to accommodate an average of 58 buses and 27 stretch-outs daily.¹²

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With these facts in mind, decisions must be made as to whether or not to provide parking for tour buses and automotive parking, and to make provisions for unloading and boarding tourists. If it is decided to provide spaces for buses and visitors' cars, a specific plan must be formulated.

Traffic committee. In 1972, a traffic committee was established by the Friends of Iolani Palace. A number of groups participated at the meetings of the traffic committee in addition to the FIP: the department of transportation; the department of land and natural resources, responsible for historic sites; the department of accounting and general services, responsible for parking on state property; the city and county traffic management, responsible for streets and parking around the Iolani Palace Complex; and members of the visitor industry.

Although the committee was established to discuss all parking problems, bus parking became its major source of concern. While buses were prohibited from parking on the Palace Complex grounds (Lot F), cars and stretch-outs (which do not qualify for bus parking by PUC ruling) were not.¹³ School buses were also allowed to park from time to time on the grounds under a Special Function Request. No other concessions were given to buses except for the Royal Hawaiian Band.¹⁴

Complaints were made by the visitor industry that buses should not be singled out for the prohibition of parking on the Palace grounds. Furthermore, the industry felt that there would be no reason to include the Palace Complex on package tours if parking spaces were not provided for buses.¹⁵ This could cause far-reaching consequences as the restoration was geared in anticipation of visitors arriving on tour buses as well as the local public arriving by cars.

Among the alternatives which were attempted or recommended to remedy the bus parking problem were:

- (1) Unloading and parking on Richards and King Streets.¹⁶
- (2) Unloading passengers on the Palace grounds and parking on Richards and King Streets.¹⁷
- (3) Bus parking on the Waikiki side of the Palace front driveway to King Street.¹⁸
- (4) Bus parking on the mauka side of King Street from the Palace entrance.¹⁹

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- (5) Bus parking on Mililani Street from Queen Street to King Street with the installation of a pedestrian operated traffic signal at Mililani and King Streets.²⁰
- (6) Unloading and parking on the makai rather than the mauka side of King Street.²¹

Alternatives (1), (4), (5), and (6) were unsatisfactory largely due to the concern for the safety of visitors. It was felt that visitors crossing the streets in order to reach the Complex "created a definite safety liability to the city".²²

In November 1974, George Yamashita of the City and County Transportation Services produced a feasibility study for bus parking. The study recommended unloading at the Capitol Mall, a walking tour of the Capitol District and tourist pick-up at Mission Lane/Kawaiahao Street. Limousines carrying ten or more passengers would qualify as buses and be permitted to park in the above-mentioned areas. Parking for stretch-outs would be on Punchbowl Street.²³

The traffic committee has not met since January 7, 1975; however, it has not been disbanded. It was felt by the committee that action for parking provision can proceed only when the Palace is completed or near completion. Although George Yamashita of the City and County advanced the proposal, no formal steps have been taken to obtain approval and action from the City Council.²⁴

Mary K. Robinson, chairman of the traffic committee, has maintained contact with the tour operators regarding Yamashita's bus parking proposal. The operators are opposed to the plan preferring, rather, to be allowed to enter the Palace grounds to unload as had been done in the past. However, to make an exception for tour buses, when there are others arriving by various means also experiencing difficulty in obtaining parking would also cause problems.²⁵

Further action to formalize the bus parking proposal with the City Council might occur in 1977. It must be emphasized that the traffic committee is postponing steps pending completion of the Palace restoration.²⁶

Yamashita's plans directly affect the Mission Houses Museum located on King and Kawaiahao Streets. There are presently 23 metered spaces on Kawaiahao Street utilized by visitors to the Mission Houses. The Mission Houses Museum had independently requested metered spaces for their visitors

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who arrive by U-drive and public transport. There are no chartered tours to the Mission Houses; consequently, parking spaces are essential for accommodating visitors to the facility. It would be objectionable to the Mission Houses Museum to have the spaces taken over by tour buses bringing visitors to Iolani Palace but not necessarily to the museum. The Mission Houses facility is, however, receptive to a joint operation venture with Iolani Palace.²⁷

Finally, in the course of the Bureau's investigation of the parking issue, it was suggested that perhaps the City and County's mass transit parking lot on King and Alapai Streets might be used for visitor parking, at least during daylight hours when buses are out. Exploration of this possibility with a member of the City's mass transit office proved unfruitful since it was stated that the subject lot was being used for parking during the day by the City.

5. Supplementary Revenues - Museum/Gift Shop

A museum/gift shop for the IP Complex has been proposed by the FIP. To date, however, no final decision has been made as to whether there should be such a shop. The issue, therefore, as to whether or not a museum/gift shop should be established in connection with the operations of IP is a matter that must be resolved before the anticipated opening date of the Palace Complex.

Briefly, arguments in favor of a museum/gift shop for IP may be listed as follows:

1. A successful gift shop operation can be a substantial contributing factor in attaining self-sufficiency. Operations on the mainland United States such as Sturbridge Village, Mount Vernon, and Colonial Williamsburg have successful gift shop operations.
2. Depending on the articles sold at the gift shop,
 - a. it could serve as a means of providing materials and publications to disseminate knowledge of Hawaii's history;
 - b. it could serve as a vehicle to attract people to Iolani Palace.

On the other hand,

1. An unsuccessful gift shop operation could be an added expense of operation.

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2. Depending on the articles sold, it could detract from the image of Iolani Palace intended to be conveyed.

The following discussion elaborates further on the foregoing points and other aspects of a gift shop operation.

Location. Three proposals have been advanced regarding the location of a museum shop. These proposals are contained in *An Interpretation Plan for Iolani Palace*, *The Report on The Iolani Palace Museum Shop*, and the present blueprints of the Kana'ina Building.

Edward P. Alexander's report entitled *An Interpretation Plan for Iolani Palace*, January 1973, proposed the following:

The Kanaina (Old Archives) Building (1905) will serve as a Visitor Center and will contain toilets, ticket and information desk, an auditorium of about 100 seats, exhibit gallery or galleries, sales desk, perhaps a snack bar, and administrative offices.²⁸
[underlines added]

The *Report on The Iolani Palace Museum Shop*, February 1974, was the result of a study conducted by a committee organized to investigate the purpose and feasibility of a museum shop for the Iolani Palace Complex. The committee recommended that the shop be located in "the corner of the lower level of the Palace adjacent to the kitchen and across from the Chamberlain's office".²⁹ The advantages of this location were:

1. Noninterference with interpretation traffic flow, nevertheless, being surrounded by points of interest thereby drawing traffic to the shop;
2. Accessibility of freight elevator;
3. Accessibility to exit-entry for both delivery of merchandise and kamaaina traffic visiting only the shop;
4. Merchandise presented to tourists after the interpretation tour familiarizing them with the Monarchy period.³⁰

The report also makes several objections to the location of the shop in the Kana'ina Building:

1. Discouragement of "drop-in" traffic which the committee considers a main market for the shop;

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2. Return traffic to the shop after the interpretive tour minimized;
3. Motivation to buy reduced because visitors will be unfamiliar with the Palace history prior to the tour;
4. Lack of storage space.³¹

Despite the recommendations of the museum shop report and the absence of a final determination of whether there should be a museum shop, present architectural plans of the Kana'ina Building provide for a gift shop on the ground floor of the structure. Restoration plans for the Iolani Palace itself provides no floor space for a museum shop. This precludes any recommendations made by the museum shop committee. Plans should be finalized and approved in the immediate future so that construction can coincide with the renovation and restoration of the Complex.

Operations. It must be decided who will manage such a museum shop; whether the operation will be open to bid or operated by concession; the number of staff and their salary; and initial capital needed to open the shop. The recommendations of the *Report on The Iolani Palace Museum Shop* regarding these matters must be examined. The report suggested "an opening inventory of \$30,000 at cost and \$10,000 for back-up orders", and a staff of a manager (\$700/month), assistant manager (\$500/month), and two part-time employees (\$400/month combined).³²

Merchandise. Finally, if a shop is to be opened, decisions must be made regarding the merchandise to be sold in the museum shop. Proposals made by the Alexander report and the museum shop report should be taken into consideration. Alexander's report recommended the following:

*The Palace should develop certain relevant and tasteful objects to be sold at the Sales Desk in the Visitor Center--reproductions or souvenirs closely connected with the Palace and advancing its teaching aims. Examples might include a featherwork lei, a miniature featherwork kahili, calabashes, kalakaua coins, distinctive jewelry, miniature portraits of King Kalakaua and Queen Liliuokalani, small pieces of furniture, and other furnishings. The Sales Desk should also carry publications and audiovisual materials produced both by the Palace and by outside producers.*³³

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Furthermore, the *Report on The Iolani Palace Museum Shop* recommended that the shop offer "exclusive merchandise not offered in any other shop or Museum in Hawaii".³⁴ However, it might prove rather difficult to market items unique to the Iolani Palace Complex because there are several other museums in Hawaii with shops offering Hawaii-related books and objects for sale (see Exhibit 11.1). Among the objects suggested by the *Report on The Iolani Palace Museum Shop* for marketing are: books and publications; jewelry; pill boxes with tops of coin reproductions; coins; Palace spoons; dolls; kahilis; souvenir plates; prints; etchings; Palace Coat of Arms items; monarchy buttons, chess, checker, and cribbage sets; reproduction of Palace items; small pieces of furniture; crafts by woodworkers and kahili makers; color and storybooks for children; toys; postcards and audio-visual material.³⁵

Conclusion. If the decision is made to operate a museum shop, the following criteria developed by the museum shop committee should be studied:

1. The shop must help extend the educational value of the interpretation of the Iolani Palace Complex;
2. The revenues from the shop must help provide funds for museum activities;
3. The shop must merchandise items which help promote Iolani Palace as an historic and educational attraction, "meaning that any merchandise carried away is in actuality a further projection of the Palace study".³⁶

According to the *Museum Salary and Financial Survey* conducted by the American Association of Museums, only 3.4 per cent of a total of 775 institutions derived any revenue from sales shops (40.9 per cent of the total revenues came from various levels of government).³⁷ Based on the Museum/Historic Site Questionnaire conducted by the LRB, only 36 per cent of the 22 responding selected institutions reported income from gift shops/food concessions.³⁸ It is possible to derive some revenue from operation of a museum/gift shop. A case in point is Old Sturbridge Village, Massachusetts, which derives approximately 49 per cent of its income from gift shops and food concessions. However, the scale of operation for Old Sturbridge Village is much larger than for the Iolani Palace Complex. A museum shop will help generate some revenue to help with the financial operation of the Palace Complex, but income from museum shops, in general, appear to be a minor source of operating income and would

Exhibit 11.1

LIST OF ITEMS SOLD AT MUSEUM GIFT SHOPS IN HAWAII

HANAIEI: HANAIEI MUSEUM

Postcards
Handicrafts and art

HILO: LYMAN HOUSE MEMORIAL MUSEUM

Books
Local handcrafted objects
Stationary

HONAUNAU: CITY OF REFUGE NATIONAL HISTORIC PARK

Books
Postcards
Slides

HONOLULU: BERNICE P. BISHOP MUSEUM

Books
Jewelry
Authentic ethnographic reproductions
Handicrafts
Prints

HONOLULU: HONOLULU ACADEMY OF ARTS

Art books
Reproductions
Museum replicas
Slides
Cards
Books on Oriental and oceanic culture
Antique ceramics

HONOLULU: MISSION HOUSES MUSEUM

Books
Stationary
Games
Hawaiiana artifacts
Feather leis

KEKAHA: HUI O LAKA (KOKEE PARK)

Postcards
Books

LAHAINA: LAHAINA RESTORATION FOUNDATION

Books
Artifact reproductions
Prints

LAIE: POLYNESIAN CULTURAL CENTER
Polynesian artifacts and souvenirs

LIHUE: KAUAI MUSEUM
Hawaiiana books
Niihau shell leis
Prints and handicrafts from the South Pacific

MAKAWAO: HALEAKALA NATIONAL PARK
Slides
Postcards
Books

WAILUKU: HALE HOIKEIKE
Books
Hawaiiana
Jewelry
Curios

Other Historic Sites with Museum Shops

Ulu Mau Village
Sea Life Park
Falls of Clyde
Heritage House
Alice Cooke Spalding House
Paradise Park

Source: *American Association of Museums with National Register Publishing Co., Inc., Museums Directory of the United States and Canada (Washington, D.C. and Skokie, Ill.: 1975), pp. 124-127.*

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not make a facility self-supporting solely on shop profits.

Policy decisions for the operation of a museum shop for the Iolani Palace Complex should be made quickly so that the visitor will be able to receive the greatest amount of information and satisfaction from the facility. A museum/gift shop is only one of several ways in which a facility such as Iolani Palace could possibly obtain revenues. Other potential sources of income include: proceeds from endowment funds, membership fees, appropriations from tax funds, organization grants, fund raising activities, and private gifts and admissions.³⁹ Each of these should also be considered if the Iolani Palace Complex is to become self-sufficient and self-supporting to the extent possible.

PART IV
STUDY RECOMMENDATIONS

Chapter 12

FINDINGS AND RECOMMENDATIONS

FINDINGS

The Bureau finds that:

1. The implementation of the operation of the IP Complex is hampered by the total absence of an officially adopted master plan for the development and use of Iolani Palace. Progress made to date has occurred from a "de facto" plan which results by virtue of appropriations requested by DLNR on an incremental basis, rather than from a conscious overall preplanning effort.
2. The effects of a "plan" executed in this manner are:
 - (a) A lack of assurance that the physically restored IP Complex will be best adapted to the manner in which the story of the facility will be told.
 - (b) The possibility that modifications to the restored facility will be required to adapt to the manner in which the facility will be displayed, once the manner of display has been decided.
 - (c) The necessity of conforming the method of interpreting the IP Complex to the way in which it has been restored, rather than having the restoration done to complement and facilitate the telling of the IP story.
 - (d) A piecemeal approach to the completion of the IP Complex, which does not take into account the results and effects of the decisions that will be forthcoming on the matters discussed in item 3 hereafter.
3. Basic policy decisions have neither been recommended nor made by the agency under whose jurisdiction Iolani Palace falls. More specifically, these decisions, which must be established before a plan of utilization of the IP Complex, including who should operate it, can be put into effect include:

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- (a) Should Iolani Palace be considered a separate entity or a part of a larger complex under chapter 6, *Hawaii Revised Statutes*?
 - (b) To whom should the display of the facilities be directed: residents, tourists, or both? If both, under what kind of a mix?
 - (c) What is the manner in which tours will be conducted: guided, at-will, or both, and what are to be the days and hours of operation of the IP Complex?
 - (d) How will admission fees, if any, be charged?
 - (e) What structures, other than Iolani Palace and Iolani Barracks, are to remain on the grounds and how are they to be utilized?
 - (f) What should be the policy with respect to artifacts:
 - (1) What artifacts should be sought?
 - (2) Should acquisition be of the original, by replication, by purchase of substitute period pieces, or any combination thereof?
 - (g) What kinds of accommodations, if any, will be made for visitor parking?
 - (h) Should or should not a museum/gift shop operation be incorporated into the facility, and if so, where and by what means?
 - (i) What access, if any, should be extended to nonvisitors to the Complex, i.e., use for fund raisers, band concerts, lunch, etc.?
4. The Friends of Iolani Palace have done a creditable job in carrying out the restoration of the physical aspects of Iolani Palace. Hampered as they are due to the nonexistence of an approved master plan and very basic decisions which have not been made, they have improvised, within their limitations and under the circumstances, a basis on which work has proceeded. Furthermore, virtually all of the Friends' efforts in the area of research and planning have been done by them or with voluntary help.

FINDINGS AND RECOMMENDATIONS

RECOMMENDATIONS

The Bureau recommends that:

- 1. An Ad Hoc Commission be established to recommend to either the Legislature or to the Board of Land and Natural Resources, who would then recommend to the Legislature, the policies that should be adopted regarding the issues raised in item 3 of the Findings, hereinabove. The Ad Hoc Commission should be composed of representatives of a broad cross-section of potential users of the IP Complex, the public, and governmental agencies affected. In arriving at the recommendations, the Commission should solicit the views of all potential users, the public, community groups, and governmental agencies.*
- 2. The Ad Hoc Commission be delegated the responsibility of overseeing the operation of the IP Complex during the interim while the recommendations for the long-range administration of the IP Complex are being formulated, including the means by which the Complex will be administered. The Commission in its oversight should be free to experiment with various modes of operation for such periods as will enable it to ascertain whether a particular mode of operation is feasible and is responsive to the needs of those to whom the operations of the IP Complex are directed.*
- 3. Upon the adoption of a statement of policy covering the basic issues hereinabove discussed, priority be given to the development of a master plan for the IP Complex, which plan is to incorporate and implement the policy decisions made.*
- 4. A moratorium be placed on proceeding with any new physical restoration activity of a substantial nature until a master plan for the IP Complex has been developed and officially adopted.*
- 5. A joint interim legislative committee be established to review the progress of the Ad Hoc Commission in developing the recommendations for policy to be established and to furnish legislative guidance on the general direction the recommendations should address.*

FOOTNOTES

Chapter 3

1. Letter from Chairman of the Board, Department of Land and Natural Resources, January 8, 1976.
2. Joint Report of Transfer of State Historic Area and Buildings, Act 254, Session Laws of Hawaii 1967, Department of Accounting and General Services and Department of Land and Natural Resources, effective July 1, 1968.
3. Letter to Legislative Reference Bureau staff from State Comptroller, Department of Accounting and General Services, February 23, 1976.
4. Ibid.
5. The Friends of Iolani Palace, Iolani Palace Restoration Project Progress Report II to ... (Honolulu: 1974), p. 2.
6. "Where Royalty Strolled," Iolani Palace Historical Register, 1, No. 3 (Honolulu: 1967), [p. 4].
7. Ibid.
8. Ibid., [p. 3].
9. Ibid., [p. 2].
10. Supplemental Appropriation Worksheet, 1976-77, Act 226, Eighth Legislature, Session Laws of Hawaii 1976, State of Hawaii.

Chapter 4

1. Preliminary Plans of the Capitol Building for the State of Hawaii, prepared by Belt, Lemmon and Lo, Architects-Engineers in Joint Venture with John Carl Warnecke and Associates, Architects and Planning Consultants, March, 1961, p. 5.
2. Iolani Palace Historical Register, "Iolani Palace -- Hawaii's Past Today", sponsored by the Junior League of Honolulu, Inc., Vol. I, No. 5, May 1969, p. 1.
3. Preliminary Draft, Capitol Site Study, A Report Upon the Location of a Site for a Capitol Building for Hawaii, prepared by the Territorial Planning Office, August, 1958, p. 57.
4. A New Capitol for Hawaii, prepared for the 30th Legislature by the Territorial Planning Office, February, 1959, p. 18.
5. A Special Report on the Honolulu Civic Center Master Plan, to The Honorable John A. Burns, Governor, State of Hawaii, Honorable Neal S. Blaisdell, Mayor, City and County of Honolulu, submitted by the Civic Center Policy Committee, John Carl Warnecke and Associates, Architects and Planning Consultants, February 3, 1965, p. 2.
6. Ibid., cover page.
7. Ibid., p. A-4.
8. Ibid., p. 5.
9. Ibid., pp. 21-22.
10. Ibid., p. 23.
11. Ibid., p. 24.
12. Ibid., pp. 33-34.
13. Oahu Civic Centers Study, submitted to the City Planning Director of Honolulu by John Carl Warnecke and Associates, Architects and Planning Consultants, November 20, 1967, p. 60.
14. Honolulu Star-Bulletin, July 23, 1975, p. E-2.
15. Honolulu Star-Bulletin, June 28, 1972, p. H-1.
16. Dorothy T. Rainwater and Rhoda E. A. Hackler, "Silver from Iolani Palace, Honolulu," Antiques, February, 1971, p. 271.
17. Honolulu Star-Bulletin, June 29, 1975.
18. Rainwater and Hackler, p. 271.
19. Iolani Palace Historical Register, "Iolani Palace -- Hawaii's Past Today," sponsored by the Junior League of Honolulu, Inc., Vol. I, No. 5, May, 1969, p. 1.
20. Charles E. Peterson, "Some Recommendations for Iolani Palace," May, 1965, p. 1.
21. Ibid., p. 1.
22. Ibid., p. 4.
23. Iolani Palace Historical Register, "The Palace at Honolulu - A Legacy from the Past," sponsored by the Junior League of Honolulu, Inc., Vol. I, No. 1, November, 1966, p. 1.
24. Iolani Palace Historical Register, Vol. I, No. 5, May, 1969, p. 1.
25. Memorandum from the Chairman, Citizen's Advisory Committee, July 25, 1965, p. 1; and memorandum from the Chairman, Citizen's Advisory Committee, January 3, 1966, p. 1.
26. By-Laws of the Friends of Iolani Palace, July 5, 1966, p. 1.
27. Honolulu Star-Bulletin, January 22, 1971.
28. Ibid.
29. Letter from the President of the Friends of Iolani Palace to the Department of Land and Natural Resources, January 9, 1967, p. 1.
30. Hawaii Rev. Stat., 1968, chapter 6.
31. Friends of Iolani Palace Newsletter, Vol. I, No. 1, February, 1969, p. 2.
32. Honolulu Star-Bulletin, January 22, 1971.

33. The Sunday Star-Bulletin & Advertiser, January 24, 1971, p. 16.
34. Contract No. 12030 between the Board of Land and Natural Resources and the Friends of Iolani Palace, August 19, 1969, pp. 2-5.
35. Honolulu Star-Bulletin, July 20, 1970.
36. Honolulu Advertiser, July 19, 1970.
37. Friends of Iolani Palace Newsletter, Vol. I, No. 2, December, 1969, p. 2.

Chapter 5

1. Hawaii Rev. Stat., sec. 6-3.
2. Hawaii Rev. Stat., secs. 171-3 and 171-4.
3. Plan of Organization, State of Hawaii, July 1975, p. 11.
4. Interview with Chief, Division of State Parks, Outdoor Recreation and Historic Sites, and Planner, Development Branch, Department of Land and Natural Resources, October 5, 1976.
5. By-Laws of the Friends of Iolani Palace, July 5, 1966, p. 1.

Chapter 6

1. John Carl Warnecke and Associates, Oahu Civic Centers Study (Honolulu: 1967), p. 70.
2. Ibid., p. 60.
3. John Carl Warnecke and Associates, A Special Report on the Honolulu Civic Center Master Plan to ..., submitted by the Civic Center Policy Committee (Honolulu: 1965), pp. 23-24.
4. John Carl Warnecke and Associates, The Hawaii State Capitol Civic Center Master Plan to ..., submitted by the Civic Center Policy Committee (Honolulu: 1968), p. 69.
5. Interviews with State Parks Administrator and Development Branch Chief, State Parks, Outdoor Recreation and Historic Sites Division, Department of Land and Natural Resources, October 4-5, 1976.
6. George Moore et al, A Report: Iolani Palace Restoration Project (Honolulu: 1970), p. 208.
7. Ibid., p. 207.
8. Ibid.
9. Office of Geoffrey W. Fairfax, A.I.A., Iolani Palace Restoration Architectural Report (Honolulu: 1972).
10. Ibid., pp. 143-145.
11. Jane Silverman, Iolani Barracks Working Report for Completion of Reconstruction and a Plan for Museum Use (Honolulu: 1968), p. 1.

12. Ibid., p. 3.
13. Geoffrey W. Fairfax, Specification for Iolani Barracks Reconstruction (Honolulu: 1970), p. 2.
14. Interview with restoration project architect, September 24, 1976.
15. Dr. Edward P. Alexander, Director of Museum Studies, University of Delaware, was commissioned by the FIP to develop a plan for the operation of IP. He presented his report, An Interpretation Plan for Iolani Palace, on January 5, 1973.

16. Interviews with State Parks Administrator and Development Branch Chief, October 4-5, 1976.

17. Iolani Palace Restoration Project Progress Report, November 1, 1972, p. 12.

18. Iolani Palace Restoration Project Progress Report II, December 15, 1974, p. 7.

19. Ibid.

20. Ibid.

21. The report submitted in November 1976 indicates that the costs of restoring the state-owned furnitures are as follows:

35 side chairs	\$ 9,700.00
12 library chairs	4,200.00
12 throne room chairs	8,800.00
2 kahili stands	220.00
1 curio case	1,390.00
2 replica thrones	5,440.00
2 original thrones	920.00
various hardware for repair work	<u>1,500.00</u>
TOTAL	\$32,170.00

22. Interviews with State Parks Administrator and Development Branch Chief, October 4-5, 1976.

23. Harry H. Schnabel was subsequently hired by the FIP as a technical director for the restoration project between January 1975 and October 1976.

24. Estimated costs of renovating/restoring first floor State-owned Iolani Palace furniture, artifacts, draperies, Throne Room carpet, hardware and labor to include installation; March 1976, Addendum.

25. Interviews with State Parks Administrator and Development Branch Chief, October 4-5, 1976.

26. Ibid.

Chapter 7

1. George Moore and Restoration Project Staff, Iolani Palace Restoration Project (Honolulu: May 1, 1970), p. 176.

2. Friends of Iolani Palace, Iolani Palace Restoration Project, Progress Report II (hereafter referred to as Progress Report II) (Honolulu: December 15, 1974), pp. 4 and 6.

3. Moore, p. 54.

4. Interview with Geoffrey W. Fairfax, restoration architect, Geoffrey W. Fairfax & Associates, April 2, 1976.
5. Progress Report II, p. 6.
6. Interview with William Kea, Sr., Vice-President, Joseph Spielman, then Restoration Committee Chairman, and Helen Rantala, office secretary, Friends of Iolani Palace, June 9, 1976.
7. Progress Report II, p. 5.
8. Honolulu Star-Bulletin, March 6, 1976, p. A-6, and Honolulu Advertiser, March 8, 1976.
9. Interview with Aaron Levine, President, Oahu Development Conference, March 31, 1976.
10. Honolulu Advertiser, March 27, 1976, p. A-7.
11. Minutes of the FIP Board of Directors meeting, February 26, 1976, and Honolulu Star-Bulletin, March 25, 1976, p. B-4.
12. Minutes of the FIP Board of Directors meeting, March 25, 1976.
13. Telephone interview with planner, Division of State Parks, Outdoor Recreation and Historic Sites, Department of Land and Natural Resources, October 22, 1976.
14. Minutes of the FIP Board of Directors meeting, January 22, 1976.
10. Interview with President, Friends of Iolani Palace, March 19, 1976.
11. Interview with former Chairman, FIP Restoration Committee, March 31, 1976.
12. Interview with former acting director of Restoration Project, March 23, 1976.
13. Contract No. 12030, August 19, 1969.
14. Letter to T. M. Nickerson, Hawaiian Historical Society, from J. M. Souza, State Parks Administrator, Division of State Parks, Department of Land and Natural Resources, July 8, 1970.
15. Critique of Report Submitted by the IP Restoration Project Staff.
16. Ibid., pp. 25-26.
17. Ibid., p. 25.
18. Ibid., p. 27.
19. Minutes of FIP Restoration Committee meeting, October 21, 1970.
20. Minutes of Board of Land and Natural Resources meeting, September 25, 1970.
21. Telephone interview with Planner, Division of State Parks, Outdoor Recreation and Historic Sites, Department of Land and Natural Resources, October 5, 1976.
22. Response by Department of Land and Natural Resources to Legislative Reference Bureau Informational Checklist, January 2, 1976.
23. Interview with restoration architect, September 24, 1976.
24. The Alexander report will be discussed in chapter 10; the other plans have been previously discussed in chapter 6 of this report.
25. "Critique," p. 27.
26. Interview with restoration architect, April 1, 1976.
27. Interview with staff architect, December 15, 1975.
28. Interviews with Chairman and staff, Department of Land and Natural Resources, October 4-5, 1976.
29. Ibid.
30. Interviews with Vice-President and Secretary of FIP, and Chairman of the Restoration Committee, June 9, 1976.
31. Interviews with Chairman and staff, Department of Land and Natural Resources, October 4-5, 1976.
32. Ibid.
33. Interview with staff architect, June 29, 1976.
34. Operating Budget Requirement for Iolani Palace, Department of Land and Natural Resources, December 5, 1975.

Chapter 8

1. Hawaiian Historical Society, Critique of Report Submitted by the Iolani Palace Restoration Project Staff, undated, pp. 13-14.

Chapter 9

1. Edward P. Alexander, "An Interpretation Plan for Iolani Palace," p. 20.
2. Charles E. Peterson, "Some Recommendations for Iolani Palace," p. 2.
3. Alexander, p. 20.
4. Contract No. 12030, August 19, 1969.
5. Interviews with Chairman and staff, Department of Land and Natural Resources, October 4-5, 1976.
6. Geoffrey W. Fairfax, A.I.A., "Iolani Palace Restoration Architectural Report" (Honolulu: March 1, 1972), p. 149.
7. Interview with restoration architect, April 1, 1976.
8. Interview with staff architect, December 15, 1975.
9. Interview with Chairman, Department of Land and Natural Resources, State Parks Administrator, and Development Branch Chief, October 4, 1976.

35. Minutes of the FIP Restoration Committee meeting, October 21, 1970.
36. Minutes of Board of Land and Natural Resources meeting, September 25, 1970.
37. Interviews with Chairman and staff, Department of Land and Natural Resources, October 4-5, 1976.
38. Review of Department of Land and Natural Resources minutes, January 1969-December 1976.
39. Interview with staff architect, December 15, 1975.
40. Interview with restoration architect and staff architect, September 24, 1976.
41. Ibid.
42. Fairfax, p. 146.
43. Ibid., p. 149.
44. Interview with restoration architect, April 1, 1976.
45. Interview with staff architect, December 15, 1975.

Chapter 10

1. Charles E. Peterson, "Some Recommendations for Iolani Palace," May 1965, pp. 2, 3.
2. George Moore, et al., A Report: Iolani Palace Restoration Project (Honolulu, 1970), p. 29.
3. Ibid., p. 30.
4. Geoffrey W. Fairfax, A.I.A., Iolani Palace Restoration Architectural Report (Honolulu: 1972), p. 146.
5. Ibid., p. 148.
6. Edward P. Alexander, "An Interpretation Plan for Iolani Palace" (Honolulu: January 5, 1973), pp. 6-13.
7. "Preliminary Operations Plan for the Iolani Palace Complex" (Honolulu: 1974), pp. 3-12, 16-22.
8. Friends of Iolani Palace, Iolani Palace - A Conceptual Plan for Operation (Honolulu: 1975), p. 5.
9. Interviews with State Parks Administrator and Development Branch Chief, October 4-5, 1976.
10. Fairfax, p. 146.
11. Interview with restoration architect, September 24, 1976.
12. Interview with Dr. Barnes Riznik, August 24, 1976.
13. Based on following calculation:

$$\frac{168 \text{ hrs. per week}}{40 \text{ hrs. per employee}} = 4.2 \text{ employees}$$

Note: No provisions are made for sick or vacation leaves.

Chapter 11

1. Interview with Dr. William Alderson, Jr., Director, American Association for State and Local History, February 13, 1976.
2. Friends of Iolani Palace, Iolani Palace Complex/ Five Years Operational Plan/1 July 76 - 30 June 82, submitted to Senate Education Committee, March 4, 1976.
3. Interview with Vice-President, Greyhound Royal Hawaiian Transportation Co., and Vice-President and General Manager, Trade Wind Tours, August 13, 1976.
4. See Appendix C.
5. "Feasibility Study: State Acquisition of Bishop Museum" (Legislative Reference Bureau, University of Hawaii, Request No. 9442, 1972), p. 35.
6. American Association of Museums, America's Museums: The Belmont Report (Washington, D.C.: 1969), p. 43.
7. Honolulu Star-Bulletin, November 1, 1976, p. C-7.
8. Interview with Dr. Barnes Riznik, Director, Grove Farm Plantation and Waioli Mission House, August 24, 1976.
9. Interview with Dr. Roland Force, past Director, Bishop Museum, April 13, 1976 and April 28, 1976.
10. See Appendix B, Table 1, items 10 and 11; Table 2, items 6 and 7; Table 3, items 4 and 5; Table 4; and Exhibits B-4 and B-5.
11. Legislative Reference Bureau telephone survey (see Exhibit B-3).
12. Friends of Iolani Palace, tour bus survey, February 12-17, 1973.
13. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, July 12, 1973.
14. Ibid.
15. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, August 9, 1973.
16. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, November 29, 1972.
17. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, February 12, 1973.
18. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, May 1, 1973.
19. Ibid.
20. Ibid.
21. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, July 12, 1973.
22. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, August 9, 1973.
23. Friends of Iolani Palace, Traffic Committee minutes, Honolulu, November 12, 1974.

24. Telephone conversation with Mary K. Robinson, Chairman, Traffic Committee, November 13, 1976.
25. Ibid.
26. Ibid.
27. Interview with Gerard Bergh, Director of the Mission Houses Museum, November 9, 1976.
28. Edward P. Alexander, An Interpretation Plan for Iolani Palace (Honolulu: 1973), pp. 9-10.
29. Mary Foster, Report on The Iolani Palace Museum Shop (Honolulu: 1974), pp. 1-2.
30. Ibid., pp. 2-3.
31. Ibid., p. 4.
32. Ibid., pp. 6-7.
33. Alexander, p. 21.
34. Foster, p. 8.
35. Ibid., pp. 8-9.
36. Foster, pp. 1-2.
37. Kyran M. McGrath, "Museum Income Sources, by Geographic Region," Museum Salary and Financial Survey, Table 46 (Washington, D.C.: 1973), p. 62.
38. Hawaii, Legislative Reference Bureau, Museum/Historic Site Questionnaire, Question 35 (Honolulu: 1976).
39. Carl E. Guthe, So You Want a Good Museum; A Guide to the Management of Small Museums (n.p.: 1957), p. 20.

PART V
APPENDICES

C
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Y

SENATE RESOLUTION

RELATING TO THE LEGISLATIVE REFERENCE BUREAU'S CONTINUING STUDY
ON THE OPERATION OF THE IOLANI PALACE COMPLEX.

WHEREAS, the Committee on Conference for Senate Bill No. 535 of the Eighth Legislature, State of Hawaii, Regular Session of 1975, requested the Office of the Legislative Reference Bureau to conduct an analysis of alternative operational proposals for the Iolani Palace Complex; and

WHEREAS, such analysis requires the gathering of basic data from various state agencies and departments, from the Friends of Iolani Palace, and from public and private organizations which have been directly or indirectly involved with the Iolani Palace Complex; and

WHEREAS, from the Bureau's preliminary research and data gathering, two major issues have evolved which require resolution before the Bureau can continue with its analysis; and

WHEREAS, the first major issue requiring resolution is the designation of the physical area and the facilities of the Iolani Palace Complex indicating the actual area, the buildings, the structures, the furnishings, and the artifacts to be included in the completed Iolani Palace Complex; and

WHEREAS, the second major issue which requires resolution is the purpose and function of the Iolani Palace Complex; and

WHEREAS, the issue relating to the purpose and function of the Iolani Palace Complex subsumes various sub-issues, including determinations regarding public services to be offered, the priority target group or audience for such services, the relationship between the Iolani Palace Complex and other state historic sites in the area, whether or not the Iolani Palace Complex should be self-sustaining, and whether or not parking will be allowed on the Iolani Palace Complex grounds; and

WHEREAS, the Office of the Legislative Reference Bureau has experienced serious difficulty in obtaining necessary basic data from the government agencies involved with the Iolani Palace Complex with respect to these two major issues; and

WHEREAS, such basic data, may, in fact, be unavailable; and

WHEREAS, the Office of the Legislative Reference Bureau expressed concern before the Senate Committee on Education on February 24, 1976 that until these major issues are addressed and official determination of the issues is expressed, the Bureau is not able to proceed with the initial concern of the legislative request, i.e., an analysis of alternative proposals for the operation of the Iolani Palace Complex; now, therefore,

BE IT RESOLVED by the Senate of the Eighth Legislature of the State of Hawaii, Regular Session of 1976, that the following are legislative policies relating to the Iolani Palace Complex that shall serve as guidelines for the Legislative Reference Bureau's study of Iolani Palace:

- (1) The Iolani Palace Complex shall consist of the entire area and grounds bounded by King, Richards, and Likelike Streets, and the Capitol Mall, and shall include buildings and structures consisting of the Iolani Palace, the Iolani Palace Barracks, the Coronation Stand, and the Kana'ina Building;
- (2) Those agencies and offices occupying space in the Kana'ina Building shall be relocated no later than July 1, 1977, and at such time, plans shall be implemented to renovate the original Kana'ina Building to meet the needs of the Iolani Palace Complex;
- (3) The Archives Division of the Department of Accounting and General Services shall remain located in the Kekauluohi Building until such time as other suitable facilities become available, and at such time, plans shall be implemented to demolish the Kekauluohi Building;
- (4) All parking shall be eliminated from the Iolani Palace Complex grounds no later than July 1, 1977;
- (5) The Iolani Palace Complex shall be a self-contained operation bearing such relationships to other historic sites in the area as may be deemed feasible;

- (6) The entire Iolani Palace Complex and grounds shall be substantially restored to the period of the Monarchy;
- (7) The function and purpose of the Iolani Palace Complex shall be one of educational, cultural, and historical interpretation focusing on the period of the Monarchy;
- (8) The Iolani Palace Complex shall be as fully self-supporting as is practicable, and the priority audience shall be a combination of residents, tourists, and school groups;
- (9) All furnishings, objects, and artifacts purchased and acquired to restore the Iolani Palace Complex shall become the property of the state if state funds are used for such purchase and acquisition, and all original Iolani Palace artifacts which are given or purchased by private groups for the Iolani Palace Complex should be covenanted for Palace use;
- (10) If the cost of acquiring furnishings, objects, and artifacts from private individuals or organizations is prohibitive, the State may adopt the policy of replicating such furnishings, objects, and artifacts, or acquire furnishings, objects, and artifacts of the same period in history;
- (11) To provide for optimum interpretive experience for the visitor to the Iolani Palace Complex, the operating agency shall conduct tours lasting not less than thirty minutes and not more than one hour for each tour group during the period of restoration of the Iolani Palace Complex;

and

BE IT FURTHER RESOLVED that the Office of the Legislative Reference Bureau shall, in the course of its study, recommend the staff requirements of the proposed operation of the Iolani Palace Complex, and include in such recommendation which, if any, personnel should be subject to the provisions of Chapters 76 and 77 of the Hawaii Revised Statutes; and

BE IT FURTHER RESOLVED that the Department of Land and Natural Resources, the Department of Accounting and General Services, any and all other governmental agencies involved with the Iolani Palace Complex, and the Friends of Iolani Palace cooperate to the fullest by providing information, data, and documentation to the research staff of the Office of the Legislative Reference Bureau involved in the analysis of alternative operational proposals for the Iolani Palace Complex; and

BE IT FURTHER RESOLVED that the Office of the Legislative Reference Bureau submit the Iolani Palace Complex study to the Legislature no less than twenty days prior to the convening of the Regular Session of 1977; and

BE IT FURTHER RESOLVED that certified copies of this Resolution be transmitted to the President of the Senate, the Chairperson of the Senate Committee on Education, the Director of the Office of the Legislative Reference Bureau, the Chairperson of the Board of Land and Natural Resources, the Comptroller of the State of Hawaii, and the President of the Friends of Iolani Palace.

Appendix B

SURVEY OF POTENTIAL VISITORS TO IOLANI PALACE

To determine potential visitor interest in Iolani Palace, three surveys were undertaken by the Legislative Reference Bureau in July and August of 1976: an airport survey of visitors from the continental United States and Canada, a telephone survey of Hawaii residents, and a survey of Japanese tourists. These surveys attempted to determine interest in IP as well as to ascertain what admission fees, if any, people were willing to pay to visit the restored Palace. The surveys revealed the following.

AIRPORT SURVEY

An airport survey of visitors to Hawaii was conducted to determine visitor interest in IP. The survey included airline passengers returning to the continental U.S. and Canada only. Visitors from Japan were covered in a separate survey. Passengers to other destinations were not surveyed because of their relatively smaller numbers.¹ Of some 130 east-bound outgoing plane flights from Honolulu airport for the week of July 26 to August 2, 1976, 32 were randomly selected using a random numbers table. The questionnaires were administered to passengers gathered in the flight waiting areas of the airport terminals 30 to 60 minutes prior to the flight departure time. A maximum of 22 passengers from each sample flight was selected at random. After ascertaining that they were visitors, and not residents of Hawaii, they were asked to read a brief description of IP and to fill out a questionnaire (see Exhibit B-1). A total of 618 responses was obtained in this survey.

The survey covered a one-week period during the summer. While a longer survey period or a series of surveys over various visitor periods during the year would have been desirable, the constraints of time precluded extending the survey period. Since the survey, however, was conducted during Hawaii's peak tourist season, it is believed that the survey results reflect the attitudes of a majority of visitors.

Half of the respondents (50.6%) came from the Western part of the United States, with the next highest group (19.1%) coming from the East. The purpose of the trip for

¹*Hawaii Visitors Bureau, 1975 Annual Research Report.*

Exhibit B-1

IOLANI PALACE VISITOR SURVEY

THE LEGISLATIVE REFERENCE BUREAU IS CONDUCTING A STUDY FOR THE STATE LEGISLATURE ON THE MANAGEMENT AND OPERATION OF THE IOLANI PALACE COMPLEX. IOLANI PALACE, THE ONLY ROYAL PALACE IN THE UNITED STATES, IS LOCATED IN DOWNTOWN HONOLULU, ADJACENT TO THE STATE CAPITOL BUILDING AND ACROSS FROM THE KAMEHAMEHA STATUE. THE PALACE, BARRACKS, CORONATION STAND AND 11-ACRE GROUNDS ARE BEING RESTORED TO THE HAWAIIAN MONARCHY PERIOD (1882 THROUGH 1893). WHEN COMPLETED IN 1977, THE \$9 MILLION RESTORATION PROJECT WILL BE OPEN TO THE PUBLIC, AND WILL POSSIBLY FEATURE A ONE-HOUR GUIDED TOUR OF THE PALACE AND FREE ACCESS TO THE OTHER FACILITIES AND GROUNDS.

WE WOULD LIKE YOUR OPINION OF THIS SITE AS A VISITOR ATTRACTION. PLEASE FILL OUT THE QUESTIONNAIRE ON THE OPPOSITE SIDE OF THIS PAGE.

the vast majority (87.2%) was for pleasure and for 56.1%, this was their first visit to Hawaii. Most visitors (75.7%) traveled independently, with only 24.3% traveling with an organized tour group. Most of the respondents were in the 21-40 (39.8%) and 41-60 (38.3%) age categories.

Most respondents (79%) had taken tours of various visitor attractions on Oahu. Prior to the survey, only 56.4% had heard of Iolani Palace, but 63% of all respondents expressed interest in visiting the restored Palace. Of those expressing interest in seeing Iolani Palace, 5.5% are unwilling to pay any admission fee for a guided tour; another 4.8% would pay no more than 50 cents; 29.5% no more than \$1, 32.6% up to \$2, 18.7% up to \$3, 6.3% up to \$4, and 2.6% up to \$5. The average price the respondents would be willing to pay is \$1.91.

Assuming no guided tour was offered, the average price the visitors would pay is \$1.37. Six and three-tenths per cent would not pay any admission fee; 12% would pay up to \$.50, 44.2% up to \$1, 29.1% up to \$2, 6.3% up to \$3, and only 1% each would pay up to \$4 and \$5.

In summary, of the respondents expressing interest in seeing IP, only 29% were willing to pay more than \$2 for a guided tour of the Palace and only 39% were willing to pay more than \$1 for a nonguided tour.

Table 1 summarizes the results of each question asked in the survey.

JAPANESE TOURIST SURVEY

Visitors from Japan currently comprise about 15% of the total number of tourists to Hawaii, and are a growing factor in the visitor industry. Hence, it was decided to conduct a survey among this group. Because of language constraints, the survey questions were written in Japanese and administered to the visitors by the five major Hawaii-based Japanese tour firms, who agreed to distribute and collect the questionnaires.

The vast majority, about three-fourths of all Japanese visitors, travel in organized tour groups, staying for five days and four nights. Ground tours are generally optional items for these organized tour groups and are selected upon their arrival in Hawaii. Most of the Japanese visitors tend to take these ground tours rather than travel independently,

Table 1
RESULTS OF IOLANI PALACE VISITOR SURVEY
(Airport Survey)

Number of respondents: 618

1. Area of residence

	<u>No.</u>	<u>%</u>
a. Western U.S.	312	50.6%
b. Midwestern U.S.	61	10.0
c. Southern U.S.	55	8.9
d. Eastern U.S.	118	19.1
e. Canada	36	5.8
f. Other	35	5.6

2. Average number of days spent on Oahu 11.4 days

3. Purpose of visit

	<u>No.</u>	<u>%</u>
Business	29	4.7%
Pleasure	536	87.2
Both	50	8.1

4. Number of visits to Hawaii

	<u>No.</u>	<u>%</u>
First visit	347	56.1%
Second or more visits	271	43.9

5. Traveling as part of tour group

	<u>No.</u>	<u>%</u>
Yes	150	24.3%
No	467	75.7

6. Visited tourist attractions this trip

	<u>No.</u>	<u>%</u>
Yes	473	79.0%
No	126	21.0

7. Places visited this trip

	<u>No.</u>	<u>%</u>
Bishop Museum	95	15.4%
Nuuanu Pali	147	23.8
Sea Life Park	170	27.5
Kahuku Sugar Mill	90	14.6
Polynesian Cultural Center	294	47.6

8. Heard of Iolani Palace prior to survey

	<u>No.</u>	<u>%</u>
Yes	345	56.4%
No	267	43.6

9. Would have visited Iolani Palace if open

	<u>No.</u>	<u>%</u>
Yes	389	63.0%
No	46	7.4
Don't know	183	29.6

10. & 11. Admission fee willing to pay^a

	<u>No Guided Tour</u>		<u>With Guided Tour</u>	
	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>
None	24	6.3%	21	5.5%
Up to 50¢	46	12.0	18	4.8
Up to \$1	169	44.2	112	29.5
Up to \$2	111	29.1	124	32.6
Up to \$3	24	6.3	71	18.7
Up to \$4	3	0.8	24	6.3
Up to \$5	5	1.3	10	2.6
	<i>Mean:</i>	<i>\$1.37</i>	<i>Mean:</i>	<i>\$1.91</i>
	<i>Median:</i>	<i>\$1.00</i>	<i>Median:</i>	<i>\$2.00</i>

12. Age

	<u>No.</u>	<u>%</u>
Under 21	66	10.7%
21 to 40	245	39.8
41 to 60	236	38.3
Over 60	69	11.2

13. Sex

	<u>No.</u>	<u>%</u>
Male	299	48.7%
Female	315	51.3

^aThose expressing interest in visiting the Palace (replying yes to Question 9).

due to language difficulties and time limitations.² Thus, the tour operator plays a key role in deciding which attractions the Japanese visitors will see, since he is the one to schedule and offer the various tours.

The questionnaire (Exhibit B-2), printed in Japanese, asks essentially the same questions asked in the airport survey discussed previously. Four hundred fifty-five responses were obtained in this survey.

Ninety-two and four-tenths per cent of those responding, indicated pleasure as the reason for their visit, with 3.8% traveling for business reasons, and another 3.8% for a combination of business and pleasure. For 354 respondents, or 77.8%, this was their first visit to Hawaii. The majority of the respondents (65.8%) were males and most (68.3%) fell in the 21 to 40 age category.

Although only 27.6% had previously heard of Iolani Palace, a majority (64.9%) expressed an interest in visiting the Palace. The admission fees the Japanese visitors were willing to pay, however, were considerably below those reported for the airport or telephone surveys.

Nonguided Tour. For the *nonguided tour*, over one-third (36.5%) would not pay an admission fee; 18.1% would pay up to 50 cents, and another one-third (34.7%) would pay up to \$1. Only 5.6% would pay up to \$2, 4.5% would pay up to \$3, and one-third of one per cent (0.3%) would pay up to \$4 and \$5. The average price this group would pay for an unguided tour is \$.69.

Guided Tour. The average price this group of Japanese visitors would be willing to pay for a *guided tour* is \$1.29. One-fourth (24.9%) would not be willing to pay an admission fee, 13.7% would pay up to 50 cents, 28.1% up to \$1, 14.4% up to \$2, 12.6% up to \$3, 3.9% up to \$4, and 2.4% up to \$5. Thus, an admission fee in excess of \$1 for a guided tour of Iolani Palace would eliminate nearly 70% of the visitors who indicated an interest in visiting Iolani Palace.

Table 2 summarizes the results of the Japanese tourist survey.

TELEPHONE SURVEY

A telephone survey of Oahu residents was conducted to determine resident interest in visiting IP. The Oahu telephone

²Interview with Mr. Hiromu Nojima, Director, Asian Department, Hawaii Visitors Bureau, July 12, 1976.

JAPANESE TOURIST SURVEY

イオラニ宮殿見学調査

1. オアフ島には何日滞在の予定ですか？ _____ 日 間
2. ハワイにいらっしゃった目的は？ 商用 _____ 観光 _____ 両方 _____
3. 最後にオアフ島を訪問せられたのは？ 初めて _____ 19 _____ 年
4. イオラニ宮殿の事を調査以前に聞かれた事がありますか？
ある _____ ない _____
5. イオラニ宮殿が公開されましたら見学しますか？
します _____ しません _____ わかりません _____
(しない場合は8・9だけ書いて下さい。)
6. イオラニ宮殿の見学料はいくら位が適当と思われませんか？
無 料 _____
50セントまで _____ 1ドルまで _____ 2ドルまで _____
3ドル まで _____ 4ドルまで _____ 5ドルまで _____
7. イオラニ宮殿の1時間のガイド付き見学料はいくら位が適当と思われ
ますか？ 無 料 _____
50セントまで _____ 1ドルまで _____ 2ドルまで _____
3ドル まで _____ 4ドルまで _____ 5ドルまで _____
8. 貴方の年齢は？ 21才以下 _____ 21～40才 _____
41～60才 _____ 60才以上 _____
9. 性別 男性 _____ 女性 _____

御協力ありがとうございました。

イオラニ宮殿に関する観光客各位の意見調査

州調査情報局は、イオラニ宮殿の自主管理及び運営に関する観光客の皆様方の意見の調査を行って居ます。

イオラニ宮殿は、アメリカ合衆国に於ける唯一の宮殿であります。位置は、ホノルル市街の中心部に在り、州議事堂に隣接しカメハメハ大王の銅像の向側にあります。イオラニ宮殿は、ハワイ王朝時代（西暦1882年より1892年迄）宮殿、兵營、即位殿として使用せられて居ました。現在宮殿及び11エーカーに亘る庭園は 900万ドルを投じて復興再建の作業中であります。再建工事が完成される1977年には完成された宮殿、庭園、其他の施設が一般に公開される予定であります。

イオラニ宮殿一般公開に関する観光客各位の皆様方の御意見を御願し裏面の質問事項にお答を記入して御協力下さい。

Table 2
RESULTS OF THE JAPANESE TOURIST SURVEY

Number of respondents: 455

1. Average number of days spent on Oahu					<u>5.26 days</u>
2. Purpose of visit					
			<u>No.</u>	<u>%</u>	
Business			17	3.8%	
Pleasure			419	92.4	
Both			17	3.8	
3. Number of visits to Hawaii					
			<u>No.</u>	<u>%</u>	
First visit			354	77.8%	
Second or more visits			101	22.2	
4. Heard of Iolani Palace prior to survey					
			<u>No.</u>	<u>%</u>	
Yes			121	27.6%	
No			317	72.4	
5. Would have visited Iolani Palace if open					
			<u>No.</u>	<u>%</u>	
Yes			294	64.9%	
No			48	10.6	
Don't know			111	24.5	
6. & 7. Admission fee willing to pay ^a					
		<u>No Guided Tour</u>		<u>With Guided Tour</u>	
		<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>
None	105	36.5%	71	24.9%	
Up to 50¢	52	18.1	39	13.7	
Up to \$1	100	34.7	80	28.1	
Up to \$2	16	5.6	41	14.4	
Up to \$3	13	4.5	36	12.6	
Up to \$4	1	0.3	11	3.9	
Up to \$5	1	0.3	7	2.4	
		<i>Mean: \$.69</i>		<i>Mean: \$1.29</i>	
		<i>Median: \$.50</i>		<i>Median: \$1.00</i>	

^aThose expressing interest in visiting Iolani Palace (replying yes to Question 5).

8. Age

	<u>No.</u>	<u>%</u>
Under 21	50	11.2%
21 to 40	306	68.3
41 to 60	74	16.5
Over 60	18	4.0

9. Sex

	<u>No.</u>	<u>%</u>
Male	296	65.8%
Female	154	34.2

directory was utilized since over 92% of all households on Oahu have telephones, although nearly 18% have unlisted numbers. Residents of the neighbor islands were not included because of the Palace's relative inaccessibility to them.

Eight telephone numbers were selected as possible survey samples from each page of the December 1, 1975 telephone book. The selection of the eight numbers was based on predetermined positions on the telephone directory page. The selected telephone numbers from each page were called according to a predetermined sequence.

If there was no answer at a given number, the next number in the sequence was called. Business listings were excluded from the sample and no more than one survey response was obtained from each page of the telephone book. To enhance the validity of the responses, one-half of the responses were obtained during weekends and evenings and one-half during business hours.

A total of 622 responses were obtained for this survey. Slightly over three-fourths (76.8%) of the respondents indicated an interest in visiting the restored Palace, while 11.6% were not interested and another 11.6% were not sure. Of those interested in seeing the Palace, 69.4% mentioned the use of private automobiles as the mode of transportation to visit IP while 19.2% indicated the use of the public transportation system. The remaining 11.4% will travel by a combination of these or other means.

The average admission fee IP visitors are willing to pay for a nonguided tour came to \$1.05. Fourteen per cent would not pay any admission fee; 21.3% would pay up to 50 cents, 41.7% up to \$1, 18.4% up to \$2, 3.5% up to \$3, and 1.1% up to \$5.

For a guided tour, the average price the visitors would be willing to pay is \$1.93. Some were not interested in a guided tour and did not respond to this question. They indicated a preference to tour the Palace at their own leisure. Five and nine-tenths per cent would not be willing to pay any admission fee; 5.4% would pay up to 50 cents, 29.8% up to \$1, 33.4% up to \$2, 14.1% up to \$3, 5% up to \$4, and 6.4% up to \$5.

These figures indicate that three-fourths of the people interested in visiting the IP Complex would not pay more than \$1 for a nonguided tour or more than \$2 for a guided tour.

Table 3 summarizes the results of the resident telephone survey. Exhibit B-3 presents the telephone survey questionnaire.

GENERAL SUMMARY OF SURVEY FINDINGS

All three surveys indicate that most respondents are interested in visiting Iolani Palace after it is opened, with a greater percentage of Hawaii residents expressing such interest. All three groups indicate they would be willing to pay more for a guided tour than for an unguided tour. The average admission fees each group would pay for an unguided tour are: continental U.S. and Canadian visitors (airport survey), \$1.37; Hawaii residents, \$1.05; and Japanese visitors, \$.69. For a guided tour, the averages are: Hawaii residents, \$1.93; continental U.S. and Canadian visitors, \$1.91; and Japanese visitors, \$1.29. Table 4 summarizes these findings.

Based on the admission fees survey results, graphs depicting the relationship between the expected number of IP visitors (expressed as % of respondents) and admission fees charged were developed for both unguided and guided tours.

Exhibits B-4 and B-5 show the expected IP visitors-admission fees relationship for an unguided tour and guided tour, respectively. Of those interested in visiting the Palace, 93.7% of the U.S.-Canadian visitors, 86.0% of the Hawaii residents and 63.5% of the Japanese visitors would be expected to visit IP if the admission fee for an unguided tour was 50 cents. If the admission fee were \$1, the corresponding attendance figures would be 81.7%, 64.7%, and 45.4%. Increasing the admission fee to \$2 would cause these figures to drop to 37.5%, 23.0%, and 10.7%, respectively.

For a guided tour, the relationship between the admission fees and the expected attendance by U.S.-Canadian visitors and Hawaii residents are almost identical and differ quite drastically from the Japanese visitors survey results. Exhibit B-5 illustrates that an admission fee of 50 cents for a guided tour would attract 94.5% of the U.S.-Canadian visitors, 94.1% of Hawaii residents, and 75.1% of the Japanese visitors who expressed interest in visiting IP. At \$1, the corresponding attendance figures for the three groups are 89.7%, 88.7%, and 61.4%. With a \$2 admission fee, the attendance percentages would be 60.2%, 58.9%, and 33.3%. If the admission fee were set at \$3, only 27.6%, 25.5%, and 18.9%, respectively, would be expected to visit IP.

Table 3

RESULTS OF THE TELEPHONE SURVEY OF HAWAII RESIDENTS

Number of respondents: 622

1. Places visited since June of last year

	<u>No.</u>	<u>%^a</u>
Bishop Museum	178	28.6%
Nuuanu Pali Lookout	299	48.1
Sea Life Park	248	39.9
Kahuku Sugar Mill Museum	102	16.4
Polynesian Cultural Center	187	30.1

2. Interested in visiting restored Palace when open

	<u>No.</u>	<u>%</u>
Yes	478	76.8%
No	72	11.6
Not sure	72	11.6

3. Intended means of transportation

	<u>No.</u>	<u>%</u>
Bus	91	19.2%
Car	329	69.4
Other	19	4.0
Bus and/or car	31	6.6
Car and/or other	2	0.4
Bus, car, and/or other	2	0.4

4. & 5. Admission fee willing to pay^b

	<u>No Guided Tour</u>		<u>With Guided Tour</u>	
	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>
None	64	14.0	26	5.9%
Up to 50¢	97	21.3	24	5.4
Up to \$1	190	41.7	131	29.8
Up to \$2	84	18.4	147	33.4
Up to \$3	16	3.5	62	14.1
Up to \$4	0	0	22	5.0
Up to \$5	5	1.1	28	6.4
	Mean:	\$1.05	Mean:	\$1.93
	Median:	\$1.00	Median:	\$2.00

^aPercentage of total respondents visiting each site.

^bThose expressing interest in visiting Iolani Palace (replying yes to Question 2).

6. Age

	<u>No.</u>	<u>%</u>
Under 21	102	16.4%
21 to 40	305	49.1
41 to 60	155	25.0
Over 60	59	9.5

7. Sex

	<u>No.</u>	<u>%</u>
Male	233	37.5%
Female	389	62.5

Exhibit B-3

IOLANI PALACE VISITOR INTEREST
TELEPHONE SURVEY OF HAWAII RESIDENTS

HELLO,

I'M CONDUCTING A PUBLIC INTEREST STUDY ON IOLANI PALACE AND I
WOULD LIKE YOUR HELP ON A SURVEY WE'RE DOING.

THE IOLANI PALACE AND THE OTHER BUILDINGS ON THE GROUNDS ARE BEING
RESTORED TO THE HAWAIIAN MONARCHY DAYS AT A COST OF ABOUT \$9 MILLION.
WE'D LIKE YOUR OPINION OF THIS SITE AS A PLACE FOR RESIDENTS TO
VISIT. MAY I ASK YOU A FEW QUESTIONS, PLEASE?

SURVEY QUESTIONS

1. Did you visit any of the following places since June of last year?

- a. Bishop Museum
- b. Nuuanu Pali Lookout
- c. Sea Life Park
- d. Kahuku Sugar Mill Museum
- e. Polynesian Cultural Center

2. Would you be interested in visiting the restored Iolani Palace
after it is opened? Yes____; No____; Not Sure____.

(If No or Not Sure, go to question 5)

3. Would you go there by:

- a. Bus
- b. Car
- c. Other

4. The next one is a two part question concerning admission fees for
guided vs. unguided tours. Using a range of up to 50¢, up to \$1,
\$2, \$3, \$4, and \$5, what is the most you would be willing to pay
if:

- a. No guided tour was provided
- b. A one hour guided tour was provided

5. Is your age category:

- a. Under 21
- b. Between 21-40
- c. Between 41-60
- d. Over 60

THANK YOU FOR YOUR HELP IN OUR SURVEY.

NOTES TO INTERVIEWER

1. If asked what Iolani Palace is: *Iolani Palace is the only royal palace in the United States and is located in downtown Honolulu next to the State Capitol and across from the Kamehameha Statue.*
2. If asked when will the palace be opened? *Iolani Palace will be opened sometime in 1977.*
3. If asked who is conducting the survey: *The Office of the Legislative Reference Bureau of the State of Hawaii.*

Table 4

AVERAGE FEE RESPONDENTS WILLING TO PAY
FOR UNGUIDED AND GUIDED TOURS

	<u>No.</u> <u>Surveyed</u>	<u>Interested in</u> <u>Visiting IP</u>		<u>Average Fee</u> <u>for No Tour</u>	<u>Average Fee</u> <u>for Guided Tour</u>
		<u>No.</u>	<u>(%)</u>		
Continental U.S. & Canadian Visitors	618	389	(63.0%)	\$1.37	\$1.91
Japanese Visitors	455	294	(64.9%)	.69	1.29
Hawaii Visitors	622	478	(76.8%)	1.05	1.93

Exhibit B-4

IOLANI PALACE VISITORS - ADMISSION FEE RELATIONSHIP:
UNGUIDED TOUR

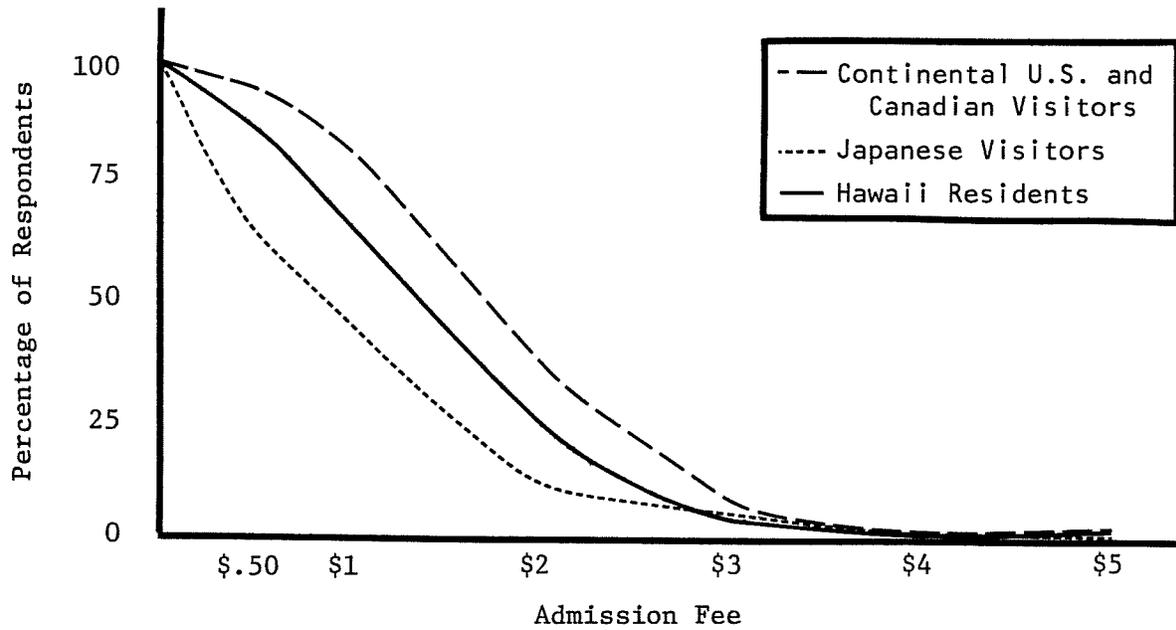
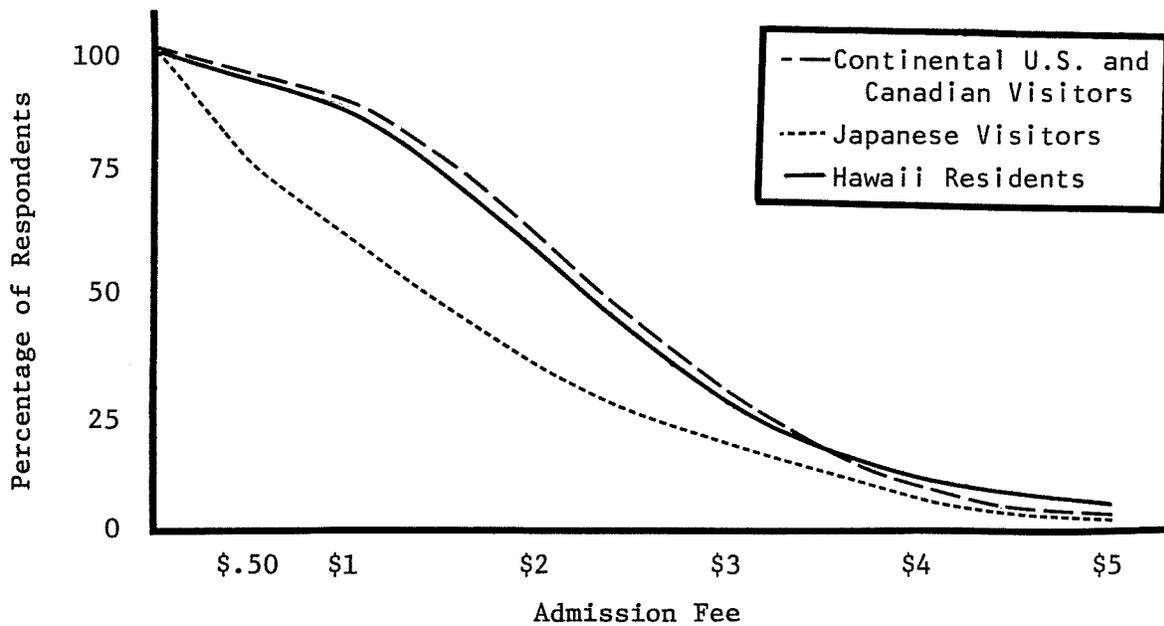


Exhibit B-5

IOLANI PALACE VISITORS - ADMISSION FEE RELATIONSHIP:
GUIDED TOUR



In summary, the graphs show that the number of visitors to IP would decrease quite rapidly with increasing admission fee prices. The rate of decrease, however, is less drastic if a guided tour is provided, indicating that visitors are willing to pay more for a guided tour of IP.

For a guided tour, a \$2 admission fee would attract approximately 60% of the U.S.-Canadian and Hawaii groups and only 33% of the Japanese group, while a \$3 fee would attract only about one-fourth or less of any of the three groups.

Appendix C

MUSEUM/HISTORIC SITES SURVEY

The Museum/Historic Sites Questionnaire was conducted in order to acquire specific information on the management and operations of twenty-nine sites with characteristics bearing comparability to the Iolani Palace Complex. Publications by the American Museum Association, the *National Register of Historic Places*, and experts in the museum field were consulted before arriving at the twenty-nine selected sites.

The primary criteria for selection were:

- (1) The facility was classified as a "natural history" museum or historical site.
- (2) The facility is located in a metropolitan area.
- (3) The description of the facilities and exhibits given by the Official Museum Directory is fairly similar to Iolani Palace.
- (4) The museum is engaged in some form of research.

Of the twenty-nine sites requested to respond to the questionnaire, twenty responded.* The twenty respondents were classified into categories by the manner in which they are owned and managed. The following are sites owned and managed by the federal government:

- (1) Fort Laramie National Historic Site
- * (2) Independence Hall (Philadelphia)
- (3) Harry S. Truman Library and Museum
(Independence, Missouri)
- (4) Harper's Ferry

Sites owned and operated by the state government are:

- (5) U.S. Grant's Home State Memorial (Galena, Illinois)
- (6) Villa Louis and Museum (Prairie du Chien, Wisconsin)
- (7) Nauvoo Historical Society Museum (Nauvoo, Illinois)

- (8) Pennsbury Manor (Morrisville, Pennsylvania)
- (9) Tryon Palace Restoration Complex (New Bern, North Carolina)

A nonprofit corporation, partnership, or individual proprietorship owns and operates the following:

- (10) Society for the Preservation of Long Island Antiquities
- (11) Colonial Williamsburg
- (12) The Henry Francis du Pont Winterthur Museum (Winterthur, Delaware)
- (13) Plymouth Plantation, Inc.
- (14) Old Salem, Inc. (Winston-Salem, North Carolina)
- (15) Old Sturbridge Village (Sturbridge, Massachusetts)
- (16) Smithsonian Institution (Washington, D.C.) also falls into this category; however, it is the only respondent which also qualifies as a trust establishment of the United States created under the will of an Englishman, James Smithson.
- (17) The Museum of the City of New York is owned by the city and operated by a nonprofit corporation.
- (18) Gunston Hall Plantation (Lorton, Virginia) is owned by the State of Virginia and operated under statute by the National Society of the Colonial Dames of America (NSCDA).
- (19) The Alamo (San Antonio, Texas) is owned by the State of Texas and is operated under statute by the Daughters of the Republic of Texas, a nonprofit corporation.
- (20) Suffolk Museum and Carriage House (under the jurisdiction of the Museums at Stony Brook, New York) is owned by a nonprofit corporation and operated by a board.
- * (21) Independence Hall is owned and run by various organizations and the municipal, state, and federal governments.

The objectives of this survey were to compare the needs and requirements of sites under different types of ownership and management and to identify which type of operation would be best suited to the needs of the Iolani Palace Complex.

SURVEY RESULTS SUMMARY

The sites surveyed are widely split in the size of nearby populations and their ownership/operator status. However, 81 per cent of the sites are operated by the same organization that owns the site. With the exception of the Alamo, sites not having ownership and operation by the same organization are located in areas with over a million people within a 50-mile radius.

66.7 per cent of the respondents said their site has been designated as a national historic site. All federally owned/operated sites are classified as national historic sites. Generalizations about other types of owned/operated sites cannot be made.

66.7 per cent classified their collections and exhibitions as exclusively or predominantly History; 19 per cent as nearly equal emphasis on Art and History. Only 23.8 per cent of the sites have any circulation collection or exhibition. 71.4 per cent have libraries. 71.4 per cent have joint programs or special affiliations with colleges and universities.

All sites provide guided tours for school classes. Other educational-cultural activities provided by a large number of sites include guided tours and gallery talks for general groups (76.2 per cent); special lectures or demonstrations for school classes at the institution (66.7 per cent); and presentations at schools (52.4 per cent).

85.7 per cent have publication programs of some kind. A large proportion of the publication programs issue membership material such as flyers and calendars.

76.2 per cent engage in formal research projects to provide specific needed information to the museum/historic site field but at none of the sites is research considered the primary function or activity.

81 per cent of the sites are open at least 300 days of the year. All sites are closed on Christmas Day with the

exception of Independence Hall. New Year's Day and Thanksgiving Day ranked as the next two widely observed holidays.

Most sites open around 9 a.m. and close around 5 p.m. but hours vary, especially at those sites with seasonal schedules. Independence Hall, for example, opens at 8 a.m. and closes at 10 p.m. during the Summer whereas the Winter schedule is from 9 a.m. to 5 p.m. Villa Louis and Museum, Nauvoo Historical Society Museum and Plimouth Plantation are open only seasonally. The curator at Pennsbury Manor, Mr. Curtis, suggests that "these sites should open about 10 and close at 6 p.m. in tourist areas or in your case maybe as late as 7 p.m." (Question 24)

Most sites can be toured both by guides or by unescorted viewing. Villa Louis and Museum and Tryon Palace Restoration Complex can be viewed by guided tours only; Fort Laramie National Historic Site, Plimouth Planatation and Old Sturbridge Village can be seen only by unescorted tours. One-half inch plexiglass doors are used at Fort Laramie to provide both protection to the contents and a full view of the scenes to the visitor. Average length of tour is 87.5 minutes.

Percentage of resident visitors to the sites varied widely--from 70 per cent at the Museum of the City of New York to 5-10 per cent at Harper's Ferry.

Of the twelve sites charging admission, 75 per cent have reduced rates for groups and 58.3 per cent have membership admission programs. Although the Museum of the City of New York and the Smithsonian Institution do not charge admission, they do have membership admission programs. Mr. Curtis (Pennsbury Manor curator) feels the taxpayer should foot the bill for museums because they are service institutions...the visitor should be charged only a nominal fee.

STATE-OWNED/NONPROFIT CORPORATIONS OPERATED

Of the twenty respondents of the historic sites questionnaire, two were owned by the state and operated by a private society/corporation organized as a nonprofit entity:

Gunston Hall Plantation, Lorton, Virginia
Alamo, San Antonio, Texas

Both are designated as national historic sites.

The Alamo is run by the Daughters of the Republic of Texas under statute and on the condition that its operation

would not involve cost to the state. Gunston Hall Plantation is operated by the National Society of the Colonial Dames of America by statutory law.

Gunston Hall cited extra projects undertaken by the Colonial Dames, which do not involve the taxpayers' money, as a major advantage of a state-owned/society-operated site. The Alamo stated that the advantage of a state-owned/society-operated site was that tax money was not involved.

Since the budget information was not provided by one of the sites, income and expenditure comparisons cannot be made. However, both provide educational-cultural services such as guided tours for school classes and general groups, libraries, and publication programs (for membership newsletters, calendars, flyers, etc.). Neither maintains joint programs or special affiliations with colleges and universities.

Both engage in research but neither consider research as the primary function or activity of the site. The Alamo does not have a research division per se but conducts research projects that result in publications of interest to the museum/historic site field and that upgrades in-house exhibits.

Gunston Hall Plantation and the Alamo have predominantly historical collections and exhibitions. Both include grounds or gardens along with buildings and space for the preservation, and/or exhibition of collections and place emphasis on the preservation, authentic restoration or reconstruction of an earlier period of their facilities.

Admission fees for Gunston Hall Plantation are \$2.00 for adults and 50¢ for children 6-16. No admission is charged at the Alamo. Both sites are open throughout the year except for Christmas Eve and Day at the Alamo and Christmas Day at Gunston Hall. The sites can be seen both by guided tours and by unescorted viewing; both have tour lengths of 45 minutes (10-45 minutes for Alamo). Gunston Hall Plantation does not have regularly scheduled tours; the Alamo has four tours per day Tuesdays thru Thursdays.

STATE-OWNED/OPERATED

Five institutions responding to the questionnaire are both owned and operated by the state government. They are:

U.S. Grant's Home State Memorial, Galena, Illinois

Villa Louis and Museum, Prairie du Chien, Wisconsin

Nauvoo Historical Society Museum, Nauvoo, Illinois

Pennsbury Manor, Morrisville, Pennsylvania

Tryon Palace Restoration Complex, New Bern, North
Carolina

All sites are located in areas with populations within a 50-mile radius of less than 500,000 except Pennsbury Manor which has a 50-mile radius population of over one million.

Among the advantages of being state-owned and operated institutions are the resources, funds, and influence of the state government which are available to them. Waste and loss of time as a result of being a part of a larger state organization and sometimes the lack of legislative support and sympathy are disadvantages listed by these institutions.

Grant's Home, Villa Louis and Museum, and Nauvoo Historical Society Museum are designated as national historic sites. All three contain collections or exhibitions that are predominantly historical. Pennsbury Manor places equal emphasis on the artistic and historical nature of its collections and exhibitions. All five provide guided tours for school classes and various other educational-cultural activities. Grant's Home, Nauvoo Historical Society Museum, and Tryon Palace have joint programs or special affiliations with colleges and universities.

Only Grant's Home and Tryon Palace maintain research divisions and libraries. Although Pennsbury Manor does not have a research division, it engages in research to upgrade in-house exhibits.

Generally, the total operating expenditures for state-owned and operated sites are below the average for all sites responding to the question. Salaries for directors/administrators, professional and nonprofessional staffs are also generally below the average of that of all respondents.

U.S. Grant's Home State Memorial is funded completely by the state. Villa Louis and Museum is funded totally by admission fees and contributions in kind. The major portion of the income for Nauvoo Historical Society Museum is from the state; other income are from gift shop/food concession and endowments/contributions. The Tryon Palace Restoration Complex derives its income mainly from the state government but admission fees and gift shop/food concession income also supplement the sum.

RESEARCH

Fifteen historic sites (75 per cent) engage in formal research that provide specific needed information to the

museum/historic sites field. However, research is not the primary function or activity of any.

Of the 15,

26.6 per cent conduct research projects performed on a contract basis

53.3 per cent conduct research projects that result in publications of interest to the museum/historic site field

80 per cent conduct research projects to upgrade in-house exhibits

26.5 per cent conduct other research projects

The following sites engage in all three types of research:

Society for the Preservation of Long Island Antiquities

Independence Hall

Colonial Williamsburg

Plimouth Plantation

Old Salem

All five are owned and operated by a corporation, partnership, or individual proprietorship organized as a nonprofit entity.

HISTORIC SITES IN HAWAII

In 1973, the Daughters of Hawaii obtained 65-year leases on Queen Emma's Summer Palace in Nuuanu and Hulihee Palace in Kailua-Kona from the State Department of Land and Natural Resources. The ownership/operator status of these two sites are most like that of the state-owned/nonprofit corporation run Gunston Hall Plantation and Alamo.

Compared to other museums, state monuments and similar attractions on Oahu listed in the *Data Book 1975* (Table 107), Queen Emma's Summer Palace has one of the lowest attendance figures for the year. In contrast, the attendance figures on the Big Island in the same year for Hulihee Palace is exceeded only by that of the Lava Tree State Monument. However, attendance to Hulihee Palace is still relatively low in terms of attendance figures to other sites on Oahu.

Queen Emma's Summer Palace and Hulihee Palace have been operated 50 and 40 years, respectively, by the Daughters of Hawaii prior to the 1973 leases.

Admission fees are charged at both palaces. At Queen Emma's Summer Palace, residents of Hawaii are admitted without charge on the fourth Saturday of every month.

There is a walking tour of the Capitol District which is available to tourists at the Mission Houses Museum. The tour is given daily (Mondays thru Fridays) through advance reservation starting at 9:30 a.m. at the Mission Houses. Included in the \$5.00 walking tour are Washington Place, Saint Andrew's Cathedral, State Capitol, Iolani Palace, Kawaiahao Church, and the Mission Houses Museum. The tour lasts for about an hour and 15 minutes.

Two other sites in the Capitol District are listed on the *National Registry of Historic Places*: Aliiolani Hale (the State Courthouse) and the Kamehameha V Post Office.

**We received two completed questionnaires from Independence Hall. One questionnaire is from Independence National Historic Park:*

Multiple ownership of the site:

- *municipal government*
- *state government*
- *federal government*
- *nonprofit corporation*
- *church affiliated nonprofit corporation*

Multiple ownership of assets:

- *municipal government*
- *federal government*
- *nonprofit corporation*

Multiple organizational operation of the site:

- *federal government*
- *nonprofit corporation*
- *church affiliated nonprofit corporation*

The second questionnaire is from Independence Hall itself; the site is owned and operated by the federal government.

LEGISLATIVE REFERENCE BUREAU
State of Hawaii
State Capitol, Room 004
Honolulu, Hawaii 96813
Telephone: 548-6237

MUSEUM/HISTORIC SITES QUESTIONNAIRE

Name and Location of Site: _____

Name and Title of Respondent: _____

Date: _____

SECTION A. GENERAL INFORMATION

1. Is your site designated as a national historical site?
Yes _____ No _____ Date of such designation _____

2. What is the approximate population within a 50-mile radius of your site?
 - a. _____ Less than 500,000
 - b. _____ 500,000 to 1,000,000
 - c. _____ more than 1,000,000

3. Which of the following best describes the agency or organization which ultimately owns the site? *(Please check one)*
 - a. _____ Municipal (city) government
 - b. _____ County government
 - c. _____ State government
 - d. _____ Federal government
 - e. _____ Corporation, partnership, or individual proprietorship organized for profit
 - f. _____ Corporation, partnership, or individual proprietorship organized as a nonprofit entity
 - g. _____ Church or denominational group or affiliated organization organized for profit
 - h. _____ Church or denominational group or affiliated organization organized as a nonprofit entity
 - i. _____ Other *(Please specify)* _____

4. Which of the following best describes the agency or organization which ultimately owns the assets of the site, including collections and installations? *(Please check one)*
 - a. _____ Municipal (city) government
 - b. _____ County government
 - c. _____ State government
 - d. _____ Federal government
 - e. _____ Corporation, partnership, or individual proprietorship organized for profit

(Continued on next page)

- f. Corporation, partnership, or individual proprietorship organized as a nonprofit entity
 - g. Church or denominational group or affiliated organization organized for profit
 - h. Church or denominational group or affiliated organization organized as a nonprofit entity
 - i. Other *(Please specify)* _____
-
5. Which of the following best describes the organizational entity operating the site? *(Please check one)*
- a. Municipal (city) government
 - b. County government
 - c. State government
 - d. Federal government
 - e. Corporation, partnership, or individual proprietorship organized for profit
 - f. Corporation, partnership, or individual proprietorship organized as a nonprofit entity
 - g. Church or denominational group or affiliated organization organized for profit
 - h. Church or denominational group or affiliated organization organized as a nonprofit entity
 - i. Other *(Please specify)* _____
-
6. Does the organization which owns the site also operate the site?
 Yes No
- If not, what specifies the manner in which the site is operated?
- a. By statute or ordinance
 - b. Formal contract agreement
 - c. Concession specification
 - d. Lease agreement
 - e. Informal agreement
 - f. Does not apply because they are the same
 - g. Other *(Please specify)* _____
-
7. Please specify how and by whom members of the management and operation group or individual(s), including the chief administrator of the site, are selected, appointed, elected, or placed in office.

8. Please describe or provide a copy of the formal organizational structure for the management and operation of the site.

9. To whom does the chief administrator of the site report?

10. Please list under column a. all agencies, departments, divisions, and organizations in the state which are directly related in connection with the operation of your site and indicate by checking the appropriate columns the nature of agency (b, c, or d) and the nature of the relationship (e, f, or g).

(Nature of Agency)				(Nature of Relationship)		
a.	b.	c.	d.	e.	f.	g.
Agency Name	Public	Private	Other	Legally Related	Cooperatively Related	Other

SECTION B. INSTITUTIONAL RESOURCES

13. What kinds of institutional facilities do you operate? *(Please check all applicable)*
- a. Building or space chiefly for the preservation and/or exhibition of collections
 - b. Historical structure or site (associated with famous person or event; may display collection)
 - c. Preservation, authentic restoration or reconstruction of an earlier period
 - d. Gardens or grounds
 - e. Research division
 - f. Library
 - g. Other *(Please specify)* _____

14. Does the site maintain collections and exhibitions?
Yes No
If "no", go to item 16.
15. What is the classification of the majority of your collections and exhibitions?
(Note: "Art" refers to materials exhibited primarily for their aesthetic qualities; "History" refers to materials exhibited primarily with the intent of interpreting the past; "Science" refers to materials exhibited primarily to demonstrate and/or interpret physical and biological phenomena, including their laws and applications.) (Please check one)
- a. Exclusively or predominantly ART
 - b. Exclusively or predominantly HISTORY
 - c. Exclusively or predominantly SCIENCE
 - d. Nearly equal emphasis on ART AND HISTORY
 - e. Nearly equal emphasis on ART AND SCIENCE
 - f. Nearly equal emphasis on HISTORY AND SCIENCE
 - g. Nearly equal emphasis on ART, HISTORY, AND SCIENCE
 - h. Other *(Please specify)* _____

16. Does the site have any circulating collection or exhibition?
Yes No
17. If your site operates a library, please specify the following:
- a. Is the library open at regular hours for use by the general public?
Yes No
 - b. Is the library open only by appointment to any interested person?
Yes No
 - c. Other *(Please specify)* _____

SECTION C. PROGRAM

18. Does your site have joint programs or special affiliations with colleges and universities?

Yes _____ No _____

If "Yes", what kinds of programs or affiliations? *(Please check all applicable)*

- a. _____ Research at graduate or undergraduate levels
- b. _____ Work experience for credit at graduate or undergraduate levels
- c. _____ Work experience without credit
- d. _____ Observation or participation in program by teacher trainees
- e. _____ Training program for professional museum workers
- f. _____ Facilities or supplies loaned to colleges
- g. _____ In-service or credit courses taught in your facilities
- h. _____ College credit courses taught by your professional staff (any location)
- i. _____ Other *(Please specify)* _____

19. What types of educational-cultural activities does your site or organization regularly schedule under the direction of the staff, paid or volunteer?

(Please check all applicable)

- a. _____ Guided tours for school classes
- b. _____ Presentations at schools
- c. _____ Special lectures or demonstrations for school classes at the institution
- d. _____ Organized school loan service of special materials and collections
- e. _____ Guided tours and gallery talks for general groups
- f. _____ Classes, clubs, and study groups for children or adults
- g. _____ Lecture series for general audience
- h. _____ Radio or TV programs produced by the institution
- i. _____ Live musical or dance events
- j. _____ Film series
- k. _____ Speaker's bureau
- l. _____ Other *(Please specify)* _____

m. _____ None

20. Do you have a publication program?

Yes _____ No _____

If "Yes", are any of the following issued? *(Please check all applicable)*

- a. _____ Formal annual report
- b. _____ Membership newsletters, calendars, flyers, etc.
- c. _____ Technical books, pamphlets, or bulletins based on research findings
- d. _____ Popular books, bulletins, or pamphlets (excluding membership newsletters, calendars, flyers, etc.)
- e. _____ Regular periodical(s) (magazines, journals, proceedings)
- f. _____ Exhibition catalogues with extensive annotations (as opposed to lists)
- g. _____ Catalogue of collection(s)
- h. _____ Other *(Please specify)* _____

21. Does your site engage in formal research projects that provide specific needed information to the museum/historical site field?

Yes _____ No _____

a. What types of research do you engage in? (Please check all applicable)

- Research projects performed on a contract basis
- Research projects that result in publications of interest to the museum/historic site field
- Research projects to upgrade exhibits in-house
- Other (Please specify) _____

b. Is research the primary function and activity of your site?

Yes _____ No _____

22. Is your site, including facilities, open to the general public?

Yes _____ No _____

If "yes", please specify the following:

- a. Open at stated hours without advance arrangements
- b. Open only by special appointment
- c. No restrictions
- d. Other (Please specify) _____

23. How many days per year is your site, including facilities, open to the general public? _____

24. What days and how many hours per day is your site, including facilities, open to the general public?

(Please check all applicable)

(Please indicate the hours in the appropriate space)

<u>Days</u>		<u>Hours</u>	
a. <input type="checkbox"/>	Sunday	from	_____ m. to _____ m.
b. <input type="checkbox"/>	Monday	from	_____ m. to _____ m.
c. <input type="checkbox"/>	Tuesday	from	_____ m. to _____ m.
d. <input type="checkbox"/>	Wednesday	from	_____ m. to _____ m.
e. <input type="checkbox"/>	Thursday	from	_____ m. to _____ m.
f. <input type="checkbox"/>	Friday	from	_____ m. to _____ m.
g. <input type="checkbox"/>	Saturday	from	_____ m. to _____ m.
h. <input type="checkbox"/>	Holidays	from	_____ m. to _____ m.

On what holidays is your site closed to the general public?

(1) Holiday

(2) Not closed on holidays

25. What are your requirements regarding attendance and touring of your site?

- a. By guided tour only
- b. By unescorted viewing only
- c. Combination of a. and b.
- d. Other (*Please specify*) _____

26. If you provide guided tours, are they scheduled on a regular basis?

Yes No

- a. What is the maximum number of persons included in each such guided tour? _____
- b. How many regularly scheduled tours do you provide daily? _____
- c. What is the length of time of the tour? _____
- d. Does the number of regularly scheduled tours meet the demand for such tours? Yes No

If "no", the number of regularly scheduled tours ideally should be increased by _____% per day

27. a. What is the approximate size of your site and ground(s) (in square feet)?

- (1) Total _____
- (2) Facilities _____
- (3) Grounds _____
- (4) Other _____
(*Please specify*) _____

b. What is the approximate size of your site and grounds included in the guided tour?

- (1) Total _____
- (2) Facilities _____
- (3) Grounds _____
- (4) Other _____
(*Please specify*) _____

SECTION D. INSTITUTIONAL STATISTICS*

I. Staff

**Information in this Section will remain confidential and will be used only for statistical purposes.*

Definitions and Instructions:

Professional Staff--Paid employees doing work that requires education, training, and skill in the academic or scholarly aspects of the institution's program, as distinct from the merely mechanical and clerical aspects.

Such employees would usually have at least a bachelor's degree in a relevant subject, or post high school education and appropriate experience equivalent to a bachelor's degree.

Other Staff--Other paid employees not fitting definition of "Professional Staff".

Staff Positions by Full-Time Equivalents--To compute full-time equivalents (FTE) of part-time personnel, add the total hours worked per week by all part-time personnel, and divide by number of hours worked by a full-time staff person in a normal work week (e.g., 40 hours). Report these calculations as decimals, converting to nearest tenth of a position.

Example:

4 employees each worked 20 hrs. per week = 80 hrs.
 2 employees each worked 10 hrs. per week = 20 hrs.
 6 employees worked a total of = 100 hrs.

$$\frac{100 \text{ hours}}{40 \text{ hours}} = 2.5 \text{ FTE}$$

Please enter a dash (-) in any item that does not apply and a zero (0) when the amount to be reported is zero. Please do not leave items blank.

28. The information given below is for what reporting year?

Calendar Year 197___ or Fiscal Year Ending _____ 197___
 (month) (Year)

<u>Item</u>	<u>Professional Staff</u>	<u>All Other Staff</u>
a. How many <u>full-time paid staff</u> members were employed and paid by the site at the end of the reporting year?	_____	_____
b. How many <u>part-time paid staff</u> members were employed by the site at the end of the reporting year?	_____	_____
c. What are the <u>full-time equivalents of your part-time staff</u> members? (FTE of Item 28B)	_____	_____
d. What is the total <u>number of hours</u> contributed by volunteers during the calendar or fiscal year listed above?	_____	_____

29. What are the annual salary ranges of your staff?

- a. Director or administrator \$ _____ to \$ _____
- b. Professional \$ _____ to \$ _____
- c. Non-Professional \$ _____ to \$ _____

II. Attendance and Visitor Information

30. What are the total attendance figures for the following calendar or fiscal years: *(Please indicate figures under the appropriate column)*

	<u>By Actual Count</u>	<u>Estimated</u>
1973-74	_____	_____
1974-75	_____	_____
1975-76	_____	_____

31. What per cent of your total visitors are residents of your state? *(Please indicate the per cent under the appropriate column)*

	<u>By Actual Count</u>	<u>Estimated</u>
1973-74	_____	_____
1974-75	_____	_____
1975-76	_____	_____

III. Operating Expenditures

Definitions:

Operating Expenditures--Total annual fiscal operation for the reporting year, excluding acquisitions, major construction and other capital outlay, and special projects such as expeditions which are not recurring expenditures.

Contributions in Kind--Total contributions for site operation for the reporting year made not in money, but through use of premises, provision of staff, provision of utilities, regular custodial or professional services, etc.

32. What were the total operating expenditures (for the year reported in question 28 excluding contributions received in kind)?

\$ _____

33. What was the estimated total value of contributions in kind, provided during the reporting year, by outside agencies or organizations (State, county, city, school district, civic organization, college, etc.) but not included in the operating expenditures?

\$ _____

34. What was the distribution of expenditures during the reporting year?

	<u>Reporting Year</u>
a. Research	\$ _____
b. School programs	\$ _____

c. Adult education programs	\$ _____
d. Exhibitions	\$ _____
e. Administration	\$ _____
f. General operating costs	\$ _____
g. Publications	\$ _____
h. Other (<i>Please specify</i>)	\$ _____
<hr/>	
Total	\$ _____

Revenues

35. What were the sources and amounts of your income during your last full year of operation?

a. Municipal (city) government	\$ _____
b. County government	\$ _____
c. State government	\$ _____
d. Federal government	\$ _____
e. College or university	\$ _____
f. Endowment and contributions	\$ _____
g. Admission fees	\$ _____
h. Gift shops, food concessions	\$ _____
i. Publications	\$ _____
j. Other (<i>Please specify</i>)	\$ _____

36. Do you charge admission fees?

Yes _____ No _____

a. What are the admission fees for individuals?

(1) Adults	\$ _____
(2) Children	\$ _____
(3) Others (<i>Please specify</i>)	\$ _____

b. Are there reduced rates for groups?

Yes _____ No _____

(1) If "yes", for what types of groups? (*Please specify*) _____

(2) If there is a minimum number required per group for the reduced rates, please specify the minimum number. _____

c. How are admission fees used? (*Please check all applicable*)

- (1) _____ General historic site operations
- (2) _____ Special historic site use (i.e. exclusively for research, for displays, for equipment, etc.)
- (3) _____ Deposited in a general fund (not earmarked for historic site)
- (4) _____ Other (*Please specify*)

37. Do you have a membership admission program?

Yes _____ No _____

If "yes", please specify membership admission fees below:

	<u>Children</u>	<u>Adults</u>
Annual fees	\$ _____	\$ _____
Long-term fees	\$ _____	\$ _____
Nonresident fees	\$ _____	\$ _____
Other (<i>Please specify</i>)	\$ _____	\$ _____

38. Do you have provision for non-paying admission?

Yes _____ No _____

a. Please specify for what individuals or groups _____

b. How is such non-paying admission scheduled?

- (1) _____ Certain day(s) (*Please specify*) _____
- (2) _____ Certain week(s) (*Please specify*) _____
- (3) _____ Certain month(s) (*Please specify*) _____
- (4) _____ No restrictions
- (5) _____ Other (*Please specify*) _____

SECTION E. MISCELLANEOUS COMMENTS

If there are other pertinent areas of concern which should be considered, kindly indicate below:

Please send me a copy of final published report. Yes _____ No _____

Appendix D

LIST OF PERSONS INTERVIEWED

Gerard Bergh, Director
Mission Houses Museum
553 South King Street
Honolulu, Hawaii 96813

Randall J. Biallas
Staff Architect
Geoffrey W. Fairfax & Assoc.
1210 Ward Ave.
Honolulu, Hawaii 96814

Christopher Cobb, Chairman
Board of Land and Natural Resources
Department of Land and
Natural Resources
P.O. Box 621
Honolulu, Hawaii 96809

Geoffrey W. Fairfax
Restoration Architect
Geoffrey W. Fairfax & Assoc.
1210 Ward Avenue
Honolulu, Hawaii 96814

Alex Hirota
Automotive Services Superintendent
Automotive Management Division
Department of Accounting and
General Services
1151 Punchbowl Street
Honolulu, Hawaii 96813

Col. Walter F. Judd
P.O. Box 605
Kaneohe, Hawaii 96744
(Member, Friends of Iolani Palace)

Walter Kagawa, Engineer
Public Works Division
Department of Accounting and
General Services
1151 Punchbowl Street
Honolulu, Hawaii 96813

Abigail Kekaulike Kawanakoa
President
Friends of Iolani Palace
P.O. Box 2259
Honolulu, Hawaii 96804

William Kea, Sr., Vice-President
Friends of Iolani Palace
P.O. Box 2259
Honolulu, Hawaii 96804

Aaron Levine, President
Oahu Development Conference
119 Merchant Street, Rm. 508
Honolulu, Hawaii 96813
(Member, Friends of Iolani Palace)

Richard Nakamura, Division Head
Central Services Division
Department of Accounting and
General Services
1151 Punchbowl Street
Honolulu, Hawaii 96813

James Olds
Vice-President & General Manager
Trade Wind Tours of Hawaii
Outrigger East Hotel
150 Kaiulani Avenue
Honolulu, Hawaii 96815

Frank W. Peppin, Vice-President
Greyhound Royal Hawaiian
Transportation Co.
1880 Kalakaua Avenue
Honolulu, Hawaii 96815

Alfred Preis, Executive Director
Foundation on Culture and the Arts
Department of Budget and Finance
Honolulu, Hawaii

Jacob Pyo
Planner, Development Branch
Division of State Parks, Outdoor
Recreation and Historic Sites
Department of Land and Natural
Resources
1151 Punchbowl Street
Honolulu, Hawaii 96813

Helen Rantala, Secretary
Friends of Iolani Palace
P.O. Box 2259
Honolulu, Hawaii 96804

Harry H. Schnabel, Jr.
Past Director
Iolani Palace Restoraton Project
P.O. Box 2259
Honolulu, Hawaii 96804

J. M. Souza, Chief
Division of State Parks, Outdoor
Recreation and Historic Sites
Department of Land and Natural
Resources
1151 Punchbowl Street
Honolulu, Hawaii 96813

Joseph Spielman, Chairman
Restoration Committee
Friends of Iolani Palace
P.O. Box 2259
Honolulu, Hawaii 96804

Michael Tokunaga
Deputy Comptroller
Department of Accounting and
General Services
1151 Punchbowl Street
Honolulu, Hawaii 96813

RESOURCE PERSONS

William T. Alderson, Director
American Association for State
and Local History
1400 Eighth Avenue, South
Nashville, Tennessee 37203

Betty Crocker, 1st Vice-President
The Outdoor Circle
200 N. Vineyard
Honolulu, Hawaii 96817

Dr. Roland Force
Former Director
Bernice P. Bishop Museum
1355 Kalihi Street
Honolulu, Hawaii 96819

Catherine Frangiamore, Curator
Atlanta Historical Society
3099 Andrews Drive, N.W.
Atlanta, Georgia 30305

Michael Harsh
Historic Site Manager
The Ohio Village
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(also President, Japan-Hawaii
Travel Association)

Haruo Kito
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Hiromu Nojima
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Appendix E

RESPONSES OF AFFECTED AGENCIES

On February 24, 1977, the Bureau transmitted a preliminary draft of the report, *Iolani Palace Complex: Some Directions for the Future*, to the Department of Land and Natural Resources, the Iolani Palace Restoration Committee of the Friends of Iolani Palace, the State Preservation Officer, and the Iolani Palace Restoration Architect, and asked for their comments on the report. A copy of the transmittal letter sent to these entities is appended as Attachment 1. Of the four entities requested to review the report, two responded. On February 28, 1977, the Restoration Architect transmitted his response, and on March 2, 1977, the President of the FIP submitted the comments of the FIP. The State Preservation Officer was out of town and could not respond, and DLNR submitted no comments. The Restoration Architect's comments and the FIP's comments are appended as Attachments No. 2 and No. 3, respectively.

COMMENTARY ON AGENCY RESPONSES

Restoration Architect. Mr. Geoffrey W. Fairfax, pointed out some minor corrections in the report and concluded that "(i)t was a job well done. This report reflects a high degree of seriousness and fairness in dealing with an extremely difficult subject".

Friends of Iolani Palace. The President of the FIP submitted a lengthy response to the report addressing various items of the report. In reviewing the items, the Bureau found that many of the specific items had recurring themes and that the items could be grouped in general categories. The Bureau comments on the FIP response are discussed according to these categories as follows:

Basic policies and master plan already developed. The FIP appears to question the basic findings of the report. The FIP implies that fundamental policies concerning the IP Complex have already been established; that a master plan for the restoration of IP Complex already exists; and as a result, there is no need to develop the policies and the plan. References to this effect (both direct and indirect) recur throughout the FIP response. For example, in regards to the policy issue, the FIP state that "the question... 'what' constitutes the IP Complex... is academic.... To continue to struggle for a definition of the complex is a waste of time.... the 'purposes' of restoration have been discussed and debated extensively." (FIP response, p. i, paragraphs 1 to 3)

The FIP appears to miss the main point of the report. Despite the FIP contention that "the question 'what' is academic" and the "'purposes' have been discussed and debated extensively", the fact still remains that policy decisions have not been made. This is clearly spelled out in chapter 9, Restoration Policies, of the report. As noted in the report, the agency (DLNR) under whom jurisdiction of the IP Complex falls indicated that policy decisions have not been made (p. 9-7). As a consequence, the department could not provide specific planning guidelines (p. 9-8); widely differing plans were formulated (p. 9-8 and chapter 10); policy assumptions were inherent in plans developed (p. 9-8); and plans implemented became de facto policy decisions (p. 9-9). It should also be noted that the FIP themselves were forced to change their basic direction in the development of their operational plan because of a basic policy assumption concerning the "purpose" of the IP Complex, to which DLNR did not concur (see p. 9-8).

The FIP also implies that a master plan to guide the restoration of the project already exists. For example, in a discussion of a master plan, the FIP concludes that "the overall general framework...is shown quite clearly in the Civic Center Master Plan and subsequent plans" (FIP response, p. iii, paragraph 6); and in the following paragraph states that "...starting with Mrs. Liliuokalani Morris, founder and first president of the FIP, many of the same people who participated in the original master planning for the Hawaii Capital District were the same ones who furnished leadership to the FIP and its restoration efforts"; and on page iv, paragraph 2 of the response, the FIP states that "...everyone is aware of the direction and time period for the restoration". Other references alluding to the existence of a master plan are found on FIP response, page iii, paragraphs 5 and 9.

Contrary to the contention of the FIP, the report clearly shows in chapter 9, A Master Plan for the Restoration Project (pp. 9-18 to 9-25), that a master plan to guide the restoration and eventual operations of the Palace has not been developed. The report also notes that none of the plans being utilized for the restoration has been officially adopted and that the state officials responsible for the IP Complex program affirm the lack of a master plan. As a result, except for the IP and Iolani Barracks, the department officials were unable to articulate "what facilities are to be restored or renovated including the areas on the Palace grounds" (p. 9-26).

One of the basic reasons for the nondevelopment of a master plan as well as other definitive operations plan is the lack of policies. In connection with the policy/master plan issue, the FIP expressed "disappointment" that the Bureau

could not determine who should operate the IP Complex (see cover letter to the FIP response, and FIP response, p. iv, paragraph 7, and p. v, paragraphs 1 and 2). The lack of the same policies which hampered the restoration effort also precluded the responsible resolution of the basic question posed. This is discussed in chapter 2, An Overview, of the report.

Items overlooked; incorrect impressions. Concerning page ii, paragraph 2, of the FIP Comments:

Contrary to the statement that section 9-1 "completely overlooks the documented fact that even though the State concluded that the restoration work should proceed, it has been unwilling to make the determination on the question of operations", the report devotes four sections in chapter 9 (pp. 9-10 to 9-16) which clearly develop the point that policy decisions were neither recommended nor rendered by the Department of Land and Natural Resources, the agency responsible for rendering such decisions.

Concerning FIP response, page i, paragraphs 5 to 7, and page ii, paragraph 1, relating to the cost and delay problem.

The Bureau presents five factors (two major and three miscellaneous) which hampered the progress of the project and contributed to delays and escalation of costs. In addition to the delays in executing contracts and delivery of funds which the FIP feels were the real reasons for the problem (but which the report treated as miscellaneous factors), the Bureau also noted that the nature of the Restoration Project, the decision to extend the project over a longer time frame (both indicated as major factors in the report), and unanticipated expenses (miscellaneous factors) contributed to the problem (see pp. 7-2 to 7-5).

Concerning FIP response, page iv, paragraphs 3 and 4, relating to restoration work completed.

The FIP again misses the point being made. No policy determination has been made as to the programs and services to be offered and how the services will be offered, e.g., tour group, at-will, etc. While no decisions have been made, the installation of the building automation system appears to have already precluded the consideration of one of the alternatives (see discussion on p. 9-31, and pp. 9-35 and 9-36).

Concerning page ii, paragraphs 5 and 6, relating to acquisition policies.

While the FIP may have found the necessary resources for carrying out the project and may have FIP policies in utilizing their own funds to acquire furnishings for the Palace, the fact still remains that no state policies have been established for effectively utilizing state funds in this area.



LEGISLATIVE REFERENCE BUREAU
State of Hawaii
State Capitol Room 004
Honolulu, Hawaii 96813
Phone 548-6237

February 24, 1977

C-6271

Ms. Jane Silverman
State Historic Preservation Officer
and State Parks Historian
State Historic Preservation Office
Pier 2
Honolulu, Hawaii

Dear Ms. Silverman:

Enclosed is an advance confidential copy of the Legislative Reference Bureau's report on *Iolani Palace Complex: Some Directions for the Future*. This study was prepared in response to Conference Committee Report for Senate Bill No. 535, H.D. 1, C.D. 1, of the 1975 legislative session.

The enclosed advance copy is not for general distribution as it is preliminary to the final report and thus subject to change. The enclosed report is the property of the Bureau and its use should be appropriately restricted.

We would appreciate a review of the report by you or appropriate members of your organization and submission of comments concerning the report. Such comments may be made by separate letter or by notations on the report itself.

We request that you return the copy of the report by 4:00 p.m. March 2, 1977 in order to allow for possible incorporation of your comments and to enable us to transmit a final draft to the Legislature by March 7, 1977.

At this time, we extend our appreciation for your assistance to our researchers in obtaining data for the report.

If there are any questions, please do not hesitate to contact Mr. Lloyd Migita of this office, or the undersigned, at 548-6237. Thank you for your continued cooperation and assistance.

Very truly yours,

A handwritten signature in cursive script that reads "Samuel B. K. Chang".
Samuel B. K. Chang
Director

SBKC:my
Enclosure

GEOFFREY W FAIRFAX FAIA & ASSOCIATES architects

28 February 1977

Mr. Samuel B.K. Chang, Director
Legislative Reference Bureau
State of Hawaii
State Capitol Room 004
Honolulu, Hawaii 96813

Re: Preliminary Draft
LRB Report on Iolani Palace
Complex

Dear Mr. Chang:

In response to your letter of 24 February I have reviewed the preliminary draft of "Iolani Palace Complex: Some Directions for the Future".

My comments are as follows:

Page 3-4

Referring to supplementary structures which projected from the Palace building in the late 1960's, the statement "these structures offered protection to the building from the elements and are credited with saving the Palace from ruin" is incorrect.

Page 7-6

There is no explanation of Footnote #14.

Page 8-3, paragraph 2

Based upon a site survey of existing conditions prepared by R.M. Towill Corporation, and based upon documentary evidence our office prepared a restoration site plan encompassing the total grounds. See Sheet #68 dated 1 May 1975.

Page 9-34

Midway down the page, change word "veterans" to verandahs".

Mr. Samuel B.K. Chang
28 February 1977
page 2

Page 9-35

Midway down the page, ..." and none of the rooms..." is incorrect. Visitor access to the makai and mauka verandahs is planned at both the first and second floors from the central hallways at those levels. (Direct access from other rooms to the verandahs will be restricted in order to 1) maintain efficient operation of the air conditioning system and 2) insure security and protection of Palace contents.)

Page 9-36

Reference is made to "supervising architect" in quoting Randall J. Biallas, one of our staff architects assigned to the Palace restoration. So that his comments are not mistakenly attributed to me, I would appreciate your designating him as "a staff architect". This should also be altered in footnotes 8,27,33,39,40 and 45 on pages 9-39,9-40, and 9-41, and also in Appendix D under "Randall J. Biallas".

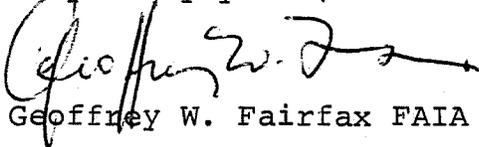
Page 11-4

I think one very significant difference between Bishop Museum and Iolani Palace is locale. The Palace enjoys a readily accessible key location.

And that's it. I hope that my comments may be of some help.

It's a job well done. The report reflects a high degree of seriousness and fairness in dealing with an extremely difficult subject. I congratulate you, Lloyd Migita and his co-workers.

Very truly yours,


Geoffrey W. Fairfax FAIA

GWF/ces



THE FRIENDS OF IOLANI PALACE

Telephone 533-3036

Post Office Box 2259

Honolulu, Hawaii 96804

2 March 1977

Mr. Samuel B.K. Chang
Director
Legislative Reference Bureau
State Capitol
Room 004
Honolulu, Hawaii 96813

Dear Mr. Chang:

Thank you for the opportunity to review the preliminary draft of the LRB report: Iolani Palace Complex: Some Directions for the Future.

The Board of Directors of the Friends of Iolani Palace was pleased when the 1975 session of the Legislature requested the Legislative Reference Bureau to conduct an analysis of the issues related to the operation and management of Iolani Palace complex. We regretted that the Bureau was unable to meet its assignment for the 1976 session and delayed completion of the report until this year.

Now, we are very disappointed by the Bureau report. It fails to meet one of its three major objectives. It offers no useful recommendations on operation or management. It furnishes no guidance for either the Legislature or the State administration.

To place the question of operation and management of the Iolani Palace complex before an ad hoc commission will only delay the decision still further. We believe the consequences could be disastrous for the Palace to remain unused now that its restoration is practically completed.

The Bureau has had almost two years in which to produce specific recommendations and has been unable to do so with a fully paid staff and the resources of the Bureau. It is questionable how much longer it would take an ad hoc commission with part-time members. Perhaps review of the question by a commission would have been appropriate five or ten years ago, but not now when the structure is restored and ready to be used.

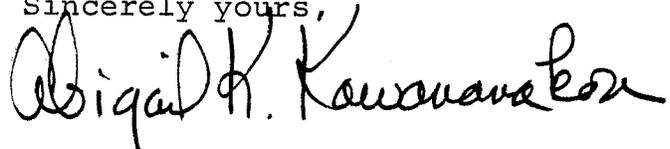
We do not find the fundamental approach of the study to be helpful. It is primarily a recapitulation of past events, with some of them misinterpreted.

We recommend that the Friends be assigned the responsibility as soon as possible to further refine, in consultation with the appropriate State agencies, the operations and management plan we submitted some time ago. Through its broad membership, the Friends can provide input from the many users of the complex.

We have reviewed the Bureau report and find that there are some sections that deserve response since they are either inaccurate or misleading. Our specific comments follow.

As always, the Friends of Iolani Palace will continue their interest and dedication to this important part of Hawaii.

Sincerely yours,

A handwritten signature in black ink, reading "Abigail H. Kawanana Koa". The signature is written in a cursive, flowing style with a large initial 'A'.

Abigail Kekaulike Kawanana Koa
President

SPECIFIC COMMENTS ON LRB REPORT ON IOLANI PALACE COMPLEX
(dated February, 1977)

Chapter 2- An Overview

(page 2-1) Except for possible alternative uses of the Kana'ina Building and the future disposition of the Archives building, the question... "'what' constitutes the Iolani Palace Complex"... is academic.

The Palace, Barracks, coronation stand, banyan tree grouping, cemetery, fountain, fences and gates, and related land and plantings, have all been recognized throughout each study of the past ten years as the Iolani Palace Complex. To continue to struggle for a definition of the complex is a waste of time.

(2-1) Similarly, the "purposes" of restoration have been discussed and debated extensively. This study merely belabors the point.

Chapter 5 - Organization for Restoration

(5-5) Exhibit 5.3 shows a major organizational component for "operations planning" by the Friends. The chart was prepared for the purpose of showing how the FIP could function if it were given the operations assignment. Not having received that responsibility thus far, it has been pointless for the FIP to institute that component, but it is ready to do so.

Chapter 7 - Some Problems relating to the Restoration Project

This chapter conveys a totally incorrect impression of the cost problems of the Palace. The original cost estimate was based on the restoration work proceeding systematically, one logical step followed directly by the next, without interruption or delays of several months between each successive phase.

Coupled with the fact that there was unprecedented escalation of construction costs during that period, what the study relegates to "other miscellaneous problems", is the real reason for the final added cost of the project. That was the repeated delay in executing contracts and delivering funds which resulted in the restoration work and the solicitation of bids being pushed into the next higher inflationary period time and time again.

Only by the FIP moving into the vacuum created by the State's delay in forwarding the funds, was the work program kept from grinding to a total halt and the final cost reaching an even higher level. Repeatedly, throughout the restoration process, that increased cost factor due to delay was brought to public notice and public agency attention by the Friends.

The treatment of that very important recurring factor receives only minor comment in this section, thereby implying that the FIP original estimates were three times lower than they should have been.

Chapter 9 - Planning Inadequacies

(9-1) This section on "lack of restoration policies" completely overlooks the documented fact that even though the State concluded that the restoration work should proceed, it has been unwilling to make the determination on the question of operations.

The other point overlooked is that the first objective of the overall goal for the Hawaii Capital District was the physical restoration of the Palace. The FIP achieved that objective with the State's cooperation.

(9-2) It is significant that only a "gift shop, snack bar, or other similar activities" can be singled out as being undetermined thus far. From the tone of the report, one would assume that the principal buildings were still unassigned in function.

(9-3) In writing paragraph 1 under "Policies for Resources for Restoration", the study is apparently unaware that the FIP has successfully found "the necessary funds for carrying out the restoration, the raw materials needed and the necessary personnel with specialized restoration skills". That has been the primary mission successfully accomplished by the FIP Restoration Committee these past years.

In regard to paragraph 2, authors of the report are also apparently unaware that there is a very definite statement in regard to FIP policy on furnishings within the Palace (originals, replications of the period, etc.). The Policy has been in writing and was available to the staff of the Bureau.

(9-3) The section on "Purpose of Capital Restoration" sets up some "straw men" and also overlooks the reality of the past decade. Is the report suggesting that no restoration work should have been started until all the items on page 9-4 were determined? If so, we would still be waiting to begin work, and the public costs would be still higher.

No one on any of the Civic Center advisory committees or FIP has ever suggested charging admission fees to enter the grounds. This is the kind of "straw man" gratuitous suggestion that only confuses the overall issue.

(9-13) At the beginning of the last paragraph on this page, Aaron Levine should be identified not as the president of the Oahu Development Conference, but as first chairman of the FIP Restoration Committee and former vice president of FIP (the same correction should be noted on page 9-39, item 10).

(9-14) Item 4 omits an important achievement of the FIP Traffic Committee, namely the sequential removal of heavy tour bus traffic from the Palace grounds on weekdays.

(9-15) The FIP successfully started public programs to acquaint people with the Palace Complex and to begin bringing it closer to the community. These activities included numerous articles and stories related to the Palace and the monarchy, successful concerts on the Palace lanai, and films and newsletters which familiarized the public with the Palace Complex.

(9-24) This page refers to "numerous basic inconsistencies in the various plans". It turns out in reading this section closely that only in discussing the future use and/or demolition of the Kana'ina and Archives building is there any significant difference between any of the plans mentioned.

The disposition of the Archives building is totally dependent on its replacement, which depends in turn on other state agencies, future CIP decisions, and the State's economy.

The Kana'ina building difference is due to an evolution of thinking and modification of plans as time passes. It is both desirable and inherent in master planning.

The point is that the report addresses the question of a master plan as though it is a mathematical formula with only one solution to be arrived at. Rather, the master plan should reflect decisions and changes over a period of time and permit major objectives, like the restoration of the Palace, to occur within the overall general framework which is shown quite clearly in the Civic Center master plan and subsequent plans.

The authors of the study do not realize, although it was told to them in personal interviews and in memoranda and minutes, that starting with Mrs. Lilioukalani Morris, founder and first president of the FIP, many of the same people who participated in the original master planning for the Hawaii Capital District were the same ones who furnished leadership to the FIP and its restoration efforts.

(9-29) The report states that there was a ... "premature rushing into the restoration phase of the project" and that the critique done by the Hawaiian Historical Society was ignored by both the FIP and DLNR.

There never was or is any question about restoring the Palace to the time of the monarchy period. That was an objective to be achieved as rapidly as possible because of the cost and the great interest to the community. Would the authors of the report have delayed the beginning of the restoration process, which had to penetrate to the fabric of the structure, until the detailed questions related to operations in the future were all answered?

The critique of the Historical Society was not ignored by the FIP. It was carefully replied to in writing.

(9-30) Despite what this page states, everyone concerned is aware of the direction and time period for the restoration. There have been innumerable items in the communications media about this.

(9-31) Like most of the report, the text on this page throws some doubt on the restoration work already completed by inferring that different mechanical systems would have been installed in the Palace if a decision had been reached on its future program and operations. What the report fails to indicate is that regardless of the decision on the latter, the systems installed are appropriate.

(9-35) The FIP retained one of the most experienced professionals in the U.S. in the restoration field, Dr. Alexander, and found that "at will or free visit" would be the least desirable way of opening the Palace to the public. Professional members of the FIP Board examined museums elsewhere in the world and concurred with that expert opinion. To suggest otherwise is an incredible disservice by this report. If only for local climatic conditions and the number of anticipated daily visitors to Hawaii, the mechanical systems installed are essential.

Chapter 12 - Findings and Recommendations

(12-3) The report gives somewhat begrudging approval to the FIP efforts by saying that "the Friends have done a creditable job in carrying out the restoration..."

The report fails to note that the task has:

- (1) met the highest standards of historic preservation;
- (2) has solved the complex problems of inserting new structural members, installing a new elevator and modern air conditioning and security equipment systems within the fabric of an old structure without diminishing its architectural integrity;
- (3) has accomplished successfully the transformation of the termite hollowed woodwork into a building containing some of the most beautiful finished woodwork in the State;
- (4) has administered \$5.9 million without one dollar being in question or being used to the individual benefit of anyone;
- (5) that it was accomplished by a volunteer citizen group whose thousands of hours of administrative work were furnished at no cost to the taxpayers.

Report Recommendations

(12-4) Instead of providing "specific recommendations for the operation and management of Iolani Palace Complex", as mandated at the very beginning of the report, the study recommends an ad hoc commission to make recommendations to the Legislature in the future.

This will not only hold and delay the problems by placing them in abeyance, but will extend the time period still further before any legislative resolution of the issue is possible.

The Bureau has had two years in which to produce specific recommendations but has been unable to do so with a fully paid staff and the resources of the Bureau. It is questionable how much longer than that it would take an ad hoc commission with part-time members. Further committee reviews and ad hoc commissions may have been appropriate ten or five years ago, but not when the structure is restored and waiting to be used.

The report suggests that the ad hoc commission ... "should be free to experiment with various modes of operations..." That is the first recognition in the report (and is significantly located next to the last page of text) that following the advice of professional and experienced people in the field and by adjusting that to local conditions, - which are far different from those of Sturbridge, Massachusetts, an effective operations plan can evolve.

Appendix B - Survey of Potential Visitors

(B-1) The surprising part of the visitors survey results is that so many people replied that they would pay even \$1 to enter the Palace.

Professional marketing analysts recognize that response to this type of question is dependent on the amount of information, the attractiveness of the feature portrayed and by word of mouth. The Bureau survey is totally lacking in its information portrayal and could not reasonably be expected to be any higher, the way the question was posed.

Additional Comments

(6-17) Line 14 should read "The FIP currently has \$40,000 available and has applied for Federal matching funds."

(6-18 and (9-27) We know of no current plans to furnish the kitchen in the basement and it will be impossible to furnish the Throne Room better than 90% by July 1977.

CONVERSION TABLE OF PAGE REFERENCES

Because the draft copy of this report utilized a different page numbering system, in order to assist the reader to find the appropriate page reference in this printed version, the following table should be consulted.

APPENDIX E, RESPONSES OF AFFECTED AGENCIES

FIP LETTER

For page referred to in the above document:	Refer to page in the report:	For page referred to in the above document:	Refer to page in the report:
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p. 9-8	p. 65	p. 6-17	p. 50
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pp. 9-10 to 9-16	pp. 66-71	p. 9-3	p. 62
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FAIRFAX LETTER

For page referred to in the above document:	Refer to page in the report:	For page referred to in the above document:	Refer to page in the report:
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p. 7-6	p. 120	p. 9-24	p. 76
p. 8-3	p. 59	p. 9-27	p. 78
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p. 11-4	pp. 98-99	p. 9-35	pp. 82-83
		p. 12-3	p. 116
		p. 12-4	p. 117