

Application Submittal Checklist

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

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



Andrew Morgan, General Director & CEO

PRINT NAME AND TITLE

1/16/2025

DATE

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

Type of Grant Request:



Operating



Capital

Legal Name of Requesting Organization or Individual: Db:

Hawaii Opera Theatre

Amount of State Funds Requested: \$ 100,000

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

These GIA funds will be used by Hawaii Opera Theatre for its newly commissioned "Kamalehua: The Sheltering Tree," a groundbreaking opera by Hawaiian composer, conductor and educator Herb Mahelona and librettist Victoria Nalani Kneubuhl, an award-winning native Hawaiian and Samoan playwright and author. Kamalehua: The Sheltering Tree tells the true story of Timoteo Kamalehua Ha'alilio, Royal Secretary and lifelong friend to King Kamehameha III. Set in the mid-nineteenth century, the opera reveals the little-known history of the Hawaiian Kingdom and its early struggles to maintain independence. The opera illustrates the sophistication and establishment of the Hawaiian government at the time, as well as the vigilance of Hawaiian leaders in dealing with the pressures and politics of the western world. HOT will present three performances of Kamalehua: The Sheltering Tree, engage K-12 students as part of the final dress rehearsal, and conduct educational lectures and panel discussions about the opera and historical significance of the events depicted in the opera.

Amount of Other Funds Available:

State: \$ 0

Federal: \$ 50,000

County: \$ _____

Private/Other: \$ 801,250

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

\$ 45,000

Unrestricted Assets:

\$ 887,400

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

Type of Business Entity:



501(C)(3) Non Profit Corporation



Other Non Profit



Other

Mailing Address:

848 S. Beretania Street, Suite 301

City:

Honolulu

State:

HI

Zip:

96813-2587

Contact Person for Matters Involving this Application

Name:

Andrew Morgan

Title:


General Director & CEO

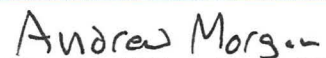
Email:

a_morgan@hawaiiopera.org

Phone:

(808) 683-7201


Authorized Signature


General Director & CEO
Name and Title

1/15/2025

Date Signed



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

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

Vendor Name: HAWAII OPERA THEATRE

DBA/Trade Name: HAWAII OPERA THEATRE

Issue Date: 01/15/2025

Status: Compliant

Hawaii Tax#: W20327324-01

New Hawaii Tax#:

FEIN/SSN#: XX-XXX7758

UI#: XXXXXX0482

DCCA FILE#: 42917

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
8821	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Exempt
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	A status determination has not yet been made
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS PURSUANT TO
CHAPTER 42F, HAWAII REVISÉD STATUTES**

The undersigned authorized representative of the applicant certifies the following:

- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide the services for which a grant is awarded;
 - b) Complies with all applicable federal and state laws prohibiting discrimination against any person on the basis of race, color, national origin, religion, creed, sex, age, sexual orientation, or disability;
 - c) Agrees not to use state funds for entertainment or lobbying activities; and
 - d) Allows the state agency to which funds for the grant were appropriated for expenditure, legislative committees and their staff, and the auditor full access to their records, reports, files, and other related documents and information for purposes of monitoring, measuring the effectiveness, and ensuring the proper expenditure of the grant.
- 2) If the applicant is an organization, the applicant meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is incorporated under the laws of the State; and
 - b) Has bylaws or policies that describe the manner in which the activities or services for which a grant is awarded shall be conducted or provided; and
- 3) If the applicant is a non-profit organization, it meets the following requirements pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is determined and designated to be a non-profit organization by the Internal Revenue Service; and
 - b) Has a governing board whose members have no material conflict of interest and serve without compensation.
- 4) The use of grant-in-aid funding complies with all provisions of the Constitution of the State of Hawaii (for example, pursuant to Article X, section 1, of the Constitution, the State cannot provide "... public funds ... for the support or benefit of any sectarian or nonsectarian private educational institution...").

Pursuant to Section 42F-103, Hawaii Revised Statutes, for grants used for the acquisition of land, when the organization discontinues the activities or services on the land acquired for which the grant was awarded and disposes of the land in fee simple or by lease, the organization shall negotiate with the expending agency for a lump sum or installment repayment to the State of the amount of the grant used for the acquisition of the land.

Further, the undersigned authorized representative certifies that this statement is true and correct to the best of the applicant's knowledge.

Hawaii Opera Theatre

(Typed Name of Individual or Organization)



(Signature)

01/15/2025

(Date)

Andrew Morgan

(Typed Name)

General Director & CEO

(Title)

Application for Grants

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

I. Certification – Please attach immediately after cover page

1. Hawaii Compliance Express Certificate (If the Applicant is an Organization)

If the applicant is an organization, the applicant shall submit one (1) copy of a Hawaii Compliance Express Certificate from the Comptroller of the Department of Accounting and General Services that is dated no earlier than December 1, 2024.

Please see Hawaii Compliance Express Certificate attached.

2. Declaration Statement

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

Please see signed Declaration Statement attached.

3. Public Purpose

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

This grant will be used by Hawai'i Opera Theatre for the public purpose of presenting a newly commissioned opera, Kamalehua: The Sheltering Tree, which tells the true and largely unknown history of the efforts of Timoteo Kamalehua Ha'ahilo, Royal Secretary to King Kamehameha III, to obtain treaties recognizing the sovereign Hawaiian government in the 1840s.

II. Background and Summary

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

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

Celebrating over 60 years as the only professional opera company in Hawai'i, Hawai'i Opera Theatre (HOT) has produced over 171 productions of opera, operetta, and musical theatre. HOT's opera productions annually reach more than 10,000 residents and visitors while its education programs reach over 15,000 students on all the major islands. As the only professional opera company

in Hawai'i, HOT is one of the largest performing arts organizations in the state with performances and education presentations on all the major islands.

Hawai'i Opera Theatre (HOT) enriches the quality of life in our island communities through engaging repertoire and education programs that share the inspirational power and joy of opera in its many forms and reflects and enhances the cultural diversity of our Hawaiian home. HOT's Vision statement is, "Hawai'i Opera Theatre believes that different perspectives, cultural histories, life experiences and personal stories enrich the operatic repertoire and have the potential to make meaningful local and worldwide impacts. As a regional company, HOT is committed to supporting and engaging creators and music lovers who reflect the diversity of Hawai'i."

HOT is one of the largest performing arts organizations in the State with performances and education presentations on all the major islands and fulfills its mission by delivering:

- Three main-stage operas annually, reaching more than 10,000 people of all ages. HOT engages internationally renowned soloists, conductors, and stage directors to appear alongside professional musicians from the Hawai'i Symphony Orchestra, HOT's local volunteer chorus, and children from the Hawai'i Youth Opera Chorus.*
- A series of diverse programs that explore beyond the operatic repertoire in HOT's flexible space, STUDIO101, focusing on local artists.*
- A wide range of educational outreach programs reaching more than 20,000 K-12 students, their teachers, families and other adults on O'ahu, Kaua'i, Maui, and Hawai'i Island.*

2. The goals and objectives related to the request;

This grant-in-aid request is to support the world premiere of the first full-length opera created by native Hawaiians and Pacific Islanders and sung in Hawaiian, titled Kamalehua: The Sheltering Tree.

Opera in Hawai'i dates to the 1850s and includes stories of Queen Emma singing in the chorus while her husband, King Kamehameha IV served as the stage manager. Today, HOT expands on its history with Kamalehua: The Sheltering Tree, the true story of Timoteo Kamalehua Ha'alilio, a remarkable native Hawaiian diplomat who secured recognition of Hawaiian sovereignty from Britain and France.

HOT believes that different perspectives, cultural histories, life experiences and personal stories enrich the operatic repertoire and can have worldwide impacts. As a regional company, HOT is committed to supporting creators who reflect the diversity of the populations that HOT serves. HOT's Asia-Pacific Voices Project

seeks to build bridges between the opera world and the unsung voices of peoples from Oceania and Asia.

As a centerpiece of the Asia-Pacific Voices Project, HOT has commissioned Kamalehua: The Sheltering Tree, an opera by Hawaiian composer, conductor and educator Herb Mahelona and librettist Victoria Nālani Kneubuhl, an award-winning native Hawaiian and Samoan playwright and author.

Kamalehua: The Sheltering Tree tells the true story of Timoteo Kamalehua Ha'alilio, Royal Secretary and lifelong friend to Kūikeyaouli, King Kamehameha III. Set in the mid-nineteenth century, the opera reveals the little-known history of the Hawaiian Kingdom and its early struggles to maintain independence. The focus is Ha'alilio's 1842-45 mission to the United States, Great Britain, Belgium, and France to secure treaties recognizing Hawai'i as a sovereign nation with the goal of protecting the kingdom from annexation by foreigners. Ha'alilio was accompanied by the Reverend William Richards, a trusted advisor and friend to both Ha'alilio and King Kamehameha III.

During the expedition Ha'alilio and Richards met with officials, including U.S. Secretary of State Daniel Webster and Lord Aberdeen, British Secretary of State for Foreign Affairs. Ha'alilio became quite the celebrity, particularly in Washington and Paris, due to his dashing presence and status as royalty from an exotic kingdom. Although they received verbal, and in some cases written, recognition, no formal treaties were ratified. But the mission was successful in bringing the Kingdom of Hawai'i to the attention of those nations. During their return from Boston to Hawai'i in 1844, Ha'alilio's health declined rapidly, and he passed away less than a month into the voyage.

Ha'alilio was a Hawaiian patriot who gave his life for his homeland, yet his contributions are largely unknown, even in Hawai'i. Despite his immense contributions to the Hawaiian Kingdom, Ha'alilio's final resting place remains obscure and largely forgotten. His gravestone at the historic Kawaiaha'o Church cemetery, resting place of royalty and dignitaries, is incorrectly marked "Richard" Ha'alilio.

The opera illustrates the sophistication and establishment of the Hawaiian government at the time, as well as the vigilance of Hawaiian leaders in dealing with the pressures and politics of the western world. While the story focuses on the unique culture, politics, and history of Hawai'i, its themes are universal.

To create this new production and showcase the talents of Hawai'i's creative artists, HOT has engaged kumu hula Patrick Makuakāne, a 2023 MacArthur Fellow, as director and choreographer. Japanese American conductor Lance Inouye, who grew up in Hawai'i and has multi-generational ties to the islands, will lead all musical aspects of the opera. Leading up the cast, in the lead role of Ha'alilio, will be internationally renowned Hawaiian baritone, Quinn

Kamakanalani Kelsey who started his career in opera as a member of the HOT chorus in 1991. Kelsey is now in-demand across the U.S. and Europe, notable for his dynamic interpretations of Verdi roles. Other casting assignments are currently being finalized.

HOT's primary goal for this project is to shed light on a watershed moment in the history of the Hawaiian Kingdom and to educate people about the story of a native Hawaiian hero and statesman whose history has been forgotten. To accomplish this goal, HOT's objectives are to:

- 1. Present three performances of the world premiere of Kamalehua; The Sheltering Tree, the first opera by a professional opera company sung largely in the Hawaiian language;*
- 2. Engage students by performing the final full orchestra dress rehearsal for K-12 students through HOT's Opera for Everyone program;*
- 3. Present pre-performance lectures about the opera and its composer, story, and music;*
- 4. Conduct panel discussions with native Hawaiian historians and experts on the historical significance of the events depicted in Kamalehua: The Sheltering Tree;*
- 5. Explore partnerships with native-Hawaiian serving institutions like Kamehameha Schools and The Liliuokalani Trust to collaborate on the creation of educational materials about Ha'alilio's diplomatic mission;*
- 6. Market the opera to visitors through collaborations with HOT's hospitality partners (e.g., Sheraton Waikiki and Halekulani hotels) and targeted visitor marketing efforts such as discounted tickets, brochures and QR codes at concierge desks, and inflight magazine advertising.*

Another goal for this project is to support creators who reflect the diversity of Hawaii. To meet this goal, HOT is collaborating with Herb Mahelona, Victoria Nālani Kneubuhl, Patrick Makuakāne, Lance Inouye, Quinn Kamakanalani Kelsey, and many other local creators and artists for the production of Kamalehua: The Sheltering Tree.

By producing and presenting this novel and historical opera, HOT's also hopes to attract new attendees and to grow interest in opera.

3. The public purpose and need to be served;

This statement from Patrick Makuakāne, director and choreographer of Kamalehua: The Sheltering Tree, best explains the public purpose and need for this project:

“For the better part of my life, I never knew the Hawaiian kingdom was once an independent sovereign nation with over 110 consulates around the world and the first non-European indigenous state admitted into the Family of Nations. I’m willing to wager that most people visiting Hawai‘i and even those who live here have no idea of that fact. It’s unimaginable that such a crucial part of our history was almost buried through the oppressive weight of occupation and a highly, successful campaign of national and cultural erasure. And the Native Hawaiian who literally gave up his life in this mission to ensure Hawai‘i’s sovereignty, was almost relegated to obscurity. That man’s name is Timoteo Ha‘alilio. His story was unintentionally discovered by a Native Hawaiian historian and dear friend, Kau‘i Sai-Dudoit. After almost a decade of dedicated research mining the Hawaiian language newspapers, she finally pieced together this man’s incredible story. She says: ‘Measured by any standard, and in any era, Ha‘alilio’s life defines resolve, sacrifice, and most of all, patriotism. He is a national treasure, a trusted friend of Hawai‘i, a diplomat and a celebrated hero, yet most of us have never heard of him.’ Like Ha‘alilio’s journey to guarantee Hawai‘i’s sovereignty, I feel we are on a crucial journey to guarantee that his name, love of country, and the unfathomable pursuit of attaining the unattainable will never be forgotten. As in the days of old, great deeds by ancestral gods, chiefs and intrepid citizens were always told through song and dance. Kamalehua: The Sheltering Tree continues this tradition with a sweeping, epic tale that is almost as grand and bold as his actual life story. One of my goals in life is to make certain that Ha‘alilio is no longer an unsung hero but a celebrated one.”

4. Describe the target population to be served; and

HOT will attract a diverse audience for the world premiere of Kamalehua: The Sheltering Tree. In addition to its regular subscribers, HOT expects to reach a wider audience of residents who are interested in the Hawaiian historical and cultural aspects of this production, including the significant artistic contributions of our local creators. HOT also targets those who may not easily access the arts, offering discounted tickets to students, military, seniors, and underserved communities. Additionally, international interest will be high with those interested in new opera, and of Hawai‘i’s rich history.

As is HOT’s practice for every mainstage production under its Opera for Everyone program, K-12 students and their teachers will enjoy the final full orchestra dress rehearsal of Kamalehua: The Sheltering Tree at the very low cost of \$7 per ticket.

5. Describe the geographic coverage.

Because the production of Kamalehua: The Sheltering Tree will be held at the Neal S. Blaisdell Concert Hall, the primary audience will be residents of Oahu. Some neighbor island residents as well as visitors from the continent and other countries are also expected to attend.

III. Service Summary and Outcomes

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

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

Casting: Singers; Conductor; Director; Designers

HOT's General Director & CEO makes the final decision on the selection of all cast and crew for each production, including singers, conductor, director, and designers. For singers, conductor, and director, the General Director & CEO consults with the Artistic Director, Jamie Offenbach, in selecting qualified artists to engage based on the requirements of each role. HOT has relationships with numerous artist managers and hears auditions throughout the year both in Honolulu and on the mainland. For HOT's production of Kamalehua: The Sheltering Tree, casting started with world-renowned baritone Quinn Kamakanalani Kelsey in the title role. Other roles were filled after that with voices the artistic staff felt would fit best with him and with the specific needs of each role. Several local artists are also being engaged as part of HOT's efforts to utilize Hawai'i talent as much as possible.

For Designers, the General Director & CEO consults with HOT's Director of Production, Gordon Svec, in selecting appropriate professionals for sets, costumes, lighting, props, and hair and makeup. All designers for this production will be Hawai'i-based. The creative team is still under consideration but will include professionals such as costume designer Maile Speetjens; lighting designer Christopher Patrinos; and hair and makeup designer Mei Chibana.

Contracting

Artistic contracts are negotiated by HOT's Artistic Director; Production contracts (for designers) are negotiated by HOT's Director of Production. Once terms are set, contracts are issued through DocuSign and signed for HOT by the General Director & CEO.

Production Design

At least 12 months prior to the production, the creative team (Stage Director, Conductor, and Designers) meet with HOT's lead staff – General Director, Artistic Program Officer, Director of Production, and others as required – to discuss the specific opera, including size of the cast, chorus, and orchestra, setting, concepts for the design, and any other pertinent topics. Generally, this meeting is led by the Stage Director who will share his vision for the production and solicit input from all others in attendance before the Designers begin their work.

Production Creation/Build

Following the initial production meeting, the Designers begin their work in earnest, meeting separately with the Director as needed. The design for sets and costumes comes first, then lighting, props, hair, and makeup join to create a cohesive look and feel. Costumes, lighting, hair and makeup will then be designed to complement those designs. Costumes and props will rely on a combination of sourcing from stock owned by HOT, renting from other theatrical companies and rental services, and building costumes from scratch. All work will take place here in Hawai'i.

Rehearsal Period

Artists will arrive in Honolulu on Tuesday, March 31, 2026, with the first day of rehearsal on April 1. Days will include both music and staging rehearsals, led by the Stage Director and Conductor. There will also be rehearsals for the Conductor to work with the Hawai'i Symphony Orchestra both alone and with the cast. HOT's Director of Production will oversee load-in, tech rehearsals, and load-out at the Blaisdell Concert Hall beginning on Monday, April 27 and ending on Wednesday, May 6 (the day following the final performance). The final dress rehearsal, scheduled for Wednesday, April 29, will be part of HOT's Opera for Everyone program that introduces opera to students in elementary school through college.

Marketing

HOT will promote the production through direct mail to current and new ticket-buyers, local print ads and through social media. HOT will initiate ad trades with local community theatres. Members of the local press will be invited to dress rehearsals and pitched to write previews. Because this is a world premiere, HOT will launch a dynamic, multi-channel campaign to promote the world premiere of the opera nationally and internationally. This includes captivating digital content across social media and video platforms, paired with SEO-optimized landing pages, including location targeting and user-specific data to encourage engagement. We plan to secure press coverage in leading global outlets, arts publications, and cultural programs on TV and radio, such as Opera Magazine, the New York Times, and Gramophone as well as broader platforms such as Spectrum and Roku that can utilize user data to target households that show interest in opera, theatre, and performing arts.

Preview Lecture and Panel Discussions

HOT's Education Programs will present free pre-performance lectures led by a local musicologist expert and will include information about the composer, story, and music. HOT is planning panel discussions with native Hawaiian historians and experts who will share the historical significance of events depicted in Kamalehua: The Sheltering Tree.

Opera for Everyone

HOT's Opera for Everyone program will offer students and teachers from elementary through college the opportunity to enjoy live opera experience by attending the final full orchestra dress rehearsal of Kamalehua: The Sheltering Tree for just \$7 per person. In addition to the opera production, HOT's Education Team, led by Director of Education Erik Haines, will provide other opportunities for schools to incorporate the performing arts into regular curricula. HOT is seeking partnerships with other nonprofits who serve native Hawaiian children and youth, to create educational activities around Ha'alilio's story.

Performances

The culmination of this project will be three performances of the world premiere of Kamalehua: The Sheltering Tree with full orchestra and chorus at the Neal S. Blaisdell Concert Hall on May 1, 3 and 5, 2026. All HOT staff and hundreds of volunteers play a role in making this possible, led principally by the General Director & CEO, Director of Production, Artistic Director, Director of Marketing & Communication, and Director of Development.

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

<i>March 2025</i>	<i>Full score completed</i>
<i>March-May 2025</i>	<i>Production design work</i>
<i>March 2025</i>	<i>Begin marketing of HOT's 2025/2026 season, including Kamalehua: The Sheltering Tree</i>
<i>September 2025</i>	<i>Complete orchestral parts</i>
<i>September-October 2025</i>	<i>Production build</i>
<i>January 2026</i>	<i>Complete casting & contracting</i>
<i>January 2026</i>	<i>Finalize ancillary events planning</i>
<i>January 2026</i>	<i>Marketing of Kamalehua: The Sheltering Tree</i>
<i>April 1-30, 2026</i>	<i>Rehearsal period, including Opera for Everyone dress rehearsal for students</i>
<i>May 1, 3 & 5, 2026</i>	<i>Mainstage performances</i>
<i>May 31, 2026</i>	<i>Close out production</i>

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

HOT measures audience engagement, its key measure of success, through ticket sales and attendance at ancillary events, including pre- and post-performance discussions. HOT conducts audience surveys following each of the performances to gather data on several aspects of the experience, including demographic information, ease of access (learning about the performance, purchasing tickets, price points), enjoyment of the performance, reactions to the production, and more. In addition, HOT monitors engagement with content

produced for the production, reporting on views, clicks, shares, and comments. HOT tracks readership of garnered press surrounding each event. HOT encourages reviews and engagement through social media networks. Reviews in the Hawai'i Star-Advertiser and other publications provide independent opinions about artistic quality and success of HOT's productions. HOT will evaluate the effectiveness of the partnerships via interviews with key staff of these organizations.

4. List the measure(s) of effectiveness that will be reported to the State agency through which grant funds are appropriated (the expending agency). The measure(s) will provide a standard and objective way for the State to assess the program's achievement or accomplishment. Please note that if the level of appropriation differs from the amount included in this application that the measure(s) of effectiveness will need to be updated and transmitted to the expending agency.

Measures of effectiveness:

- 1) *HOT will present three performances of Kamalehua: The Sheltering Tree at the Neal S. Blaisdell Concert Hall for approximately 5,000 attendees.*
- 2) *HOT will serve 450 students and teachers at the Opera for Everyone final dress rehearsal of Kamalehua: The Sheltering Tree.*
- 3) *HOT will present pre-performance and panel discussions on Kamalehua: The Sheltering Tree to approximately 1,000 attendees total.*

IV. Financial

Budget

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
 - a. Budget request by source of funds (Link)
 - b. Personnel salaries and wages (Link)
 - c. Equipment and motor vehicles (Link)
 - d. Capital project details (Link)
 - e. Government contracts, grants, and grants in aid (Link)

Please see Budget Request by Source of Funds (page 6 spreadsheet) and Government Contracts, Grants, and/or Grants in Aid (page 10 spreadsheet) attached.

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2026.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$	\$	\$50,000	\$50,000	\$100,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2026.

For the proposed project, HOT is seeking \$731,250 in other funds for fiscal year 2026 as follows:

<i>Subscription tickets and single ticket revenue</i>	<i>\$273,935</i>
<i>Foundations</i>	<i>\$185,000</i>
<i>Corporations</i>	<i>\$15,000</i>
<i>National Endowment for the Arts</i>	<i>\$50,000</i>
<i>Individuals</i>	<i>\$107,315</i>
<i>Special Events</i>	<i>\$100,000</i>

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

Granted:

IRS Employee Retention Tax Credit 1/1/22-3/31/22 \$61,499

IRS Employee Retention Tax Credit 7/1/22-9/30/22 \$51,125

HOT does not anticipate applying for any capital project tax credits.

5. The applicant shall provide a listing of all federal, state, and county government contracts, grants, and grants in aid it has been granted within the prior three years and will be receiving for fiscal year 2026 for program funding.

Please see Government Contracts, Grants, and/or Grants in Aid (page 10 spreadsheet) attached.

At this time, HOT has not been awarded any government contracts or grants for fiscal year 2026.

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2024.

\$887,400.

V. Experience and Capability

1. Necessary Skills and Experience

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

HOT has been staging opera productions for the people of Hawai'i for over 60 years. As the only professional opera company in Hawai'i, HOT is one of the largest performing arts organizations in the state with performances and education presentations on all of the major islands. HOT's mainstage opera performances reach more than 10,000 residents and visitors each year.

HOT's 11 full-time and four part-time staff work diligently in artistic, development, education, marketing, finance and box office management, along with contracted technical staff, singers, musicians, and over 300 dedicated volunteers – including the HOT chorus.

HOT's 32-member Board of Directors oversees all aspects of HOT and ensures its financial and operational viability. Board members represent a wide variety of community professionals in the arts, education, philanthropy, law, medicine, finance, and real estate.

HOT has received these pertinent non-government grants for other mainstage productions and other program operating costs over the most recent three years. (For Government Contracts, Grants, and/or Grants in Aid please see page 10 spreadsheet attached.)

Hawai'i Community Foundation Equitable Arts & Culture Fund, \$57,000

John R. Halligan Charitable Fund \$85,000

Atherton Family Foundation, \$75,000

Kosasa Foundation, \$20,000

Clarence T.C. Ching Foundation, \$25,000

John Chin Young Foundation \$20,000

Elsie H. Wilcox Foundation \$5,000

The Arthur and Mae Orvis Foundation, \$70,000

G.N. Wilcox Trust \$7,000

2. Facilities

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

The production of Kamalehua: The Sheltering Tree will be performed at the Neal S. Blaisdell Concert Hall, HOT's longtime venue for its mainstage opera productions. The Blaisdell Concert Hall is ADA-compliant.

Rehearsals will be conducted at HOT's STUDIO101 located in HOT's building as well as at the Blaisdell Concert Hall.

VI. Personnel: Project Organization and Staffing

1. Proposed Staffing, Staff Qualifications, Supervision and Training

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

Victoria Nālani Kneubuhl is a playwright, screenwriter, and librettist of Hawaiian and Samoan descent. Kneubuhl's work often explores Hawaiian history, culture, and identity. Kneubuhl has written numerous plays that have been produced internationally. Her plays include Murder Mysteries of Hawai'i, Emmalehua, and The Conversion of Ka'ahumanu. She has also written for television, contributing scripts to Magnum P.I.. Kneubuhl has been recognized with numerous awards and honors. She has received the Cades Award for Literature, the Hawai'i Award for Literature, and the Pu'uhoonua Award from the Hawai'i Alliance for Arts Education. In 2019, she was named a Living Treasure of Hawai'i by the Honpa Hongwanji Mission of Hawai'i.

Herb Mahelona is a renowned Hawaiian composer, conductor, and educator. He resides on the island of Hawai'i where he is the high school choir director at the Kamehameha Schools Hawai'i Campus and director of the Kamehameha Schools Alumni Chorus. Mahelona composed and performed his first Hawaiian-themed opera in 1996 for the Hawai'i Youth Opera Chorus. He subsequently composed 11 operas, all based on Hawaiian themes; three of which were written entirely in Hawaiian and featured at the Edinburgh Festival Fringe in 2016, 2019 and 2023. Mahelona is a passionate advocate and has contributed to projects that highlight the stories and experiences of Hawaiians, such as the children's book Ka Huaka'i a Timoteo Ha'alilio, which chronicles the journey of the Hawaiian diplomat who is the focus of Kamalehua: The Sheltering Tree.

Patrick Makuakāne is a visionary kumu hula who has been pushing the boundaries of traditional hula since founding his San Francisco-based dance company Nā Lei Hulu i ka Wēkiu in 1985. In 2023, Makuakāne was named a MacArthur Fellow, becoming the first native Hawaiian to receive the prestigious “genius grant.” Born and raised in Honolulu, Makuakāne studied hula under renowned teachers and received the title of kumu hula from Mae Kamāmalu Klein in 2003. Makuakāne’s innovative approach blends ancient hula traditions with contemporary music, costumes, and themes.

Lance Inouye, a Japanese American conductor originally from Hawai‘i, is based in Portland, Oregon, where he holds several prestigious positions, including Artistic Director and Conductor of the Willamette Valley Symphony, Artistic Director of The Portland Concert Opera, and Associate Professor of Music and Director of Orchestral Activities at Lewis & Clark College. Inouye's conducting career has taken him to opera companies such as Portland Opera, Florida Grand Opera, and Sarasota Opera. In the fall of 2023, he made his debut with Hawai‘i Opera Theatre, conducting “An American Dream”.

Andrew Morgan, HOT’s General Director and CEO oversees all aspects of Hawai‘i Opera Theatre, including artistic, production, marketing, development, education, and administration departments. He brings over 30 years of comprehensive hands-on experience as a manager, performer, and stage director. He served as Director of Development at the San Francisco Opera, Executive Director of American Bach Soloists, and other various positions.

Jamie Offenbach, HOT’s Artistic Director, advises Mr. Morgan on all aspects of artistic programming for the company, including casting, season programming, identifying appropriate community partnerships for collaborative work, and advising Morgan and the HOT Director of Education in curating the Mae Z. Orvis Opera Studio training program. Previously, Offenbach had a career spanning over four decades as a guest artist and stage director with dozens of opera companies spanning North America. He was born and raised in Honolulu.

Gordon Svec, HOT’s Director of Production, returned to HOT in August 2021 after a 14 year-long journey in the corporate events world. He oversees the daily technical and budget concerns of producing HOT’s various productions. A performing arts veteran with more than 52 years of comprehensive, hands-on experience in all varieties of the arts, Svec has served as Technical Director for nearly all the local arts organizations: Hawai‘i Opera Theatre, Diamond Head Theatre, Ballet Hawai‘i, to name a few; plus, numerous mainland companies.

As HOT’s Finance Manager, Elgin Caballa works closely with the General Director and Board Treasurer. He oversees all company financial activities. His duties include managing all accounting functions, building revenue reports, distributing calculated funds to various departments, and implementing company financial policies. He also oversees the annual audit and filing of reports to

federal, state, and local government agencies, provides data for grant applications, and manages all compensation related areas. Elgin joined HOT in March 2024.

2. Organization Chart

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

Please see Organization Chart attached.

3. Compensation

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

<i>General Director & CEO:</i>	<i>\$170,000-\$195,000</i>
<i>Director of Development:</i>	<i>\$60,000-\$90,000</i>
<i>Director of Marketing:</i>	<i>\$60,000-\$90,000</i>

VII. Other

1. Litigation

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

None.

2. Licensure or Accreditation

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

HOT is a member in good standing of Opera America, the professional service organization for opera companies in the USA and Canada.

3. Private Educational Institutions

The applicant shall specify whether the grant will be used to support or benefit a sectarian or non-sectarian private educational institution. Please see [Article X, Section 1, of the State Constitution](#) for the relevance of this question.

Not applicable.

4. Future Sustainability Plan

The applicant shall provide a plan for sustaining after fiscal year 2026 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2026, but
- (b) Not received by the applicant thereafter.

HOT has been incorporated since 1980, presenting three or four opera productions each season. HOT works constantly to increase revenues from ticket sales; contributions from individual donors; grants from federal, state, county, and private foundations; and fundraising events, such as its popular annual Opera Ball most recently held in April.

HOT will continue to call upon these sources, in particular individual gifts, to support its Kamalehua: The Sheltering Tree production after the grant period ends and if not all funding is received.

HOT's enduring financial stability is demonstrated by its strong balance sheet, anchored by the freehold ownership of its office building, which generates significant rental income for HOT, as well as investment portfolios with a combined value of over \$7 million -- a reflection of HOT's success in building its legacy giving program.

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2025 to June 30, 2026

Applicant: Hawaii Opera Theatre

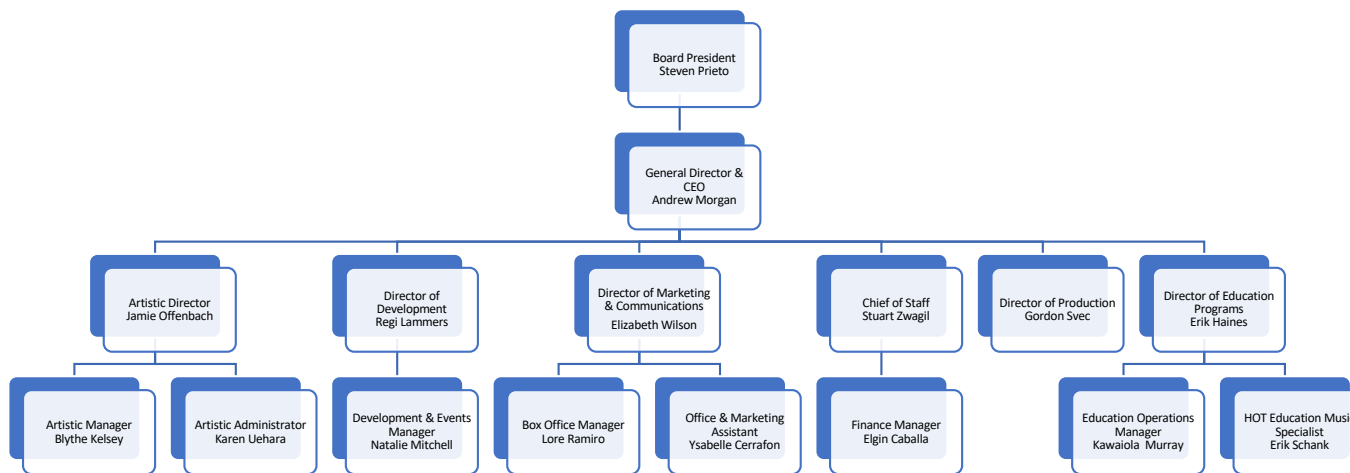
BUDGET CATEGORIES	Total State Funds Requested (a)	Total Federal Funds Requested (b)	Total County Funds Requested (c)	Total Private/Other Funds Requested (d)
A. PERSONNEL COST				
1. Salaries				76,133
2. Payroll Taxes & Assessments				11,589
3. Fringe Benefits				15,278
TOTAL PERSONNEL COST				103,000
B. OTHER CURRENT EXPENSES				
1. Artist Fees (singers, conductor, director)	40,000			96,550
2. Artist Housing & Travel		50,000		22,600
3. Royalties & Fees (commission)				72,500
4. Other Artistic Expenses				11,000
5. Orchestra	30,000			90,000
6. Designer Fees (sets, costumes, lighting)	30,000			106,000
7. Facility Rental (performance, shop)				36,500
8. Costumes				19,000
9. Equipment Rental (projectors, lights, etc.)				7,500
10. Security Expense				4,500
11. Other Production Expenses				1,000
12. Tech Labor				99,000
13. Marketing Expenses				32,100
14				
15				
16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES	100,000	50,000		598,250
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	100,000	50,000		701,250
SOURCES OF FUNDING		Budget Prepared By: <div style="display: flex; justify-content: space-between;"> <div> (a) Total State Funds Requested 100,000 (b) Total Federal Funds Requested 50,000 (c) Total County Funds Requested (d) Total Private/Other Funds Requested 701,250 </div> <div> Andrew Morgan (808) 683-7201 Name (Please type or print) Phone Signature of Authorized Official 01/16/2025 Date </div> </div>		
TOTAL BUDGET	851,250	Andrew Morgan, General Director & CEO Name and Title (Please type or print)		

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Applicant: Hawaii Opera Theatre

Contracts Total: 313,000

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	1927907-36 Grants for Arts Projects - Stuck Ele	7/1/24 - 12/31/24	NEA	U.S.	18,000
2	FY25-0062 Biennium Grant - Education Progra	7/1/24 - 6/30/25	HSCFA	State	15,000
3	FY24-0031 Biennium Grant - Education Progra	7/1/23 - 6/30/24	HSCFA	State	15,000
4	CT-DCS-2400029 Tier II - Education Programs	10/1/23 - 9/30/24	C&C of Honolulu	Honolulu County	125,000
5	1910752-36 Grants for Arts Projects - An Ameri	6/1/23 - 12/31/23	NEA	U.S.	25,000
6	FY22-0082 Biennium Grant - Education Progra	7/1/21 - 6/30/22	HSCFA	State	15,000
7	1901130-66 American Recue Plan	1/122 - 12/31/22	NEA	U.S.	100,000
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Jan-25