

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:

Hawai'i Symphony Orchestra

Hawai'i Symphony Orchestra

Amount of State Funds Requested: \$ 250,000

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

Attached on next page

Amount of Other Funds Available:

State: \$ 0

Federal: \$ 0

County: \$ 0

Private/Other: \$ 5,721,350

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

\$ 193,200 (\$150,000 State GIA not executed in FY23)

Unrestricted Assets:

\$ 723,193.30

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:

3610 Waialae Ave

City:

Honolulu

State:

HI

Zip:

96816

Contact Person for Matters Involving this Application

Name:

Kelsey Ann Kimura

Title:

Advancement Manager

Email:

kelsey@hawaiisymphonyorchestra.org

Phone:

8083807724


Authorized Signature

Amy Iwano, President & CEO

Name and Title

1/16/2025

Date Signed

Brief Description of Request:

The Hawai'i Symphony Orchestra (HSO) is the only professional orchestra in the state of Hawai'i and one of the most isolated orchestras in the world, therefore providing some of the only music and arts access to the community. With a majority of our musicians being music educators and publicly performing within the community, the HSO plays a vital role in providing music education to students and ensuring music plays a vital role in the physical and mental development of students.

The HSO's State GIA request of \$250,000 would support the HSO's educational opportunities for our keiki and music for the community. Key educational events include our side-by-side concert with the Hawai'i Youth Symphony, in which students have the opportunity to play with professional musicians, our Nā Hōkū 'Ōpio Young Stars competition, which allows the winners a chance to play a solo concerto with the orchestra during the summer Starlight Festival concert series, and Symphony of the Hawai'i Seas, which provides a multi-media presentation to students teaching them about the preservation of our oceans. Other HSO programming includes our classical Masterworks Series, the Hawaiian artist-focused HapaSymphony series, and the ever-popular Films in Concert Series. Our diversity of programming reflects the HSO's commitment to delighting audiences of all ages and backgrounds and to provide programming reflective of our multicultural, all-inclusive island community.

Applicant Hawaii Symphony Orchestra

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


AUTHORIZED SIGNATURE

Amy Iwano, President & CEO
PRINT NAME AND TITLE

1/16/25
DATE



STATE OF HAWAII
STATE PROCUREMENT OFFICE

CERTIFICATE OF VENDOR COMPLIANCE

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

Vendor Name: HAWAII SYMPHONY ORCHESTRA

DBA/Trade Name: HAWAII SYMPHONY ORCHESTRA

Issue Date: 01/09/2025

Status: **Compliant**

Hawaii Tax#: 49709066-01
New Hawaii Tax#: GE-1811644416-01
FEIN/SSN#: XX-XXX1988
UI#: XXXXXX0571
DCCA FILE#: 232983

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

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.

2. Declaration Statement

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

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](#).

The Hawai'i Symphony Orchestra will use the grant for a public purpose - to fulfill its role as the orchestra of Hawai'i, a pillar for the arts, and a home for an all-inclusive community - pursuant to section 42F-102, Hawaii Revised Statutes.

II. Background and Summary

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

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

The Hawai'i Symphony Orchestra (HSO) is the only professional orchestra in the state and is also the state's largest and most distinguished performing arts organization, dedicated to enriching the cultural and educational life of Hawai'i through the transformative power of orchestral music. Our mission is to inspire and engage diverse communities across the islands by delivering world-class performances, expanding accessibility to classical and contemporary music, and promoting musical education. We

envision a Hawai'i where music fosters understanding, cultivates creativity, and connects people across generations and cultures.

Founded in 2011, HSO serves as the successor to the Honolulu Symphony, carrying forward a rich tradition of excellence in performance and community engagement. Over the years, HSO has distinguished itself not only as the most isolated orchestra in the world but also as one of the most inclusive, reflecting the rich cultural diversity of the islands. HSO is committed to offering exceptional programming that includes classical concerts, pops, and educational outreach, while also exploring new and innovative forms of collaboration in both local and global contexts.

2. The goals and objectives related to the request;

The Hawai'i Symphony Orchestra's key strategic goals include expanding our reach to underserved communities, enhancing music education programs, and cultivating new audiences through accessible and engaging performances. We aim to strengthen community partnerships, leveraging the power of music to address broader social, cultural, and ecological issues across the state. HSO has an extensive history of successfully conducting programs that align with these goals, from large-scale performances at iconic venues such as the Hawaii Theatre, the Blaisdell Concert Hall, and the Tom Moffatt Waikiki Shell, to educational outreach in schools statewide.

3. The public purpose and need to be served;

Music and the arts offer diverse benefits, promoting economic growth, education, and social well-being. The arts foster cultural identity and social cohesion in Hawai'i communities, reinforcing its essential role in community health. However, access to quality music and arts education is often a challenge, even in Hawai'i.

According to the Arts Action Fund, Hawai'i's per capita arts funding of \$0.62 in 2023 is well below the national average of \$3.94, contributing to issues in arts access across income levels. Hawai'i ranks 40th in arts education funding, limiting school exposure to music education. Additionally, many communities face socio-economic challenges that limit their ability to participate in cultural events. Arts-driven spending boosts local businesses, and governmental initiatives supporting the arts would strengthen our economy.

As the only professional orchestra in the state and a public service provider, HSO is a cornerstone in the performing arts, presenting music reflective of our island home. HSO recognizes Hawaii's cultural diversity and calls for a connection between symphonic music and local art forms. While national research indicates audiences of non-white backgrounds are typically underrepresented in the orchestra space, HSO is dedicated to increasing equitable access to arts and culture, focusing on reaching communities historically excluded from classical music.

Furthermore, HSO musicians benefit the broader music education ecosystem. Many are music teachers, offering private lessons and working in schools. They perform with the Royal Hawaiian Band, Hawai'i Opera Theatre, Ballet Hawai'i, and more. Supporting local musicians contributes to the development of young talent, sustaining a vibrant arts culture throughout the state.

HSO aims to diversify its audience and make symphonic music inclusive for all. We are committed to engaging communities of color and individuals of lower economic status and creating more inclusive opportunities through data-driven outreach and partnerships with schools and community organizations. Our goal is to make symphonic music accessible and relevant to all residents, encouraging broader participation from traditionally excluded communities.

4. Describe the target population to be served; and

The HSO is dedicated to increasing equitable access to arts and culture with a focus on reaching communities that have been historically excluded from classical music, aiming to diversify its audience and make symphonic music inclusive for all. We are committed to engaging communities from across the island, including those in Central and West O'ahu, and creating more inclusive opportunities through data-driven outreach and partnerships with schools and community organizations. Furthermore, our dedication to increasing access to music education opportunities for teachers and their students to give more first-time symphony experiences and inspire the next generation of musicians. Our goal is to make classical music accessible and relevant to all residents, encouraging broader participation from traditionally excluded communities.

In an effort to provide more family programming to the community, the HSO features popular culture music through the Films in Concert series, the Sheraton Starlight Festival of summer concerts, and other special event concerts featuring the music of box office hits and best-selling artists. Our Films in Concert events give the opportunity for families to bond across generations with beloved franchises, such as *Star Wars* and *Harry Potter*, and holiday classics, such as *The Muppets Christmas Carol* and *How the Grinch Stole Christmas*. Meanwhile, concerts for the Sheraton Starlight Festival take place at the Tom Moffatt Waikiki Shell, providing a relaxed and engaging outdoor experience for all ages without the formalities of a concert hall.

With our summer concerts at the Tom Moffatt Waikiki Shell, the HSO is working to target more tourists. The HSO is currently a member of the Hawai'i Visitors & Convention Bureau and is partnering with the organization to attract more visitors. In the past, patrons have visited from the mainland United States, Japan, Canada, Australia, and more to attend concerts.

Additionally, the HSO aims to cater to school educators and their students. Since 2018, HSO has put on a series of educational concerts to educate the next generation on the importance of environmental conservation in Hawai'i. The concerts have included Symphony of the Hawaiian Birds, Symphony of the Hawai'i Forests, and the upcoming Symphony of the Hawai'i Seas, set to premier in Fall 2025. These free performances are tailored for school students in grades 4 through 12, focusing on environmental conservation through music and education to inspire the next generation of eco-conscious citizens. Each series is thoughtfully crafted to connect with specific communities and enrich their cultural and educational experiences. For our previous Symphony of the Hawai'i Forests, approximately 40% percent of attending schools were considered Title I, allowing the HSO to provide first-time symphony performances for underserved communities.

Beyond the educational concerts, the HSO offers group discounts which has made attending regular season HSO concerts, such as our Masterworks and Star Wars performances, more affordable for schools, providing opportunities for students to gain first-time exposure to a live symphony orchestra.

Additionally, we aim to address financial obstacles by offering free or discounted tickets to our larger performances at venues like the Blaisdell Concert Hall and Tom Moffatt Waikiki Shell, specifically targeting students and families from economically disadvantaged backgrounds. In the past, we have worked with our partners at Vet Tix, Make a Wish, and Special Olympics to offer complimentary tickets to deserving and disadvantaged members of our community. We also work on initiatives like a ticket donation program with the Hawaii Theater, where unused tickets are donated back to local communities, ensuring that cost is not a barrier to experiencing live classical music.

The HSO's concert series are designed to serve a wide range of audiences, each with unique interests and needs. Our longest running series, the Masterworks series, draws patrons who appreciate traditional and contemporary classical music, offering a refined and timeless experience.

In the last two Masterworks seasons, HSO has introduced music from Pacific Rim composers to highlight its geographic and cultural position between East and West. At the forefront of these composers is the HSO's own Composer in Residence, Michael-Thomas Foumai, a Hawai'i-born and American Chinese-Samoan composer. By introducing new works alongside enduring composers such as Beethoven and Tchaikovsky, the HSO is changing the narrative around the definition of classical music and aiming to bring in a more diverse audience of all ages to the Symphony.

Alongside the Masterworks performances, HSO has introduced the HapaSymphony Series, a program that features the music of local Hawai'i artists, blending the rich sounds of Hawaiian music with a full symphony orchestra into a cultural fusion representative of Hawai'i. Past HapaSymphony artists have included Jake Shimabukuro, Raiatea Helm, Robert Cazimero, the Makaha Sons, Kimié Miner, and Paula Fuga, with the current 2024-2025 season featuring artists such as Jordan Segundo, Taimane, and Keola Beamer. As classical music events tend to feature more music typical of the Western European style, the series aims to create a space where the Native Hawaiian community and Hawaiian music lovers can feel welcome to attend the symphony. The series has proven to attract more Native Hawaiian communities in recent years, with 11% of attendees identified as Native Hawaiian in past seasons compared to 2% in other concert series, reflecting the HapaSymphony's success in bringing in a more diverse audience.

The HSO is dedicated to "delighting and educating audiences of all ages and backgrounds," which is reflected through the diverse programming presented throughout the season.

5. Describe the geographic coverage.

Performances will take place at various venues on the island of O'ahu. HSO is the Artistic Partners in Residence with the Hawaii Theatre Center, and many of our season performances are held there. HSO also has a partnership with the Department of Enterprise Services and holds concerts at the Neal S. Blaisdell Concert Hall and the Tom Moffatt Waikiki Shell. The HSO also performs at other venues across the island, such as Kailua District Park for the annual free Symphony in the Park event and Moanalua Performing Arts Center at Moanalua High School for special events.

Additionally, our musicians are also involved in the performing arts on neighboring islands. HSO core musicians and musician substitutes play in orchestra ensembles across the state such as the Maui Pops

Orchestra on Maui and the Kamuela Philharmonic on Hawai'i Island. By employing musicians in the HSO, our musicians can further branch out and foster the growth of musical talent in our islands.

III. Service Summary and Outcomes

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

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

The requested grant funds would provide resources for the HSO to support its 84 total musicians for concerts throughout the season. These concerts would include approximately 21 concert weeks of Masterworks, HapaSymphony, Films in Concert, community, and educational performances from July 1, 2025 to June 30, 2026. These would include concerts held at the Hawaii Theatre, Blaisdell Concert Hall, Tom Moffatt Waikiki Shell, and other venues across the state.

Our programming in the 2025-2026 seasons plans to expand opportunities for music education, exposure, and mentorship. The first of this will be our Nā Hōkū 'Ōpio Young Stars concerto competition for Hawai'i high school seniors. Students will submit a video playing an orchestra concerto, and a few will be selected to perform with the HSO during a community concert in summer 2025. To date, the program has featured seventeen students from various schools across the state and has given developing musicians the rare opportunity to play with a world-class professional orchestra.

HSO performs two Side-by-Side concerts with the Hawai'i Youth Symphony (HYS) annually. The event presents young budding musicians the opportunity to play alongside professional musicians in the HSO, giving them valuable insight into pursuing music as a career path. The event has been presented since 2017, and the HSO plans to partner with the HYS to present the event again in the 2025-2026 season.

The HSO has also continued to present masterclasses with Masterworks guest artists, including violinist Charles Yang and pianist Joyce Yang. The HSO will present public masterclasses for Hawai'i students with visiting guest artists that will allow young musicians to receive feedback from world-class artists and be further inspired to excel in their art.

At the college level, the HSO will continue composer readings with the University of Hawai'i at Mānoa Music Department, giving college-level composers the chance to have their piece read by a professional orchestra. In the past, the event has given students real-time feedback from the orchestra, providing a valuable learning opportunity to hear their piece live.

A major component of outreach to schools includes our *Symphony of the Hawai'i Seas*, a concert for school students that will emerge from the intersection of music, art, and environmental education. Set to premiere in October 2025, the project, produced in collaboration with the University of Hawai'i, will offer a performance featuring an original six-movement symphony composed by Hawaii-based composers Michael-Thomas Foumai, Herb Mahelona, Takuma Itoh, T.J. Tario, and Justin Park. Performed by the 64-member HSO and enhanced by animations, the symphony promotes conservation efforts of our island's oceans through a symphonic narrative, emphasizing both the importance of the performing arts

and environmental education. By the end of the project, the HSO anticipates heightened environmental stewardship among 5,000 4th to 12th grade students, educators, and residents.

For all concerts throughout the 2025-2026 season, the HSO will be responsible for the following:

- Production: Overseeing all logistical aspects of the concert, including venue coordination, arranging transportation for equipment, confirming all technical and operational requirements for the concert.
- Education and Community Outreach: Partnering with schools and community organizations to connect the next generation with professional musicians and the performing arts.
- Artistic Management: Working with the Music & Artistic Director to curate concert programming and coordinating guest artists and conductors for performances.
- Marketing and Promotion: Developing a comprehensive marketing strategy for upcoming concerts through the use of social media promotions, email campaigns, website updates, and print materials. The HSO currently works with Bennet Group Strategic Communications for matters regarding public relations.
- Volunteer Management: Working with our volunteers to prepare program books for upcoming concerts and greeting patrons at performances.
- Box Office: Working with the Hawaii Theatre Center to put subscriptions and single tickets on sale for ticketed concerts.
- Development: Cultivating relationships with donors to garner support through individual donors, corporate sponsors, foundations, and special events.

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

Grant reporting will happen quarterly to evaluate the progress of the grant. The following is the current timeline for the 2025-2026 HSO Season (July 1, 2025 to June 30, 2026):

October 2024 - February 2025: Artistic planning for the 2025-2026 season begins

February 2025 - April 2025: Collect submissions for the Nā Hōkū 'Ōpio Young Stars concerto competition

March 2025 - September 2025: Marketing and promotion for the 2025-2026 season

July 2025 - August 2025: Summer concerts begin, including

- Sheraton Starlight Festival at the Tom Moffatt Waikiki Shell
- Symphony in the Park at Kailua District Park
- Performances by the Nā Hōkū 'Ōpio Young Stars competition winners
- Side-by-side concert with the Hawai'i Youth Symphony

October 2025 - June 2026: The HSO resumes performances and events for its 2025-2026 season including:

- The premiere of Symphony of the Hawai'i Seas for Hawai'i school students in October 2025
- 2025-2026 Masterworks, HapaSymphony, and Films in Concert series at the Hawaii Theatre and Neal S. Blaisdell Concert Hall
- HSO musicians performing with Hawai'i Opera Theatre throughout their 2025-2026 season
- HSO musicians playing performances of the Nutcracker with Ballet Hawai'i in December
- Side-by-side concert with the Hawai'i Youth Symphony

- A composer reading with students from the University of Hawai'i at Mānoa Music Department
- Masterclasses with HSO's guest artists

June 2026: Final end of fiscal year reporting using aggregate patron data, post-concert survey results, and testimony from audience members

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

The HSO will provide both quantitative and qualitative data for the request. Quantitative data will include ticket reservations, which will be pulled from the Hawaii Theatre Center's (and other related venues') box office reports.

Qualitative data will be taken via surveys from patrons about the concert events. After each concert, the HSO currently emails post-concert surveys, through which patrons are able to provide feedback about each event. Additionally, the HSO will collect feedback from its partner organizations to better foster collaborations within the performing arts community and to ensure that mutual goals are met.

The HSO Advancement Manager will work with the rest of the HSO staff to ensure that all aspects of the grant are accounted for and ensure that the HSO is reaching the community as appropriate.

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.

The HSO will provide reports on the following:

- Number of concerts held for Masterworks concerts, HapaSymphony concerts, Films in Concert concerts, Community (free) concerts, Educational concerts
- Total ticket reservations per concert
- Number of students attending educational concerts
- Patron feedback through surveys

IV. Financial

Budget

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.
 - a. Budget request by source of funds ([Link](#))
 - b. Personnel salaries and wages ([Link](#))
 - c. Equipment and motor vehicles ([Link](#))

- d. Capital project details ([Link](#))
- e. Government contracts, grants, and grants in aid ([Link](#))

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

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$62,500	\$62,500	\$62,500	\$62,500	\$250,000

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

The HSO receives funding from individual donors, corporate sponsors, private foundations, and special fundraising events (i.e. annual gala) to support its mission and operations.

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.

Not applicable

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.

- Hawaii Council for the Humanities - \$5,100

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

\$723,193.30

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.

As the orchestra of Hawai'i, the Hawai'i Symphony Orchestra is a public service provider, a pillar for the arts, and a home for an all-inclusive community. Our passion for classical music has always inspired us to act, to do more, and to bring beautiful music to everyone in our culturally rich state.

Since the organization's first concert in 2012, the HSO has entertained approximately 35,000 patrons annually across the state. As the state's largest single employer of performing musicians, the orchestra employs a minimum of 64 professional musicians for its array of Masterworks, HapaSymphony, Films, community, and educational programs. With these musicians, the HSO performs across a multitude of genres including classical symphonic repertoire, Hawaiian music, and popular film scores.

The HSO is uniquely qualified to provide the array of musical experiences proposed in this application, measured by these unique projects:

- Since 2017, our enduring partnership with the Hawai'i Youth Symphony (HYS) pairs aspiring young musicians with their professional HSO counterparts for an annual educational performance experience. This past year, select HYS musicians performed with the HSO for our annual gala, and HYS's Youth Symphony I will be performing with the HSO in March 2025.
- The HSO has partnered with the University of Hawai'i at Mānoa for performances of Symphony of the Hawai'i Forests (2023, 2024) and Symphony of the Hawaiian Birds (2018) to promote environmental conservation through a multimedia presentation. The HSO and UH Mānoa will complete the trilogy with Symphony of the Hawai'i Seas in Fall 2025 and once again put on free educational performances for school students with a goal of reaching 5,000 students in Fall 2025.
- The HSO partners with Alexander & Baldwin each summer to present Symphony in the Park at Kailua District Park. The event is the largest free community event that the HSO presents, with more than 1,500 community members in attendance per year.
- With the Hawaii Tourism Authority, the HSO has collaborated with its partner organizations to present the Beethoven Festival in February to March 2025. Partner organizations include the O'ahu Choral Society, Hawai'i Opera Theatre, Chamber Music Hawai'i, the Hawai'i Youth Symphony, Honolulu Chamber Music Festival, Downtown Art Center, and the Halekulani Hotel.
- For the past four years, the *Sheraton Starlight Festival* and our summer community performances have featured a total of 17 winners of the Nā Hōkū 'Ōpio | Young Stars Program — a competition hosted by the HSO for locally trained, young musicians of Hawai'i — showcasing the abundance of talent being cultivated in our community. These successful events demonstrate the HSO's ability to work closely with community partners to elevate local young talent and provide valuable opportunities for their musical development.
- The HSO is a long-time partner of the Hawai'i Opera Theatre and Ballet Hawai'i with our musicians performing in their operas and Nutcracker performances.
- Through a partnership with Hawaii News Now, we streamed our 2023-2024 HapaSymphony Season finale with Jake Shimabukuro, resulting in an astounding three million impressions, showcasing immense interest and engagement from a global audience.
- HapaSymphony performances have also proved to attract more Native Hawaiian communities in recent years, with 11% of HapaSymphony attendees identifying as Native Hawaiian compared to 2% for other concert series.

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 HSO's administrative offices are located in Kaimuki at 3610 Waialae Avenue, Honolulu.

Since 2020, the HSO has been the "Artistic Partner and Resident Company" at the Hawaii Theatre Center (HTC) which provides HSO preferred access to perform regularly at the historic theatre. Partnering with the HTC offers a beautiful stage setting, access to their built-in equipment, and the efficiency of shared box office operations. Additionally, the venue features accessible seating for ADA patrons and assistive listening devices for patrons who are hard of hearing.

The HSO partners with the Department of Enterprise Services (operated by the City & County of Honolulu) and presents concerts at the Tom Moffatt Waikiki Shell and the Neal S. Blaisdell Concert Hall. The HSO also performs community concerts in small and large ensemble settings at locations such as Kailua District Park and schools.

VI. Personnel: Project Organization and Staffing

1. Proposed Staffing, Staff Qualifications, Supervision and Training

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

The HSO's leadership team comprises the Board of Directors, chaired by Paul Kosasa and thirteen other community leaders who serve without compensation, and the President & CEO Amy Iwano, who began her tenure on July 1, 2024, and the orchestra's first Music & Artistic Director Dane Lam, who commenced his position on July 1, 2023.

The administrative staff positions include a General Manager, Director of Finance and Administration, Associate Director of Advancement, and Advancement Manager. The artistic and production team consists of the Director of Artistic Engagement & Composer in Residence, the orchestra's Personnel Manager, Operations & Stage Manager, Music Librarian & Operations Administrator, and stagehands and security.

The HSO employs a total of 84 musicians, with 64 core musicians and 20 musicians hired on a per-service basis. The HSO musicians are members of the Musician's Association of Hawai'i Local 677, the American Federation of Musicians. The members of the stage crew belong to IATSE, Local 665.

The HSO professional musicians are selected through a highly competitive and anonymous international audition process. All artistic positions require experienced, talented, and established professionals who are recognized for excellence in musical accomplishments. Most have earned degrees in music, including graduate degrees and doctorates.

Guest artists and conductors are chosen based on artistic merit, reputation, and demonstrated performance ability.

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.

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.

Music and Artistic Director - \$175,000 - \$210,000

President and CEO - \$160,000 - \$190,000

Director of Finance and Administration - \$85,000 - \$110,000

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.

No pending litigation

2. Licensure or Accreditation

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

The Hawai'i Symphony Orchestra is the only professional orchestra in the state. It is a member of the League of American Orchestras. Our professional musicians are members of the American Federation of Musicians, Local 677. No other relevant licensure or accreditation is relevant to this request.

3. Private Educational Institutions

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

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.

The HSO will prioritize building its fundraising efforts with individual donors, corporate sponsors, private foundations and grants, and prospective government grant applications. Additionally, the HSO is working on creating more earned revenue streams and will consider raising ticket prices to match inflation and to cover needed costs to increase earned income. The HSO will continue its ongoing partnership with aligned performing arts organizations to continue serving the islands through music and the arts and seek new partnerships to broaden its community reach.

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

The undersigned authorized representative of the applicant certifies the following:

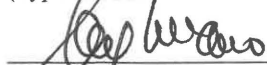
- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide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

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

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

Hawaii Symphony Orchestra

(Typed Name of Individual or Organization)



(Signature)
Amy Iwano

11/16/25

(Date)
President & CEO

(Typed Name)

(Title)

Period: July 1, 2025 to June 30, 2026

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 (Musicians + Admin)	175,000			2,616,800
2. Payroll Taxes & Assessments				25,200
3. Fringe Benefits (Musicians + Admin)				1,187,700
TOTAL PERSONNEL COST	175,000			3,829,700
B. OTHER CURRENT EXPENSES				
1. Artistic (Guest Artist Fees + Travel)				466,200
2. Production (Concerts + Education)	75,000			775,500
3. Marketing				201,600
4. Development				110,250
5. Administrative - General Excise Tax				29,694
6. Bank / Credit Card Fees, Interest				78,750
7. Office (Rent, Supplies, Utilities)				81,900
8. Professional Fees (Accounting/Legal)				88,200
9. Other expenses (Insurance, Depreciation)				59,556
TOTAL OTHER CURRENT EXPENSES	75,000			1,891,650
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES	0			
E. CAPITAL	0			
TOTAL (A+B+C+D+E)	250,000			5,721,350
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	250,000	Kelsey Ann Kimura 8083807724		
(b) Total Federal Funds Requested		Name (Please type or print) Phone		
(c) Total County Funds Requested		Signature of Authorized Official 1/16/25		
(d) Total Private/Other Funds Requested	5,721,350	Date		
TOTAL BUDGET	5,971,350	Amy Iwano, President + CEO		
		Name and Title (Please type or print)		

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES Period: July 1, 2025 to June 30, 2026

Applicant: Hawai'i Symphony Orchestra

POSITION TITLE		FULL TIME EQUIVALENT	ANNUAL SALARY A	% OF TIME ALLOCATED TO GRANT REQUEST B	TOTAL STATE FUNDS REQUESTED (A x B)
Orchestra Musicians (84)		1	\$2,791,799.85	6.27%	\$ 175,000.00
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
TOTAL:					175,000.00
JUSTIFICATION/COMMENTS: Pay scale varies according to musicians' union contracts.					

Applicant: Hawai'i Symphony Orchestra

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
TOTAL:				

JUSTIFICATION/COMMENTS:

Not applicable

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

JUSTIFICATION/COMMENTS:

Not applicable

Applicant: Hawai'i Symphony Orchestra

FUNDING AMOUNT REQUESTED						
TOTAL PROJECT COST	ALL SOURCES OF FUNDS RECEIVED IN PRIOR YEARS		STATE FUNDS REQUESTED	OTHER SOURCES OF FUNDS REQUESTED	FUNDING REQUIRED IN SUCCEEDING YEARS	
	FY:2023-2024	FY:2024-2025	FY:2025-2026	FY:2025-2026	FY:2026-2027	FY:2027-2028
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
TOTAL:						
JUSTIFICATION/COMMENTS: Not applicable						

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID (Active)

Applicant: Hawai'i Symphony Orchestra

Contracts Total: 10,000

	CONTRACT DESCRIPTION	EFFECTIVE DATES	AGENCY	GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)	CONTRACT VALUE
1	Beethoven Festival	1/1/25-6/30/25	Hawaii Tourism Authority	State	10,000
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

