

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

1/20/26
DATE

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, 2025.

Attached

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](#).

Attached



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: 12/30/2025

Status: **Compliant**

Hawaii Tax#: [REDACTED]
New Hawaii Tax#: [REDACTED]
FEIN/SSN#: [REDACTED]
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

**DECLARATION STATEMENT OF
APPLICANTS FOR GRANTS PURSUANT TO
CHAPTER 42F, HAWAI'I REVISED STATUTES**

The undersigned authorized representative of the applicant certifies the following:

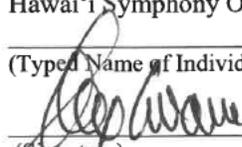
- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawai'i Revised Statutes:
 - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide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

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

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

Hawai'i Symphony Orchestra

(Typed Name of Individual or Organization)


(Signature)
Amy Iwano


(Date)
President & CEO

(Typed Name)

(Title)

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

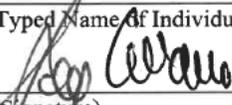
The undersigned certifies that this grant will be used for a public purpose pursuant to Section 42F-102, Hawaii Revised Statutes:

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

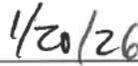
- (1) The name of the requesting organization or individual;
- (2) The public purpose for the grant;
- (3) The services to be supported by the grant;
- (4) The target group; and
- (5) The cost of the grant and the budget. [L 1997, c 190, pt of §3; am L 2014, c 96, §6]

Hawai'i Symphony Orchestra

(Typed Name of Individual or Organization)



(Signature)
Amy Iwano



(Date)
President & CEO

(Typed Name)

(Title)

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 orchestra of Hawai'i, grounded in and shaped by Western classical music and centuries of indigenous cultural arts found nowhere else in the United States. While we have distinguished ourselves as the most isolated orchestra in the world, we are also one of the most inclusive, reflecting the unique diversity of the islands. Together with our artists and our communities, we are redefining a new artistic future for our islands—one where music fosters understanding, cultivates creativity, and connects people across generations.

HSO was founded in 2011 to continue the legacy of the Honolulu Symphony (est. 1902), as one of the oldest American orchestras.

2. The goals and objectives related to the request;

Upon joining HSO in 2023, Music and Artistic Director and Conductor Dane Lam shared an important message that reverberated through the organization and the broader community—*everyone has a place at the Symphony*. Every year since, we have committed ourselves to achieving this vision through exceptional symphonic experiences that are inspiring and reinvigorating. Now, as we enter our 15th anniversary season (2026-2027), we are emphasizing accessibility for *all* island residents, not simply those who can afford to attend.

This proposal outlines Music for All: Hawai'i Symphony Orchestra at 15, a year-long celebration of Hawai'i Symphony Orchestra's 15th anniversary through a series of free indoor and outdoor concerts, featuring the full symphony and chamber ensembles, across the islands of O'ahu, Hawai'i, Maui, and Kauai. Each concert will be filled with an exciting mix of different kinds of music, creating performances that are broadly appealing and welcoming to all. In bringing vibrant, inspiring orchestral experiences *to* our communities, we are making music accessible *for* our communities.

The initiative outlined in this proposal supports a whole host of intangible benefits for our communities. Studies have demonstrated that participation in and exposure to music activities like orchestra concerts positively impact emotional, psychological, and social health among audiences with diverse backgrounds. Arts programming offers socialization opportunities, especially important for older adults, low-income families, and youth, helping audiences build relationships and support networks that strengthen emotional well-being. For our communities especially, arts programming also fosters a sense of pride and cultural identity, connecting individuals with their heritage, land, and traditions. Increased awareness of local issues and pride in the community strengthen social cohesion, reinforcing the critical role arts play in the fabric of Hawai'i's communities.

We have identified several tangible, measurable outcomes for this proposed project that align well with the Grants in Aid priorities:

- Hold 15 free, outdoor/indoor full orchestra and chamber ensemble performances between July 2026 and June 2027, with at least two of the concerts being held in low to moderate income communities.
- Cultivate deeper relationships with 5 - 10 organizations to maximize attendance and bring in new audiences, including community-based organizations, independent living facilities, libraries, and Title I schools in low-income areas.
- Welcome 8,000 audience members of all ages, with a significant emphasis on underserved individuals as well as youth and older adults.
- Over half of the audience members will report experiencing an orchestra concert for the first time, gathered through informal surveying.
- Inspire pride in our islands' musical and cultural heritage.

3. The public purpose and need to be served;

Arts and culture play a vital role in our communities. They promote social cohesion, serving as a bridge across cultures, backgrounds, and generations. They play a part in preserving the cultural heritage and identity of our islands. There is a strong correlation between live music attendance and “individual-level social outcomes that contribute to the health of civil society” (NEA). And the arts are an important economic driver, too, contributing about \$3.3 billion to Hawaii’s economy and supporting roughly 20,000 jobs, yielding about \$1.6 billion in wages and benefits (NEA).

But there are barriers to participation in the arts for the residents of Hawaii. For example, the islands’ high cost of living creates substantial financial strain for many residents, with nearly half of Hawaii’s households living below the ALICE (Asset Limited, Income Constrained, Employed) threshold, leaving many to struggle for basic needs. With only minimal disposable income, attending concerts or any other arts experience is out of financial reach for many.

On top of this, there are system-level challenges reducing access to the arts in Hawaii. According to the Arts Action Fund, Hawaii’s per capita arts funding of \$0.62 in 2023 was far below the national average of \$3.94. And Hawaii ranks 40th in the nation for arts education funding, which limits exposure to music, theater, and other cultural activities in schools. Because of these and other factors, only 36% of island residents attended live music performances in 2024 (NEA). For a state so rich in cultural heritage, this gap highlights the need for greater investment in the arts.

We see the impacts of this absence every day. Lack of arts funding leads to an erosion of cultural heritage and social isolation, particularly for our marginalized communities.

Despite all of these challenges and needs in our community, the arts can play a vital role in healing. Let’s look at two examples of arts serving as protective factors in our communities.

“At-risk students who have access to the arts in or out of school also tend to have better academic results, better workforce opportunities, and more civic engagement,” the NEA states in a report entitled “The Arts and Achievement in At-Risk Youth.” This is especially true for youth who are from the lowest quarter of socioeconomic status. “Teenagers and young adults of low socioeconomic (SES) status who have a history of in-depth arts involvement (“high arts”) show better academic outcomes than low-SES youth with less arts involvement (“low arts”). They earn better grades and have higher rates of college enrollment and attainment.” And these youth are more civically engaged, as well; low-income students who participate in the arts are more likely to read the newspaper at least once per week (73%) compared to 44% of low-income students who did not participate in the arts. The same is true of volunteering, where 47% of low-income students who participated in the arts were more likely to volunteer compared to low-income students who did not participate in the arts (26%).

For adults, the results were enlightening as well. According to a report from NORC at the University of Chicago, the benefits of arts engagement include “shaping and reinforcing people’s cultural identity, promoting civic behaviors such as voting and volunteering, enhancing communities’ livability and economic vitality, and bridging relationships across races, generations, and political divides.” And the University of Pennsylvania noted in a study on the impacts of the arts in low-income communities that there were “14% fewer cases of child abuse and neglect...” as well as a reduction in crime and obesity. While not fully correlative, these data points support the concept that communities with better access to the arts have a greater sense of well-being and happiness.

With funding via the Grants in Aid program, HSO will celebrate our 15th Anniversary by honoring our communities through a year-long series of free concerts.

4. Describe the target population to be served; and

The HSO is dedicated to increasing equitable access to arts and culture in Hawai'i, with a focus on reaching communities that have been historically excluded from orchestral music. And in doing so, we are diversifying our audiences and making symphonic experiences inclusive and equitable for all.

But, due to financial and budgetary constraints, HSO has primarily performed in the central Honolulu area. We are committed to engaging communities from across the islands and creating more inclusive opportunities through outreach and partnerships with schools and community organizations. This Grant in Aid from the state of Hawai'i would support performances across O'ahu, Hawai'i, Maui, and Kauai— helping us share the joy of symphonic music with people on many of Hawai'i's islands.

Furthermore, our dedication to increasing access to music education opportunities for teachers and their students is 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.

Target audiences for this initiative include residents of O'ahu, Hawai'i, Maui, and Kauai; underresourced communities; Native Hawaiians and Pacific Islanders; young people and their families across the islands; older adults; visitors and tourists; and school educators and their students. Concerts of this nature have historically drawn audiences who do not come to our ticketed concerts, introducing entirely new groups of people to the healing power of the arts.

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 and engagements will take place in venues, community spaces, and schools on O'ahu, Hawai'i, Maui, and Kauai—including Neal S. Blaisdell Concert Hall, Leeward Community College, Palama Settlement, and Kailua District Park.

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 HSO's 15th anniversary initiative, Music for All: Hawai'i Symphony Orchestra at 15, offers free symphonic and chamber experiences that invite all communities—especially those facing barriers to access—to experience the power of live performance. The initiative reflects HSO's commitment to accessibility, belonging, cultural connection, and music for all. All performances will be **free** and open to the public, and will include:

July 2026:

- Each year, HSO performs a free outdoor concert at Kailua District Park, welcoming kama'aina, active military, veterans, families, and visitors to the island to experience the magic of music under the stars.
- HSO will host a side-by-side concert with participants of Hawai'i Youth Symphony's Pacific Music Institute—a summer music program for local and non-local student musicians—at Blaisdell Concert Hall, giving young musicians the special experience of performing alongside professional musicians.
- We will also host a community side by side performance in Blaisdell, giving skilled members of our community the chance to perform with HSO musicians.

September 2026:

In September, we will give a free concert for the community on Maui to mark the third anniversary of the Lahaina fire. This performance will feature Maui artists such as Keola Beamer and his wife Moanalani, Jeff Peterson, and others.

Of note, this concert has received commitments of considerable in-kind support from several Hawaiian companies. Highgate is providing accommodations and meals for the musicians, staff, and crew; Hawaiian/Alaskan Air is providing air travel; and Hawaii Stage is providing the stage, sound, and lighting equipment.

December 2026:

Symphony in the Schools takes the full orchestra out into the community for concerts in schools. We consistently strive to engage Title I schools through this initiative.

January 2027:

Chamber ensembles of HSO musicians will tour to the islands of Hawai'i and Kauai and will pop up in locations around O'ahu for five free performances in non-traditional, intimate settings like libraries, community centers, senior residences, and more.

February 2027:

Hawai'i Youth Symphony will join the HSO once again for a concert at Blaisdell Hall, featuring local young musicians performing side by side with HSO musicians.

April 2027:

Emerging composers are invited to hear their new works performed by the HSO, receiving valuable feedback from orchestra musicians and guidance from HSO's Composer-in-Residence. These readings, open to the public, support creative development and highlight the importance of contemporary composition as a way to preserve our musical heritage.

April and May 2027:

The HSO will tour O'ahu for our 15th anniversary with a focus on bringing concerts to underresourced communities. Concerts will take place at Leeward Community College, Palama Settlement, and Kailua District Park.

A special new work written by HSO Composer in Residence Michael-Thomas Foumai, *Lei and the Mo'o*, will be part of the repertoire for this series of concerts. This piece is based on a book by Hawai'i author Malia Maunakea and is a companion to Prokofiev's "Peter and the Wolf," honoring Hawai'i's cultural traditions in new ways.

Tasks and Responsibilities

HSO's community engagement efforts are overseen by Michael-Thomas Foumai, Director of Artistic Engagement and Composer in Residence, with support from our entire staff, as outlined below.

- Dane Lam, Music and Artistic Director and Conductor: will select repertoire, run rehearsals, and conduct during performances.
- Michael-Thomas Foumai, Director of Artistic Engagement and Composer in Residence: planning the artistic and community engagement of these concerts and overseeing their implementation.

- Amy Iwano, President and CEO: will oversee all aspects of the initiative, from finance to fundraising to vision.
- Merle N. Bratlie, General Manager: will oversee all non-artistic efforts, including logistics, contracts, transportation, and more.
- Megan Wade, Personnel Manager: will manage contracts for all artists, liaise between the musicians and administration, scheduling all rehearsals, ensuring compliance with union contracts, and more.
- James Finamore, Operations & State Manager: responsible for all production elements of the concerts, including supervising the IATSE crew
- Kim Kiyabu, Operations Administrator: will implement all logistics, including coordination of transportation, venues, and other operational requirements for each event.
- Autumn Woods, Director of Advancement:
- Nicholas Chakinis, Director of Finance and Administration:
- Renée Ragucci, Marketing Manager: oversees and implements integrated marketing efforts in support of concerts, from digital marketing to social media to public relations.
- Mieke J. Doezema, Community and Education Coordinator: cultivation of and outreach to potential partners, including schools, private students, peer arts organizations, senior residences, social service organizations, and more.

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

Following is an anticipated timeline for our 2026-2027 season programming.

March 2026: 2026-27 season announced, including brochures and materials sent to patrons, donors, and community partners. Due to the timing of this funding, we will not announce our Music for All initiative until grant awards are set.

April 2026 - September 2026: outreach for summer and fall concerts, including the Maui performance, side by side performances, Symphony in the Schools, and more.

June 2026: Should HSO receive this grant, Music for All: Hawai'i Symphony Orchestra at 15, will be announced this month.

June - August 2026: summer performances take place.

September 2026: Maui concert takes place.

November 2026 - April 2027: outreach for winter and spring concerts, including the chamber ensemble performances on Hawai'i and Kauai, and the O'ahu tour.

December 2026: Symphony in the Schools concerts take place.

January 2027: Chamber ensemble performances on Hawai'i and Kauai.

April and May 2027: HSO tour of O'ahu; composition readings.

3. Describe its quality assurance and evaluation plans for the request.

Specify how the applicant plans to monitor, evaluate, and improve their results;

HSO will provide quantitative and qualitative data in support of the outlined initiative.

Quantitative data will include audience attendance for all events, participation rates for programs, and engagement data with community partners. Surveys will also be used

to gather quantitative data from audiences and others engaged in and by these performances.

Qualitative data will be taken via surveys and feedback loops with community organizations engaged in the work.

Quality assurance and evaluation are owned by the Director of Community Engagement and the Community and Education Engagement Coordinator. They meet regularly to assess the success or troubleshoot the challenges of each program; design interventions for improvement (as needed); and debrief with colleagues.

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.

We define and measure success through the following efforts, which are directly aligned to the goals and outcomes defined above.

Hold free, outdoor/indoor performances between July 2026 - June 2027.

Success looks like: introducing more audiences, especially those from under-resourced communities, to the HSO via 15 performances.

We will measure this through:

- Increased reach of programming, measured through number of attendees.
- Increased engagement with underserved communities, measured through number of audiences from under-resourced zip codes.

Cultivate deeper relationships with partner organizations to maximize attendance and bring in new audiences, including community-based organizations, independent living facilities, and Title I schools in low-income areas.

Success looks like: 5-10 new community-based partners who actively promote our initiative and introduce their communities, clients, participants, and others to our concerts.

We will measure this through:

- Attendance of individuals who reported attending due to hearing about the performance from one of said partners.
- Increased engagement with underserved communities, measured through number of audiences from under-resourced zip codes.

Welcome audience members of all ages, with a significant emphasis on underserved individuals as well as youth and older adults.

Success looks like: diverse audiences attend performances.

We will measure this through:

- Increased reach of promotions, measured through the number of attendees.

- Increased demographic diversity (in age, in race/ethnicity, in zip code, etc.), as reported by audience surveys.

Audiences report experiencing an orchestra concert for the first time.

Success looks like: Over half of all attendees will report experiencing an orchestral performance for the first time.

We will measure this through:

- Attendance of individuals who report attending an orchestra concert for the first time, as reported by audience surveys.
- Attendance of individuals who report attending an HSO concert for the first time, as reported by audience surveys.

Inspire pride in our islands' musical heritage.

Success looks like: residents recognizing and taking part in Hawai'i's cultural contributions and musical traditions.

We will measure this through:

- Attendance and engagement in programs rooted in Hawai'i's culture.
- Audience surveys indicating an increased knowledge or appreciation of Hawaiian/Polynesian culture.

IV. Financial

Budget

1. The applicant shall submit a budget utilizing the enclosed budget forms as applicable, to detail the cost of the request.

- Budget request by source of funds ([Link](#))
- Personnel salaries and wages ([Link](#))
- Equipment and motor vehicles ([Link](#))
- Capital project details ([Link](#))
- Government contracts, grants, and grants in aid ([Link](#))

2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2027.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total grant
\$125,000	\$125,000	\$125,000	\$125,000	\$500,000

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2027.

The HSO receives funding from individual donors, corporate sponsors, private foundations, in-kind donors, and special fundraising events (i.e. annual gala) to support its mission and operations. Additionally, earned income via ticket sales and contracted fees makes up a portion of our revenue.

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 2027 for program funding. No federal, state, or county government contracts or grants have been awarded for FY27 programming at this time. We have submitted or will be submitting applications for the City and County Grants in Aid, the State Foundation on Culture and Arts, and the National Endowment for the Arts.

In FY26, we were awarded grants from the SFCA, State GIA, and the NEA.

6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2025.

As of December 31, 2025, HSO has \$2,161,994 in unrestricted current assets.

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.

The HSO has a proven track record of executing impactful, culturally resonant programming for Hawai'i's communities.

We consistently deliver inclusive, community-centered musical experiences. Over the past four years, the HapaSymphony series has highlighted this commitment by integrating Hawaiian music and featuring Hawai'i homegrown artists, offering a platform for voices historically underrepresented on symphonic stages. Other successful initiatives include the Symphony of the Hawaii Forests (2022-2024) in partnership with the University of Hawaii; the Masterworks Series, which brings world-class artists from around the globe to our stage and often feature new works written by Hawai'ian and other composers from around the Pacific Rim; the Beyond the Music series, which welcomes families to the concert hall for short but engaging performances; the popular Films in Concert; summer music festival; and special holiday celebrations like our Halloween concert, annual holiday program, and in 2026, our Lunar New Year and Mother's Day concerts. And most recently, at our October 2025 Student Matinee

concerts, more than 3,000 students from across O'ahu enjoyed the *Symphony of the Hawai'i Seas*, a musical journey celebrating the rich marine ecosystems of Hawai'i, blending science, animation, storytelling, and symphonic sounds. We anticipate a similar number of students at our April school matinee concerts, which will feature Composer in Residence Michael-Thomas Foumai's "Raise Hawaiki," a work celebrating the Hokule'a voyaging canoe and the revival of Polynesian wayfinding.

HSO's commitment to accessibility is evident in discounted and free ticket initiatives, along with free community concerts. Each year, we offer significant discounts to military and first responders, educators, and students. In the 2024-25 season, HSO hosted a free children's concert at the Waikiki Shell. And in summer 2025, in addition to our concert at Kailua District Park, which drew 3,500 audience members, we held a free Ohana Concert for the *Symphony of the Hawai'i Seas*, which had over 1,300 in attendance.

HSO excels in audience engagement, employing strategic digital campaigns and PR efforts. With programming that appeals to diverse demographics—such as live film score performances of *Harry Potter* alongside our wildly popular Beethoven Festival—HSO continues to broaden its reach and serve a wide array of audiences.

HSO is led by Music & Artistic Director Dane Lam and President & CEO Amy Iwano, with an 84-member professional orchestra, a 19-member Board, 12 administrative employees, and 50 volunteers. This experienced leadership team provides artistic vision and administrative stability, ensuring HSO's continued growth and alignment with community needs. The organization's infrastructure and human resources are well-positioned to deliver the proposed activities effectively.

HSO's strategic partnerships amplify its ability to serve the community. Collaborations with organizations like the Hawaii Youth Symphony, Hawaii Opera Theatre, and local corporate partners, including hotels, strengthen HSO's reach and impact. Partnerships enable HSO to provide diverse programming and offer low- and moderate-income residents opportunities. HSO's network fosters a robust cultural ecosystem and reinforces its mission to make orchestral music accessible to all.

We have received a \$10,000 grant from the Hawaii Tourism Authority and a \$5,100 grant from the Hawai'i Council for Humanities, and both grants were successfully

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.

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

Our home venue is the Neal S. Blaisdell Concert Hall, managed by the Department of Enterprise Services (operated by the City and County of Honolulu).

We will also present concerts at Leeward Community College, Palama Settlement, and Kailua District Park.

Additional venues and facilities, particularly for the Maui concert and chamber concerts in the community, are not presently set, but all locations will be secured by late spring 2026.

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 18 other community leaders who serve without compensation; our President & CEO Amy Iwano, who began her tenure on July 1, 2024; and the orchestra's first Music & Artistic Director, Dane Lam, who assumed his role on July 1, 2023.

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

The administrative staff positions include a General Manager, Director of Finance and Administration, Director of Advancement, and Marketing Manager. Open positions include a Patron Services Manager and a Patron and Donor Services Associate. The artistic and production team consists of the Director of Artistic Engagement and Composer in Residence, Personnel Manager, Operations and Stage Manager, Artistic Administrator, and Operations Administrator. All staff are adequately trained by their managers, and managers and their direct reports meet on a weekly basis. Weekly staff meetings ensure the organization is aligned in all work.

Qualifications and experience of staff members are as follows.

LEADERSHIP

Chinese-Australian conductor **Dane Lam** is **Music & Artistic Director** of the HSO (assuming the post of Music Director in July 2023) and Principal Conductor and Artistic Director of the Xi'an Symphony Orchestra. He was the first conductor in the history of Opera Queensland to be honoured with an official position when he was appointed their Associate Music Director and Resident Conductor in December 2020.

President & CEO Amy Iwano's impressive arts career includes orchestral, chamber, jazz, and world music; educational programming; community events and performing arts leadership in Los Angeles, Chicago, and Santa Fe. Currently, she is the vice chair of the

Board of Directors of New Music USA, a board member of the Amphion Foundation, and an advisory board member for the Collaborative Arts Institute of Chicago.

Dr. Michael-Thomas Foumai is the **Director of Artistic Engagement and the Susan Kosasa Composer in Residence** for the HSO. He is a graduate of the University of Hawai'i at Mānoa. In 2019, Dr. Foumai was selected as part of the 17th class of the Pacific Century Fellows and received a Certificate of Recognition from the Mayor of Honolulu and a proclamation from the State Senate of Hawai'i.

ADMINISTRATION

Autumn Woods is the **Director of Advancement** at HSO. Her background spans fundraising, marketing, and stakeholder engagement across the nonprofit, educational, and membership spaces, with a focus on building strong relationships and advancing mission-driven work. She recently worked at Mid-Pacific Institute.

Director of Finance and Administration, Nicholas Chakinis, is a finance and accounting professional with over six years of diverse experience across corporate, nonprofit, and small business environments. He most recently served as Senior Accountant at Signature Analytics. He has a degree in Business Administration.

Renée Ragucci is the **Marketing Manager** at the HSO. Her professional background is in arts marketing and communications, with experience in media production and project coordination. She holds a degree in TV, Film, and Communication Arts and brings multidisciplinary experience in digital media, design, and project management.

Merle Bratlie is the **General Manager** at the HSO and has served in this capacity for over 12 years. He leverages his 40+ year career in the arts—from roles in sales to artistic services at the Houston Texas Center and Houston Symphony—in his current role, where he manages contracts, schedules, and travel.

Megan Wade is the **Personnel Manager** for the HSO. Originally from Texas, she holds a Bachelor's degree in Trumpet Performance from the University of Houston. Prior to working at HSO, she served as the Financial Associate for a church in Texas.

James Finamore serves as the **Operations and Stage Manager** at HSO. He is a composer whose works have been performed in the U.S. and Japan. He brings over 15 years of music production experience with the American Music Academy and the University of Hawai'i at Mānoa.

Artistic Administrator Julie Eugenio has worked with the HSO since 2011. She served in the same capacity with the Cincinnati Symphony Orchestra for 14 years and is currently the Executive Director of Linton Chamber Music in Ohio. She is a graduate of the League of American Orchestras' Orchestra Management Fellowship.

Mieke J. Doezema is the HSO's first **Community and Education Coordinator**. She has degrees in music education and composition from Western Washington University

and the University of Hawai'i at Mānoa. She has taught music in Seattle schools and music theory at the collegiate level.

Kim Kiyabu is the **Operations Administrator** at HSO and also serves as the Music Librarian. She has Bachelor and Master of Music degrees in Piano Performance from the University of Hawai'i at Mānoa, and maintains her own piano studio, teaching students from around Honolulu and O'ahu.

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 at the end of the narrative.

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.

Following are the annual salary ranges paid by HSO to the three highest-paid officers, directors, or employees of the organization.

President & CEO: \$170,000 - \$190,000

Music & Artistic Director: \$185,000 - \$210,000

Director of Finance and Administration: \$80,000 - \$100,000

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.

HSO has 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 fully 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 2027 the activity funded by the grant if the grant of this application is:

(a) Received by the applicant for fiscal year 2027, but

(b) Not received by the applicant thereafter.

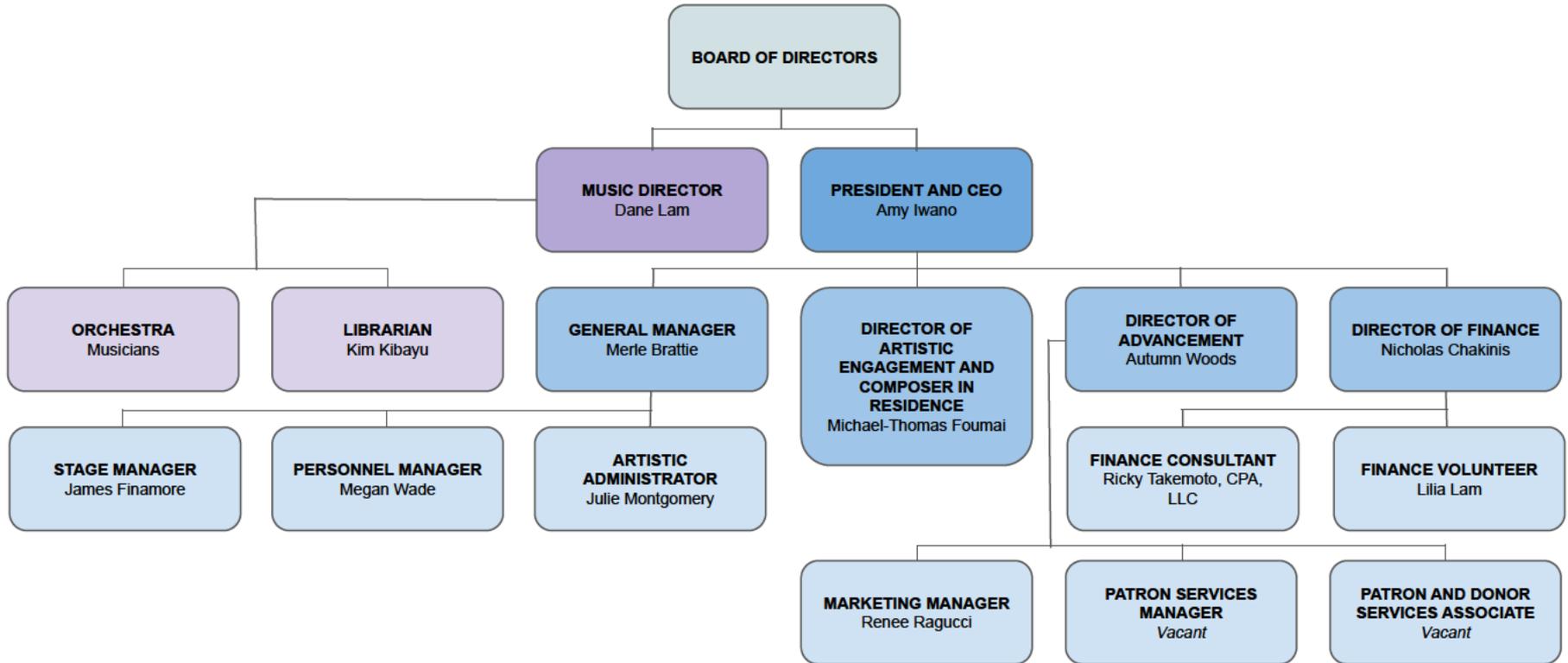
HSO is well-positioned to sustain our traditional programming beyond fiscal year 2027. The free concerts that are part of Music for All: Hawai'i Symphony Orchestra at 15 are offered in addition to traditional programming in celebration of our 15th anniversary.

We prioritize diversifying our revenue to ensure no one stream is heavily relied upon. This diversification encompasses individual giving, corporate giving and sponsorships, and grants from foundations and other philanthropic investors. Additionally, as an orchestra, we leverage ticket sales as earned revenue, the prices for which we assess each year to determine if they should be increased.

A robust series of free concerts across all Hawai'ian islands can only be sustained with the support of a broad range of philanthropic investors, including the State of Hawai'i. We will continue to cultivate relationships that we can build upon to sustain such activities in the future.

HSO ORGANIZATION CHART

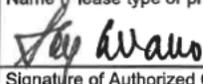
January 2026



BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2026 to June 30, 2027

Hawai'i Symphony Orchestra

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	262,119		105,713	129,979
2. Payroll Taxes & Assessments	31,454		12,686	15,597
3. Fringe Benefits	78,355		31,601	38,855
TOTAL PERSONNEL COST	371,928		150,000	184,431
B. OTHER CURRENT EXPENSES				
1. Travel, Hospitality & Catering	50,403			
2. Production, Stage, Sound, Light	22,939			
3. Guest Artist & Music Rental	30,984			
4. Lease/Rental of Space	4,160			
5. Licensing, Acquisition & Negotiation Fee	4,720			
6. Security, Parking, Venue Building Services	7,192			
7. Truck Rental	3,147			
8. Miscellaneous Production	4,527			
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
TOTAL OTHER CURRENT EXPENSES	128,072			
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	500,000		150,000	184,431
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	500,000	Nicholas Chakinis, HSO Director of Finance (708) 897-6274		
(b) Total Federal Funds Requested		Name (Please type or print) Phone		
(c) Total County Funds Requested	150,000			
(d) Total Private/Other Funds Requested	184,431	01/22/2026		
		Signature of Authorized Official Date		
TOTAL BUDGET	834,431	Amy Iwano, HSO President & CEO		
		Name and Title (Please type or print)		

BUDGET JUSTIFICATION - PERSONNEL SALARIES AND WAGES

Period: July 1, 2026 to June 30, 2027

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)
Core orchestra musicians		2,701,861	7%	190,637
IATSE production crew		363,204	5%	18,160
Music Director		207,360	5%	10,368
President & CEO		190,000	2%	3,800
Part time Director of Finance & Admin	90,000	55,000	1%	550
Director of Advancement		75,190	1%	752
Director of Artistic Engagement & Composer In Residence		72,000	2%	1,440
General Manager		61,215	1%	612
Marketing & Creative Manager		55,000	2%	1,100
Personnel Manager		50,000	2%	1,000
Operations & Stage Manager		50,000	5%	2,500
Education & Community Engagement Coordinator	49,920	31,200	100%	31,200
				0
				0
TOTAL:				262,119
JUSTIFICATION/COMMENTS: 15 free performances across Hawaii will utilize all HSO staff. Our education and community engagement coordinator will be utilized the most followed by our musicians and production crew. This total ties to the \$500k total state request on page 6. This allocation is based on the amount of time required by each position for each of these free performances across all other HSO performances during the 26.27 season. 100% of everyone's time will be fully utilized for the entire 26.27 season outside of these free performances.				

Hawai'i Symphony Orchestra

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
Production, Stage, Sound & Light	15	1,529	22,939	22,939
			0	
			0	
			0	
			0	
TOTAL:	15		22,939	22,939

JUSTIFICATION/COMMENTS: The number of items will be required for the 15 performances. The cost per item is based on the historical spending of similar performances for all production, stage, sound and light equipment. Equipment will include monitors, stands, projectors (if visual is required), mixing consoles, stage racks, speakers, subwoofers and cabling

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
Truck Rental	15	210	3,147	3,147
			0	
			0	
			0	
			0	
TOTAL:	15		3,147	3,147

JUSTIFICATION/COMMENTS: The number of vehicles will be required for the 15 performances. The cost per item is based on the historical spending of similar performances for all truck rentals.

GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID

Hawai'i Symphony Orchestra

Contracts Total: 311,000

	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	Hawai'i Tourism Authority	State	10,000
2	2025-2026 Season	7/1/25-6/30/26	State Grants in Aid	State	250,000
3	HapaSymphony Concert Series	7/1/2025-6/30/26	State Foundation on Culture and the Arts	State	15,000
4	"Raise Hawaiki: the Hokule'a Symphony" in honor of America250	01/01/26-06/30/26	National Endowment for the Arts	U.S.	36,000
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					