

**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: \$ 200,000

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

Request for funds to support a program of opera productions and educational outreach activities across four islands, including ticket subsidies to increase access to opera and classical music across a broader Hawaii demographic.

Amount of Other Funds Available:

State: \$ N/A

Federal: \$ _____

County: \$ _____

Private/Other: \$ _____

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

\$ 293,941.30

Unrestricted Assets:

\$ _____

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 St., ste. 301

City: Honolulu State: HI Zip: 96813

Contact Person for Matters Involving this Application

Name:
Kevin Takamori

Title:
Director of Development

Email:
k_takamori@hawaiiopera.org

Phone:
808-596-7372

Federal Tax ID#:

██████████

State Tax ID#

██████████

Karen Tiller
Authorized Signature

KAREN TILLER, INTERIM GENERAL DIRECTOR

Name and Title

January 16, 2019

Date Signed

received
1/18/19 1:41p JR

HAWAII OPERA THEATRE

Application Submittal Checklist

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

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

Karen Tiller

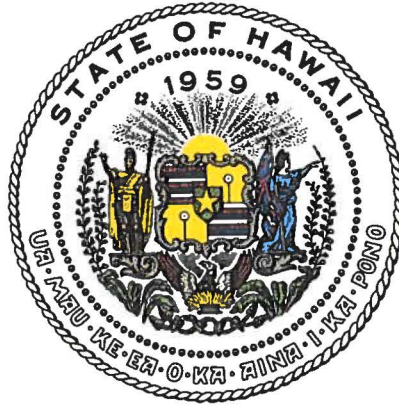
KAREN TILLER,
INTERIM GENERAL DIRECTOR

1/18/2019

AUTHORIZED SIGNATURE

PRINT NAME AND TITLE

DATE



Department of Commerce and Consumer Affairs

CERTIFICATE OF GOOD STANDING

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

HAWAII OPERA THEATRE

was incorporated under the laws of Hawaii on 02/19/1980 ; that it is an existing nonprofit corporation; and that, as far as the records of this Department reveal, has complied with all of the provisions of the Hawaii Nonprofit Corporations Act, regulating domestic nonprofit corporations.



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

Dated: January 16, 2019

Director of Commerce and Consumer Affairs

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

The undersigned authorized representative of the applicant certifies the following:

- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii 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.

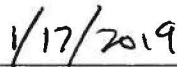
Further, the undersigned authorized representative certifies that this statement is true and correct to the best of the applicant's knowledge.

Hawaii Opera Theatre

(Typed Name of Individual or Organization)


(Signature)

Karen Tiller



(Date)

Interim General Director

(Typed Name)

(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. Certificate of Good Standing (If the Applicant is an Organization)

If the applicant is an organization, the applicant shall submit one (1) copy of a certificate of good standing from the Director of Commerce and Consumer Affairs that is dated no earlier than December 1, 2018.

2. Declaration Statement

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

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. ([Link](#))

We declare that the grant shall be used for a public purpose, pursuant to Section 42F-102 of the 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;

Established in 1960 as part of the Honolulu Symphony, and incorporated in 1980, Hawaii Opera Theatre's mission is to use sound business practice to present a broad spectrum of world-class opera and music-theatre, as well as a wide range of educational and artistic opportunities, to the whole State of Hawaii. As the only company performing opera in Hawaii, our work is vitally important to the community we serve, both in terms of our performances, and also the wide range of education programs that we present throughout the State.

2. The goals and objectives related to the request;

Hawaii Opera Theatre's goal is to engage, enthuse, educate and entertain the people of Hawaii about opera and classical music. In order to do that we will

reach as many people in the State of Hawaii as possible, through an extensive program of public performances, outreach concerts and educational programs.

Our objectives are as follows:

- To reach an audience of over 15,000 through our mainstage performances.
- To perform a wide variety of opera of different styles and types.
- To connect with over 20,000 children and their families by presenting educationally sound programs that reflect the priorities of the State Department of Education.
- To present performances and education programs on the islands of Oahu, Kauai, Maui and Hawaii.
- To offer tickets at reduced prices that will make our performances accessible to everyone, increasing the number of low-priced tickets, ensuring that price is not a barrier to admission.

3. The public purpose and need to be served;

The arts play a major role in the quality of life for all of our citizens by giving identity to our community, making it more viable and enjoyable by fostering cultural appreciation, creating jobs and strengthening the local economy, and by providing an effective method for teaching our youth the many skills needed to live and work successfully in society.

The renowned cellist, Yo-Yo Ma, said: "Culture is a fabric composed of gifts from every corner of the world. The arts teach us that there is something that connects us all and is bigger than each of us. Music belongs to us all."

The ninety-second American Assembly in 1997 identified the broad public purposes served by the arts and the specific ways in which the arts can and do meet the needs of the nation and of all Americans. Specifically, this Assembly identified four public mandates addressed by the arts:

1. The arts help to define what it is to be an American—by building a sense of the nation's identity, by reinforcing the reality of American pluralism, by advancing democratic values at home, and by advancing democratic values and peace abroad.
2. The arts contribute to the quality of life and economic growth—by making America's communities more livable and more prosperous, and by increasing the nation's prosperity at home and abroad.
3. The arts help to form an educated and aware citizenry—by promoting understanding in this diverse society, by developing competencies in school and at work, and by advancing freedom of inquiry and the open exchange of ideas and values.

4. The arts enhance individual life—by encouraging individual creativity, spirit, and potential; and by providing release, relaxation and entertainment.

4. Describe the target population to be served;

HOT aims to bring opera statewide with top quality opera productions and performances as well as innovative education programs on the four islands of Oahu, Kauai, Maui and Hawaii. We strive to reach the widest possible audience, with particular initiatives in recent seasons to younger opera-goers, especially young professionals, as well as broadening our appeal by performing new and topical works that have particular relevance to today's audiences.

In the field of education, we have programs that are designed for particular age ranges: the *Opera Express* touring opera visits elementary schools and community venues on four islands; the Opera Residency program takes place in schools with a large proportion of less-privileged students, such as Palolo Elementary and Blanche Pope Elementary in Waimanalo. Our *Opera for Everyone* dress rehearsal performances are open to students in middle and high schools across the educational spectrum, with a very low ticket price (\$7) to increase accessibility.

Without HOT's performances and education programs, the majority of people in Hawaii would have no access to opera or, in some cases, classical music. Many of the schools we serve have no music programs of their own, and the opportunity to work with HOT's teaching artists is the only music education available to the students. With all the benefits for cognitive and social development that result from arts education, as has frequently been proved in research, HOT's programs are vital to the children, families and adults that we serve.

In all, HOT's public performances reach over 15,000 people on Oahu each year, and our education programs reach over 22,000 children and their families on the islands of Oahu, Kauai, Maui and Hawaii. Our goal is to increase that reach, and introduce more people to opera and classical music. To that end, in recent years we have incorporated marketing strategies to engage younger audiences, including HOT Tuesday events for under-40s, and the GenHOT Advisory Board of young professionals who are interested in supporting HOT and leading our outreach to the younger generation.

In addition, HOT has pricing policies to make opera accessible to everyone, with prices starting at \$29, and many discount initiatives on offer. We plan to utilize some of the grant money to increase the number of low-price tickets on offer for each performance.

5. Describe the geographic coverage.

HOT's mainstage productions normally take place in Honolulu, principally at the Neil S. Blaisdell Concert Hall, but also at other venues around the city, including the Hawaii Theatre; Pier Ten at Aloha Tower; and The ARTS at Mark's Garage. During the 2016/17 Season, the company took its production of *Three Decembers* to Kauai, Maui and the Big Island. This connected HOT with audiences on each of the neighbor islands and opened the way for future performances.

In the current season we are planning a series of concerts by our Orvis Studio singers on the neighbor islands, in order to continue the connection with audiences on each island. One notable example will be HOT's participation in Imua Family Services' "Carnival de Venice" Grand Ball at the Hyatt Regency in Ka'anapali, Maui in Spring 2019. In the same vein, we will be performing in other parts of Oahu.

Also in Spring 2019, HOT will be featuring Verdi's *La Traviata* starring Hawaii's own Quinn Kelsey, a native Hawaiian who spent his formative years with HOT and is regarded as one of the top baritones in the opera world today. Co-starring with Quinn in *La Traviata* will be tenor Pene Pati of the popular New Zealand trio SOL3 MIO. For the past three years, SOL3 MIO has thrilled Hawaii audiences at the Blaisdell Concert Hall. SOL3 MIO's Samoan heritage has helped the group to develop an enthusiastic, devoted following among audiences from as far away as Leeward Oahu, Kahuku and Laie. With Quinn and Pene, we anticipate increased tickets sales via a broader Hawaii demographic who will come to support these two Polynesian artists.

Building on these experiences, we plan to extend our program on the neighbor islands to incorporate smaller-scale operatic performances on each island, using Orvis Studio singers, and devising programs of popular operatic excerpts to introduce new audiences to opera and engage, educate and entertain them.

For the past several years, HOT's Education Department has presented its *Opera Express* touring show for schools on four islands. This 40-minute, specially adapted show, travels to elementary schools and community venues across the State each year. Last season they gave 85 performances of *No More Mr. Bad Wolf*, a mini-opera written by children from Waikele Elementary School (Oahu) and set to music by HOT's Education team. In the current season, they are delivering a similar number of performances of Rossini's *The Barber of Seville*. Next season, they will perform Rossini's *Cinderella* at a similar number of venues statewide.

HOT's *Opera Residency* programs take place in schools across Oahu, particularly in places which have little access to classical music, including Waimanalo, Aiea and Palolo Valley.

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;

For the period July 1, 2019 to June 30, 2020, Hawaii Opera Theatre will undertake the following activities:

- Three performances of Puccini's *Tosca* at the Blaisdell Concert Hall in October 2018
- Three performances of Mozart's *Marriage of Figaro* at the Blaisdell Concert Hall in February 2019
- Three performances of Strauss's *Salome* at the Blaisdell Concert Hall in May 2019
- Six performances on four islands of a touring production by the Orvis Opera Studio
- Eighty-five (85) performances of an *Opera Express* production of Rossini's *Cinderella* in elementary schools and community venues on four islands
- Five *Opera Residency* projects in schools on Oahu, including Olomana Youth Corrections (pending enrollment)
- Three *Opera For Everyone* dress rehearsal performances for elementary through undergraduate college students
- Multiple workshops, masterclasses and coaching sessions for singers in the *Orvis Opera Studio* and *Young Voices Studio*, providing professional level training for young singers in high school and beyond as a means of training for future careers in the performing arts industry, including Tim Shaindlin of the Yale Opera; Mark Morash of the San Francisco Opera Center; Metropolitan Opera soprano Erie Mills; and other world-class professional artists.

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

October 2019

- *Opera Express* – 2-week tour of Rossini's *Cinderella* on Oahu
- *Opera Residency* – program begins
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses begin
- *Opera For Everyone* – Dress Rehearsal of *Tosca*
- ***Tosca*** – Three performances at Blaisdell Concert Hall

November 2019

- *Opera Express* – 2 week tour of *Cinderella* on Maui
- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue
- *Opera Ball* – major annual fundraising event at the Sheraton Waikiki

December 2019

- *Opera Express* – continuation of *Cinderella* on Maui
- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue

January 2020

- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue

February 2020

- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue
- *Opera For Everyone* – Dress Rehearsal for Mozart's *Marriage of Figaro*
- ***Marriage of Figaro*** – Three performances at Blaisdell Concert Hall

March 2020

- *Opera Express* – 1 week tour of *Cinderella* on Kauai
- *Opera Express* – 1 week tour of *Cinderella* on Big Island
- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue
- HOT's Orvis Studio singers' participation in Imua Family Services' "Carnival de Venice" Grand Ball in Ka'anapali, Maui

April 2020

- *Opera Express* – 2-week tour of *Cinderella* on Oahu
- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue

May 2020

- *Opera Residency* – program continues
- *Orvis Opera Studio* and *Young Voices* – coaching and masterclasses continue
- *Opera For Everyone* – Dress Rehearsal of Strauss's *Salome*
- ***Salome*** – Three performances at Blaisdell Concert Hall

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

Hawaii Opera Theatre strives to maintain the highest possible artistic standards for its mainstage public performances. Using a combination of visiting artists from around the world, local-based professional musicians in the orchestra, and our highly talented local volunteer chorus, HOT produces operas that are well-received by the public and widely acclaimed by local and international commentators.

HOT's Education Team attends the annual Arts First "Teaching Arts Institute" and works with the State Artists in Schools program coordinator to ensure that our programs help to enhance curriculum components. Research shows that whereas teachers have pedagogical and curricular expertise, and teaching artists bring arts knowledge and skills, together they provide inventive arts-integrated instruction to support student learning. Learning through partnerships with arts specialists and teaching artists also motivate and equip teachers to integrate the arts in their classrooms more frequently and in greater depth.

One measure of success for our education programs is the demand for our performances and projects from schools on all four islands that we visit, as well as attendance at our *Opera for Everyone* school performances. Feedback from teachers and participants is regularly sought, and comments are incorporated into our work to ensure that our programs are both relevant and helpful to the schools and to the teachers. HOT's Education Director meets before and after each *Opera Residency* project with teachers and administrators in each school, to discuss how to tailor the program, review its success and receive valuable feedback.

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.

Hawaii Opera Theatre will track the following measures to report on the effectiveness of the program:

- Attendance at public performances
- Attendance by first-time opera goers at public performances
- Traffic on the HOT website and through social media platforms
- Attendance at *Opera for Everyone*
- Number of *Opera Express* performances
- Teacher feedback on *Opera Express* and *Opera Residency* programs

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](#))

Budget documents attached.

- 2. The applicant shall provide its anticipated quarterly funding requests for the fiscal year 2020.**

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$0	\$70,000	\$70,000	\$60,000	\$200,000

- 3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2020.**

National Endowment for the Arts
 State Foundation on Culture and the Arts
 City and County of Honolulu
 John R. Halligan Charitable Fund
 Hearst Foundations
 Arthur and Mae Orvis Foundation
 Strong Foundation
 Carol Franc Buck Foundation
 Alexander and Baldwin Foundation
 Atherton Family Foundation
 Bank of Hawaii Foundation
 Cades Foundation
 Cooke Foundation
 Sidney E. Frank Foundation
 McInerney Foundation
 G.N. Wilcox Trust
 John Young Foundation
 Other Foundations and Trusts
 Individuals

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.**

NONE

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 2020 for program funding.**

National Endowment for the Arts
 FY17 \$20,000 Three Decembers

State Foundation for Culture and the Arts
 FY17 \$10,817 Education Program
 FY18 \$10,733 Education Program
 FY19 \$11,422 Education Program
 FY20 \$15,000 *Will Apply*

State of Hawaii Grant in Aid
 FY17 \$150,000 Three Decembers Statewide Tour
 FY20 \$200,000 *Applied*

City and County of Honolulu Grant in Aid
 FY18 \$ 50,000
 FY19 \$125,000
 FY20 \$125,000 *Applied*

6. **The applicant shall provide the balance of its unrestricted current assets as of December 31, 2018.**

Total Cash and Other Assets as of December 31, 2018: \$2,112,365

Total Assets as of December 31, 2018: \$6,703,733

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.

Opera Productions

The quality of Hawaii Opera Theatre's work has been praised for over fifty years by audiences and reviewers, including those from international publications such as Opera News and Opera Now, as well as local media outlets.

"Hawaii Opera Theatre brings this remarkably current story to life with a well-balanced cast, featuring mezzo soprano Kate Aldrich in the title role—and proving why she is considered perhaps the best Carmen in opera today—and local tenor Kip Wilborn as Don Jose, who undergoes a tortuous journey from would-be straight arrow to hapless foil."

- Steven Mark, *Hawaii Star-Advertiser*, October 2017

"Hawaii Opera Theatre's 'As One' is the story of a young transgender person discovering who s/he is, but like many operas, it connects on a universal level and is relevant to everyone who struggles towards self-acceptance. Thursday's performance was outstanding, sure to be a highlight of HOT's year."

- Ruth Bingham, *Hawaii Star-Advertiser*, January 2018

Recent seasons from HOT have included very successful productions of *La Boheme*; *A Streetcar Named Desire*; *The Tales of Hoffmann*; *Carmen*; *Daughter of the Regiment*; *Eugene Onegin*; and *Romeo and Juliet* at the Blaisdell Concert Hall. In addition, over the past two years HOT has produced *Three Decembers* at the Hawaii Theatre, and on Kauai, Maui and the Big Island; *As One* at Pier Ten Cruise Terminal (Aloha Tower); and *Lifeboat* at The Arts at Marks Garage. These productions, with a wide range of styles and scenic treatment, demonstrate the flexibility of the company, and our ability to tackle works of varying size and era. Our production team includes key staff from Hawaii, as well as seasoned experts from the mainland, with rich and varied experience of mounting opera in many cities.

Educational Outreach Programs

Demand for HOT's educational programs continues to grow, and in recent years the *Opera Express* tour has expanded to over 80 performances on four islands. HOT's education team prepares a detailed information pack on the opera to be performed, including historical context, some sample lesson plans, music for some of the choruses for the children to learn and sing along, and some fun games for them to play. Following the performance, the students are invited to take part in a question-and-answer session with the singers.

HOT's *Opera Residency* program won an award by Opera America for its innovative approach to teaching students to put on an opera. Our education staff audition the students, assign roles, coach the singers and lead the final performances. Staff also assist in costume, staging and other production elements. After many such productions, the HOT education team has a strong track record in delivering these

programs, as evidenced by the frequency of return invitations to schools such as Waikele, Aiea, Blanche Pope, and Waimanalo Elementary Schools.

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.

HOT's mainstage productions are presented at the Neal S. Blaisdell Concert Hall in Honolulu. This is a city-owned and operated facility with 2,100 seats.

Other productions are presented at venues across the city, including Hawaii Theatre in Chinatown; Pier 10 Terminal at Aloha Tower; Central Union Church; Kawaihao Church; and The Arts at Marks Garage. Additional partnerships being discussed include Mamiya Theater at St. Louis School; Paliku Theatre in Kaneohe; and the recently renovated Leeward Community College Theatre.

Education programs and performances take place in schools and community venues across the State.

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.

Karen Tiller, Interim General Director

Karen Tiller was appointed Interim General Director in March 2018, and is responsible for its marketing, development, financial stability, and long-range planning. She had previously served as HOT's Executive Director from 2003 to 2013, where she received the Highest Possible 4-STAR rating in 2007, 2008 and 2009 for fiscal and organizational management from Charity Navigator, the world's largest non-profit evaluation firm. In addition, Karen has directed several critically acclaimed HOT opera productions including *Susannah*, Jun Kaneko's *Madama Butterfly*, *The Pearl Fishers*, and the 2013 production of *Turandot*. Other notable productions in her career include *Sweeney Todd* at HOT, *The Turn of the Screw* at Opera Memphis and *Orpheo et Euridice* at the New Jersey Opera Festival. She retired from HOT in 2013 to focus on her growing young family. Karen has served as treasurer for the national board of the Joyful Heart Foundation and served on the board of the Rehabilitation Hospital of the Pacific. She currently serves as an Oahu Commissioner for the Hawaii State Foundation on Culture and the Arts. Since her return to HOT as Interim General

Director in March 2018, the company has taken major steps towards right-sizing its productions and establishing a working model that will allow HOT to continue its tradition and reputation as a performing arts leader and invaluable arts education provider in the state.

Erik Haynes, Director of Education

Erik has been HOT's Director of Education since 1992 and has been instrumental in the tremendous growth of HOT's outreach activities. He is credited with HOT receiving the Opera America Success Award for educational programming at the 1999 Opera America Conference. He has been a National Association of Teachers of Singing State Governor, a board member of the Hawaii Arts Alliance, and served as president of the Waikele Elementary PTSO for five years. Erik has a master's degree in Music and Voice Concentration from the University of Hawaii at Manoa and has taught there as well as at Chaminade University, Windward Community College and Punahou Music School. He is also on staff at Hawaii Youth Opera Chorus where he provides private and class instruction to Hawaii's next generation of vocal talent.

Blythe Kelsey, Education Programs Specialist and Teaching Artist

Blythe is responsible for the stage direction and coordination of the Opera Express Tours and school residencies. She has been involved HOT's productions since the age of 12. She attended the Westminster Choir College of Rider university, where she majored in Vocal Performance with a concentration in Opera Studies. Roles include Sister Mathilde in *Dialogues of the Carmelites*, the High Priestess in *Aida*, and Miss Todd in a radio production of *The Old Maid and the Thief*, all at HOT; Turandot and Liu in *The Curse of Lou-Ling*, the title role in *Aida*, and Jezibaba in *Rusalka*, for HOT's Opera Express program; Cobweb in *A Midsummer Night's Dream*, and Michaela in *Carmen*, with Westminster Opera Theatre. She performs as a soloist with Hawaii Opera Theatre, including the *Great American Voices* and *Great Singers, Great Songs* concert series.

Eric Schank, HOT Education Music Specialist

Eric joined the staff of Hawaii Opera Theatre in December of 2005. He attended the University of Hawaii, where he studied piano with Edward Shipwright, and then the University of Akron, where his teachers were Eugene Mancini and Stephanie Browne. Prior to HOT, he was employed by the University of Hawaii Music Department as well as the Theater and Dance Department as an accompanist. He has also, over the years, been a pianist in many vocal, instrumental and chamber music recitals and continues to be the pianist for the Hawaii Vocal Arts Ensemble.

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.

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.

General Director	\$150,000
Director of Development	\$102,000
Director of Finance & Administration	\$ 90,245

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.

Hawaii Opera Theatre 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 2019-20 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2019-20, but**

(b) Not received by the applicant thereafter.

Hawaii Opera Theatre has been in existence since its incorporation in 1980, presenting three or four opera productions each season. The company's fiscal stability is demonstrated by its strong balance sheet, anchored by the freehold ownership of its office building, which generates rental income for HOT; and its investment portfolio in the region of \$5 million, the outcome of legacy gifts to the organization.

HOT continues its efforts to increase revenue from ticket sales and contributions. In the past four years, HOT has increased ticket income each successive year, as well as increasing the amount of contributed income it receives from corporations, foundations and individuals.

HOT maximizes its earned income by presenting one-off concerts by groups such as the Samoan vocal trio Sol3 Mio, and also holds regular fundraising events, including the highly-anticipated annual Opera Ball in November.

HOT has strong support from the National Endowment for the Arts, as well as foundations from the mainland and the State of Hawaii.

HOT continues to focus its efforts on cutting costs through in-kind donations of housing and transportation and other production costs. In addition, the repertoire is planned to balance potential ticket income against costs of production, including the availability of sets and costumes for rental from other opera companies.

BUDGET REQUEST BY SOURCE OF FUNDS

Period: July 1, 2019 to June 30, 2020

Applicant: _____

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 - Education Staff				150,840
2. Payroll Taxes & Assessments				16,985
3. Fringe Benefits				47,814
TOTAL PERSONNEL COST				215,639
B. OTHER CURRENT EXPENSES				
1. Education Program Costs	55,000			55,399
2. Artists incl travel and housing	45,000			249,000
3. Orchestra				440,000
4. Production Costs	100,000			743,281
5. Technical Labor				384,440
6. Marketing Costs				272,377
7. Box Office				68,000
8. Utilities				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
TOTAL OTHER CURRENT EXPENSES	200,000			2,212,497
C. EQUIPMENT PURCHASES				
D. MOTOR VEHICLE PURCHASES				
E. CAPITAL				
TOTAL (A+B+C+D+E)	200,000			2,428,136
SOURCES OF FUNDING		Budget Prepared By:		
(a) Total State Funds Requested	200,000	<div style="display: flex; justify-content: space-between;"> <i>Karen Tiller</i> (808) 596-7372 </div>		
(b) Total Federal Funds Requested		Name (Please type or print)		
(c) Total County Funds Requested		<div style="display: flex; justify-content: space-between;"> <i>Karen Tiller</i> 1/18/2019 </div>		
(d) Total Private/Other Funds Requested	2,428,136	Signature of Authorized Official		
TOTAL BUDGET	2,628,136	<div style="display: flex; justify-content: space-between;"> <i>Karen Tiller, Interim General Director</i> </div>		
		Name and Title (Please type or print)		

*HOT STAFF

