

**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

Amount of State Funds Requested: \$ 150,044

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

The request will support the HSO's community engagement focus in Central Oahu by removing residents' financial and geographic barriers to participation. Our new Neighborhood Concert Series will broaden access to live Masterworks classical performances at the Moanalua High School Performing Arts Center at significantly low ticket prices; serve students at Moanalua High School and other schools with six free open rehearsals prior to the Masterworks concerts and offer students and teachers integrated music and performing arts activities, presented by HSO musicians and staff.

Amount of Other Funds Available:

State: \$ 0

Federal: \$ 0

County: \$ 0

Private/Other: \$ 70,000

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

\$ 45,634

Unrestricted Assets:

\$ 1,315,820

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 Avenue

City:

Honolulu

State:

HI

Zip:

96816

Contact Person for Matters Involving this Application

Name:  
Dave Moss

Title:  
Executive Director

Email:  
dmoss@hawaiisymphonyorchestra.org

Phone:  
808-380-7722

Federal Tax ID#:

[REDACTED]

State Tax ID#

[REDACTED]

  
\_\_\_\_\_  
Authorized Signature

Dave Moss, Executive Director  
Name and Title

1/21/22  
Date Signed

## 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



AUTHORIZED SIGNATURE

Dave Moss, Executive Director

PRINT NAME AND TITLE

1/21/22

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 SYMPHONY ORCHESTRA

was incorporated under the laws of Hawaii on 06/13/2011 ; 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 17, 2022

*Catherine P. Awai-Cole*

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:

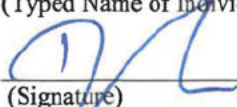
- 1) The applicant meets and will comply with all of the following standards for the award of grants pursuant to Section 42F-103, Hawaii Revised Statutes:
  - a) Is licensed or accredited, in accordance with federal, state, or county statutes, rules, or ordinances, to conduct the activities or provide 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.

Hawai'i Symphony Orchestra

\_\_\_\_\_  
(Typed Name of Individual or Organization)

  
(Signature)

Dave Moss

1/21/22  
(Date)

Executive 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, 2021.

See attached

#### **2. Declaration Statement**

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

See 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](#).

1) The name of the requesting organization or individual;  
Hawai'i Symphony Orchestra (HSO) is a 501 (c)(3) nonprofit corporation.

2) The public purpose for the grant;

The grant will be used for the public purpose of bringing music and culture to the State of Hawai'i.

3) The services to be supported by the grant;  
The HSO is seeking Grant in Aid funds for its new Neighborhood Concert Series to broaden community access to live Masterworks classical performances in Central O'ahu by removing some of the financial and geographic barriers to concert attendance.

- The grant will partially support six Masterworks classical concerts from October 2022 to May 2023 at the Moanalua High School Performing Arts Center at significantly low ticket prices. The grant will also support music integration into the educational programming at for Moanalua High School and other local students, presented by HSO musicians and staff.

4) The target group;

The target group is the 40,000+ residents of Salt Lake, Moanalua, Mapunapuna and other neighborhoods near the Moanalua High School Performing Arts Center, including students, families, older adults, veterans, active duty military personnel and low-to-moderate income households.

5) The cost of the grant and the budget.

The HSO respectfully requests \$150,044 to fund 100% of the musicians' salaries and payroll for the Neighborhood Concert Series and education engagement activities. The HSO's sponsors, grantors and other resources will fund the balance of the \$220,044 budget.

## **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 Hawai'i's premier professional orchestra. Established in 2011, its mission is to present the highest-quality performances of great music, bringing national and international distinction to the orchestra and its community; to delight and educate audiences of all ages and backgrounds, and enhance the cultural vitality and quality of life in these Islands; and to operate in a financially sound manner.

Since its debut in 2012, the HSO has performed for more than 292,000 people in person, and over 400,000 households through digital offerings featuring our gifted musicians, stellar guest artists and renowned conductors.

The HSO's purpose is to bring joy to the widest possible audience in Hawai'i. Our vision is to broaden community access to world-class symphonic performances for residents, families, youth, older adults and visitors at affordable prices in accessible venues featuring a spectrum of musical and cultural experiences.

Despite these difficult times, the HSO remains a valued community asset that will continue to be shaped by Hawai'i, whose offerings are uniquely of Hawai'i, and who's vision for the future is designed for Hawai'i.

The orchestra's Artistic Advisor is JoAnn Falletta, the renowned American maestro who has conducted around the world. The HSO's 64 musicians perform for all concert activities in full orchestra programs, as well as in smaller ensembles. The musicians are a vital community resource as performers, teachers, mentors, advisors and organizers

of music education activities that typically serve 10,000 students and educators on O'ahu and across the state annually.

2. The goals and objectives related to the request;

The project vision is to broaden community access to live music performances and music education for youth by bringing the symphony orchestra experience directly into O'ahu's neighborhoods and removing some of the financial and geographic barriers to participation.

Building audiences in underserved areas and performing in different locations is essential to the HSO's mission, particularly for the 2022-23 season because the Neal Blaisdell Concert Hall, our primary venue, has extremely limited capacity to rent to the HSO and other local organizations, due to its Broadway in Hawai'i season. The situation propels the HSO forward to fulfill its goal of performing more frequently outside of downtown Honolulu.

It is critically important for the HSO to serve audiences in alternative spaces, to meet people where they are, and to share the symphonic experience directly with residents in easier and more accessible ways. To do so, we have created a new Neighborhood Concert Series in cooperation with Moanalua High School and its Performing Arts Center.

Through mutually beneficial relationships with the Department of Education, Assistant Superintendent for Office of Facilities and Operations Randall Tanaka, Moanalua High School Music Director Elden Seta and other teachers, students, their families, and community supporters, we can all be an important part of Hawai'i's success story of recovery and growth.

The project has three main goals:

- Offer our new Neighborhood Concert Series of six Masterworks performances with low-cost tickets (\$5 to \$25) to serve Central O'ahu residents, in partnership with the Moanalua High School Performing Arts Center;
- Serve the students at Moanalua High School and other schools with six free open rehearsals prior to the Masterworks concerts;
- Offer students and teachers integrated music and STEAM activities (Science, Technology, Engineering, Arts and Math) related to the performing arts, presented by HSO musicians and staff.

The project will support the HSO as a catalyst for the Moanalua High School Performing Arts Center to attract other professional performing groups to rent the concert hall. The Neighborhood Concert Series has the potential to attract new audiences to enjoy our professional symphony orchestra with renowned guest artists, popularize this under-



utilized \$33,000,000 state-built facility as a community gathering place, and provide guaranteed revenue to the center.

3. The public purpose and need to be served;

Music adds a dimension to the quality of life that enables people of diverse backgrounds to come together and relate, across languages, cultures and traditions. The people of Hawai'i benefit from the resources that a world-class resident symphony orchestra brings to our shared cultural vitality and quality of life. The HSO has been the centerpiece of classical music in Hawai'i for many years. Our organization and its musicians have always been leaders for the arts — introducing famous works from the classical composers, strengthening music education, and giving the community enlightening and healing experiences.

Our mission is the strong foundation for what the Hawai'i Symphony Orchestra strives to be. We are the orchestra of Hawai'i, a public service provider, a pillar for the arts, and a home for an all-inclusive community. By developing mutually beneficial relationships, particularly in Central O'ahu, the HSO can play an important role as a catalyst at the Moanalua High School Performing Arts Center to attract other professional performing groups to use this \$33,000,000 state-of-the-art concert hall, and increase and secure revenue for this marvelous, yet under-utilized state facility.

The HSO continues to develop local partnerships to present concerts and support new work by local composers that reflects the cultures, challenges and values of our island home. This shared creativity provides students, educators, residents and local artists with positive cultural, educational, and social advantages.

The HSO contributes to the economic vitality of the arts and culture sector. It plays a significant role as the only organization actively recruiting, auditioning and relocating professional musical talent to Hawai'i. Our professional musicians are selected through a highly competitive international audition process, and many HSO musicians are now Honolulu residents because they auditioned for and were hired by the orchestra. Their musical mastery provides live professional services for Hawai'i Opera Theatre, Ballet Hawaii, Chamber Music Hawaii, the O'ahu Choral Society and many smaller groups on the Neighbor Islands, enhancing the scope and quality of cultural activities in our state.

The HSO's critical mass of professional, highly-trained musicians are deeply engaged in the community, sharing their artistry on the concert stage and making their impact as educators. More than half of the instrumental faculty in the Music Department at the University of Hawai'i – Manoa are members of the Hawai'i Symphony Orchestra. Some are also members of the Royal Hawaiian Band, many teach in public and private schools and provide coaching and instruction to students, including Hawai'i Youth Symphony members, who are required to study privately with qualified, trained musicians.

Inspiring the next generation of student musicians and young audiences is an on-going focus. Children's faces light up as they are inspired by HSO's music.

"Performing with the HSO was honestly one of the greatest and most incredible highlights of my musical career. After so many months of modified pandemic life, performing in front of a live crowd alongside so many amazing musicians was almost surreal. From the first rehearsal to the moment I walked out on stage to the post-concert greetings I felt so much love and support from the musical community as well as all my friends and 'ohana. I am SO thankful to not only the HSO, but also to the Hawai'i Youth Symphony for sponsoring this event!" — Erin Nishi, Nā Hōkū 'Ōpio | Young Stars Program winner

Research confirms that involvement in the arts provides unparalleled learning opportunities for young people. It helps students explore creativity, contributes to positive study habits, and fosters self-esteem through artistic self-expression, resulting in academic and social improvements, increased attendance and graduation rates.

The systematic decline of arts education in local schools means that today's students lack exposure to art, theatre and music appreciation, which many of their grandparents and parents experienced on a regular basis during their school years. While there is broad consensus that arts education has lasting, positive effects on youth development and learning, under-resourced families rarely have access to music or art programs. The HSO fills this need for music education, engagement and enrichment with its variety of concerts and education and community engagement activities.

The HSO has attracted a wide range of artistic talent to the stage, many of whom live locally, representing all of Hawai'i. Our commitment to local composers, themes and musicians, as well as to the established masters of classical music attest to the HSO's ability to serve and impact audiences of all kinds, from first-time families with young children to loyal subscribers.

"For me, this summer was something I will always cherish. The HSO incorporated an unprecedented festival of my music during the inaugural *Sheraton Starlight Series*. These presentations encompassed seven works and two new arrangements for a total of 30 performances within a span of three months, something most composers do not experience during their lifetime. Mahalo." — Michael-Thomas Foumai, Composer and Lecturer with the Academy for Creative Media at the University of Hawai'i–West O'ahu.

Our performances honor the range of traditions of the people who live in this community and utilize public parks and unusual performance spaces throughout the community, as well as the Hawaii Theatre Center, Neal Blaisdell Concert Hall, Kawaiaha'o Church and the Waikiki Shell. Broadcast television is another way the HSO serves the community. Hawaii News Now has partnered with the HSO to present the Holiday Spectacular, an annual holiday concert as a gift to the community. More than 114,198 viewers tuned into the five broadcasts during December 2021.

"I am in the middle of watching — or crying through — your holiday spectacular. It's so beautiful. I haven't gone to a concert in so long; I didn't realize how badly I needed to feel music...this pandemic has been really hard. Tchaikovsky especially got me. So thank you for sharing your gifts with me and my family tonight. You all have been a true Christmas blessing to us. Mele kalikimaka to you and yours. I hope the blessing comes back to you all ten-fold." — Concert viewer via email.

Given the current climate of gathering size restrictions and ongoing health and safety concerns, the Symphony remains invested in presenting music in whatever ways are practical, safe, and accessible.

4. Describe the target population to be served; and

Since its debut in 2012, the HSO has performed for more than 292,000 people of all ages in person, featuring our gifted musicians, stellar guest artists and renowned conductors. The HSO concerts have also reached over 400,000 households with digital offerings during the pandemic.

The target population is the 40,000+ Central O'ahu residents, including students, families, kupuna, retirees, veterans, active duty military personnel and low-to-moderate income households that would appreciate a \$5 to \$25 affordable ticket to extraordinary concerts in their community's convenient, beautiful new Moanalua High School Performing Arts Center.

5. Describe the geographic coverage.

The geographic coverage is the City and County of Honolulu, with an emphasis on Central O'ahu, including Salt Lake, Moanalua, Mapunapuna and other neighborhoods near the Moanalua High School Performing Arts Center.

### **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 the resources to expand the HSO's services in Central O'ahu during the 2022-23 season. The project has three main components that will take place at the Moanalua High School Performing Arts Center:

- The Neighborhood Concert Series will present six Masterworks classical concert programs from October 2022 to May 2023 featuring the 64 musicians of our



symphony orchestra with renowned guest conductors and soloists. Each Friday evening performance will be available to community members at significantly lower ticket prices than the regular Masterworks series, from \$25 for premier seats to \$5 student seats. The same program will be performed on Saturday and Sunday at the Hawai'i Theatre Center at regular ticket prices ranging from \$99 for premier seats to \$18.

- Each Friday morning open rehearsal will be available to students and teachers at no cost, featuring the 64 musicians of our symphony orchestra, the guest conductor and soloists along with informal commentary.
  - HSO musicians and staff will present integrated music and STEAM activities to students, support educators, and offer opportunities to learn about career paths related to the performing arts.
2. Provide a projected annual timeline for accomplishing the results or outcomes of the service;

Projected annual timeline

July to September 2022

- Schedule dates for music and performing arts activities at Moanalua High School.
- Begin Masterworks concert marketing, promotion and ticket sales for secured dates at the Moanalua High School Performing Arts Center.

October to December 2022

- Three Masterworks concert programs and three open rehearsals
- Music and performing arts activities
- Student usher training
- Marketing, promotion and ticket sales continue

January 2023

- Marketing, promotion and ticket sales continue

February to May 2023

- Three Masterworks concert programs and three open rehearsals
- Music and performing arts activities
- Student usher training
- Marketing, promotion and ticket sales continue

June 2023

- Program evaluation; prepare project reports

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

To assure quality, the HSO will provide training, feedback and coaching for its employees and volunteers. We will work with our concert production partners to monitor their services and conduct periodic surveys of concertgoers to assess their experiences, noting and implementing appropriate suggestions for quality improvements. The HSO will monitor the results periodically and adjust its outreach, marketing plans, programming as appropriate.

Due to quickly changing local ordinances to control the pandemic, the proposed concerts, music and performing arts activities are all subject to change, based on many factors. Program information is updated regularly on our website [www.myhso.org](http://www.myhso.org), and on our social media sites.

Evaluation tools such as social media quantitative data, analytics of views and on-line surveys will measure the degree to which the orchestra has met audience expectations and how, together with internal feedback, we can improve the experience.

The HSO has a robust presence on social media, and uses it to gather quantitative data and analytics of views, open and click through rates, etc. on audience response to each event.

The website's comments section and regular email communications to our mailing list of 19,000 provide additional opportunities for qualitative feedback. Direct feedback from the community at our concerts encourages dialogue about artists, repertoire, and audience preferences.

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.

Effectiveness measures that will be reported include:

- The number of tickets sold for each concert.
- The quality of the concert experience as measured by reviews, comments and audience feedback.
- The number of students who participate in the integrated music and performing arts activities.
- The number of students who participate in the open rehearsals.
- Educator feedback qualitative and quantitative baseline data and suggestions for improving the program.

#### **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 2023.

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total Grant
\$0	\$75,022	\$50,015	\$25,007	\$150,044

3. The applicant shall provide a listing of all other sources of funding that they are seeking for fiscal year 2023.

Earned income sources of funding include ticket sales, contracted services, advertising sales. The HSO continuously seeks grant support, sponsorships and donations from individuals, local companies, foundations, and public sources to sustain and expand its programs.

The Halekulani is expected to continue its sponsorship of the HSO's Masterworks concerts in 2022-23. Requests will be made to funding sources including: Alexander & Baldwin, Atherton Family Foundation, Cades Foundation, Central Pacific Bank Foundation, Cooke Foundation, John R. Halligan Charitable Fund, Hawai'i Community Foundation, Arthur & Mae Orvis Foundation, the State Foundation on Culture and the Arts, Servco Pacific, Atsuhiko & Ina Goodwin Tateuchi Foundation, the John Young Foundation, among others.

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 2023 for program funding.

See attached form for contracts, grants and grants in aid within the prior three years.



6. The applicant shall provide the balance of its unrestricted current assets as of December 31, 2021.

\$1,315,820 preliminary, unaudited unrestricted current assets.  
See attached balance sheet.

## **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 Hawai'i Symphony Orchestra is not only geographically the orchestra of Hawai'i, we are also 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.

To date, more than 400,000 households have experienced and benefited from the HSO's live, online and broadcast programs in Hawai'i and around the world which rivals the 270,000 total live audience reached during the first eight seasons of the HSO's live concerts (2012-2019).

The HSO's presence has a positive impact on the quality of those at other leading arts organizations. As the state's largest single employer of performing musicians, the orchestra employs 64 professional musicians who are the minimum core personnel used for Masterworks, pops, community, and educational programs. With these musicians, the HSO is able to perform most of the standard classical symphonic repertoire.

The HSO is uniquely qualified to provide the array of musical experiences proposed in this application, measured by these recent projects over the past three years:

- The HSO presented six *'Ohana Holiday* concerts in December 2021 at the Neal Blaisdell Concert Hall, SALT in Kakaako and at the new Moanalua High School Performing Arts Center. We made history at the two Moanalua concerts as the first public performance by any arts organization at this beautiful concert hall, and also marked the orchestra's first public concert specifically in the Salt Lake/Moanalua community. Moanalua High School students were invited to volunteer as ushers. Ushers were briefed in basic customer service and COVID

protocols and had the opportunity to attend the concerts at no cost. Now with two successful performances completed and hands-on production experience at the concert hall, the HSO is eager to launch the new Neighborhood Concert Series at the Moanalua High School Performing Arts Center.

- After 439 nights without a live HSO concert due to the pandemic, audiences were tremendously receptive to the inaugural eight-week *Starlight Series* of outdoor performances at the iconic Waikiki Shell in summer 2021. The HSO led the way for the State of Hawai'i as the first organization to return to live events with an in-person audience, and returned to work over 100 musicians, crew, and staff members in the process. From May to August 2021 the series featured music by Hawai'i-born Samoan composer Michael-Thomas Foumai on every program. We partnered with the Lili'uokalani Trust for three July performances of *E Lei Ho'i, E Lili'ulani E* | Music for and by The Queen Lili'uokalani, with a lineup of legendary Hawaiian artists including Moon Kauakahi, Eric Lee, Ho'okena, Del Beazley, Aaron Mahi, Marlene Sai, and Robert Cazimero.
- The *Starlight Series* also featured 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 present authentic cultural experiences.
- In 2020, the HSO became the first "Artistic Partner and Resident Company" at the Hawaii Theatre Center (HTC) which provides us preferred access to perform regularly at the historic theatre. Partnering with the HTC offers a beautiful stage setting, access to their expertise in digital, their already built-in equipment, and the efficiency of shared box office operations.
- The HSO's Education and Community Engagement program, funded in part by City & County of Honolulu Grant in Aid in FY2019-21 includes free community concerts, keiki concerts, and 'ohana concerts for family audiences. Small ensembles of HSO musicians present age appropriate, one-hour free lecture demonstrations, so that young people and older adults can engage directly with the performers, see and hear the instruments that comprise an orchestra, learn their names and hear the live sounds they produce. The HSO's resource musicians also work closely with music educators in the schools to coach and inspire young music students in practical ways including technique and skills to reach for higher levels of excellence.
- Our enduring partnership with the Hawai'i Youth Symphony pairs aspiring young musicians with their professional HSO counterparts for an annual educational performance experience. This Side-by-Side opportunity is a model that will be offered to the Music Department at Moanalua High School, for a variety of student music ensembles, including an award-winning Symphony Orchestra of hand-picked students from grades 9 to 12.

## **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.

Hawai'i Symphony Orchestra

3610 Waiialae Avenue, Honolulu, HI 96816

The HSO's administrative facility includes staff offices, an extensive music library, an on-site box office and instrument storage.

Moanalua High School Performing Arts Center

2825 Ala Ilima Street, Honolulu, HI 96818

Moanalua High School marked the grand opening of the new Performing Arts Center on March 12, 2021. The Performing Arts Center features a 694-seat auditorium that is equipped with state-of-the-art audio-visual systems and LED lighting. The facility also includes dressing rooms with lockers. What started out as dreams and drawings more than twenty years ago has become reality due to the efforts of past and present legislators, school and DOE administrators, staff, alumni, parents, students, and community members.

## **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.

Executive Director Dave Moss is the project leader and manages the artistic, production and administrative staff. He joined the HSO in March 2020 after his successful tenure at Haymarket Opera Company, one of Chicago's most dynamic arts organizations. Moss was a noted violist, studied at The Juilliard School and performed with leading artists including Yo-Yo Ma and Itzhak Perlman, before receiving his MBA from the University of Chicago.

General Manager Merle Bratlie joined the HSO in 2015 after a 25-year career with the Houston Symphony, one of America's oldest performing arts organizations. His HSO responsibilities include coordinating the master orchestra schedule, contracts with venues, sponsors and guest artists, travel, hospitality, ground transportation, and accommodating special requests.

Administrative staff includes the Director of Finance, Director of Advancement, Digital Brand Manager, Patron Services and Marketing Associate, and Office Assistant. The

production team includes the Orchestra Personnel Manager, Music Librarian, Stage Manager, Stagehands and Security, who are integral partners for all performances.

The Hawai'i Symphony Orchestra's 64 musicians are selected through a highly competitive international audition process. All artistic positions require experienced, talented and established professionals who are recognized for excellence in musical accomplishments.

Guest artists and conductors are chosen based on artistic merit, reputation, and unparalleled 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.

Please see attached chart

**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.

Executive Director	\$110,000 - \$130,000
General Manager	\$ 55,000 - \$70,000
Director of Advancement	\$ 45,000 - \$60,000

**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.

Not applicable

**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 American Federation of Musicians, Local 677. No other 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 2022-23 the activity funded by the grant if the grant of this application is:

- (a) Received by the applicant for fiscal year 2022-23, but
- (b) Not received by the applicant thereafter.

a) The Neighborhood Concert Series at Moanalua is the next exciting phase of the HSO's commitment to meeting residents where they are and bringing our music directly to their neighborhoods.

Our fundraising efforts will continue year round at the HSO for this program. The initial grant funding for the Neighborhood Concert Series places the HSO at the nexus of connection for community and economic engagement to build further momentum and sustain the program.

b) If the grant is not fully funded in future years, we will identify corporate sponsors, foundation grants, and individuals who are interested in supporting youth development and achievement, STEAM activities, and in strengthening the neighborhoods in which they live and do business.

The success of each season increases the confidence of the community, which reflects on the HSO's ability to retain sustaining and attract new donors each season.

The HSO will also consider raising ticket prices as an option to increase earned income.





## BUDGET JUSTIFICATION - EQUIPMENT AND MOTOR VEHICLES

Period: July 1, 2022 to June 30, 2023

Applicant: Hawai'i Symphony Orchestra

DESCRIPTION EQUIPMENT	NO. OF ITEMS	COST PER ITEM	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
<b>TOTAL:</b>				
<b>JUSTIFICATION/COMMENTS:</b>				
Not applicable				

DESCRIPTION OF MOTOR VEHICLE	NO. OF VEHICLES	COST PER VEHICLE	TOTAL COST	TOTAL BUDGETED
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
<b>TOTAL:</b>				
<b>JUSTIFICATION/COMMENTS:</b>				
Not applicable				



## BUDGET JUSTIFICATION - CAPITAL PROJECT DETAILS

Period: July 1, 2022 to June 30, 2023

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: 2020-2021	FY: 2021-2022	FY:2022-2023	FY:2022-2023	FY:2023-2024	FY:2024-2025
PLANS						
LAND ACQUISITION						
DESIGN						
CONSTRUCTION						
EQUIPMENT						
<b>TOTAL:</b>						
<b>JUSTIFICATION/COMMENTS:</b>						
Not applicable						

**GOVERNMENT CONTRACTS, GRANTS, AND / OR GRANTS IN AID**

Applicant: Hawai'i Symphony Orchestra

Contracts Total: 797,249

	<b>CONTRACT DESCRIPTION</b>	<b>EFFECTIVE DATES</b>	<b>AGENCY</b>	<b>GOVERNMENT ENTITY (U.S./State/Hawaii/ Honolulu/ Kauai/ Maui County)</b>	<b>CONTRACT VALUE</b>
1	Shuttered Venue Operators Grant	6/29/2021	SBA Office of Disaster Assistance	U.S.	425,615
2	CT-DCS-2100036 Grant-in-Aid. Hawai'i Symphony Orchestra Education and Community Outreach Programs on Oahu	1/5/21 to 1/14/22	City & County of Honolulu Dept. of Community Services	Honolulu County	125,000
3	CT-DCS-2000039 Grant-in-Aid. Hawai'i Symphony Orchestra Education and Community Outreach Programs on Oahu.	11/15/19 to 10/31/20	City & County of Honolulu Dept. of Community Services	Honolulu County	125,000
4	CARES (Coronavirus Relief Act) Grant	11/9/2020	City & County of Honolulu, Hawaii Community Reinvestment Corporation	Honolulu County	50,000
8	Program participant fees	11/1/2020 to 12/31/2020	Economic Development Alliance of Hawaii	State	3,200
9	Hawaii Pivot Program	11/27/2020	Chamber of Commerce of Hawaii	State	10,000
12	FY22-0013 American Rescue Plan Grant FY2021.	10/1/21 to 11/30/21	State Foundation on Culture and the Arts	State	15,000
13	FY21-0041 Biennium Grant FY2021. Hawai'i Symphony Orchestra 2020-2021 Concert Season.	12/1/20 to 6/30/21	State Foundation on Culture and the Arts	State	15,000
14	FY20-0028 Cares Act Relief Grant FY2020 Fund Award	7/17/2020 to 10/30/20	State Foundation on Culture and the Arts	State	13,434
15	CON 20018 2020 Community Enrichment Program. Symphony Experience-New Year Celebration. \$10,000 contract cancelled due to lack of HTA funds.	1/2/20 to 12/31/20	Hawai'i Tourism Authority (HTA)	State	-
16	FY20-0063 Biennium Grant FY2020. Hawai'i Symphony Orchestra 2019-2020 Concert Season.	7/1/19 to 6/30/20	State Foundation on Culture and the Arts (SFCA)	State	15,000
30					

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Annual Basis

**Hawaii Symphony Orchestra**  
**Balance Sheet**  
As of December 31, 2021

	<u>Dec 31, 21</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
Checking/Savings	1,131,679.92
Accounts Receivable	49,311.79
Other Current Assets	134,828.29
<b>Total Current Assets</b>	<u>1,315,820.00</u>
<b>Fixed Assets</b>	104,434.39
<b>Other Assets</b>	0.00
<b>TOTAL ASSETS</b>	<u><u>1,420,254.39</u></u>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Accounts Payable	218,223.16
Credit Cards	-370.21
Other Current Liabilities	2,472,259.40
<b>Total Current Liabilities</b>	<u>2,690,112.35</u>
<b>Total Liabilities</b>	2,690,112.35
<b>Equity</b>	<u>-1,269,857.96</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>1,420,254.39</u></u>

# Hawai'i Symphony Orchestra

