

# ATTACHMENT F

## Cultural Arts Grants Application Form

Reference #	17662040
Status	Complete
Login Username	lcariage@pacificsymphony.org
Login Email	lcariage@pacificsymphony.org
Popular Name of Organization	Pacific Symphony
Legal Name (if different)	Pacific Symphony Association
Federal Tax ID No.	95-3635496
Mailing Address	17620 Fitch, Suite 100
City / Zipcode	IRVINE
Contact Name	Luisa Cariaga
Phone number	(714) 876-2369
Fax Number	7147555789
Email address	<a href="mailto:lcariaga@pacificsymphony.org">lcariaga@pacificsymphony.org</a>
Website	<a href="http://www.PacificSymphony.org">www.PacificSymphony.org</a>
Geographical Area Served	Orange County
Have you received a City of Newport Beach Cultural Arts Grant before?	Yes
If so, what year did you receive a grant?	2025
Year organization was founded:	1978
Number of paid staff:	50
Number of active volunteers:	1839
Total amount requested: (from request line of project budget):	5000
Estimated number of people in Newport Beach that the proposed project(s) will serve:	492

**1. Briefly describe below your organization's purpose, mission, and goals.**

Pacific Symphony's mission is to perform inspiring, entertaining and healing music, connect communities through diverse programming, inspire youth, provide therapeutic benefits and promote the well-being of the people we serve in southern California. The orchestra was founded in 1978 to provide musical concerts for the region and remains the largest American music ensemble formed in the last 50 years.

Pacific Symphony's strategic organizational goals are to: 1) Be a vibrant and inclusive cultural anchor recognized for the public value of its work; 2) Cultivate artistic vitality and grow market share through the continuous evolution of its work; 3) Foster wellness, spark inspiration, deepen self-awareness and nurture a zeal for life through deeper participation with orchestral music in order to leverage positive educational and community engagement outcomes; and 4) Build internal culture and institutional capacity.

The Symphony presents more than 100 performances for the public, serving 275,000 residents and visitors each year. Education and community engagement programs produce more than 3,000 distinct learning and arts participation opportunities annually. Now fully restored following the pandemic, programs and services furnish K-12 students with interactive music enrichment through Class Act (the focus of this request) while serving under-represented and vulnerable populations through the Heartstrings initiative and other specially-designed and tailored programs for residents.

**2. Identify and describe why there is a need in**

Class Act is unduplicated in Orange County as it

the Newport Beach Community for your proposed project/program. Include a quantitative description of the need and on what you based your findings (i.e. “Based on a study done by the PTA, there are one hundred children in the 4th-6th grades at Newport Elementary who have had no training with musical instruments.” ) Describe how you have determined that your organization is the best organization for the proposed project/program.

provides music education and arts opportunities for students to learn directly from professional Pacific Symphony musicians. Orchestra players serve as teaching artists, coaches and mentors, inspiring students to achieve their academic goals through music enrichment. The program also helps schoolchildren improve key life skills from their musical studies, which is proven to advance student scholastic performance. For example, in 2014 and 2016, the National Science Foundation researched connections between musical instruction and attention span and discovered that music education is associated with enhanced abilities in math, creativity, reading, cognition, critical thinking and communication skills. Music has also been shown to improve motivation, concentration, confidence, poise and teamwork.

More recently in December 2025, research studies at the Neuroarts Resource Center at Johns Hopkins University show that when we attend an arts event or create art ourselves, measurable transformations take place: stress and anxiety decreases, life satisfaction and mental health improves, and cognitive decline is slowed. Remarkably, just 45 minutes of artmaking lowers the stress hormone cortisol by 25%. For this project, Class Act enhances arts learning for students, helping music programs augment activities in Newport Beach and other local schools. Class Act is the only arts education program in Orange County which offers the expertise of Symphony-affiliated professional musicians.

3. Describe the specific project/program that will be funded by a cultural grant. Include how the proposed project/program will be implemented

Grant funds are requested for the Class Act Music Education Program in one Newport Beach school this year: Newport Coast Elementary

and outline a schedule or project timeline, with planned dates and locations. Identify individuals and groups involved, particularly artists and performers, and describe their roles and responsibilities. Describe the background and qualifications of your organization and key personnel to be involved in the program. Remember: the City funds only projects and programs- not operating expenses. These projects and programs must promote community involvement and awareness of the arts in Newport Beach.

School. Class Act has met the community's need for professional music education for 31 years, helping Orange County schools strengthen student academic achievement. The program trains and assigns Pacific Symphony union musicians into schools where students receive meaningful music learning from teaching artists in the classroom. Through year-long residencies in each school, musicians focus on the fundamentals of music through age-appropriate classroom instruction, on-site school performances and a trip to the concert hall for a full Pacific Symphony performance.

Class Act runs from September to June each year, with student participation beginning in November. The program staff designs Common Core curriculum-based workshop materials and lesson plans using a theme and composer each year ("America the Beautiful" with Aaron Copland in 2026). Materials are delivered to classroom teachers during professional development and training workshops where they learn to integrate music into all areas of learning. In-person student activities and workshops run throughout the academic year and Youth Concerts are presented in May. Assessments and evaluations are conducted during and after all student activities. Staff measures program effectiveness throughout the year to monitor student progress and to ensure outcomes and goals are met.

Class Act engages the entire student body at Newport Coast as well as teachers and principals (parents, administrators and volunteers also participate). There are five musicians who serve fifteen schools in the full 2025-26 Class Act program across the...

... county, with schools assigned a different musician each year. The program is led by Director of Education Leighanna Sears who joined the staff in 2024 and leads a team of seven who manage and oversee all program components, scheduling and activities. Since its inception, Class Act has served more than 375,000 students, teachers and principals in Orange County over a 31-year history.

**Is this a new or existing project/program?**

Existing program

**4. Define or describe the segment of the population in Newport Beach that you intend to serve by your project/program. Include such things as age, location, numbers served, etc.**

In 2026, Class Act will serve 469 children in Newport Coast Elementary School together with 22 teachers and 1 principal for a total of 492 beneficiaries. Newport Coast serves Kindergarten to 6th grade students, ages 5-11. The school has partnered with Class Act for seventeen non-consecutive years and has seen great progress in their students with the assistance of grant support from the Newport Beach City Arts Commission.

#### **PROJECT BUDGET: Expenses - Personnel**

##### **Artistic**

Funding from the City of Newport Beach	2500
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Funding from Other Sources	20000
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##### **Administrative**

Funding from the City of Newport Beach	1000
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Funding from Other Sources	2000
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##### **Technical Production**

Funding from the City of Newport Beach	1500
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Funding from Other Sources	3000
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#### **PROJECT BUDGET: Expenses - Operating**

##### **Facility Expense/Space Rental**

Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Marketing</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Production/Exhibition Expense</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Touring/Presentation Expense</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Education Materials</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Transportation</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Equipment</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>Other (if greater than 10% annotate below)</b>	
Funding from the City of Newport Beach	0
Funding from Other Sources	0
<b>GRAND TOTAL:</b>	5000/25000
<b>6. Describe the expected quantifiable outcomes of your project/program and how you will evaluate the results. Be very specific in addressing the ways that you will determine that</b>	The overall desired outcome is for K-6 elementary schoolchildren to improve their academic achievement through the Class Act music education program. The overarching

your project/program met the needs that you identified and accomplishes the goals you set out to achieve (i.e. you provide 50 hours of musical instruction and instruments to the 100 children at Newport Elementary school as measured by music store rental receipts and logs of instructors.)

outcome for educators is to improve their music aptitude in order to teach the arts more effectively, and augment student learning in music. The quantifiable outcomes for 469 Newport Beach students and 22 teachers are:  
a.A total of 80% or 376 of the estimated 469 students will demonstrate increased knowledge about the Class Act composer of the year (Aaron Copland) and their music. Outcomes are measured through pre- and post-program testing, questionnaires and teacher surveys.

b.A total of 329 students out of 469 will express a desire to continue to engage in music and the arts, representing 70% of all Class Act students. Results are quantified through pre- and post-program surveys, along with parent/teacher comments and feedback, and student enrollment in subsequent music and arts programs.

c.A total of 81% or 18 of the 22 Class Act teachers will increase their capacity to teach the arts more effectively in the classroom and better support the Common Core. The results are measured from teacher and principal surveys, individual interviews, one-on-one follow-up and in-person meetings with teachers.

List of Board Members and their affiliations	<i>Document found on page 10.</i>
Recent list of individuals, corporations, and foundations that provide organizational support	<i>Document found on page 11.</i>
IRS Determination Letter (if you are a 501(c)(3)) indicating tax exempt status	<i>Document found on pages 12–13.</i>
One brochure and/or one press clipping.	<i>Document found on page 14.</i>
I. Income (cash only)	

**Contributed**

FY 2024/25 Budget (current)	14,225,750
FY 2025/26 Budget (projected)	14,500,500

**Earned**

FY 2024/25 Budget (current)	10,265,195
FY 2025/26 Budget (projected)	11,195,268

**Total Income**

FY 2024/25 Budget (current)	24,490,945
FY 2025/26 Budget (projected)	25,695,768

**II. Expenses****Program**

FY 2024/25 Budget (current)	15,952,300
FY 2025/26 Budget (projected)	15,955,250

**General and Administrative**

FY 2024/25 Budget (current)	2,812,200
FY 2025/26 Budget (projected)	2,800,500

**Marketing and Development**

FY 2024/25 Budget (current)	5,340,595
FY 2025/26 Budget (projected)	5,325,290

**Total Expenses**

FY 2024/25 Budget (current)	24,105,095
FY 2025/26 Budget (projected)	24,081,040

**Item #49****III. Operating Surplus/Deficit (Income minus Expenses)**

FY 2024/25 Budget (current)	385,850
FY 2025/26 Budget (projected)	1,614,728

**IV. Fund Balance at Beginning of Year**



FY 2024/25 Budget (current)	(1,596,677)
FY 2025/26 Budget (projected)	(1,210,827)

V. Accumulated Surplus (Deficit) (Add lines III and IV)


FY 2024/25 Budget (current)	(1,210,827)
FY 2025/26 Budget (projected)	403,901

Item #50

VI. In-Kind Contributions (attach schedules if greater than 10% of total income)

FY 2024/25 Budget (current)	0
FY 2025/26 Budget (projected)	0

I verify the knowledge that the information submitted in this application is true and correct to the best of my knowledge.



Name	Luisa Cariaga
Title	Director of Institutional Giving
Last Update	2026-01-05 15:25:45
Start Time	2026-01-05 15:03:23
Finish Time	2026-01-05 15:25:45



## Board of Directors 2024-25

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\*Jo Ellen Chatham, Retired

Patrick Chen, JETCC Investments

Alayne Cortes, NC Private Bank

Robert F. Davey, Retired

William Dolan, U.S. Bank

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Nancy Wong, Real Estate Investor

Jane Fujishige Yada, Fujishige Farms, Inc.

### Officers in Bold

\*Executive Committee

Rev. 11/5/2025

<b>Pacific Symphony</b>	
<b>Institutional Support 2024-25 (\$5000 and up)</b>	
for fiscal year ending June 30, 2025	
<u><i>Foundations and Corporations</i></u>	<b>2024-25</b>
Hal and Jeanette Segerstrom Family Foundation	\$ 1,000,000
Schwab Charitable Fund	\$ 586,100
Lyons Share Foundation	\$ 572,956
William and Nancy Thompson Foundation	\$ 460,200
Zion Charity Foundation	\$ 410,000
Ahmanson Charitable Community Trust	\$ 370,000
Samueli Foundation	\$ 350,000
Fidelity Charitable Gift Fund	\$ 260,410
Jewish Community Foundation of Orange County	\$ 252,202
Joe MacPherson Foundation	\$ 250,000
Orange County Community Foundation	\$ 229,654
Bank of America/BofA Foundation/Charitable Gift Fund	\$ 212,500
Farmers and Merchants Bank	\$ 154,000
The Nicholas Endowment	\$ 154,000
Hanson Family Foundation	\$ 140,000
California Community Foundation	\$ 137,500
Simon Foundation for Education	\$ 125,000
Morgan Stanley	\$ 115,000
City of Hope	\$ 106,000
PNC Bank	\$ 102,000
The Segerstrom Foundation	\$ 100,000
Lugano Diamonds	\$ 85,000
East West Bank	\$ 80,000
Tiffany & Co.	\$ 75,000
National Christian Foundation California	\$ 70,000
Wells Fargo Advisors	\$ 67,500
Isidore and Penny Myers Foundation	\$ 64,903
Loftus Family Foundation	\$ 60,000
South Coast Plaza	\$ 60,000
U.S. Bank/U.S. Bancorp Foundation	\$ 60,000
UBS Financial Services	\$ 56,000
Starland Enterprises	\$ 55,000
The Colburn Foundation	\$ 55,000
Horowitz Management, Inc.	\$ 51,000
US Charitable Gift Trust	\$ 50,000
Chapman University	\$ 50,000
SchoolsFirst Federal Credit Union	\$ 45,000
The Capital Group Companies	\$ 50,000
Hoag Memorial Hospital	\$ 49,000
The UCI Foundation	\$ 45,000
Mark Chapin Johnson Foundation	\$ 45,000
Bluebird Legacy, Inc.	\$ 40,000
Van Cleef & Arpels	\$ 40,000
Argyros Family Foundation	\$ 35,000
Fidelity Brokerage Services LLC	\$ 32,000
UHL and KK Foundation	\$ 31,000
LPL Financial	\$ 30,500
Leatherby Family Foundation	\$ 30,000
National Philanthropic Trust	\$ 30,000
Raymond James Global	\$ 30,000
Wilfred and Janet Roof Foundation	\$ 25,000
Huang Family Foundation	\$ 25,000
Troob Family Foundation	\$ 25,000
Green Foundation	\$ 25,000
Kennedy Foundation	\$ 29,500
East Sunrise Investments LLC	\$ 20,000
Farhang Foundation	\$ 20,000
Ship & Shore Environmental, Inc.	\$ 20,000
Margolis Family Foundation	\$ 18,000
California State University Fullerton	\$ 15,000
Pacific Life Foundation	\$ 15,000
Troy Group, Inc.	\$ 15,000
SPA Music & Education Foundation	\$ 13,000
Northern Trust	\$ 10,000
AYCO Charitable Foundation	\$ 10,000
Bialer Family Foundation	\$ 10,000
Langson Family Foundation	\$ 10,000
Fletcher Jones Foundation	\$ 10,000
Nellie Leaman Taft Foundation	\$ 10,000
Pledgeling Foundation	\$ 10,000
Shanbron Family Foundation	\$ 10,000
Crean Foundation	\$ 10,000
Labowe Family Foundation	\$ 10,000
RDJH Enterprises LLC	\$ 5,000
E. Nakamichi Foundation	\$ 5,000
The Gerrit and Amy Cole Foundation	\$ 5,000
O.L. Halsell Foundation	\$ 5,000
Greater Houston Community Foundation	\$ 5,000
<b>Sample Foundation and Corporate Support</b>	<b>\$ 7,949,925</b>

Internal Revenue Service  
District Director

Department of the Treasury

7/2;

Date: JAN 13 1982

Employer Identification Number:

95-3635496

Accounting Period Ending:

May 31

Form 990 Required: ☒ Yes ☐ No

▷ Pacific Symphony Association  
c/o CSUF 800 No. State College Blvd.  
Fullerton, CA 92634

Person to Contact:

B. Brewer

Contact Telephone Number:

(213) 688-4553

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in section 509(a)(2).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. Also, you should inform us of all changes in your name or address.

Generally, you are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. If you have paid FICA taxes without filing the waiver, you should contact us. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excise, employment, or other Federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

The box checked in the heading of this letter shows whether you must file Form 990, Return of Organization Exempt from Income tax. If Yes is checked, you are required to file Form 990 only if your gross receipts each year are normally more than \$10,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter, we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees.

If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

A handwritten signature in dark ink, reading "W. H. Connett". The signature is written in a cursive style with a large, stylized "W" and "H".

District Director





## Pacific Symphony Class Act

The Frieda Belinfante Class Act Program

# Come Join Us!

**Pacific Symphony's flagship educational program, Class Act, brings the joy of music to up to 40 schools across Orange County every year!**



***Attend a Pacific Symphony performance with your students at Segerstrom Concert Hall***



***Bring a Pacific Symphony musician to your school!***



***Enjoy a performance by Pacific Symphony musicians at your school during Family Night!***

Participation in the Class Act program brings a Pacific Symphony musician to your school as a partner in music education. Enjoy lessons, performances, and curriculum all aligned with state and national standards, as well as an increase in the connections with your school community.

Space is limited, so reserve your spot today!

**Email Class Act**  
**[classact@pacificsymphony.org](mailto:classact@pacificsymphony.org) for more information!**