

** PUBLIC DISCLOSURE COPY **

Department of the Treasury Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

▶ Do not enter social security numbers on this form as it may be made public. ► Go to www.irs.gov/Form990 for instructions and the latest information. 2021

Open to Public Inspection

A	For the	\approx 2021 calendar year, or tax year beginning $\mathrm{JUL}1,2021$	JUN 30, 2022	
		·		action number
	Check if applicable	C Name of organization	D Employer identifi	cation number
_	Addre	SS ODDGON GUMBUONN AGGOGTABLON		
L	chang Name	e OREGON SIMPHONI ASSOCIATION		
	chang	Doing business as	93-04465	<u>27 </u>
	Initial return	Number and street (or P.O. box if mail is not delivered to street address) Room/s	uite E Telephone numbe	r
	Final return	921 SW WASHINGTON ST. 200	(503) 22	8-4294
	termir		G Gross receipts \$	26,858,460.
	Amen		H(a) Is this a group re	
F	Applic		for subordinates	
	Ition pendi	SAME AS C ABOVE		····· — —
_			H(b) Are all subordinates in	
				list. See instructions
		te: > WWW.ORSYMPHONY.ORG	H(c) Group exemption	
			ear of formation: 1896	M State of legal domicile: OR
P	art I	Summary		
4	1	Briefly describe the organization's mission or most significant activities: THE OREG	ON SYMPHONY I	NSPIRES
Governance		AUDIENCES AND BUILDS COMMUNITY BY CREATING OU	TSTANDING MUS	ICAL
na T	2	Check this box if the organization discontinued its operations or disposed of m	ore than 25% of its net as:	sets.
Ver	3		3	41
ဇ္ဗ	4	Number of independent voting members of the governing body (Part VI, line 1b)		37
જ	1 -	Total number of individuals employed in calendar year 2021 (Part V, line 2a)		304
<u>ie</u>	3			120
Ξ	6	Total number of volunteers (estimate if necessary)		_
Activities	7 a	Total unrelated business revenue from Part VIII, column (C), line 12		0.
_	b	Net unrelated business taxable income from Form 990-T, Part I, line 11		0.
			Prior Year	Current Year
Φ	8	Contributions and grants (Part VIII, line 1h)	13,053,221.	16,670,994.
Revenue	9	Program service revenue (Part VIII, line 2g)	0.	9,057,332.
eve	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	656,437.	476,048.
ď	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	63,739.	-20,420.
	1	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	13,773,397.	26,183,954.
_		Grants and similar amounts paid (Part IX, column (A), lines 1-3)	2,010,000.	10,000.
	1		0.	0.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	7,116,733.	12,544,863.
es	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		
Expenses	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
ă×	b	Total fundraising expenses (Part IX, column (D), line 25) 1,457,121.		
Ш	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	2,347,527.	
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	11,474,260.	20,940,068.
	19	Revenue less expenses. Subtract line 18 from line 12	2,299,137.	5,243,886.
20	<u> </u>		Beginning of Current Year	End of Year
ets	20	Total assets (Part X, line 16)	27,740,551.	28,423,833.
Ass	21	Total liabilities (Part X, line 26)	6,635,404.	4,514,752.
Net Assets or	22	Net assets or fund balances. Subtract line 21 from line 20	21,105,147.	23,909,081.
	art II	Signature Block	21/105/11/0	23/303/001
		lities of perjury, I declare that I have examined this return, including accompanying schedules and stat	amente and to the heet of my	/ knowledge and helief it is
		thes of perjuly, i declare that i have examined this return, including accompanying schedules and star et, and complete. Declaration of preparer (other than officer) is based on all information of which prep		Kilowieuge allu bellel, it is
true	,	is, and complete. Declaration of preparer (other than officer) is based on an information of which prepare	arer rias arry knowledge.	
		Signature of officer	I Date	
Sig		ļ',		
Hei	re	JANICE ROMANO, VP-FINANCE & ADMINISTRATION Type or print name and title		
			Data In F	DTIN
_	_	Print/Type preparer's name Preparer's signature	Date Check Check	PTIN
Pai		SANG AHN	self-employ	
	parer	Firm's name MCDONALD JACOBS, P.C.	Firm's EIN ▶	<u>93-0900579</u>
Use	Only	Firm's address 520 SW YAMHILL ST., STE 500		
		PORTLAND, OR 97204	Phone no. (5	
Ma	v the II	RS discuss this return with the preparer shown above? See instructions		X Yes No

If "Yes," describe these new services on Schedule O. Did the organization cease conducting, or make significant changes in how it conducts, any program services?	Pai	Till Statement of Program Service Accomplishments	
THE OREGON SYMPHONY IS DEDICATED TO MOVING MUSIC FORWARD. OUR VISI. IS BOLD AND ADVENTUROUS: TO INSPIRE AUDIENCES WITH ERHILARATING PERFORMANCES, PRESENT THE BEST MUSICIANS IN A WIDE RANGE OF STYLES EXPLORE NEW ART FORMS, SHINE LIGHT ON CONTEMPORARY ISSUES AND BUIL Did the organization undertake any significant program services during the year which were not listed on the prior form 980 or 980-627		Check if Schedule O contains a response or note to any line in this Part III	X
IS BOLD AND ADVENTUROUS: TO INSPIRE AUDIENCES WITH EXHILARATING PERFORMANCES, PERSENT THE BEST MUSICIANS IN A WIDE RANGE OF STYLES EXPLORE NEW ART FORMS, SHINE LIGHT ON CONTEMPORARY ISSUES AND BUILD the organization undertake any significant program services during the year which were not listed on the prior form 890 or 980-E2? If 'Yes,' describe these new services on Schedule O. Did the organization case conducting, or make significant changes in how it conducts, any program services? If 'Yes,' describe these changes on Schedule O. Did the organization's program service accomplishments for each of its three largest program services, as measured by expense section 501(6); and 501(6) organizations are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service accomplishments for each of its three largest program services, as measured by expense section 501(6); and 501(6)(6) organizations are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service accomplishments for each of its three largest program services, as measured by expense revenue, if any, for each program service accomplishments for each of its three largest program services, as measured by expense revenue, if any, for each program service accomplishments of grants and allocations to others, the total expense revenue, if any, for each program service each program service accomplishment of grants and allocations to others, the total expense revenue, if any, for each program service accomplishment of grants and allocations to others, the total expense revenue, if any, for each program service accomplishment of grants and allocations to others, the deciding program service accomplishment of grants and allocations to others, the total expense revenue, if any, for each program service accomplishment of grants and allocations to others, the deciding program services of the expense program services of the expense progr	1	, ·	
PERFORMANCES, PRESENT THE BEST MUSICIANS IN A WIDE RANGE OF STYLES EXPLORE NEW ART FORMS, SHINE LIGHT ON CONTEMPORARY ISSUES AND BUIL Did the organization undertake any significant program services during the year which were not listed on the prior Form 980 or 990 EZ? if "Yes," describe these news services on Schedule O. Did the organization cease conducting, or make significant changes in how it conducts, any program services? If "Yes," describe these changes on Schedule O. Did the organization cease conducting, or make significant changes in how it conducts, any program services. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service reported. 10 000. (newword 1, 200, 200, 200, 200, 200, 200, 200, 2			
EXPLORE NEW ART FORMS, SHINE LIGHT ON CONTEMPORARY ISSUES AND BUIL Did the organization undertake any significant program services during the year which were not listed on the prior form 980 or 990-E27 If "Yes," describe these new services on Schedule O. Did the organization case conducting, or make significant changes in how it conducts, any program services? If "Yes," describe these changes on Schedule O. Describe the organization program service accomplishments for each of its three largest program services, as measured by expensive the organization program service reported. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service reported. Coste (September 1) (expenses 16, 284,856. including greats of 3 10,000.) (Revenues 9,05 THE 21/22 SEASON MARKED A JOYFUL RETRUNN TO LIVE PERFORMANCE, COINT WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMBERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS POR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF, DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN Highly ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Coste)(Copenses) INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL EASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTORE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, PRODUCT ONSTAGE REMAINED CONCISTS FUTUR EXCELLENT, AND WE WERE ABLE! FRESENT MORE THAN 100 CONC			
2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-E27 If 'Yes,' describe these new services on Schedule O. 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? 1			
prior Form 990 or 990 cr 990 cr 27 If "Yes," describe these new services on Schedule O. Did the organization cease conducting, or make significant changes in how it conducts, any program services? If "Yes," describe these changes on Schedule O. Describe the organization sporgram service accomplishments for each of its three largest program services, as measured by expensive the conduction of program services are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service reported. (Coste) (topeware 18, 284,856. including grants of 3 10,000.) (Revenue's 9,05 THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COLING WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (Coste) (Supemers i including grants of 3 1) (Senerous Supembrous Decreased Supembrous Substitution of Supembrous Substitution		EXPLORE NEW ART FORMS, SHINE LIGHT ON CONTEMPORARY ISSUES AND BUILD A	
if "Yes," describe these new services on Schedule O. Did the organization cease conducting, or make significant changes in how it conducts, any program services?	2		_
3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?		prior Form 990 or 990-EZ?	No
4 Describe these changes on Schedule O. 4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expense Section 501(g)(g) and 501(g)(d) organizations are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service reported. 40 (code) (Expenses 1 8, 2, 24, 856. recluding grants of \$ 10,000.) (Revenue 1 9,05 THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COINC WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTISTS WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMARS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (code) (Expenses 1 INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 41 INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS IN NOVAL SHORT THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS IN TOO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SITUAL THE HEALTH, SAFETY, AND WELDELING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO		If "Yes," describe these new services on Schedule O.	
Describe the organization's program service accomplishments for each of its three largest program services, as measured by expense Section 501(c)(2) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expense revenue, if any, for each program service reported. 4a (Coole (Septement S 18, 28 4, 856. Including grants of S 10,000.) (Revenues S 9,05 THE 21/22 SEASON MARKED A JOYPUL RETURN TO LIVE PERFORMANCE, COINC WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNEMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (Coole (Septement Septement Septeme	3	Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes X	No
Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expense reverue, if any, for each program service reported. 4a (code:)(Expenses: 18, 284, 856.: including grants of \$ 10,000.) (Revenues: 9,05 THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COINC WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN. MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE. METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF. DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (code:)(Expenses: included Inversary		If "Yes," describe these changes on Schedule O.	
revenue, if any, for each program service reported. 4a (code) (Expenses 18,284,856. including grants of \$ 10,000.) (Revenue \$ 9,05 THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COINC WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN. MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (Code) (Expenses included INTERNATIONAL TRAVEL RESTRICTIONS, FINDING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SUBSTITUTE AS AFFIX, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME BUCUATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMUTTING SOME BUCUATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMUTTMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND DEGRANZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOP	4	Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.	
THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COINC WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPRIMENTING WITH DIFFRENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Cook:) (Experiments INNOVATING ARTISTICALLY INNOVATING ARTISTICALLY INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE IN SUMSTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAILENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE IN THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR. WHILE PLYOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND DEFORMING WITH NONPROFT ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and	
THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COINC WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (Coos:			
WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVIN. MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Code:) (Revenue S	4a	(Code:) (Expenses \$18,284,856. including grants of \$10,000.) (Revenue \$9,057,332)	<u>2.</u>)
MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTIST WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (Code:)(Expenses		THE 21/22 SEASON MARKED A JOYFUL RETURN TO LIVE PERFORMANCE, COINCIDING	3
WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVE METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEDIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Code:) (Expenses \$ Including grants of \$] (Prevenue \$ INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE 'PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON S' 4c (Code:) (Expenses Including grants of \$) (Prevenue \$ INVESTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO REFURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFT ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SC. 6) (Revenue \$ INCLUDING COSCIDED ON SCHEDULE (CONTINUNED ON SC. 6) (Revenue \$ INCLUDING COSCIDED ON SCHEDULE (CONTINUNED ON SC.		WITH A CELEBRATION OF OUR LANDMARK 125TH ANNIVERSARY. WE ARE MOVING	
METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONT TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Code:) (Expenses including grants of \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Neverues \$) (Never		MUSIC FORWARD WITH OUR INVESTMENT IN NEW MUSIC AND EMERGING ARTISTS,	
TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Code:) (Expenses including grants of \$		WHILE ALSO EXPERIMENTING WITH DIFFERENT CONCERT FORMATS AND DELIVERY	
INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAF DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 40 (Code:)(Expensed \$		METHODS FOR SHARING MUSIC DIGITALLY. AS THE COVID-19 PANDEMIC CONTINUES	3
DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (code:)(Expenses \$		TO AFFECT OUR OPERATIONS, HOWEVER, WE FACE DECREASED GOVERNMENT	
REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN EXCITING FUTURE FOR THE ARTS IN OREGON. 4b (Code:)(Expenses		INVESTMENT AND AN AUDIENCE THAT REMAINS CONCERNED ABOUT PUBLIC SAFETY	
### EXCITING FUTURE FOR THE ARTS IN OREGON. ###################################		DOWNTOWN. DESPITE THIS UNCERTAINTY, OUR BOARD, PATRONS, AND DONORS	
4b (Code:		REMAIN HIGHLY ENGAGED IN THE ORGANIZATION AND ARE INVESTING IN AN	
INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE 'PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STAVE THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFT' ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)		EXCITING FUTURE FOR THE ARTS IN OREGON.	
INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE 'PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STAVE THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFT' ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)			
INNOVATING ARTISTICALLY THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE 'PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STAVE THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFT' ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)			
THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALL TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SITURED ON SITURE OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFIT ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)	4b	(Code:) (Expenses \$ including grants of \$) (Revenue \$)
TO BRING FULL SEASONS TO THE STAGE IN PORTLAND AND SALEM. ONGOING CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SINVESTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFITENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)			
CHALLENGES INCLUDED INTERNATIONAL TRAVEL RESTRICTIONS, FINDING SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND—THE—SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON S 4c (Code:)(Expenses \$ including grants of \$) (Revenue \$ INVESTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN—PERSON WOR. WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFIT ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)		THROUGHOUT 21/22, WE NAVIGATED MANY COVID-RELATED PRODUCTION CHALLENGES	3
SUBSTITUTE MUSICIANS IN RESPONSE TO POSITIVE COVID TESTS, AND REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STAVE TO THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFTE ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)			
REPERTOIRE CHANGES THAT REQUIRED ADDITIONAL LICENSING, SOURCING OF SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STAND IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFITENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
SCORES AND PARTS, AND APPROVAL OF THE CONDUCTORS, ARTISTIC STAFF, MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STATE OF CONTINUED ON SCHOOL STATE OF CONTINUED ON SCHOOL STATE OF CONTINUED ON SCHOOL SCHOOL STATE OF CONTINUED ON SCHOOL SCHO		·	
MUSICIANS' UNION. DESPITE THESE BEHIND-THE-SCENES CHALLENGES, THE PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE ' PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SOME INVESTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFT' ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
PRODUCT ONSTAGE REMAINED CONSISTENTLY EXCELLENT, AND WE WERE ABLE PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON STATE OF CONTINUED ON SCHOOL OF			
PRESENT MORE THAN 100 CONCERTS WITH MINIMAL CANCELATIONS, BRINGING INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SOME CONTINUED ON SOME COMMUNITY The health, safety, and wellbeing of our community remained our to priority as we shared music with children and adults from all backgrounds. We were able in some cases to return to in-person work while pivoting some education programs to digital formats. Our musicians remained flexible in the face of changing circumstances. Their commitment to our community goes beyond the oregon symphony, including coaching students, creating and performing with nonproficensembles, serving on college faculties, and organizing free performances throughout the region that bring joy, healing, and connection to countless people. (continued on sch o) 4d Other program services (Describe on Schedule O.) (Expenses \$,	
INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SOME COMMUNITY INCUMENTAL PROBLEM OF OUR COMMUNITY REMAINED OUR TOWN WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFITENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
4c (Code:) (Expenses \$			
INVESTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFICENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)		INTO THE DOWNTOWNS OF OREGON'S TWO LARGEST CITIES. (CONTINUED ON SCH O))
INVESTING IN COMMUNITY THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFICENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
THE HEALTH, SAFETY, AND WELLBEING OF OUR COMMUNITY REMAINED OUR TO PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFICENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)	4c)
PRIORITY AS WE SHARED MUSIC WITH CHILDREN AND ADULTS FROM ALL BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WOR WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFILE ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
BACKGROUNDS. WE WERE ABLE IN SOME CASES TO RETURN TO IN-PERSON WORD WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFITE ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
WHILE PIVOTING SOME EDUCATION PROGRAMS TO DIGITAL FORMATS. OUR MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFITE ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
MUSICIANS REMAINED FLEXIBLE IN THE FACE OF CHANGING CIRCUMSTANCES. THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFI ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
THEIR COMMITMENT TO OUR COMMUNITY GOES BEYOND THE OREGON SYMPHONY, INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFILE ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
INCLUDING COACHING STUDENTS, CREATING AND PERFORMING WITH NONPROFICE ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
ENSEMBLES, SERVING ON COLLEGE FACULTIES, AND ORGANIZING FREE PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
PERFORMANCES THROUGHOUT THE REGION THAT BRING JOY, HEALING, AND CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O) 4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)			
(Expenses \$ including grants of \$) (Revenue \$)		CONNECTION TO COUNTLESS PEOPLE. (CONTINUNED ON SCH O)	
(Expenses \$ including grants of \$) (Revenue \$)			
	4d		
4e Total program service expenses ► ±0, ∠04, 000.			
	4e	Total program service expenses ► 18, 284, 850 •	0004

	<u> </u>		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?			
	If "Yes," complete Schedule A	1	Х	
2	Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	Х	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for			
	public office? If "Yes," complete Schedule C, Part I	3		Х
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect			
	during the tax year? If "Yes," complete Schedule C, Part II	4		Х
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or			
	similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III	5		х
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to			
	provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		х
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		х
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete			
Ū	Schedule D, Part III	8		Х
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for	<u> </u>		
Ū	amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?			
	If "Yes," complete Schedule D, Part IV	9		х
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments	ا ا		
10		10	х	
44	or in quasi endowments? <i>If</i> "Yes," <i>complete Schedule D, Part V</i> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X,	10	21	
11				
_	as applicable.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,		х	
	Part VI	11a	Λ	
D	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total	446		Х
_	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		Α
С	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total			Х
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c		
a	Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in			Х
	Part X, line 16? If "Yes," complete Schedule D, Part IX	11d	v	
	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	X	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses		v	
40	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f	X	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete	١		₩.
	Schedule D, Parts XI and XII	12a		X
b	Was the organization included in consolidated, independent audited financial statements for the tax year?	46.	, .	
	If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b	X	v
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,			
	investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000	 		37
	or more? If "Yes," complete Schedule F, Parts I and IV	14b		X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any			,,
	foreign organization? If "Yes," complete Schedule F, Parts II and IV	15		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to			٦,
	or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,			
	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions	17		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines			
	1c and 8a? If "Yes," complete Schedule G, Part II	18	Х	
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"			<u>-</u> -
	complete Schedule G, Part III	19		X
20 a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	domestic government on Part IX, column (A), line 1? If "Yes." complete Schedule I. Parts I and II	21	Х	

132003 12-09-21

Form **990** (2021)

Form 990 (2021) OREGON SYMPHONY ASSOCIATION
Part IV Checklist of Required Schedules (continued)

	(Sometimes)		Yes	No
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on		100	110
	Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		x
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current			
	and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete			
	Schedule J	23	Х	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the			
	last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete			
	Schedule K. If "No," go to line 25a	24a		Х
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
С	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease			
	any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit			
	transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and			
	that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete			
	Schedule L, Part I	25b		X
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current			
	or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%			
	controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II	26		X
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,			
	creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled			
	entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	27		X
28	Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV,			
	instructions for applicable filing thresholds, conditions, and exceptions):			
а	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If			
	"Yes," complete Schedule L, Part IV	28a	X	177
	A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	28b		X
С	A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If			7.7
	"Yes," complete Schedule L, Part IV	28c	v	X
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	Х	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation			v
0.4	contributions? If "Yes," complete Schedule M	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31		
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete	20		x
22	Schedule N, Part II	32		
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations	33		x
34	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33		
34		34	Х	
35.2	Part V, line 1 Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X	
	Did the organization have a controlled entity within the meaning of section 512(b)(13)? If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity	554		
J	within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b		x
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?	300		
	If "Yes," complete Schedule R, Part V, line 2	36		x
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization			
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37		x
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?			
	Note: All Form 990 filers are required to complete Schedule O	38	Х	L
Pa				
	Check if Schedule O contains a response or note to any line in this Part V	<u></u>		
			Yes	No
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable			
b				
С				
	(gambling) winnings to prize winners?	1c		
12200	1 12 00 21	Eorm	990	(2021)

OREGON SYMPHONY ASSOCIATION 93-0446527 Page 5 Form 990 (2021) Part V Statements Regarding Other IRS Filings and Tax Compliance Yes No 2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, 304 filed for the calendar year ending with or within the year covered by this return Х b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? 2b Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions. Х **3a** Did the organization have unrelated business gross income of \$1,000 or more during the year? За **b** If "Yes," has it filed a Form 990-T for this year? *If* "No" to line 3b, provide an explanation on Schedule O 3b 4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a Х financial account in a foreign country (such as a bank account, securities account, or other financial account)? 4a **b** If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). Х **5a** Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? Х Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? 5b If "Yes" to line 5a or 5b, did the organization file Form 8886-T? Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit Х any contributions that were not tax deductible as charitable contributions? b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 7 Organizations that may receive deductible contributions under section 170(c). Х Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? 7a Х If "Yes," did the organization notify the donor of the value of the goods or services provided? 7b Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required X to file Form 8282? 7с Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f N/A If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? 7g N/A 7h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the 8 sponsoring organization have excess business holdings at any time during the year? Sponsoring organizations maintaining donor advised funds. N/A 9a Did the sponsoring organization make any taxable distributions under section 4966? Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? N/A 9b 10 Section 501(c)(7) organizations. Enter: a Initiation fees and capital contributions included on Part VIII, line 12 N/A Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities 11 Section 501(c)(12) organizations. Enter: Gross income from members or shareholders N/A Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) 12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? 12a **b** If "Yes," enter the amount of tax-exempt interest received or accrued during the year N/A 12b Section 501(c)(29) qualified nonprofit health insurance issuers. a Is the organization licensed to issue qualified health plans in more than one state? N/A 13a Note: See the instructions for additional information the organization must report on Schedule O. Enter the amount of reserves the organization is required to maintain by the states in which the

14a Did the organization receive any payments for indoor tanning services during the tax year?

b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O

15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

15 X

If "Yes," see the instructions and file Form 4720, Schedule N.

16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?

16 X

If "Yes," complete Form 4720, Schedule O.

Section 501(c)(21) organizations. Did the trust, any disqualified person, or mine operator engage in any
activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953?

N/A

activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953?

If "Yes," complete Form 6069.

organization is licensed to issue qualified health plans

Enter the amount of reserves on hand

Form **990** (2021)

132005 12-09-21

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

	Check if Schedule O contains a response or note to any line in this Part VI			X						
Sec	tion A. Governing Body and Management									
			Yes	No						
1a	Enter the number of voting members of the governing body at the end of the tax year 41									
	If there are material differences in voting rights among members of the governing body, or if the governing									
	body delegated broad authority to an executive committee or similar committee, explain on Schedule O.									
b	Enter the number of voting members included on line 1a, above, who are independent									
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other									
	officer, director, trustee, or key employee?									
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision									
	of officers, directors, trustees, or key employees to a management company or other person?	3	X							
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		Х						
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		Х						
6	Did the organization have members or stockholders?	6		Х						
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or									
	more members of the governing body?	7a		Х						
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or									
	persons other than the governing body?	7b		Х						
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:									
а	The governing body?	8a	Х							
b	Each committee with authority to act on behalf of the governing body?	8b	Х							
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the									
	organization's mailing address? If "Yes." provide the names and addresses on Schedule O	9		Х						
Sec	tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)									
			Yes	No						
10a	Did the organization have local chapters, branches, or affiliates?	10a		Х						
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,									
	and branches to ensure their operations are consistent with the organization's exempt purposes?	10b								
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X							
b	b Describe on Schedule O the process, if any, used by the organization to review this Form 990.									
12a	2a Did the organization have a written conflict of interest policy? If "No," go to line 13									
	b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?									
С	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe									
	on Schedule O how this was done	12c	Х							
13	Did the organization have a written whistleblower policy?	13	X							
14	Did the organization have a written document retention and destruction policy?	14	Х							
15	Did the process for determining compensation of the following persons include a review and approval by independent									
	persons, comparability data, and contemporaneous substantiation of the deliberation and decision?									
а	The organization's CEO, Executive Director, or top management official	15a	Х							
	Other officers or key employees of the organization	15b	X							
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.									
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a									
	taxable entity during the year?	16a		Х						
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation									
	in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's									
	exempt status with respect to such arrangements?	16b								
Sec	tion C. Disclosure									
17	List the states with which a copy of this Form 990 is required to be filed ▶OR									
18	Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s	only)	availal	ole						
	for public inspection. Indicate how you made these available. Check all that apply.									
	X Own website X Another's website X Upon request Other (explain on Schedule O)									
19	Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and	financ	cial							
	statements available to the public during the tax year.									
20	State the name, address, and telephone number of the person who possesses the organization's books and records									
	JANICE ROMANO - 503-416-6319									
	921 SW WASHINGTON, SUITE 200, PORTLAND, OR 97205-2819									

Form **990** (2021)

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's current key employees, if any. See the instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

(A)	(B)				C)			(D)	(E)	(F)
Name and title	Average	(do		Pos			200	Reportable	Reportable	Estimated
	hours per	box	, unles	ss pe	rson i	than o	an	compensation	compensation	amount of
	week	_	cer an	id a d	irecto	r/trus	tee)	from	from related	other
	(list any	recto						the	organizations	compensation
	hours for related	or di	99			sated		organization	(W-2/1099-MISC/	from the
	organizations	ndividual trustee or director	Institutional trustee		ee (ee	npens		(W-2/1099-MISC/ 1099-NEC)	1099-NEC)	organization and related
	below	dual t	ntiona	_	nploy	st cor	15	1000 1420)		organizations
	line)	Indivi	Institu	Officer	Key employee	Highest compensated employee	Former			
(1) SCOTT SHOWALTER	58.00									
PRESIDENT/CEO	2.00			Х				370,712.	0.	23,286
(2) RUSSELL KELBAN	45.00									
VP MARKETING & STRATEGIC ENGAGEMENT						Х		155,717.	0.	10,774
(3) HILARY BLAKEMORE	45.00									
VP DEVELOPMENT						Х		131,386.	0.	14,796
(4) STEVE WENIG	40.00									
VP & GM	5.00					Х		113,196.	0.	23,534
(5) JANET PLUMMER	50.00									
CFOO (FORMER)	10.00			Х				118,018.	0.	17,545
(6) DAVID DANZMAYR	40.00									
MUSIC DIRECTOR						X		118,876.	0.	8,443
(7) CHARLES CALMER	45.00	1							_	
VP ARTISTIC PLANNING						X		113,023.	0.	14,226
(8) SARAH KWAK	35.00	1								
CONCERTMASTER						X		105,152.	0.	10,186
(9) JANICE ROMANO	40.00								_	
VP FINANCE & ADMIN	5.00			Х				69,770.	0.	8,407
(10) BRAIZAHN JONES	35.00									
BOARD MEMBER/MUSICIAN		Х						38,204.	0.	20,829
(11) SERGIO CARRENO	35.00									
BOARD MEMBER/MUSICIAN		Х						37,806.	0.	18,507
(12) EMILY COLE	35.00									
BOARD MEMBER/MUSICIAN		Х						32,797.	0.	11,791
(13) RICK HINKES	20.00									
CO-CHAIR		Х		Х				0.	0.	0
(14) TIGE HARRIS	20.00]								
CO-CHAIR		Х		Х				0.	0.	0
(15) DAN DRINKWARD	20.00									
VICE CHAIR		Х		Х				0.	0.	0
(16) EVE CALLAHAN	20.00	1								
SECRETARY		Х		Х				0.	0.	0
(17) JACK WILBORN	20.00									
TREASURER		Х		Х				0.	0.	0

132007 12-09-21 Form **990** (2021)

	THE HONT	ΔL	JUC	<u>,Ст</u>	Λı	<u> </u>	.T.4		73 0440	JZ1 Fage 0
Part VII Section A. Officers, Directors, Tru	stees, Key Em	oloy	ees,	and	l Hig	ghes	t C	ompensated Employee	s (continued)	
(A)	(B)				C)			(D)	(E)	(F)
Name and title	Average hours per week	box	not c	ss pe	more rson i	than of than of is both or/trus	n an	Reportable compensation from	Reportable compensation from related	Estimated amount of other
	(list any hours for related organizations below line)	Individual trustee or director	In stit utio nal trustee	Officer	Key employee	Highest compensated employee	Former	the organization (W-2/1099-MISC/ 1099-NEC)	organizations (W-2/1099-MISC/ 1099-NEC)	compensation from the organization and related organizations
(18) AMANDA TUCKER	5.00									
BOARD MEMBER		Х						0.	0.	0.
(19) BILL EARLY BOARD MEMBER	5.00	Х						0.	0.	0.
(20) CHABRE VICKERS	5.00	25								· ·
BOARD MEMBER	3.00	х						0.	0.	0.
(21) CLIFF DEVENEY	5.00									
BOARD MEMBER		Х						0.	0.	0.
(22) COURTNEY ANGELI BOARD MEMBER	5.00	X						0.	0.	0.
(23) DAN RASAY	5.00								-	
BOARD MEMBER		Х						0.	0.	0.
(24) DERALD WALKER	5.00									
BOARD MEMBER		Х						0.	0.	0.
(25) GERALD HULSMAN	5.00	1								
BOARD MEMBER		Х						0.	0.	0.
(26) GERRI KARETSKY	5.00									
BOARD MEMBER		Х						0.	0.	0.
1b Subtotal							ightharpoons	1,404,657.	0.	182,324.
c Total from continuation sheets to Part \	/II, Section A						ightharpoons	0.	0.	0.
d Total (add lines 1b and 1c)							<u> </u>	1,404,657.	0.	182,324.
2 Total number of individuals (including but	not limited to th	ose	liste	d ab	ove	e) wh	o re	ceived more than \$100,	000 of reportable	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization

3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

5 X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(B) Description of services	(C) Compensation
ARLENE SCHNITZER	
CONCERT HALL	597,052.
OFFICE LEASE	262,188.
PRINTING COMPANY	238,532.
LIVESTREAM	
TECHNICIAN	146,044.
ARTIST AGENT	142,000.
I above) who received more than	
	Description of services ARLENE SCHNITZER CONCERT HALL OFFICE LEASE PRINTING COMPANY LIVESTREAM TECHNICIAN ARTIST AGENT

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2021)

8

Form 990 OREGON S:	1 111 11011 1		-						93-044	0027
Part VII Section A. Officers, Directors, Tru	ıstees, Key Er	nplo	yee	s, ar	nd H	lighe	est (Compensated Employe	ees (continued)	
(A)	(B)			(0				(D)	(E)	(F)
Name and title	Average			Posi	ition			Reportable	Reportable	Estimated
	hours	(c	heck	all t	that	app	y)	compensation	compensation	amount of
	per							from	from related	other
	week	'n				loyee		the	organizations	compensation
	(list any hours for	direct				d emp		organization (W-2/1099-MISC)	(W-2/1099-MISC)	from the organization
	related	3e or 0	stee			satec		(***-2/1099-141130)		and related
	organizations	truste	al trus		yee	om per				organizations
	below	Individual trustee or director	Institutional trustee	er	Key employee	Highest compensated employee	Je.			· ·
	line)	Indi	Insti	Officer	Key	High	Former			
(27) GRADY JURRENS	5.00									
BOARD MEMBER		Х						0.	0.	0.
(28) IDA RAE CAHANA	5.00									
BOARD MEMBER		Х						0.	0.	0 .
(29) J. CLAYTON HERING	5.00									
BOARD MEMBER		Х						0.	0.	0.
(30) JANET BLOUNT	5.00	1								
BOARD MEMBER		Х						0.	0.	0.
(31) JEFF HEATHERINGTON	5.00									
BOARD MEMBER		Х						0.	0.	0.
(32) JOANN YOUNG	5.00								_	_
BOARD MEMBER		Х						0.	0.	0.
(33) JUDY HUMMELT	5.00	1								_
BOARD MEMBER		Х						0.	0.	0.
(34) KRIS KERN	5.00									_
BOARD MEMBER		Х						0.	0.	0.
(35) LANE SHETTERLY	5.00								•	
BOARD MEMBER	F 00	Х						0.	0.	0.
(36) LAUREN FOX	5.00	٠,,							0	0
BOARD MEMBER	F 00	Х						0.	0.	0 .
(37) MATT EDLEN	5.00	٠,,							0	0
BOARD MEMBER	F 00	Х						0.	0.	0 .
(38) MICHELE MASS	5.00	٠,,							0	0
BOARD MEMBER	F 00	Х						0.	0.	0 .
(39) MJ STEEN	5.00	. ,							0	0
BOARD MEMBER (40) NANCY HALES	F 00	Х						0.	0.	0 .
	5.00	Х						0.	0	^
BOARD MEMBER (41) PEGGY MILLER	5.00	Δ						0.	0.	0 .
	3.00	Х						0.	0	0
BOARD MEMBER (42) PRISCILLA LONGFIELD	5.00	Λ	\vdash					J •	0.	0 .
BOARD MEMBER	3.00	Х						0.	0.	0.
(43) RENEE HOLZMAN	5.00	^						0.	0.	0.
BOARD MEMBER	3.00	Х						0.	0.	0.
(44) ROBERT HALEY	5.00		\vdash					· ·	0.	0.
BOARD MEMBER	7.00	Х						0.	0.	0 .
(45) ROBERT HARRISON	5.00	25	\vdash					•	0 •	
BOARD MEMBER	— 3.00	Х						0.	0.	0 .
(46) ROBYN GASTINEAU	5.00								0 •	0.
		Х	ı	1	ı	ı		0.	0.	0.

Form 990 OREGON SY	MPHONY	AS	SO	CI	ΑT	'IO	N		93-044	6527
Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)										
(A)	(B)		(C)					(D)	(E)	(F)
Name and title	Average			Pos	ition			Reportable	Reportable	Estimated
	hours	(cl	heck	all t	that	арр	ly)	compensation	compensation	amount of
	per							from	from related	other
	week					yee		the	organizations	compensation
	(list any	rector				old me		organization	(W-2/1099-MISC)	from the
	hours for	ordi	ee			ated		(W-2/1099-MISC)		organization
	related	ustee	trust		ee ee	Suedic				and related
	organizations below	lual tr	tional		nploy	st con	_			organizations
	line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(47) ROSCOE NELSON	5.00	_	_		×		Н.			
BOARD MEMBER	3.00	Х						0.	0.	0.
(48) THOMAS LAUDERDALE	5.00	23						•	•	•
BOARD MEMBER		х						0.	0.	0.
(49) WALT WEYLER	5.00							-	-	
BOARD MEMBER		Х						0.	0.	0.
	<u> </u>	<u> </u>	I		!	<u> </u>	<u> </u>			
Total to Part VII, Section A, line 1c										

Form 990 (2021) OREGON
Part VIII Statement of Revenue

		Check if Schedule O contains a response of	or note to any lin	e in this Part VIII			
				(A)	(B)	(C)	(D)
				Total revenue	Related or exempt	Unrelated	Revenue excluded
					function revenue	business revenue	from tax under sections 512 - 514
							30000013 3 12 3 14
nts nts		Federated campaigns 1a					
žra ou		Membership dues 1b					
s, (Am	c	Fundraising events 1c 1,	435,864.				
ii a	d	Related organizations 1d					
Contributions, Gifts, Grants and Other Similar Amounts	е	Government grants (contributions) 1e 8,	164,962.				
is Sign	f	All other contributions, gifts, grants, and					
out the		similar amounts not included above 1f 7,	070,168.				
Ξō	c	Noncash contributions included in lines 1a-1f	85,746.				
Š	_	Total. Add lines 1a-1f		16670994.			
			Business Code				
	2 -	CONCERT TICKET & FEES		9,057,332.	9 057 332.		
ice			711130	5,051,552.	5,051,552.		
er ue	b						
n S	C						
Program Service Revenue	d						
o.	е						
₾		All other program service revenue		0 055 220			
_	g	Total. Add lines 2a-2f		9,057,332.			
	3	Investment income (including dividends, intere		10-016			10- 016
		other similar amounts)		195,016.			195,016.
	4	Income from investment of tax-exempt bond p	roceeds				
	5	Royalties					
		(i) Real	(ii) Personal				
	6 a	Gross rents 6a					
		Less: rental expenses 6b					
		Rental income or (loss) 6c					
		Net rental income or (loss)	•				
		Gross amount from sales of (i) Securities	(ii) Other				
		assets other than inventory 7a 724,503.					
	h	Less: cost or other basis					
ø	~	and sales expenses					
ž	_	Gain or (loss) 76 281,032.					
eve				281,032.			281,032.
her Revenue		Net gain or (loss)		201,032.			201,032.
	8 a	Gross income from fundraising events (not					
δ		including \$1, 435, 864. of					
		contributions reported on line 1c). See	156 750				
			156,750.				
			231,035.	E 4 00E			E 4 00E
		Net income or (loss) from fundraising events		-74,285.			-74,285.
	9 a	Gross income from gaming activities. See					
		Part IV, line 199a					
	b	Less: direct expenses9b					
	c	Net income or (loss) from gaming activities	>				
	10 a	Gross sales of inventory, less returns					
		and allowances 10a					
	b	Less: cost of goods sold 10b					
	c	Net income or (loss) from sales of inventory					
-			Business Code				
sno	11 a	OTHER INCOME	900099	53,865.			53,865.
ane Duc	b						
eve	c						
Miscellaneous Revenue	d	All other revenue					
2	е	Total. Add lines 11a-11d		53,865.			
	12	Total revenue. See instructions		26183954.	9,057,332.	0.	455,628.

93-0446527

Form 990 (2021) OREGON SYMPHONY ASSOCIATION Part IX | Statement of Functional Expenses

Ture by									
Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).									
Check if Schedule O contains a respon	nse or note to any line in	this Part IX							
Do not include amounts reported on lines 6b,	(A) Total expenses	(B) Program service	(C) Management and	(D) Fundraising					

	Check if Schedule O contains a respon	se or note to any line in	this Part IX		
	not include amounts reported on lines 6b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to domestic organizations				
	and domestic governments. See Part IV, line 21	10,000.	10,000.		
2	Grants and other assistance to domestic				
	individuals. See Part IV, line 22				
3	Grants and other assistance to foreign				
	organizations, foreign governments, and foreign				
	individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors,	011 524	707 000	F2 000	FO 717
	trustees, and key employees	811,534.	707,008.	53,809.	50,717.
6	Compensation not included above to disqualified				
	persons (as defined under section 4958(f)(1)) and				
_	persons described in section 4958(c)(3)(B)	8,657,414.	7,427,290.	663,213.	566,911.
7	Other salaries and wages Pension plan accruals and contributions (include	0,037,414.	1,421,250.	005,215.	300,511.
8	section 401(k) and 403(b) employer contributions)	387,848.	341 794	21,528.	24 526
9	Other employee benefits	1,691,569.		46,981.	24,526. 78,273.
10	Payroll taxes	996,498.	886,670.	46,267.	63,561.
11	Fees for services (nonemployees):	220,1200	220,0,00	23,23,4	***************************************
	Management				
b	Legal	480.		480.	
	Accounting	22,965.		22,965.	
	Lobbying	•		,	
	Professional fundraising services. See Part IV, line 17				
f	Investment management fees	67,653.		67,653.	
g	Other. (If line 11g amount exceeds 10% of line 25,				
	column (A), amount, list line 11g expenses on Sch O.)	741,802.	662,765.	30,008.	49,029.
12	Advertising and promotion	747,048.	714,200.	1,878.	30,970.
13	Office expenses	859,781.	548,515.	47,924.	263,342.
14	Information technology				
15	Royalties	222 526	010 000	26.450	
16	Occupancy	920,596.	819,230.	36,150.	65,216.
17	Travel	102,421.	28,950.	11,667.	61,804.
18	Payments of travel or entertainment expenses				
40	for any federal, state, or local public officials				
19	Conferences, conventions, and meetings				
20	Interest Payments to affiliates				
21 22	Payments to affiliates	132,706.	53,082.	39,812.	39,812.
23	Insurance	24,442.	23,002.	24,442.	<u> </u>
24	Other expenses, Itemize expenses not covered				
	above. (List miscellaneous expenses on line 24e. If				
	line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule 0.)				
а	CONTRACT LABOR	2,797,474.	2,687,454.	11,837.	98,183.
b	PRODUCTION EXPENSES	1,686,058.	1,686,058.		
С					
d					
е	All other expenses	281,779.		71,477.	64,777.
25	Total functional expenses . Add lines 1 through 24e	20,940,068.	18,284,856.	1,198,091.	1,457,121.
26	Joint costs. Complete this line only if the organization				
	reported in column (B) joint costs from a combined				
	educational campaign and fundraising solicitation.				
	Check here if following SOP 98-2 (ASC 958-720)				Form 990 (2021)

Form **990** (2021)

Form 990 (2021)
Part X | Balance Sheet

Par	tΧ	Balance Sheet					
		Check if Schedule O contains a response or note to	any li	ine in this Part X			
					(A) Beginning of year		(B) End of year
	1	Cash - non-interest-bearing	6,231,149.	1	3,592,245.		
	2	Savings and temporary cash investments				2	
	3	Pledges and grants receivable, net			1,144,324.	3	2,036,846.
	4	Accounts receivable, net			203,028.	4	1,538,014.
	5	Loans and other receivables from any current or form					
		trustee, key employee, creator or founder, substantia	al cor	ntributor, or 35%			
		controlled entity or family member of any of these pe	erson	sL		5	
	6	Loans and other receivables from other disqualified p	perso	ons (as defined			
		under section 4958(f)(1)), and persons described in s	sectio	on 4958(c)(3)(B)		6	
က္	7	Notes and loans receivable, net				7	
Assets	8	Inventories for sale or use				8	
۲	9	Prepaid expenses and deferred charges			458,726.	9	399,201.
	10a	Land, buildings, and equipment: cost or other					
		basis. Complete Part VI of Schedule D Less: accumulated depreciation 10)a	2,147,995.			
	b	Less: accumulated depreciation 10)b	1,278,201.	719,050.	10c	869,794.
	11	Investments - publicly traded securities			17,989,741.	11	19,048,770.
	12	Investments - other securities. See Part IV, line 11			994,533.	12	938,963.
	13	Investments - program-related. See Part IV, line 11			13		
	14	Intangible assets			14		
	15	Other assets. See Part IV, line 11			07 740 551	15	00 402 022
	16	Total assets. Add lines 1 through 15 (must equal lines)			27,740,551. 625,776.	16	28,423,833.
	17	Accounts payable and accrued expenses	023,770.	17	915,694.		
	18	Grants payable			4,000,398.	18	3,587,254.
	19	Deferred revenue			4,000,390.	19	3,301,234.
	20	Tax-exempt bond liabilities				20 21	
	21 22	Escrow or custodial account liability. Complete Part Loans and other payables to any current or former of				21	
Liabilities	22	trustee, key employee, creator or founder, substantia					
≣ 		controlled entity or family member of any of these pe				22	
Lia	23	Secured mortgages and notes payable to unrelated to				23	
	24	Unsecured notes and loans payable to unrelated thir			1,996,798.	24	
	25	Other liabilities (including federal income tax, payable			, ,		
		parties, and other liabilities not included on lines 17-2					
		of Schedule D	•	.	12,432.	25	11,804.
	26	Total liabilities. Add lines 17 through 25			6,635,404.	26	4,514,752.
		Organizations that follow FASB ASC 958, check h	ere	► X			
Ses		and complete lines 27, 28, 32, and 33.					
auc	27	Net assets without donor restrictions			5,399,972.	27	9,187,787.
Ba	28	Net assets with donor restrictions			15,705,175.	28	14,721,294.
Pu		Organizations that do not follow FASB ASC 958, o	check	k here 🕨 🗌			
띤		and complete lines 29 through 33.					
Ō	29	Capital stock or trust principal, or current funds				29	
set	30	Paid-in or capital surplus, or land, building, or equipn	nent	fund		30	
Net Assets or Fund Balances	31	Retained earnings, endowment, accumulated income			04 40= 44=	31	00.000.000
Š	32				21,105,147.	32	23,909,081.
	33	Total liabilities and net assets/fund balances			27,740,551.	33	28,423,833. Form 990 (2021)

Form **990** (2021)

Pai	T XI Reconciliation of Net Assets					
	Check if Schedule O contains a response or note to any line in this Part XI					
1	Total revenue (must equal Part VIII, column (A), line 12)	1			3,9	
2	Total expenses (must equal Part IX, column (A), line 25)	2			0,0	
3	Revenue less expenses. Subtract line 2 from line 1	3			3,8	
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4			5,1	
5	Net unrealized gains (losses) on investments	5	-2,	43	9,9	<u>52.</u>
6	Donated services and use of facilities	6				
7	Investment expenses	7				
8	Prior period adjustments	8				
9	Other changes in net assets or fund balances (explain on Schedule O)	9				0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32,					
	column (B))	10	23,	90	9,0	<u>81.</u>
Pai	t XII Financial Statements and Reporting					
	Check if Schedule O contains a response or note to any line in this Part XII					X
			_		Yes	No
1	Accounting method used to prepare the Form 990: Cash X Accrual Other		_			
	If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule	Ο.				
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		[2a		_X_
	If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed	on a				
	separate basis, consolidated basis, or both:					
	Separate basis Consolidated basis Both consolidated and separate basis					
b	Were the organization's financial statements audited by an independent accountant?		[2b	X	
	If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate	basis,				
	consolidated basis, or both:					
	Separate basis X Consolidated basis Both consolidated and separate basis					
С	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the	audit,				ı
	review, or compilation of its financial statements and selection of an independent accountant?		🛓	2c	X	
	If the organization changed either its oversight process or selection process during the tax year, explain on Scho	edule O.				
3а	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Sin	-				ı
	Act and OMB Circular A-133?			3a	Х	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required	ed audit				ı
	or audits, explain why on Schedule O and describe any steps taken to undergo such audits		<u></u>	3b	X	
				Form	990 ((2021)

132012 12-09-21

SCHEDULE A

(Form 990)

Total

Department of the Treasury Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

Employer identification number Name of the organization OREGON SYMPHONY ASSOCIATION 93-0446527 Reason for Public Charity Status. (All organizations must complete this part.) See instructions. Part I The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.) A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990).) 3 A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.) 6 A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). X An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.) A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.) An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) 11 An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g. Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B. Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C. Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E. Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V. Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization. Enter the number of supported organizations Provide the following information about the supported organization(s). (i) Name of supported (ii) EIN (iii) Type of organization (v) Amount of monetary (vi) Amount of other your governing document? (described on lines 1-10 organization support (see instructions) support (see instructions) No above (see instructions))

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) Part II

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Sec	tion A. Public Support						
Cale	ndar year (or fiscal year beginning in) 🕨	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1	Gifts, grants, contributions, and						
	membership fees received. (Do not						
	include any "unusual grants.")	14683486.	11488429.	6446767.	13053221.	16670994.	62342897.
2	Tax revenues levied for the organ-						
	ization's benefit and either paid to						
	or expended on its behalf						
3	The value of services or facilities						
	furnished by a governmental unit to						
	the organization without charge						
4	Total. Add lines 1 through 3	14683486.	11488429.	6446767.	13053221 .	16670994.	62342897.
5	The portion of total contributions						
	by each person (other than a						
	governmental unit or publicly						
	supported organization) included						
	on line 1 that exceeds 2% of the						
	amount shown on line 11,						
	column (f)						7683764.
	Public support. Subtract line 5 from line 4.						54659133.
Sec	tion B. Total Support						
Cale	ndar year (or fiscal year beginning in) 🕨	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7	Amounts from line 4	14683486.	11488429.	6446767.	<u> 13053221.</u>	<u> 16670994.</u>	62342897.
8	Gross income from interest,						
	dividends, payments received on						
	securities loans, rents, royalties,						
	and income from similar sources	101,607.	189,131.	148,804.	64,778.	195,016.	699,336.
9	Net income from unrelated business						
	activities, whether or not the						
	business is regularly carried on						
10	Other income. Do not include gain						
	or loss from the sale of capital						
	assets (Explain in Part VI.)	288,045.	302,694.	73,579.	102,579.		820,762.
11	Total support. Add lines 7 through 10						63862995.
12	Gross receipts from related activities,	etc. (see instruction	ns)			12 35	,878,042.
13	First 5 years. If the Form 990 is for the	ne organization's fir	st, second, third, f	ourth, or fifth tax y	ear as a section 5	01(c)(3)	
	organization, check this box and stop						>
	tion C. Computation of Publi						
	Public support percentage for 2021 (I					14	85.59 %
	Public support percentage from 2020					15	82.99 %
16a	33 1/3% support test - 2021. If the						
	stop here. The organization qualifies						
b	33 1/3% support test - 2020. If the o	•		•		•	
	and stop here. The organization qual						
17a	'a 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more,						•
	and if the organization meets the fact				-	VI how the organiz	zation
	meets the facts-and-circumstances te	•	•				
b	10% -facts-and-circumstances test	_					10% or
	more, and if the organization meets the				-		. \square
	organization meets the facts-and-circu		-	•			
18	Private foundation. If the organization	on did not check a l	oox on line 13, 16a	ı, 16b, 17a, or 17b	o, check this box a	nd see instructions	s

Schedule A (Form 990) 2021

Part III | Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Secti	ion A. Public Support	low, picase comp	nete i art ii.j				
Calend	ar year (or fiscal year beginning in)	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
n	Sifts, grants, contributions, and nembership fees received. (Do not not not not not not not not not no						
n fo a	aross receipts from admissions, nerchandise sold or services per- ormed, or facilities furnished in ny activity that is related to the irganization's tax-exempt purpose						
а	Gross receipts from activities that re not an unrelated trade or busness under section 513						
iz	ax revenues levied for the organ- cation's benefit and either paid to r expended on its behalf						
5 T	the value of services or facilities urnished by a governmental unit to the organization without charge						
	otal. Add lines 1 through 5						_
	mounts included on lines 1, 2, and received from disqualified persons						
fro ex	mounts included on lines 2 and 3 received om other than disqualified persons that xceed the greater of \$5,000 or 1% of the mount on line 13 for the year						
сА	add lines 7a and 7b						
	Public support. (Subtract line 7c from line 6.)						
	ar year (or fiscal year beginning in)	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
9 A 10a G d s	Amounts from line 6 Gross income from interest, lividends, payments received on ecurities loans, rents, royalties, nd income from similar sources	(4) 2011	10/2010	(0) 20 10	(4) 2020	(6) 202.	(1) 10101
b U (I	Inrelated business taxable income less section 511 taxes) from businesses cquired after June 30, 1975						
11 N a	dd lines 10a and 10b						
12 C	other income. Do not include gain or loss from the sale of capital ssets (Explain in Part VI.)						
	otal support. (Add lines 9, 10c, 11, and 12.)			1			<u> </u>
	irst 5 years. If the Form 990 is for the	· ·			•		. —
	heck this box and stop here						>
	ion C. Computation of Public			. (6)		145	
	Public support percentage for 2021 (lin		•	.,,		15	<u>%</u>
	Public support percentage from 2020					16	%
	ion D. Computation of Invest			ino 10 pali ima (n)		47	0/
	nvestment income percentage for 202					17	<u>%</u>
	nvestment income percentage from 2			on line 14 and line		18	%
	3 1/3% support tests - 2021. If the					- 4.1	▶ □
b 3	nore than 33 1/3%, check this box and 3 1/3% support tests - 2020. If the	organization did n	not check a box or	line 14 or line 19a	a, and line 16 is m	ore than 33 1/3%, a	and
lii	ne 18 is not more than 33 1/3%, chec	k this box and st	top here. The orga	nization qualifies a	as a publicly supp	orted organization	▶∐
20 P	Private foundation. If the organization	n did not check a	hox on line 14 19	a or 19h check th	nis hox and see in	structions	

132023 01-04-22 Schedule A (Form 990) 2021

V-- N-

Part IV | Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- **3a** Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.
- **b** Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in **Part VI** when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.
- **4a** Was any supported organization not organized in the United States ("foreign supported organization")? *If* "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.
- **b** Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in **Part VI** how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- **b Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).
- 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7?

 If "Yes." complete Part I of Schedule L (Form 990).
- 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI.
- **b** Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes." provide detail in **Part VI.**
- c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.
 - **b** Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

		162	140
	1		
Ì	•		
	2		
	0-		
	3a		
	3b		
	_		
	3c		
	4a		
ı			
	4b		
	4c		
	5a		
	5b		
	5c		
	6		
	7		
	8		
	9a		
	9b		
	9с		
	90		
	10a		
	46:		
	10b		

132024 01-04-21 Schedule A (Form 990) 2021

Par	t IV	Supporting Organizations (continued)			
				Yes	No
11	Has th	he organization accepted a gift or contribution from any of the following persons?			
а		son who directly or indirectly controls, either alone or together with persons described on lines 11b and			
	-	elow, the governing body of a supported organization?	11a		
b		illy member of a person described on line 11a above?	11b		
		6 controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide			
·		in Part VI.	11c		
Sec	tion E	3. Type I Supporting Organizations			
				Yes	No
1	Did th	ne governing body, members of the governing body, officers acting in their official capacity, or membership of one or		163	140
•		supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers,			
		ors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s)			
		ively operated, supervised, or controlled the organization's activities. If the organization had more than one supported			
		ization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the	1		
0		orted organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	•		
2		ne organization operate for the benefit of any supported organization other than the supported			
		ization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in			
		how providing such benefit carried out the purposes of the supported organization(s) that operated,	•		
Sec	supen tion (vised, or controlled the supporting organization. C. Type II Supporting Organizations	2		
000	LIOIT	5. Type it Supporting Organizations		1	·
				Yes	No
1		a majority of the organization's directors or trustees during the tax year also a majority of the directors			
	or trus	stees of each of the organization's supported organization(s)? If "No," describe in Part VI how control			
		nagement of the supporting organization was vested in the same persons that controlled or managed			
800	the su	upported organization(s). D. All Type III Supporting Organizations	1		
Sec	LIOIT L	5. All Type III Supporting Organizations			l
	D: III			Yes	No
1		ne organization provide to each of its supported organizations, by the last day of the fifth month of the			
	-	ization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax			
		(ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the	_		
•	-	ization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2		any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported			
		ization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how	2		
2	•	ganization maintained a close and continuous working relationship with the supported organization(s). ason of the relationship described on line 2, above, did the organization's supported organizations have a			
3	•	icant voice in the organization's investment policies and in directing the use of the organization's			
	•	·			
		ne or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's	2		
Sec	<i>suppo</i> tion E	orted organizations played in this regard. E. Type III Functionally Integrated Supporting Organizations	3		
1 a		k the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions). The organization satisfied the Activities Test. Complete line 2 below.			
b		The organization satisfied the Additional Test. Complete line 2 perow. The organization is the parent of each of its supported organizations. Complete line 3 below.			
C		The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see ins	truction	ام	
2		ties Test. Answer lines 2a and 2b below.	uction	Yes	No
		ubstantially all of the organization's activities during the tax year directly further the exempt purposes of		100	140
u		upported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify			
		e supported organization(s) to which the organization was responsive: If Tes, trief if the triadentity esupported organizations and explain how these activities directly furthered their exempt purposes,			
		he organization was responsive to those supported organizations, and how the organization determined			
		nee activities constituted substantially all of its activities.	2a		
h		ne activities described on line 2a, above, constitute activities that, but for the organization's involvement,	u		
		r more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in			
		If the reasons for the organization's position that its supported organization(s) would have engaged in			
			2b		
3		activities but for the organization's involvement. It of Supported Organizations. Answer lines 3a and 3b below.	د.		
		ne organization have the power to regularly appoint or elect a majority of the officers, directors, or			
u		es of each of the supported organizations? If "Yes" or "No" provide details in Part VI.	За		
	-, 4010	1 163 OF THE SUPPORTED OF GAME AND OFFICE OF THE PROVIDE CECANIS IT! AND THE	-u	-	

of its supported organizations? If "Yes." describe in Part VI the role played by the organization in this regard. 132025 01-04-22 Schedule A (Form 990) 2021

b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each

3b

Sche	dule A (Form 990) 2021 OREGON SYMPHONY ASSOCIA	MOITA		93-0446527 Page 6
Pai				3
1	Check here if the organization satisfied the Integral Part Test as a qualifying			Part VI). See instructions.
	All other Type III non-functionally integrated supporting organizations mus	st complete S	Sections A through E.	
Sect	ion A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1		
2	Recoveries of prior-year distributions	2		
3	Other gross income (see instructions)	3		
4	Add lines 1 through 3.	4		
5	Depreciation and depletion	5		
6	Portion of operating expenses paid or incurred for production or			
	collection of gross income or for management, conservation, or			
	maintenance of property held for production of income (see instructions)	6		
7	Other expenses (see instructions)	7		
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8		
Sect	ion B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see			
	instructions for short tax year or assets held for part of year):			
а	Average monthly value of securities	1a		
b	Average monthly cash balances	1b		
С	Fair market value of other non-exempt-use assets	1c		
d	Total (add lines 1a, 1b, and 1c)	1d		
е	Discount claimed for blockage or other factors			
	(explain in detail in Part VI):			
2	Acquisition indebtedness applicable to non-exempt-use assets	2		
3	Subtract line 2 from line 1d.	3		
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount,			
	see instructions).	4		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6	Multiply line 5 by 0.035.	6		
7	Recoveries of prior-year distributions	7		
8	Minimum Asset Amount (add line 7 to line 6)	8		
Sect	ion C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1		
2	Enter 0.85 of line 1.	2		
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3		
4	Enter greater of line 2 or line 3.	4		
_	Income toy imposed in prior year	-		

Schedule A (Form 990) 2021

Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see

Distributable Amount. Subtract line 5 from line 4, unless subject to

emergency temporary reduction (see instructions).

instructions).

Schedule A (Form 990) 2021

Schedule B

(Form 990)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

► Attach to Form 990 or Form 990-PF.

► Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

Name of the organization **Employer identification number**

OREGON SYMPHONY ASSOCIATION 93-0446527

Organization type (check one):							
Filers of	:	Section:					
Form 99	0 or 990-EZ	X 501(c)(3) (enter number) organization					
		4947(a)(1) nonexempt charitable trust not treated as a private foundation					
		527 political organization					
Form 99	0-PF	501(c)(3) exempt private foundation					
		4947(a)(1) nonexempt charitable trust treated as a private foundation					
		501(c)(3) taxable private foundation					
Check if your organization is covered by the General Rule or a Special Rule . Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.							
General	Rule						
	-	filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.					
Special	Rules						
X	For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.						
	For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.						
	year, contributions is checked, enter he purpose. Don't com	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., aplete any of the parts unless the General Rule applies to this organization because it received nonexclusively, etc., contributions totaling \$5,000 or more during the year					
Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).							

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2021)

Schedule B (Form 990) (2021)

Name of organization

Employer identification number

OREGON SYMPHONY ASSOCIATION

Part I	Contributors (see instructions). Use duplicate copies of Part I if additional	space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 6,460,832.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2		\$ <u>1,459,430</u> .	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3		\$ <u>1,175,000</u> .	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
4		\$ 501,250.	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
5		\$\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)

93-0446527

Name of organization Employer identification number

OREGON SYMPHONY ASSOCIATION

93-0446527

(a) No. from Part I (b) Description of noncash property given (See instructions.) (c) FMV (or estimate) (See instructions.) (d) Date received (See instructions.) (a) No. from Part I Description of noncash property given (See instructions.) (b) Date received (See instructions.) (c) FMV (or estimate) (See instructions.) (d) Date received (See instructions.)	
(a) No. from Part I (b) FMV (or estimate) (See instructions.) (c) FMV (or estimate) (See instructions.) (d) Date receing (a) No. (b) (c) FMV (or estimate) (See instructions.) (d) Date receing (a) No. (b) (c) (d) Date receing (d)	ved
No. from Part I (a) (b) (b) FMV (or estimate) (See instructions.) (b) FMV (or estimate) (See instructions.) (c) FMV (or estimate) (See instructions.) (d) Date received (See instructions.)	ved
(a) (c) (d)	
No. (C)	
from Description of noncash property given See instructions.) FMV (or estimate) (See instructions.) Date received	ved
(a) No. from Part I (b) FMV (or estimate) (See instructions.) (d) Date received Date received	ved
(a) No. from Part I (b) FMV (or estimate) (See instructions.) (d) Date received	ved
(a) No. from Part I (b) See instructions.) (c) FMV (or estimate) (See instructions.) Date received	ved

Name of organization **Employer identification number** OREGON SYMPHONY ASSOCIATION 93-0446527 Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) Use duplicate copies of Part III if additional space is needed. (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

► Attach to Form 990.

►Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Inspection

Name of the organization

OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

Par	t I Organizations Maintaining Donor Advised organization answered "Yes" on Form 990, Part IV, line		imilar Funds or <i>F</i>	Accounts. Complete if the		
	organization answered Tes On Form 990, Part IV, line	(a) Donor advise	d funds	(b) Funds and other accounts		
1	Total number at end of year	()				
2	Aggregate value of contributions to (during year)					
3	Aggregate value of grants from (during year)					
4	Aggregate value at end of year					
5	Did the organization inform all donors and donor advisors in w	vriting that the assets he	ld in donor advised fu	nds		
	are the organization's property, subject to the organization's e	-				
6	Did the organization inform all grantees, donors, and donor ac					
	for charitable purposes and not for the benefit of the donor or					
	impermissible private benefit?			Yes No		
Par	t II Conservation Easements. Complete if the org	anization answered "Yes	s" on Form 990, Part I	V, line 7.		
1	Purpose(s) of conservation easements held by the organization	on (check all that apply).				
	Preservation of land for public use (for example, recreat	tion or education)	Preservation of a his	storically important land area		
	Protection of natural habitat		Preservation of a ce	rtified historic structure		
	Preservation of open space					
2	Complete lines 2a through 2d if the organization held a qualifi	ed conservation contribu	ution in the form of a c			
	day of the tax year.			Held at the End of the Tax Year		
а	Total number of conservation easements			2a		
b						
С	Number of conservation easements on a certified historic stru			2c		
d	Number of conservation easements included in (c) acquired a					
	listed in the National Register			2d		
3	Number of conservation easements modified, transferred, rele	eased, extinguished, or to	erminated by the orga	nization during the tax		
_	year					
4	Number of states where property subject to conservation ease					
5	Does the organization have a written policy regarding the peri			□ v □ u.		
•	violations, and enforcement of the conservation easements it		d anfaraing concernat			
6	Staff and volunteer hours devoted to monitoring, inspecting, h	nandling of violations, an	d emorcing conservat	ion easements during the year		
7	Amount of expenses incurred in monitoring, inspecting, handl	ling of violations, and on	forcing conservation o	acoments during the year		
′	\$\\$\$ \$\$	iii ig or violations, and em	lording conservation e	asements during the year		
8	Does each conservation easement reported on line 2(d) above	e satisfy the requirement	s of section 170(h)(4)(l	3)(i)		
Ū	and section 170(h)(4)(B)(ii)?	• •				
9	In Part XIII, describe how the organization reports conservation					
	balance sheet, and include, if applicable, the text of the footnote					
	organization's accounting for conservation easements.	3				
Par	t III Organizations Maintaining Collections of	Art, Historical Trea	asures, or Other	Similar Assets.		
	Complete if the organization answered "Yes" on Form	990, Part IV, line 8.				
1a	If the organization elected, as permitted under FASB ASC 958	8, not to report in its reve	enue statement and ba	alance sheet works		
	of art, historical treasures, or other similar assets held for pub	lic exhibition, education,	or research in further	ance of public		
	service, provide in Part XIII the text of the footnote to its financial statements that describes these items.					
b	If the organization elected, as permitted under FASB ASC 958	8, to report in its revenue	statement and balan	ce sheet works of		
	art, historical treasures, or other similar assets held for public $% \left(1\right) =\left(1\right) \left(1\right) $	exhibition, education, or	research in furtheran	ce of public service,		
	provide the following amounts relating to these items:					
	(i) Revenue included on Form 990, Part VIII, line 1					
2	If the organization received or held works of art, historical trea			, provide		
	the following amounts required to be reported under FASB AS					
	Revenue included on Form 990, Part VIII, line 1			k .		
LHA	For Paperwork Reduction Act Notice, see the Instructions	for Form 990.		Schedule D (Form 990) 2021		

Pai	t III Organizations Maintaining C	ollections of Art	t, Historical Tre	asures, or	Other	Similar	Assets	(contin	ued)	
3	Using the organization's acquisition, accession	on, and other records	s, check any of the	following that	make sig	nificant u	se of its			
	collection items (check all that apply):									
а	Public exhibition	d	Loan or exc	hange progra	ım					
b	Scholarly research	е	Other							
С	c Preservation for future generations									
4	4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.									
5	5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets									
	to be sold to raise funds rather than to be ma	intained as part of th	ne organization's co	llection?				Yes		No
Pai	t IV Escrow and Custodial Arrang	gements. Comple	ete if the organization	n answered "	Yes" on F	orm 990	Part IV, I	ine 9, or		
	reported an amount on Form 990, Par									
1a	Is the organization an agent, trustee, custodia	an or other intermedi	iary for contribution	s or other ass	ets not in	ncluded				
	on Form 990, Part X?						\square	Yes		No
b	If "Yes," explain the arrangement in Part XIII a									
								Amount		
С	Beginning balance					1c				
d	Additions during the year					1d				
	Distributions during the year					1e				
f	Ending balance					1f				
2a	Did the organization include an amount on Fo					y?		Yes		No
b	If "Yes," explain the arrangement in Part XIII.	Check here if the ex	planation has been	provided on F	Part XIII					
Pai	T V Endowment Funds. Complete it	f the organization an	swered "Yes" on Fo	rm 990, Part	IV, line 10	٥.				
		(a) Current year	(b) Prior year	(c) Two year	s back (d) Three y	ears back	(e) Four	years	back
1a	Beginning of year balance	17,885,630.	10,858,263.	11,527	,523.	11,47	72,533.	10,	119,	898.
b	Contributions	2,435.	3,695,895.	4	315.		2,981.	1,	005,	864.
	Net investment earnings, gains, and losses	-1,264,920.	4,012,340.		-326.	7:	21,263.		990,	031.
d	Grants or scholarships									
	Other expenditures for facilities									
	and programs	1,023,343.	680,868.	673	3,249.	6	59,254.		643,	260.
f	Administrative expenses									
g	End of year balance	15,599,802.	17,885,630.	10,858	,263.	11,52	27,523.	11,	472,	533.
2	Provide the estimated percentage of the curre	ent vear end balance	e (line 1a. column (a)) held as:						
а	Board designated or quasi-endowment	17.7690	%	,						
	Permanent endowment ► 61.8980	%	— •							
	00 000	 * %								
	The percentages on lines 2a, 2b, and 2c show	uld equal 100%.								
За	Are there endowment funds not in the posses	•	tion that are held a	nd administer	ed for the	organiza	tion			
	by:	3				3		Γ	Yes	No
	(i) Unrelated organizations							3a(i)	х	
	(ii) Related organizations							3a(ii)		Х
b	If "Yes" on line 3a(ii), are the related organizar	tions listed as require	ed on Schedule R?					3b		
4	Describe in Part XIII the intended uses of the									
Pai	t VI Land, Buildings, and Equipm									
	Complete if the organization answered	d "Yes" on Form 990	, Part IV, line 11a. S	ee Form 990	, Part X, li	ine 10.				
	Description of property	(a) Cost or o	ther (b) Cost	or other	(c) Ac	cumulate	d	(d) Book	valu	<u></u> -
		basis (investr	` '	(other)		reciation		,_,		
1a	Land									
	Buildings									
	Leasehold improvements									
	Equipment		71	1,895.	4	59,55	8.	252	2,3	37.
	Other			6,100.		18,64		617		
-	I. Add lines 1a through 1e. (Column (d) must e							869		
			 						_	

Schedule D (Form 990) 2021

Schedule D (Form 990) 2021 OREGON SYMP:	HONY ASSOCIAT	ION 9:	3-0446527 Page 3
Part VII Investments - Other Securities.			
Complete if the organization answered "Yes"	on Form 990, Part IV, line	11b. See Form 990, Part X, line 12.	
(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or er	nd-of-year market value
(1) Financial derivatives			
(2) Closely held equity interests			
(3) Other			
(A)			
(B)			
(C)			
(D)			
(E)			
(F)			
(G)			
(H)			
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)			
Part VIII Investments - Program Related.			
Complete if the organization answered "Yes"	on Form 990, Part IV, line	11c. See Form 990, Part X, line 13.	
(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or er	nd-of-year market value
(1)			
(2)			
(3)			
(4)			
(5)			

Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ► Part IX Other Assets.

(6) (7) (8) (9)

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

	(a) Description	(b) Book value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
	(Column (b) must occup Form 000 Port V and (D) line 15	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1.	(a) Description of liability	(b) Book value
(1)	Federal income taxes	
(2)	CHARITABLE GIFT ANNUITY	11,804.
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total.	(Column (b) must equal Form 990, Part X, col. (B) line 25.)	11,804.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... X

Schedule D (Form 990) 2021

Part XI Reconciliation of Revenue per Audited Financia	Statements With Revenue	per Return.	rage -
Complete if the organization answered "Yes" on Form 990, Par	t IV, line 12a.		
1 Total revenue, gains, and other support per audited financial statemen	ts	1	
2 Amounts included on line 1 but not on Form 990, Part VIII, line 12:	1 1		
A Net unrealized gains (losses) on investments			
b Donated services and use of facilities			
c Recoveries of prior year grants			
d Other (Describe in Part XIII.)	2d		
e Add lines 2a through 2d			
3 Subtract line 2e from line 1		3	
4 Amounts included on Form 990, Part VIII, line 12, but not on line 1:	45		
a Investment expenses not included on Form 990, Part VIII, line 7b			
b Other (Describe in Part XIII.) c Add lines 4a and 4b	·	40	
c Add lines 4a and 4b 5 Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I. li			
Part XII Reconciliation of Expenses per Audited Financia	al Statements With Expense	es per Return.	
Complete if the organization answered "Yes" on Form 990, Par			
		1	
2 Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a Donated services and use of facilities	2a		
b Prior year adjustments			
c Other losses			
d Other (Describe in Part XIII.)			
e Add lines 2a through 2d		2e	
3 Subtract line 2e from line 1		3	
4 Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b Other (Describe in Part XIII.)	4b		
c Add lines 4a and 4b			
5 Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I.	line 18.)	5	
Part XIII Supplemental Information.			
Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a		t V, line 4; Part X, line 2;	Part XI,
lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide	vide any additional information.		
DADE W I TAIR A.			
PART V, LINE 4:			
THE ORGANIZATION'S POLICY IS TO REALIZE	F & 68 DICMPIDITMION	T FDOM THE	
THE ORGANIZATION S POLICE IS TO REALIZE	E A 0% DISTRIBUTION	N FROM INE	
ENDOWMENT FUNDS AVERAGE FAIR VALUE OVE	R THE PRIOR 13 OTTAI	פייבפג יישפטוופי	a THE
ENDOWMENT TONDS AVERAGE TAIR VALUE OVER	K IIII IKIOK IS QUA	KILIKO IIIKOOOI	1 111111
YEAR-END PRECEEDING THE FISCAL YEAR IN	WHICH THE DISTRIB	TTTON IS PLAN	INED.
	MILOI III DIDINID	<u> </u>	1111111
DISTRIBUTIONS ARE USED TO FUND PROGRAM	S IN THE AREAS FOR	WHICH THE	
ENDOWMENTS WERE ESTABLISHED.			
PART X, LINE 2:			
-			
THE ORGANIZATIONS FOLLOW THE PROVISIONS	S OF FASB ASC 740 S	TOPIC ACCOUNT	ring .
FOR UNCERTAINTY IN INCOME TAXES. MANAGE	GEMENT HAS EVALUATI	ED THE	
ORGANIZATION'S TAX POSITIONS AND CONCLU	UDED THAT THERE ARI	E NO UNCERTA	IN TAX
POSITIONS THAT REQUIRE ADJUSTMENT TO T	HE FINANCIAL STATE		
132054 10.29-21		Schadula D (E	orm 990) 2021

SCHEDULE G (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

► Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization

Employer identification number

OREGON	SYMPHONY Z	ASSOCIATIO	NC			93-0446	527			
Part I Fundraising Activities. required to complete this part	Complete if the o	rganization answe	red "Y	es" or	n Form 990, Part IV, I	ine 17. Form 990-EZ	filers are not			
1 Indicate whether the organization raised funds through any of the following activities. Check all that apply. a										
(i) Name and address of individual or entity (fundraiser)	I III ACTIVITY I have custody I \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \									
			Yes	No						
otal				•						
List all states in which the organizatio or licensing.						it is exempt from re	gistration			

132081 10-21-21

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule G (Form 990) 2021

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000

		of fundraising event contributions and gro	oss income on Form 990	-EZ, lines 1 and 6b. List e	vents with gross receipt	s greater than \$5,000.
			(a) Event #1	(b) Event #2	(c) Other events	(d) Total events
					NONE	(add col. (a) through
			SPRING GALA	OPENING		col. (c))
a)			(event type)	(event type)	(total number)	001. (0))
Revenue						
eve.	1	Gross receipts	1,546,214.	46,400.		1,592,614.
ш						
	2	Less: Contributions	1,389,464.	46,400.		1,435,864.
			456 550			4-6
	3	Gross income (line 1 minus line 2)	156,750.			156,750.
	_					
	4	Cash prizes				
	_	Nanagah prizas				
S	5	Noncash prizes				
nse	6	Rent/facility costs	10,336.	1,500.		11,836.
Direct Expenses	0	Tient lacinty costs	10,330.	1,500.		11,050.
ίĒ	7	Food and beverages	130,596.	30,568.		161,164.
)ire	-	r coa ana povorageo		30,000		
	8	Entertainment	44,933.			44,933.
	9	Other direct expenses	44,933. 13,102.			44,933. 13,102.
	10		9 in column (d)		>	231,035.
	11	Net income summary. Subtract line 10 from li			>	-74,285.
Pa	rt I		answered "Yes" on Form	990, Part IV, line 19, or r	eported more than	
		\$15,000 on Form 990-EZ, line 6a.	Γ	T =		T
ь			(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue				billigo/progressive billigo		coi. (a) through coi. (c)
Re	_	0				
	1	Gross revenue				
	2	Cash prizes				
Direct Expenses						
pen	3	Noncash prizes				
τĒ						
irec	4	Rent/facility costs				
	5	Other direct expenses				
			Yes %	Yes %	Yes %	
	6	Volunteer labor	No No	No	No	
	_				_	
	7	Direct expense summary. Add lines 2 through	15 in column (d)		>	
	8	Net gaming income summary. Subtract line 7	from line 1 column (d)			
	0	Net garning income summary. Subtract line r	monthine t, column (a)			
9	En	ter the state(s) in which the organization condu	cts gaming activities:			
		the organization licensed to conduct gaming ac				Yes No
		No," explain:				
		·				
		ere any of the organization's gaming licenses re				Yes No
b	If "	Yes," explain:				
	_					

132082 10-21-21 Schedule G (Form 990) 2021

Sch	edule G (Form 990) 2021 OREGON SYMPHONY ASSOCIATION 93	-0440) <u> </u>	Page 3
11	Does the organization conduct gaming activities with nonmembers?		Yes	No No
	Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed			
	to administer charitable gaming?		Yes	☐ No
13	Indicate the percentage of gaming activity conducted in:			
а	The organization's facility	13a		%
b	An outside facility	13b		%
14	Enter the name and address of the person who prepares the organization's gaming/special events books and records:			
	Name			
	Address			
15a	Does the organization have a contract with a third party from whom the organization receives gaming revenue?		Yes	☐ No
b	o If "Yes," enter the amount of gaming revenue received by the organization > \$ and the amount of gaming revenue retained by the third party > \$			
c	If "Yes," enter name and address of the third party:			
	Name			
	Address >			
16	Gaming manager information:			
	Name			
	Gaming manager compensation ▶ \$			
	Description of services provided			
	Director/officer Employee Independent contractor			
17	Mandatory distributions:			
	solutions is the organization required under state law to make charitable distributions from the gaming proceeds to			
	retain the state gaming license?		Yes	☐ No
b	• Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the	:		
	organization's own exempt activities during the tax year > \$			
Pa	Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and	Part III, lir	nes 9,	9b, 10b,
	15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.	,	,	, ,

Schedule G	G (Form 990)	OREGON	SYMPHONY	ASSOCIATION	93-0446527	Page 4
Part IV	G (Form 990) Supplemental Infor	mation (con	ntinued)			
		(COII	tiriaca)			

SCHEDULE I (Form 990)

Department of the Treasury Internal Revenue Service **Grants and Other Assistance to Organizations, Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

► Attach to Form 990.

► Go to www.irs.gov/Form990 for the latest information.

2021
Open to Public

Inspection

Schedule I (Form 990) 2021

OMB No. 1545-0047

Employer identification number Name of the organization 93-0446527 OREGON SYMPHONY ASSOCIATION Part I **General Information on Grants and Assistance** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection X No criteria used to award the grants or assistance? Yes Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990. Part IV. line 21. for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed. (f) Method of 1 (a) Name and address of organization (b) EIN (c) IRC section (d) Amount of (e) Amount of (g) Description of (h) Purpose of grant valuation (book, or government (if applicable) cash grant noncash noncash assistance or assistance FMV, appraisal, assistance other) PORTLAND YOUTH PHILHARMONIC 9320 SW BARBUR BLVD, STE 140 93-0386902 501(C)(3) PORTLAND, OR 97219 0 2022 WONDER AWARD 10,000.

2 Enter total number of section 501(c)(3) a	and government or	ganizations listed in the	e line 1 table	 	 >	1
3 Enter total number of other organization	s listed in the line	1 table				0

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non- cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistar
Supplemental Information. Provide the information.	tion required in Part I, lin	e 2; Part III, columi	n (b); and any other ad	Iditional information.	

SCHEDULE J (Form 990)

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

➤ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

➤ Attach to Form 990.

ZUZ I

OMB No. 1545-0047

Open to Public Inspection

Internal Revenue Service Name of the organization

Department of the Treasury

► Go to www.irs.gov/Form990 for instructions and the latest information.

OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

Pa	art I Questions Regarding Compensation			
			Yes	No
1 a	Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990,			
	Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.			
	First-class or charter travel X Housing allowance or residence for personal use			
	Travel for companions X Payments for business use of personal residence			
	Tax indemnification and gross-up payments Health or social club dues or initiation fees			
	Discretionary spending account Personal services (such as maid, chauffeur, chef)			
b	If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or			
	reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	1b	Х	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors,			
	trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?	2		X
3	Indicate which, if any, of the following the organization used to establish the compensation of the organization's			
	CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to			
	establish compensation of the CEO/Executive Director, but explain in Part III.			
	X Compensation committee X Written employment contract			
	Independent compensation consultant X Compensation survey or study			
	X Form 990 of other organizations X Approval by the board or compensation committee			
4	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing			
	organization or a related organization:			
а	Receive a severance payment or change-of-control payment?	4a		X
b	Participate in or receive payment from a supplemental nonqualified retirement plan?	4b		X
С	Participate in or receive payment from an equity-based compensation arrangement?	4c		Х
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.			
_	Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation			
	contingent on the revenues of:			v
a	The organization?	5a		X
D	Any related organization? If "Yes" on line 5a or 5b, describe in Part III.	5b		Λ
_	•			
6	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation			
_	contingent on the net earnings of:	6-		Х
	The organization?	6a		X
a	Any related organization?	6b		
7	If "Yes" on line 6a or 6b, describe in Part III.			
′	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III	7	Х	
8	Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the	Ľ,		
5	initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	8		х
9				
J	D 1 1 1 50 1050 0()0	9		
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2021

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

		(B) Breakdown of W	I-2 and/or 1099-MISC compensation	C and/or 1099-NEC	(C) Retirement and other deferred	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	in column (B)
(A) Name and Title		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	compensation			reported as deferred on prior Form 990
(1) SCOTT SHOWALTER	(i)	320,712.	50,000.	0.	14,500.	8,786.	393,998.	0.
PRESIDENT/CEO	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) RUSSELL KELBAN	(i)	155,717.	0.	0.	3,472.	7,302.	166,491.	0.
VP MARKETING & STRATEGIC ENGAGEMENT	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 1A:

A. SCOTT SHOWALTER, PRESIDENT & CEO. PAYMENT FOR BUSINESS USE OF HIS

RESIDENCE FOR POST

CONCERT RECEPTIONS AND DONOR DINNERS. THIS IS PAID AS TAXABLE COMPENSATION.

B. DAVID DANZMAYR, MUSIC DIRECTOR. HOUSING ALLOWANCE PAID MONTHLY AS

TAXABLE

COMPENSATION.

PART I, LINE 1B:

BOTH ARRANGEMENTS ABOVE ARE INCLUDED IN THE EMPLOYMENT CONTRACTS OF THE

STATED EMPLOYEES. THESE ARE SIGNED BY THE BOARD OF DIRECTORS.

PART I, LINE 7:

THE CEO, SCOTT SHOWALTER WAS GIVEN A DISCRETIONARY BONUS OF \$50K (ALLOWED

FOR IN THE EMPLOYMENT CONTRACT) IN DECEMBER 2022.

SCHEDULE L

Department of the Treasury

(Form 990)

Transactions With Interested Persons

► Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.

► Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open To Public Inspection

Internal Revenue Service	▶ G	o to www	irs.gov.	/Form99	90 for i	nstruc	tions and the	late	est information.			In	spect	ion	
Name of the organization										Em	oloyer	ident	ificati	on nu	mber
	OREGON											465	27		
Part I Excess Ben	efit Trans	actions	(section	n 501(c)(3), sect	ion 50	1(c)(4), and se	ctio	n 501(c)(29) orga	nizatio	ns on	ly).			
Complete if the	organization	answered	d "Yes" c	n Form	990, Pa	art IV, I	ine 25a or 25b	o, or	Form 990-EZ, Pa	art V, I	ine 40	b.			
1 (a) Name of disqualified	person	(b) Relati				lified	1	c) D	escription of tran	sactio	n		(d)	Corre	cted?
— (a) manus or anoquamion	po. 55.11	pe	rson and	organiz	ation		•						<u> </u>	es	No
													+	-	
													+	+	
													+	-	
													+	-	
2 Enter the amount of tax	incurred by	the organi	zation m	nanagers	or disc	qualifie	d persons dur	ing t	the year under						
4050	•	•		Ū		•	•	•			> \$				
3 Enter the amount of tax											> \$				
Part II Loans to an	id/or From	Interes	sted Pe	ersons	.										
·	ŭ					, Part \	V, line 38a or F	orm	n 990, Part IV, lin	e 26; d	or if th	e orga	nizatio	on	
reported an am				14.0	22. .oan to or			Ι.				(h) Ap	nroved	623.34	
(a) Name of interested person	(b) Relation with organiz		Purposof of loan) fro	m the		e) Original cipal amount	(1	f) Balance due	(g) defa) In ault?	by bo	ard or	1 (1) V	/ritten ment?
intoroctou porcon	With Organiz		or loan		nization?		orpar amount				Ι	comm			1
				To	From					Yes	No	Yes	No	Yes	No
								\vdash							
															_
Part III Grants or A	ecictanca	Ronofit	ina Int	arasta	d Dar	eone	> \$								
Complete if the			_												
(a) Name of interested							c) Amount of		(d) Type	of		10	\ Durn	ose o	f
(a) Name of interested	person		elationsh erested p			l '	assistance		assistan				assist		'
			the organ												
	·														
						<u> </u>									
		1				I									

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule L (Form 990) 2021

(a) Name of interested person		3b, or 28c.		(-) O		
	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing organizatio revenues		
				Yes	No	
PINK MARTINI	BAND FOUNDER IS A B	180,000.	GUEST ARTIS		Х	
Part V Supplemental Information. Provide additional information for resp.	onses to questions on Schedule L (see ii	nstructions).				
·						
SCH L, PART IV, BUSINESS T	RANSACTIONS INVOLVIN	G INTERESTE	D PERSONS:			
(A) NAME OF PERSON: PINK M	ARTINI					
(B) RELATIONSHIP BETWEEN I	NTERESTED PERSON AND	ORGANTZATI	ON:			
		011011111111	.0211			
BAND FOUNDER IS A BOARD ME	MBER					
(D) DEGGREDATION OF MD11/G16						
(D) DESCRIPTION OF TRANSAC	TION: GUEST ARTIST F	EES				

SCHEDULE M (Form 990)

Noncash Contributions

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

▶ Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

➤ Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization OREGON SYMPHONY ASSOCIATION Employer identification number 93-0446527

Par	TI Types of Property							
		(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1	noncash cor	(d) of determin ntribution ar		s
4	Art Works of art		items continuated	r omi ooo, r are viii, iirio 1	9			
1	Art - Works of art							
2	Art - Historical treasures							
3	Art - Fractional interests							
4	Books and publications							
5	Clothing and household goods							
6	Cars and other vehicles							
7	Boats and planes							
8	Intellectual property							
9	Securities - Publicly traded							
10	Securities - Closely held stock							
11	Securities - Partnership, LLC, or							
	trust interests							
12	Securities - Miscellaneous							
13	Qualified conservation contribution -							
	Historic structures							
14	Qualified conservation contribution - Other							
15	Real estate - Residential							
16	Real estate - Commercial							
17	Real estate - Other							
18	Collectibles							
19	Food inventory							
20	Drugs and medical supplies							
21	Taxidermy							
22	Historical artifacts							
23	Scientific specimens							
24	Archeological artifacts							
25	Other ► (SUPPLIES)	X	11	50.506	. PURCHASE	PRICE		
26	Other (EVENT ITEMS)	X	4		• PURCHASE			
27	Other (_	33,210	0110111102			
28	Other ()							
<u>20</u> 29	Number of Forms 8283 received by the organization	ation during	the tax year for e	ontributions				
25	for which the organization completed Form 828							
	for which the organization completed form 626	o, rait v, D	onee Acknowledge	ement 29			Yes	No
202	During the year did the organization receive by	contributio	n any proporty ron	orted in Part Llinas 1 thro	igh 28 that it		163	NO
Sua	During the year, did the organization receive by must hold for at least three years from the date							
	,		,			20-		Х
	exempt purposes for the entire holding period?					30a		$\overline{}$
	If "Yes," describe the arrangement in Part II.	a l: a Ala aAa	i				v	
31	Does the organization have a gift acceptance po	•	•	•		31	Х	
32a	Does the organization hire or use third parties o contributions?					32a		х
b	If "Yes," describe in Part II.							
33	If the organization didn't report an amount in co	olumn (c) for	a type of property	for which column (a) is ch	ecked,			
	describe in Part II.							
ΙЦΔ	For Panerwork Reduction Act Notice see t	he Instruct	ions for Form 990)	School	ule M (Forn	990)	2021

132142 11-17-21

SCHEDULE O (Form 990)

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047 Inspection

Department of the Treasury Internal Revenue Service Name of the organization

OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

Ollecti Pillinoit inproduition
FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
EXPERIENCES.
FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
STRONGER COMMUNITY.
FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:
IN HIS FIRST FULL SEASON AS JEAN VOLLUM MUSIC DIRECTOR, DAVID DANZMAYR
LED THE ORCHESTRA'S TRIUMPHANT RETURN TO THE STAGE, FITTINGLY BEGINNING
WITH MAHLER'S "RESURRECTION" SYMPHONY AND CONCLUDING WITH BEETHOVEN'S
"ODE TO JOY." IN BETWEEN, OUR CLASSICAL SERIES FEATURED AN ARTIST OF
COLOR OR A FEMALE ARTIST ON EVERY PROGRAM AS COMPOSER, CONDUCTOR,
AND/OR FEATURED SOLOIST, A RARE FEAT AS BOTH WOMEN AND ARTISTS OF COLOR
REMAIN UNDERREPRESENTED IN THE FIELD.
WE BROUGHT NEW WORKS TO LIFE THAT ENRICH THE ORCHESTRAL CANON,
PARTICULARLY IN CONJUNCTION WITH THE ARTISTS OF OUR CREATIVE ALLIANCE.
ARTIST-IN-RESIDENCE JOHANNES MOSER PREMIERED A CELLO CONCERTO FROM
COMPOSER ROBIN HOLLOWAY, AND WE PREMIERED AN ORCHESTRAL ARRANGEMENT OF
NATHALIE JOACHIM'S SUITE FROM FANM D'AYITI BASED ON THE MUSIC OF HER
HAITIAN HERITAGE. TWO CO-COMMISSIONED PIECES ALSO CAME TO LIFE THIS
SPRING: CREATIVE CHAIR GABRIEL KAHANE DEBUTED HIS PIANO CONCERTO WITH
HIS FATHER, JEFFREY KAHANE, AS SOLOIST, AND OUR OWN JTTIK CLARK
PERFORMED A NEW TUBA CONCERTO BY THE WORLD-RENOWNED WYNTON MARSALIS.
BEYOND OUR CLASSICAL PROGRAMS, OUR POPS, POPCORN, AND SPECIALS SERIES
TREATED AUDIENCES TO A WIDE DIVERSITY OF GENRES INCLUDING ROCK. INDIE.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2021

Employer identification number Name of the organization 93-0446527 OREGON SYMPHONY ASSOCIATION FILM SCORES, RAP, R&B, AFRO-CUBAN JAZZ, AND MORE. ARTISTS FROM GLADYS KNIGHT TO THE MAMBO KINGS, LESLIE ODOM JR. TO BEN FOLDS, AND THE JAZZ AT LINCOLN CENTER ORCHESTRA TO THE MEXICAN FOLK-INSPIRED MUSIC OF BELOVED PIXAR FILM COCO BROUGHT A RICH TAPESTRY OF MUSICAL TRADITIONS TO OUR STAGE. WE ALSO INVESTED IN OREGON ARTISTS, WITH FEATURED SOLOS FROM SYMPHONY MUSICIANS SARAH KWAK (CONCERTMASTER), MARTIN HEBERT (OBOE), AND MICHAEL ROBERTS (PERCUSSION), ALONGSIDE WORKS FROM PORTLAND-BASED COMPOSERS KENJI BUNCH AND ANDY AKIHO. IN MAY, TOGETHER WITH RESONANCE ENSEMBLE, WE GAVE THE WORLD PREMIERE OF AN AFRICAN AMERICAN REQUIEM, A 20-MOVEMENT PIECE FOR ORCHESTRA, CHOIR, AND SOLOISTS, BY PORTLAND COMPOSER DAMIEN GETER. THIS WORK HONORS VICTIMS OF RACIAL VIOLENCE THROUGH CENTURIES, FROM PAST LYNCHINGS TO PRESENT-DAY DEATHS BY POLICE VIOLENCE. GETER'S REQUIEM INTEGRATES THE TRADITIONAL LATIN REQUIEM TEXT WITH CONTEMPORARY TEXTS, DRAWING UPON THE CLASSICAL, JAZZ, AND GOSPEL TRADITIONS AND INCORPORATING LYRICS FROM AFRICAN AMERICAN SPIRITUALS, CIVIL RIGHTS ACTIVISTS, AND POETS. A GROUP OF AFRICAN AMERICAN COMMUNITY LEADERS, INCLUDING BOARD MEMBER CHABRE VICKERS, HELPED THE SYMPHONY TO DESIGN OPPORTUNITIES FOR POST-CONCERT REFLECTION IN THE CONCERT HALL. LOCAL ORGANIZATIONS ALSO JOINED US IN THE LOBBY TO SHARE RESOURCES SUPPORTING THE BLACK COMMUNITY IN PORTLAND.

THE REQUIEM HAS ALREADY HAD DEEP IMPACT BOTH LOCALLY AND NATIONWIDE.

THE PIECE WAS THE CAPSTONE OF A CIVIL RIGHTS CURRICULUM DEVELOPED IN

PARTNERSHIP WITH RESONANCE ENSEMBLE AND PORTLAND PUBLIC SCHOOLS. PPS

STUDENTS LEARNED ABOUT THE HISTORY OF RACIAL VIOLENCE IN PORTLAND AND

THROUGHOUT AMERICA, STUDIED THE REQUIEM, ATTENDED THE CONCERT FOR FREE,

AND AFTERWARD DISCUSSED IT AND THEIR RESPONSES IN STRUCTURED DIALOG.

Schedule O (Form 990) 2021

Name of the organization OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

THE PREMIERE REACHED A NATIONAL AUDIENCE THANKS TO LIVE RADIO BROADCAST

ON ALL CLASSICAL PORTLAND AND WQXR IN NEW YORK. MANY RADIO STATIONS

AROUND THE COUNTRY RE-AIRED OUR BROADCAST AS PART OF THEIR JUNETEENTH

CELEBRATIONS, AND THE PIECE HAS ALREADY BEEN PERFORMED BY OTHER

ORCHESTRAS, INCLUDING AT THE KENNEDY CENTER IN WASHINGTON, D.C.

WE EMBRACED NEW CONCERT FORMATS, INNOVATING BY ALIGNING WITH THE

EVOLVING TASTES OF A YOUNGER MARKET, REMAINING CULTURALLY RELEVANT, AND

REACHING OUTSIDE OF DOWNTOWN PORTLAND. GABRIEL KAHANE CURATED TWO

ORIGINAL PERFORMANCES AT THE NEW RESER CENTER FOR THE ARTS. HE ALSO

HOSTED OUR NEW OPEN MUSIC SERIES, WHICH EXPLORED THE CREATIVE PROCESSES

OF THREE COMPOSERS ON THE SEASON: KENJI BUNCH, MISSY MAZZOLI, AND

NATHALIE JOACHIM. THESE CONCERTS FEATURED CHAMBER ENSEMBLES THAT

ALLOWED US TO DEPLOY OUR MUSICIANS IN DIFFERENT COMBINATIONS AND IN

MORE INTIMATE VENUES LIKE REVOLUTION HALL, MISSISSIPPI STUDIOS, AND

ALBERTA ROSE THEATER. WE ALSO LAUNCHED OUR FIRST LIVESTREAM SERIES OF

SIX CONCERTS, AN EFFORT TO EXPAND MUSIC ACCESS. PEOPLE UNABLE TO COME

TO THE HALL DUE TO PHYSICAL, GEOGRAPHICAL, OR ECONOMIC BARRIERS CAN NOW

ACCESS OREGON SYMPHONY PERFORMANCES FROM THEIR HOMES.

WE EXPERIMENTED WITH NEW SUBJECT MATTER, IN KEEPING WITH OUR COMMITMENT

TO EXPLORE TIMELY SOCIETAL THEMES THROUGH MUSIC. WE ADAPTED TAYLOR

MAC'S PULITZER-NOMINATED A 24-DECADE HISTORY OF POPULAR MUSIC FOR ITS

FIRST ORCHESTRAL STAGING. THIS BOLD WORK FOCUSES ON HISTORICALLY

MARGINALIZED COMMUNITIES WHILE POKING FUN AT THE PATRIARCHAL,

HOMOPHOBIC, AND RACIST SYSTEMS THAT OPPRESSED THEM. INDIE ARTIST KISHI

BASHI JOINED US TO PERFORM IMPROVISATIONS ON E09066, HIS VISUALLY

STUNNING MULTIMEDIA PIECE EXPLORING THE IMPACT OF THE JAPANESE

Name of the organization
OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

INTERNMENT ORDER DURING WWII. 2022 MARKED THE 80TH ANNIVERSARY OF

EXECUTIVE ORDER 9066, AN ACTION THAT DEEPLY AFFECTED OREGON'S

JAPANESE-AMERICAN COMMUNITY IN WAYS THAT ARE STILL FELT TODAY.

IN ADDITION TO PROGRAMMING WORKS FROM UNDERREPRESENTED COMPOSERS, WE ALSO INVESTED IN A MORE EQUITABLE FUTURE FOR CLASSICAL MUSIC. IN APRIL, WE HOSTED EARSHOT, A PROGRAM OF THE AMERICAN COMPOSER'S ORCHESTRA THAT SUPPORTS YOUNG COMPOSERS BY GIVING THEM AN OPPORTUNITY TO HAVE THEIR WORKS REHEARSED BY A PROFESSIONAL ENSEMBLE. WE HOSTED FOUR YOUNG LATINX COMPOSERS TWO MEN AND TWO WOMEN WHO HAD THEIR PIECES READ BY THE ORCHESTRA, AND WORKED WITH MENTOR COMPOSERS KENJI BUNCH, ANDY AKIHO, AND ANDREIA PINTO-CORREIA TO FURTHER DEVELOP THEIR COMPOSITIONS. ORCHESTRA REHEARSAL TIME IS EXCEEDINGLY RARE, ESPECIALLY FOR YOUNG COMPOSERS, AND BY PARTICIPATING IN PROGRAMS LIKE EARSHOT WE INVEST IN THE DEVELOPMENT OF DIVERSE VOICES THAT WILL FILL ORCHESTRA HALLS IN THE YEARS TO COME. ADDITIONAL WORK AT A SYSTEMIC LEVEL TO SUPPORT EQUITY IN OUR INDUSTRY INCLUDES OUR PARTNERSHIPS WITH THE NATIONAL ALLIANCE FOR AUDITION SUPPORT THAT HELPS BLACK AND LATINX ARTISTS AFFORD TO TRAVEL FOR AUDITIONS, AND THE SPHINX QUALIFIED ARTISTS PROGRAM THAT IDENTIFIES UNDERREPRESENTED ARTISTS FOR SUBSTITUTE AND AUDITION OPPORTUNITIES.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

THEIR PRESENCE IN OUR COMMUNITY ENABLES A RICH ECOSYSTEM OF ARTISTIC

OPPORTUNITIES THAT SHARE THE POWER OF MUSIC TO EDUCATE, INSPIRE, UNITE,

AND HEAL.

AS SCHOOLS LIMITED FIELD TRIPS, WE ADAPTED OUR SIGNATURE YOUTH PROGRAMS

FOR USE IN THE CLASSROOM. WE PRODUCED A DIGITAL VERSION OF OUR YOUNG

PEOPLE'S CONCERT, WHICH WE SHARED FOR FREE ON OUR WEBSITE IN MAY AND
DISTRIBUTED IN PARTNERSHIP WITH MUSIC WORKSHOP, A NONPROFIT THAT SHARES
MUSIC EDUCATION VIDEOS WITH TEACHERS AROUND THE WORLD. CALLED
SINFNICA!, THESE FOUR 20-MINUTE EPISODES ARE FULLY BILINGUAL AND TAKE
STUDENTS ON A JOURNEY ACROSS LATIN AMERICA AND THE CARIBBEAN. WE ALSO
DISSEMINATED THE VIDEOS DIRECTLY TO MORE THAN 50 SCHOOL DISTRICT
PARTNERS THROUGHOUT OREGON AND SW WASHINGTON FOR USE IN CLASSROOMS. WE

SING SONGS AND PLAY THE RECORDER THROUGHOUT THE YEAR, CULMINATING IN A
PRE-RECORDED VERSION OF THE FINAL CONCERT WHICH ALLOWED THEM TO PLAY
ALONG WITH A FULL ORCHESTRA. FINALLY, A THIRD SEASON OF SYMPHONY
STORYTIME HAS FINISHED PRODUCTION AND NEW EPISODES IN ENGLISH AND
SPANISH ARE BEING RELEASED THROUGHOUT AUGUST AND SEPTEMBER, JUST IN

TIME FOR TEACHERS TO INCORPORATE THEM INTO THEIR SCHOOL YEAR CURRICULA

THROUGHOUT AND BEYOND METRO PORTLAND. STUDENTS IN GRADES 3-5 LEARNED TO

PROVIDED CARNEGIE HALL'S LINK UP CURRICULUM TO 28 SCHOOL PARTNERS

FOR 22/23.

Name of the organization

MUSIC IS AN ESSENTIAL PART OF A THRIVING COMMUNITY, AND WE WERE PROUD

TO OFFER THREE FREE, LARGE-SCALE CONCERTS THROUGHOUT THE YEAR SERVING

TENS OF THOUSANDS OF PEOPLE. PARTICULARLY DURING SUCH POLITICALLY

FRAUGHT TIMES, MUSIC CREATES SPACE FOR PEOPLE OF ALL BACKGROUNDS TO

EXPERIENCE ART TOGETHER AND BEGIN TO HEAL FROM THE MANY CHALLENGES

FACING OUR COMMUNITY. THE WATERFRONT CONCERT OVER LABOR DAY WAS OUR

FIRST FULL PERFORMANCE IN 545 DAYS, AND A JOYFUL RETURN TO THE HEART OF

DOWNTOWN. IN APRIL, MORE THAN 700 OF OUR COMMUNITY-BASED ARTS,

EDUCATION, AND SOCIAL SERVICE PARTNERS FILLED THE CONCERT HALL DURING

THE 125TH ANNIVERSARY CELEBRATION CONCERT, MADE POSSIBLE BY OUR GALA

PATRONS. AND IN MAY, WE WERE PROUD TO PERFORM THE ROSE CITY REUNION

Employer identification number

Name of the organization OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

CONCERT AS PART OF PORTLAND'S ICONIC ROSE FESTIVAL. AS OREGON'S LARGEST AND MOST VISIBLE MUSIC ORGANIZATION, WE ARE COMMITTED TO HELPING LEAD

THE CULTURAL, SOCIAL, SPIRITUAL, AND ECONOMIC LIFE OF OUR REGION.

WITH THE RETURN OF LIVE PERFORMANCE IN OUR CONCERT HALL, WE WERE PLEASED TO WELCOME BACK BOTH PRELUDE PERFORMANCES AND ORCHESTRA REHEARSAL VISITS FOR STUDENTS. THESE OPPORTUNITIES ARE AN IMPORTANT WAY THAT YOUNG MUSICIANS CAN SEE PERFORMANCES WITH NO FINANCIAL BARRIERS TO ENTRY. WE ALSO ARRANGED FOR STUDENT GROUPS TO VISIT WITH WORLD CLASS ARTISTS LIKE VIOLINIST JOSHUA BELL, AND THE JAZZ AT LINCOLN CENTER ORCHESTRA FEATURING WYNTON MARSALIS. IN A TYPICAL YEAR, ROUGHLY 1,000 STUDENTS ACCESS THESE INSPIRING OPPORTUNITIES, MANY OF WHOM WOULD BE OTHERWISE UNABLE TO ATTEND A SYMPHONY CONCERT. COMBINED WITH OUR ARTS FOR ALL \$5 TICKETS FOR EBT CARDHOLDERS, DEEPLY DISCOUNTED STUDENT TICKETS, AND FREE RADIO BROADCASTS ON ALL CLASSICAL AND AMERICAN PUBLIC MEDIA THAT REACH MORE THAN 20 MILLION LISTENERS WORLDWIDE, WE ARE REMOVING BARRIERS TO ALLOW ALL PEOPLE TO ACCESS GREAT ART. WE UNDERTOOK A FIFTH YEAR OF THE LULLABY PROJECT IN PARTNERSHIP WITH PORTLAND HOMELESS FAMILY SOLUTIONS. THEIR COVID PROTOCOLS PREVENTED OUR TYPICAL LARGE GROUP GATHERING FOR SONGWRITING, SO INSTEAD OUR SINGER-SONGWRITERS WORKED ONE-ON-ONE WITH FAMILIES LIVING AT PHFS TO WRITE THEIR PIECES TOGETHER. THE LULLABY PROJECT CELEBRATION CONCERT, DURING WHICH THE FAMILIES, SINGER-SONGWRITERS, AND OREGON SYMPHONY MUSICIANS WILL SHARE THE LULLABIES WITH THE PUBLIC, WILL TAKE PLACE IN SEPTEMBER AT LENTS PARK NEAR THE PHFS FAMILY VILLAGE IN EAST PORTLAND. EACH FAMILY WILL RECEIVE A PROFESSIONAL-QUALITY RECORDING OF ALL THE LULLABIES FROM THE YEAR, ALLOWING THEM TO LISTEN TO AND SING THEM FOR YEARS TO COME. IN THIS WAY, THE PROJECT IS FULFILLING ITS GOALS TO

Schedule O (Form 990) 2021

<u>Schedule O (Form 990) 2021</u> Page **2**

Name of the organization OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

STRENGTHEN FAMILY BONDS AND IMPROVE HEALTH OUTCOMES FOR FAMILIES

EXPERIENCING HOMELESSNESS.

FORM 990, PART VI, SECTION A, LINE 1A:

THE EXECUTIVE COMMITTEE IS AUTHORIZED TO ACT ON BEHALF OF THE BOARD DURING

THE INTERVALS BETWEEN FULL BOARD MEETINGS. THE EXECUTIVE COMMITTEE

POSSESSES THE FULL POWER OF THE BOARD.

FORM 990, PART VI, SECTION A, LINE 2:

THOMAS LAUDERDALE, BOARD MEMBER, IS FOUNDER/OWNER OF PINK MARTINI, A
PERFORMING GROUP THAT WORKS OFTEN WITH THE OREGON SYMPHONY.

FORM 990, PART VI, SECTION A, LINE 3:

THE EXECUTIVE COMMITTEE IS AUTHORIZED TO ACT ON BEHALF OF THE BOARD DURING

THE INTERVALS BETWEEN FULL BOARD MEETINGS. THE EXECUTIVE COMMITTEE

POSSESSES THE FULL POWER OF THE BOARD.

FORM 990, PART VI, SECTION B, LINE 11B:

FORM 990 WILL BE REVIEWED BY THE FINANCE COMMITTEES PRIOR TO SUBMISSION TO
THE IRS. THE FULL BOARD WILL RECEIVE AN ELECTRONIC COPY OF THE FULL FORM
PRIOR TO SUBMISSION.

FORM 990, PART VI, SECTION B, LINE 12C:

THE BOARD OF DIRECTORS CONSISTENTLY MONITORS ANY POSSIBILITY OF A CONFLICT
OF INTEREST. BOARD MEMBERS HAVE RECUSED THEMSELVES FROM VOTING ON POLICIES
THAT MIGHT AFFECT THEM: FOR EXAMPLE, IF THE BOARD IS VOTING ON A MOTION
THAT WILL INCREASE MUSICIAN COMPENSATION, DIRECTORS WHO ARE ALSO EMPLOYED
BY THE SYMPHONY AS MUSICIANS IN THE ORCHESTRA HAVE CITED A CONFLICT OF

132212 11-11-21

Schedule O (Form 990) 2021 **Employer identification number** Name of the organization 93-0446527 OREGON SYMPHONY ASSOCIATION INTEREST AND RECUSED THEMSELVES FROM VOTING ON THE MOTION. FORM 990, PART VI, SECTION B, LINE 15: FOR KEY EMPLOYEES OF THE ORGANIZATION, SPECIFICALLY THE CEO AND MUSIC DIRECTOR, MULTIYEAR EMPLOYMENT CONTRACTS ARE SIGNED. THESE CONTRACTS ARE PREPARED USING COMPARABILITY DATA BASED ON INFORMATION FROM THE SEARCH FIRM (FOR NEW HIRES) AND INDUSTRY REPORTS SUCH AS THE LEAGUE OF AMERICAN ORCHESTRAS ANNUAL WAGE SURVEYS. AT THE TIME OF PREPARATION, AN ADHOC COMPENSATION COMMITTEE FROM THE INDEPENDENT BOARD IS CREATED. EACH CONTRACT IS REVIEWED ON AN ANNUAL BASIS BY THE EXECUTIVE COMMITTEE. THE PROCESS IS SUBSTANTIATED THROUGH THE ACCEPTANCE OF THE ANNUAL BUDGET BY THE BOARD AND THE COMMITTEES. FORM 990, PART VI, SECTION C, LINE 18: FORM 990 IS AVAILABLE ON THE WEBSITE ORSYMPHONY.ORG AND IS UPLOADED TO GUIDESTAR. COPIES ARE ALSO AVAILABLE UPON REQUEST. FORM 990, PART VI, SECTION C, LINE 19: THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST. FINANCIAL STATEMENTS ARE ALSO PUBLISHED ON THE ORGANIZATION'S WEBSITE.

FORM 990, PART XII, LINE 2C:

THIS PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR.

SCHEDULE R (Form 990)

Related Organizations and Unrelated Partnerships

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

Attach to Form 990.

Department of the Treasury Internal Revenue Service Name of the organization

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

OREGON SYMPHON	Y ASSOCIATION	93-04465	527			
Part I Identification of Disregarded Entities. Complet	te if the organization answered "Yes"	on Form 990, Part IV, line 33	3.			
(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state o foreign country)	(d) Total inco	me End-of-year	assets Direct of	(f) controlling ntity
	_					
Part II Identification of Related Tax-Exempt Organizations during the tax year.	tions. Complete if the organization a	answered "Yes" on Form 990), Part IV, line 34, b	ecause it had one o	or more related tax-exe	mpt
(a)	(b)	(c)	(d)	(e)	(f)	(g) Section 512(b)(13)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section	(f) Direct controlling entity	contr	g) 512(b)(13) rolled ity?
				501(c)(3))		Yes	No
OREGON SYMPHONY FOUNDATION - 93-1225609							
921 SW WASHINGTON, SUITE 200	SUPPORT OF THE OREGON				OREGON SYMPHONY		
PORTLAND, OR 97205	SYMPHONY ASSOCIATION	OREGON	501(C)(3)	LINE 12A, I	ASSOCIATION	X	
OREGON SYMPHONY ASSOCIATION IN SALEM -	BRING SYMPHONIC MUSIC AND						
93-6031819, 921 SW WASHINGTON, SUITE 200,	THE OREGON SYMPHONY TO				OREGON SYMPHONY		
PORTLAND, OR 97205	SALEM	OREGON	501(C)(3)	LINE 10	ASSOCIATION	Х	
	-						
]						

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2021

		0 11 20 1	"' "	D . N . II . O .		
Dort III Ide	entification of Related Organizations Taxable as a Partnership.	Complete if the organization answered	"Yes" on Form 990	, Part IV, line 34,	because it had one or r	nore related
org	ganizations treated as a partnership during the tax year.					

(a) Name, address, and EIN of related organization	(b) Primary activity	Legal domicile (state or foreign	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	Disprop alloca	h) ortionate ations?	(i) Code V-UBI amount in box 20 of Schedule	(j) General managir partner	(k) Percentage ownership
		country)		sections 512-514)			Yes	No	K-1 (Form 1065)	Yes N	0

Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	entity:	
		country						Yes	No

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

Page 3

Yes No

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

1	During the tax year, did the organization engage in any of the following transactions with o	one or more rela	ated organizations listed in	n Parts II-IV?			
а	Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		-		1a		Х
b	Gift, grant, or capital contribution to related organization(s)				1b		Х
С	Gift, grant, or capital contribution from related organization(s)				1c		Х
	Loans or loan guarantees to or for related organization(s)				1d		Х
	Loans or loan guarantees by related organization(s)				1e		Х
	, , , , , , , , , , , , , , , , , , , ,						
f	Dividends from related organization(s)				1f		Х
а	Sale of assets to related organization(s)				1g		Х
h	Purchase of assets from related organization(s)				1h		Х
	Exchange of assets with related organization(s)				1i		Х
i	Lease of facilities, equipment, or other assets to related organization(s)				1i		Х
•							
k	Lease of facilities, equipment, or other assets from related organization(s)				1k		Х
ı	Performance of services or membership or fundraising solicitations for related organization	n(s)			11	Х	
· m	Performance of services or membership or fundraising solicitations by related organization				1m		Х
	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)				1n		X
					10		X
·	onaling of paid omproyose man related organization(c)						
n	Reimbursement paid to related organization(s) for expenses				1p		х
	Reimbursement paid by related organization(s) for expenses				1a		X
ч	Thembursement paid by related organization(s) for expenses				-19		
	Other transfer of cash or property to related organization(s)				1r		х
					1s		X
	If the answer to any of the above is "Yes," see the instructions for information on who mus				13		
_		,		•			
	(a) Name of related organization Tra	(b) ansaction	(c) Amount involved	(d) Method of determining amount invo	olved		
	· · · · · · · · · · · · · · · · · · ·	ype (a-s)		gg			
1) (OREGON SYMPHONY ASSOCIATION IN SALEM	L	240,000.	CASH			
-,			.,				
2)							
3)							
4)							
5)							
6)							
2010	0.44.47.04			Schodula I) (Earr	n 000)	2021

Part VI Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	Are all partners sec. 501(c)(3) orgs.? Yes No	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproptionat allocatio	Code V-UBI amount in box 2 of Schedule K-	General of managing partner? Yes No	(k) Percentage ownership