PUBLIC DISCLOSURE COPY - STATE REGISTRATION NO. 11682 | Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) Do not enter social security numbers on this form as it may be made public.

OMB No. 1545-0047 Open to Public

Department of the Treasury Internal Revenue Service

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

A F	or the	e 2022 calendar year, or tax year beginning $00LL$, 2022 and	enaing U	<u>UN 30, 2023</u>	
B c	heck if pplicabl	C Name of organization		D Employer identific	cation number
X	Addre	OREGON SYMPHONY ASSOCIATION			
	Name chang	Doing business as		93-04465	27
	Initial return		Room/suite	E Telephone number	
	Final return.		385	503-228-	4294
	termin ated	City or town, state or province, country, and ZIP or foreign postal code		G Gross receipts \$	24,545,936.
	Ameno return	PORTLAND, OR 9/204-1339		H(a) Is this a group re	turn
	Application	F Name and address of principal officer: 13AAC 1110MF 30N		for subordinates	? Yes X No
	pendir	SAME AS C ABOVE		H(b) Are all subordinates in	cluded? Yes No
ΙT	ax-ex	empt status: X 501(c)(3) 501(c) () (insert no.) 4947(a)(1) (or 527	If "No," attach a	list. See instructions
J۷	Vebsi	te: WWW.ORSYMPHONY.ORG		H(c) Group exemptio	n number
		organization: X Corporation Trust Association Other	L Year	of formation: 1896 N	State of legal domicile: OR
Pa	ırt I	Summary			
_	1	Briefly describe the organization's mission or most significant activities: SEE \$	SCHEDU	LE O	
nce					
rna	2	Check this box if the organization discontinued its operations or dispos	ed of more	than 25% of its net ass	ets.
Ş.	3	Number of voting members of the governing body (Part VI, line 1a)		3	45
Ğ	4	Number of independent voting members of the governing body (Part VI, line 1b)		4	40
δ		Total number of individuals employed in calendar year 2022 (Part V, line 2a)			412
/itie		Total number of volunteers (estimate if necessary)			120
Activities & Governance				7a	0.
⋖	b	Net unrelated business taxable income from Form 990-T, Part I, line 11		7b	0.
				Prior Year	Current Year
a)	8	Contributions and grants (Part VIII, line 1h)		16,670,994.	7,913,809.
ž	9	Program service revenue (Part VIII, line 2g)		9,057,332.	8,760,304.
Revenue	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)		476,048.	209,610.
æ	ı	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		-20,420.	15,470.
	l	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		26,183,954.	16,899,193.
	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)		10,000.	10,000.
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0.	0.
s	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		12,544,863.	13,495,336.
Expenses	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0.	0.
be	ı	Total fundraising expenses (Part IX, column (D), line 25) 1,667,42	25.		
ũ	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		8,385,205.	8,353,953.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		20,940,068.	21,859,289.
	19	Revenue less expenses. Subtract line 18 from line 12		5,243,886.	-4,960,096.
or			Ве	ginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)		28,423,833.	25,268,377.
l Assid	21	Total liabilities (Part X, line 26)		4,514,752.	5,093,084.
E E	22	Net assets or fund balances. Subtract line 21 from line 20		23,909,081.	20,175,293.
Pa	ırt II	Signature Block			
		lties of perjury, I declare that I have examined this return, including accompanying schedules			knowledge and belief, it is
true,	correc	t, and complete. Declaration of preparer (other than officer) is based on all information of wh	ich preparer	has any knowledge.	
Sigr	า	Signature of officer		Date	
Her	е	JANICE ROMANO, VP-FINANCE & ADMINISTRATIO	N		
		Type or print name and title			
		Print/Type preparer's name Preparer's signature		Date Check	PTIN
Paid		SANG AHN		self-employ	
Prep	arer	Firm's name MCDONALD JACOBS, P.C.		Firm's EIN 9	3-0900579
Use	Only	Firm's address 121 SW SALMON ST., STE 1100			
		PORTLAND, OR 97204		Phone no. (5	03) 227-0581
May	the IF	RS discuss this return with the preparer shown above? See instructions			X Yes No

Chack if Schedules O contains a response or note to any line in this Part III 1 Briefly describe the organization's mission: SEE SCHEDULE O 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 cases concluding, or mase significant changes in how it conducts, any program services?	Par	t III Statement of Program Service Accomplishments
2 Did the organization undertake any significant program services during the year which were not listed on the prior form 900 or 900 c?? 1 Yes (No if Yes, 'Georgication cease conducting, or make significant changes in how it conducts, any program services?		Check if Schedule O contains a response or note to any line in this Part III
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Form 990 (2022) OREGON SYMPHONY ASSOCIATION Part IV Checklist of Required Schedules

			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_	X	
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		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to	<u> </u>		
	provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,	Ť		
'	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		x
	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If</i> "Yes," <i>complete</i>	-		
8	, ,			x
•	Schedule D, Part III	8		
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for			
	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		X
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments		77	
	or in quasi endowments? If "Yes," complete Schedule D, Part V	10	X	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X,			
	as applicable.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,			
	Part VI	11a	X	
b	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total			
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		X
С	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total			
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c		Х
d	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			
	Part X, line 16? If "Yes," complete Schedule D, Part IX	11d		Х
е	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	Х	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f	Х	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete			
	Schedule D, Parts XI and XII	12a		x
h	Was the organization included in consolidated, independent audited financial statements for the tax year?	IZG.		
	, .	12b	х	
13	If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		Х
	Did the appropriation projection of the control of the United Otelson			X
14a	Did the organization maintain an office, employees, or agents outside of the United States? Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,	14a		
b				
	investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000	441.		X
	or more? If "Yes," complete Schedule F, Parts I and IV	14b		<u> </u>
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			,,
	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		<u> X</u>
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	X	<u> </u>
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"			
	complete Schedule G, Part III	19		X
20 a	and the second s	20a		X
b	and the contract of the contra	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	X	

232003 12-13-22

Form **990** (2022)

1 01111 000	LOLL		
Part IV	Ch	ecklist of Required Schedules	(continued)

22	1 011	Continued)		Vaa	Na
Part IX. column (A), line 27 (** Yes, *complete Schedule I, Parts I and III 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 I.** If "Yes," 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 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. 24b Did the organization maintain an escrow account other than a returding escrow at any time during the year? 4d Did the organization act as an 'on behalf of' issue for bonds outstanding at any time during the year? 4d Did the organization act as an 'on behalf of' issue for bonds outstanding at any time during the year? 4d Did the organization act as an 'on behalf of' issue for bonds outstanding at any time during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4d Did the organization with a disqualified person during the year? 4f "Yes," complete Schedule L, Part I Did the organization provide a grant or other assistance to any ournet or former officer, director, trustee, key employee, creator or founder, substantial contributor? 7f "Yes," complete Schedule L, Part II Did the or	22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on		Yes	No
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, firestess, key employees, and highest compensated employees? If 'Yes,' complete Schedule J. 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. 5 Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 6 Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 7 Did the organization invest tan an escrows account other than a refunding scrow at any time during the year to defease any tax-exempt bonds? 8 Did the organization and as an 'on behalf Or' issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? 9 Did the organization with a disqualified person during the year? If 'Yes,' complete Schedule L, Part I 10 Is the organization has not been reported on any of the organization's prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I 11 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 of ramily member of any of these persons? If 'Yes,' complete Schedule L, Part III 12 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor? If 'Yes,' complete Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions; 12 A X Sa by a current or former officer, director, trustee, key employee, creator or founder, substantial contributor? If 'Yes,' complete Schedule L, Part IV, instructions for applicable filin	~~		22		х
and former orficers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J. 24 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." op to line 25a 25 Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 26 Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 27 Did the organization act as an "on behalf of" issue for bonds outstanding at any time during the year to defease any tax-exempt bonds? 27 Section 501(2)3, 501(2)4, and 501(2)9 organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I. 28 Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in any of the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization in sprior Forms 390 or 990-E7? If "Yes," complete Schedule L, Part II. 28 Did the organization preport 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 III. 28 Was the organization preport any in the part of	23				
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entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	27				
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): a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV 28c X 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 29 X 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation 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 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part I 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, Iine 1 35a Did the organization have a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, Iine 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, Iine 2			27		x
instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV 28b X 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 29 X 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation 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 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 31 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 32 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 33 Did the organization have a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 34 Was the organization. Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 35 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	28	, , ,	21		71
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36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 X	b				
If "Yes," complete Schedule R, Part V, line 2	•		35b		<u>X</u>
" 100, 0011plate 001100011, 1 at 1, 1 at 1	36				v
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization	37	If "Yes," complete Schedule R, Part V, line 2	36		
	31	· · · · · · · · · · · · · · · · · · ·	37		x
and that is treated as a partnership for federal income tax purposes? <i>If</i> "Yes," <i>complete Schedule R, Part VI</i>	38		0,		
Note: All Form 990 filers are required to complete Schedule O		Note: All Form 990 filers are required to complete Schedule O	38	Х	
Part V Statements Regarding Other IRS Filings and Tax Compliance	Par				
Check if Schedule O contains a response or note to any line in this Part V		Check if Schedule O contains a response or note to any line in this Part V			
Yes No		1 1		Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable 1a 71					
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable		Enter the number of Forms W Za moldada of line 1a. Enter of inflot applicable	4		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	С		4-		
(gambling) winnings to prize winners? 1c 232004 12-13-22 Form 990 (2022	222004			990	(2022)

Form 990 (2022) OREGON SYMPHONY ASSOCIATION

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

				Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,				
		2a 412			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns	?	2b	Х	
За	5:11		За		X
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		
	At any time during the calendar year, did the organization have an interest in, or a signature or other aut	hority over, a			
	financial account in a foreign country (such as a bank account, securities account, or other financial account	ount)?	4a		X
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 Acc	ounts (FBAR).			
5а	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		5a		_X_
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction		5b		_X_
С	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		5c		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts that are normally greater than \$100,000, and did the organization have annual gross receipts than \$100,000, and did the organization have annual gross receipts than \$100,000, and did the organization have annual gross receipts than \$100,000, and did the organization have annual gross receipts than \$100,000, and did the organization have a superior or the organization have a superior or the organization have a superior or the organization of the organization had been declared by the organization of the organization had been declared by the organization of the organization of the organization had been declared by the organization of	organization solicit			
	any contributions that were not tax deductible as charitable contributions?		6a		_X_
b	If "Yes," did the organization include with every solicitation an express statement that such contribution	s or gifts			
	were not tax deductible?		6b		
7	Organizations that may receive deductible contributions under section 170(c).			37	
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and service	es provided to the payor?	7a	X	
b			7b	Х	
С	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was	required	_		v
	to file Form 8282?	l	7c		<u> </u>
d	,	7d	7.		
e •	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit com-		7e 7f		<u>X</u>
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract If the organization received a contribution of qualified intellectual property, did the organization file Form		7g		
g h	If the organization received a contribution of qualified intellectual property, did the organization file Form		79 7h		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained b		/!!		
Ŭ	sponsoring organization have excess business holdings at any time during the year?	y tilo	8		
9	Sponsoring organizations maintaining donor advised funds.				
а	Did the arranging agreement as a series and a series distribution and a series 40000		9a		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b		
10	Section 501(c)(7) organizations. Enter:				
а	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	Section 501(c)(12) organizations. Enter:				
а	Gross income from members or shareholders	l1a			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against				
	/	11b			
	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 10		12a		
	,	2b			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		40		
а	Is the organization licensed to issue qualified health plans in more than one state?		13a		
	Note: See the instructions for additional information the organization must report on Schedule O.				
D	Enter the amount of reserves the organization is required to maintain by the states in which the	10h			
•	· · · · · · · · · · · · · · · · · · ·	3b 3c			
		•	14a		X
14a b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule		14b		
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remunerations.		טדי		
10	excess parachute payment(s) during the year?		15		Х
	If "Yes," see the instructions and file Form 4720, Schedule N.		.0		
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment in	icome?	16		X
	If "Yes," complete Form 4720, Schedule O.				
17	Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activ	ities			
	that would result in the imposition of an excise tax under section 4951, 4952 or 4953?		17		
	If "Yes," complete Form 6069.				

Form **990** (2022)

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.

1a Enter the number of voting members of the governing body at the end of the tax year	_	Check if Schedule O contains a response or note to any line in this Part VI						X			
there are material efferences in winting rights sample methers of the governing body of the queening body delegated troad authority to an executive committee or similar committee, explain on Schedule 0. b Firster the number of voting members included on line 1s, above, who are independent officer, or incort, include, or key employee? 2 X 3 Did the organization delegated corrido over management duties customarily performed by or under the direct supervision of officers, director, trustees, or key employees to a management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a 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 5 Did the organization become aware during the year of a significant diversion of the organization's assets? 5 Did the organization have members or stockholders? 7 Did the organization have members or stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? 5 Did the organization have members, stockholders, or other persons other than the governing body? 6 Did the organization have members of the coverning body? 7 Did the organization orter proproadeutly decument the meetings held or written actions undertaken during the year by the following: 8 Did the organization orteroproadeusly decument the meetings held or written actions undertaken during the year by the following: 9 Is there any officer, director, trustee, or key employee listed in Part VII. Section A, who cannot be reached at the organization have local chapters, branches, or affidises? 10 Did the organization have local chapters, branches, or affidises? 10 If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to sersure their operations are consistently monitor and enforces compliance with the policy? If "Yes	Sec	tion A. Governing Body and Management									
there are material differences in vating rights among members of the governing body, or if the governing body dilegaled troad authority to an executive committee or similar committies, epide in on Schedule 0. b Either the number of voting members included on line 1a, above, who are independent 2 Did any officer, director, trustees, or key employees have a family relationship or a business relationship with any other officer, director, trustees, or key employees to a management of the committee of voting of voting of voting of voting of voting the voting of voting of voting of voting the voting of voting the voting of voting of voting the voting of voting the voting of voting to voting the voting of voting the voting of voting to voting the voting of voting voting the voting of voting voting the voting of voting voting the voting vo					_		Yes	No			
body delegated transit authority to an executive committee or similar committee, replian on Schedule D. b Effect the number or vioting members included to line 1a, above, who are independent. 1 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 have a family relationship or a business relationship with any other officer, directors, trustees, or key employees to a management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? 2 X 3 Did the organization baccome aware during the year of a significant diversion of the organization's assests? 5 Did the organization have members or stockholders? 6 Did the organization have members or stockholders, or other persons who had the power to elect or appoint one or more members of the operating body? 5 Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the operating body? 5 Did the organization that the governing body? 6 Did the organization that the governing body? 7 To X 8 Did the organization that the governing body? 8 Did the organization contemporareously document the mentings held or written actions undertaken during the year by the following: a The governing body? 8 Did the organization that the governing body? 9 Is there any officer, director, trustee, or key employee listed in Part VII. Section A, who cannot be reached at the organization that we written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization provided a complete copy of this Form 990. In all members of its governing body before filing the form? 10 Describe on Schedule O the process, if any, used the mannes and decisions or seven we and approval by independent persons, companization have a written	1a	Enter the number of voting members of the governing body at the end of the tax year	1a	4	45						
b Enter the number of voting members included on line 1a, above, who are independent 2 Did any 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 employee? 4 Did the organization make any significant changes to its governing documents since the prior Form 900 was flied? 4 Did the organization make any significant changes to its governing documents since the prior Form 900 was flied? 4 X 5 Did the organization have members or stockholders? 5 Did the organization have members or stockholders? 6 Did the organization have members or stockholders? 7 Did the organization have members or stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? 7 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? 7 Did the organization ontemporaneously document the meetings held or written actions undertaken during the year by the following: 8 The governing body? 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 9 Is there any officer, director, furtuate, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? It "Ves." provide the names and addresses on Schedule 0 10 Did the organization have written policides and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? 10 Did by "Yes," did the organization have written policides and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? 10 Did the organization have a written conflict of interest policy? If "No.", or to fine in 3 10 Did the		If there are material differences in voting rights among members of the governing body, or if the governing									
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13 X 14 Did the organization have a written whistleblower policy? 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? a The organization's CEO, Executive Director, or top management official b Other officers or key employees of the organization 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? 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 Section 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) available 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 financial statements available to the public during the tax year.			,		1	2c	X				
14	13						Х				
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 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) available for public inspection. Indicate how you made these available. Check all that apply.	Sec										
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 X Own website X Another's website X Upon request Other (explain on Schedule O) Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. State the name, address, and telephone number of the person who possesses the organization's books and records 				(-)		,, -					
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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	19				and fi	nanc	ial				
20 State the name, address, and telephone number of the person who possesses the organization's books and records											
	20		oks and	d records							
	-	JANICE ROMANO - 503-416-6319									

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, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

- 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) Name and title	(B) Average hours per	box	not cl	heck i ss per	ition more rson is	than o	an	(D) Reportable compensation	(E) Reportable compensation	(F) Estimated amount of
	week (list any hours for related organizations below line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	from the organization (W-2/1099-MISC/ 1099-NEC)	from related organizations (W-2/1099-MISC/ 1099-NEC)	other compensation from the organization and related organizations
(1) SCOTT SHOWALTER PRESIDENT/CEO	2.00			Х				403,020.	0.	24,474.
(2) DAVID DANZMAYR	40.00			Λ				403,020.	0.	24,4/4•
MUSIC DIRECTOR	40.00	1				x		273,614.	0.	17,525.
(3) SARAH KWAK	35.00							2/3,014.	0.	17,323.
CONCERTMASTER	33.00	1				x		183,176.	0.	16,622.
(4) RUSSELL KELBAN	45.00							200,2701		
VP MARKETING & STRATEGIC ENGAGEMENT		1				x		167,348.	0.	15,673.
(5) HILARY BLAKEMORE	45.00								• •	
VP DEVELOPMENT						X		140,149.	0.	16,130.
(6) STEVE WENIG	40.00							,		,
VP & GM	5.00					Х		125,993.	0.	26,128.
(7) JANICE ROMANO	40.00									
VP FINANCE & ADMIN	5.00			Х				128,306.	0.	16,381.
(8) ALICIA DIDONATO PAULSEN	35.00									
BOARD MEMBER/MUSICIAN		Х						68,298.	0.	23,117.
(9) SERGIO CARRENO	35.00									
BOARD MEMBER/MUSICIAN		Х						70,315.	0.	17,695.
(10) EMILY COLE	35.00									
BOARD MEMBER/MUSICIAN		Х						55,638.	0.	12,006.
(11) DAN DRINKWARD	20.00									
CHAIR		Х		Х				0.	0.	0.
(12) COURTNEY ANGELI	20.00									
VICE CHAIR		Х		Х	<u> </u>			0.	0.	0.
(13) EVE CALLAHAN	20.00							_	_	_
SECRETARY		Х		Х	<u> </u>			0.	0.	0.
(14) JACK WILBORN	20.00							_	_	_
TREASURER		Х		Х				0.	0.	0.
(15) RICK HINKES	5.00	l								
BOARD MEMBER		Х			<u> </u>			0.	0.	0.
(16) TIGE HARRIS	5.00							_		_
BOARD MEMBER	F 00	Х			<u> </u>	_		0.	0.	0.
(17) PATRICK CLARK	5.00	.,							_	•
BOARD MEMBER		Х						0.	0.	990 (2022)

232007 12-13-22 Form **990** (2022)

Form 990 (2022) UREGON S	YMPHONY	AS	<u> </u>	CI	A.I	. TO	IN _		93-0446	527 Page 6
Part VII Section A. Officers, Directors, Trus	tees, Key Em	oloy	ees,	and	l Hi	ghes	t Co	ompensated Employee	s (continued)	
(A)	(B)			(0	C)			(D)	(E)	(F)
Name and title	Average hours per week	box	not c	ss per	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 stitutio 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) BILL EARLY BOARD MEMBER	5.00	x						0.	0.	0.
(19) CHABRE VICKERS	5.00									
BOARD MEMBER	3100	х						0.	0.	0.
(20) CLIFF DEVENEY	5.00									
BOARD MEMBER		Х						0.	0.	0.
(21) CAMERON HUNT	5.00									
BOARD MEMBER		Х						0.	0.	0.
(22) DAN RASAY BOARD MEMBER	5.00	x						0.	0.	0.
(23) DERALD WALKER	5.00	Ħ				\vdash				
BOARD MEMBER		Х						0.	0.	0.
(24) GERALD HULSMAN	5.00									
BOARD MEMBER		Х						0.	0.	0.
(25) GERRI KARETSKY	5.00									
BOARD MEMBER		Х						0.	0.	0.
(26) GRADY JURRENS	5.00									
BOARD MEMBER		Х						0.	0.	0.
1b Subtotal								1,615,857.	0.	185,751.
c Total from continuation sheets to Part VI								0.	0.	0.
d Total (add lines 1b and 1c)	<u></u>							1,615,857.	0.	185,751.
2 Total number of individuals (including but n	ot 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

Yes No

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.

(A)	(B)	(C)
Name and business address	Description of services	Compensation
PORTLAND' 5 CENTERS FOR THE ARTS, MERC	ARLENE SCHNITZER	
UNIT 14, PO BOX 5000, PORTLAND, OR 97208	CONCERT HALL	1,788,625.
1547 CSR - PITTOCK BLOCK LLC, 921 SW		
WASHINGTON STE 100, PORTLAND, OR 97205	OFFICE LEASE	352,156.
DOCUMART COPIES & PRINTING		
3310 NW YEON, PORTLAND, OR 97210	PRINTING COMPANY	349,068.
CAPACITY INTERACTIVE CONSULTING, LLC		
PO BOX 50019, NEWARK, NJ 07101	ADVERTISING	286,743.
PINK MARTINI, INC.		
728 SW 1ST AVE, PORTLAND, OR 97204	GUEST ARTIST	180,000.
2 Total number of independent contractors (including but not limited to those listed	above) who received more than	
\$100,000 of compensation from the organization 15		

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2022)

18

	YMPHONY	_								6527
Part VII Section A. Officers, Directors, Tru	ustees, Key Er	nplo	yee	s, aı	nd H	lighe	est (Compensated Employe	es (continued)	
(A)	(B)			(0	C)			(D)	(E)	(F)
Name and title	Average			Pos	ition			Reportable	Reportable	Estimated
	hours	(c	heck	all t	that	app	ly)	compensation	compensation	amount of
	per							from	from related	other
	week	=				loyee		the	organizations	compensation
	(list any	or director				emp		organization	(W-2/1099-MISC)	from the
	hours for related	e or d	tee			sated		(W-2/1099-MISC)		organization and related
	organizations	ruste	l trus		yee	m pen				organizations
	below	Individual trustee	Institutional trustee	<u>~</u>	Key employee	Highest compensated employee	er			organizations
	line)	Indivi	Instit	Officer	Key e	Highe	Former			
(27) IDA RAE CAHANA	5.00									
BOARD MEMBER		Х						0.	0.	0.
(28) J. CLAYTON HERING	5.00									
BOARD MEMBER		Х						0.	0.	0.
(29) JANET BLOUNT	5.00									
BOARD MEMBER		Х						0.	0.	0.
(30) JEFF HEATHERINGTON	5.00							-	-	-
BOARD MEMBER		Х						0.	0.	0.
(31) EMILY KARR	5.00									
BOARD MEMBER		Х						0.	0.	0.
(32) JUDY HUMMELT	5.00									
BOARD MEMBER		Х						0.	0.	0.
(33) KRIS KERN	5.00									
BOARD MEMBER		Х						0.	0.	0.
(34) JASON MATUSOW	5.00									
BOARD MEMBER		Х						0.	0.	0.
(35) LAUREN FOX	5.00									
BOARD MEMBER		Х						0.	0.	0.
(36) MATT EDLEN	5.00									
BOARD MEMBER		Х						0.	0.	0.
(37) MICHELE MASS	5.00									
BOARD MEMBER		Х						0.	0.	0.
(38) MJ STEEN	5.00									
BOARD MEMBER		Х						0.	0.	0.
(39) KAIZAD MISTRY	5.00									
BOARD MEMBER		Х						0.	0.	0.
(40) PEGGY MILLER	5.00									
BOARD MEMBER		Х						0.	0.	0.
(41) PRISCILLA LONGFIELD	5.00									
BOARD MEMBER		Х						0.	0.	0.
(42) RENEE HOLZMAN	5.00	1								
BOARD MEMBER		Х						0.	0.	0.
(43) ROBERT HALEY	5.00	1_						_	_	_
BOARD MEMBER	 	Х						0.	0.	0.
(44) ROBERT HARRISON	5.00							_		_
BOARD MEMBER		Х						0.	0.	0.
(45) ROBYN GASTINEAU	5.00							_	_	_
BOARD MEMBER		Х						0.	0.	0.
	5.00	1	1	l	1					
(46) ROSCOE NELSON	3.00	Х						0.	0.	0.

Form 990 OREGON S	YMPHONY	ΑS	20	L	ΑT.	TO	N		93-044	0521
Part VII Section A. Officers, Directors, Tru	ustees, Key Er	nplo	yee	s, aı	nd H	lighe	est (Compensated Employe	es (continued)	
(A)	(B)			(0	C)			(D)	(E)	(F)
Name and title	Average				ition			Reportable	Reportable	Estimated
	hours	(cl	neck	all	that	app	ly)	compensation	compensation from related	amount of other
	per week (list any hours for related organizations below line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	from the organization (W-2/1099-MISC)	organizations (W-2/1099-MISC)	compensation from the organization and related organizations
47) THOMAS LAUDERDALE	5.00	Х						0.	0.	0
48) WALT WEYLER	5.00	Λ						0.	0.	0
OARD MEMBER	3.00	Х						0.	0.	0
49) BONNIE REAGAN	5.00									
BOARD MEMBER		х						0.	0.	0
50) MICHELLE WEISENBACH	5.00	Ī						<u> </u>		
SOARD MEMBER		Х						0.	0.	0
51) MARK WILLIAMS	5.00									
SOARD MEMBER		Х						0.	0.	0
		i		i	i		i	1	i l	

	Part VIII Statement of Revenue									
Pai										
		Check if Schedule O c	ont	ains a re	esponse	or note to any lin				
							(A)	(B)	(C)	(D) Revenue excluded
							Total revenue	Related or exempt function revenue	Unrelated business revenue	from tax under
(0 to								lanction revenue	business revenue	sections 512 - 514
	1 2	Federated campaigns			1a					
Contributions, Gifts, Grants and Other Similar Amounts					1b		1			
يخ و		Membership dues				920,010.	1			
ts, An		Fundraising events				920,010.	1			
重		Related organizations			1d	605 546				
ī,š	е	Government grants (contri	buti	ions)	1e	695,546.				
Ρ̈́S	f	All other contributions, gifts, g	gran	ts, and						
E E		similar amounts not included	abov	ve	1f 5,	298,253.				
ÖĒ	g	Noncash contributions included in li	ines '	1a-1f	1g \$	72,908.				
줐띪	_	Total. Add lines 1a-1f		_			7,913,809.			
<u> </u>						Business Code	, ,			
_	0 -	CONCERT TICKE	T	यम २	ъc		8,760,304.	8 760 304		
Program Service Revenue	2 a				<u> </u>	711150	0,700,304.	0,700,304.		
e ec	b									
S c	С									
e a	d									
<u>В</u> п	е									
4	f	All other program service r	eve	nue						
	g	Total. Add lines 2a-2f					8,760,304.			
	3	Investment income (includ	ina	dividen	ds. intere	est. and				
		Investment income (including dividends, interest other similar amounts)					255,417.			255,417.
	4	Income from investment of								
					-					
	5	Royalties			Real	(ii) Personal				
	_	_	_	<u> </u>	neai	(II) Fersonal	1			
		Gross rents	<u>6a</u>				-			
	b	Less: rental expenses	6b							
	С	Rental income or (loss)	6с							
	d	Net rental income or (loss)	<u> </u>							
	7 a	Gross amount from sales of		(i) Se	curities	(ii) Other				
		assets other than inventory	7a	7423	540.					
	b	Less: cost or other basis								
<u>o</u>			7h	7469	347.					
Revenue	c	Gain or (loss)	70	-45	807.					
ě		. ,					-45,807.			-45,807.
		Net gain or (loss)					43,007.			45,007
Other	8 а	Gross income from fundraisin								
0		including \$1,920								
		contributions reported on I								
		Part IV, line 18				152,100.				
	b	Less: direct expenses			8b	177,396.				
	С	Net income or (loss) from f	und	Iraising	event <u>s</u>		-25,296.			-25,296.
	9 a	Gross income from gaming	g ac	tivities.	See					
		Part IV, line 19	-							
	h	Less: direct expenses					1			
		Net income or (loss) from g								
					ville3					
	io a	Gross sales of inventory, le								
	_	and allowances					1			
		Less: cost of goods sold				<u> </u>				
\rightarrow	С	Net income or (loss) from s	sale	s of inve	entory					
σ						Business Code	10 = 11			10 = 55
on e	11 a	OTHER INCOME				900099	40,766.	ļ		40,766.
ane	b									
e še	С									
Miscellaneous Revenue	d	All other revenue								
_		Total. Add lines 11a-11d					40,766.			
	12	Total revenue. See instruction					16899193.	8,760,304.	0.	225,080.

93-0446527 Part IX | Statement of Functional Expenses 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 response or note to any line in this Part IX (**D**) Fundraising expenses (C) Management and general expenses Do not include amounts reported on lines 6b. Program service expenses Total expenses 7b, 8b, 9b, and 10b of Part VIII. Grants and other assistance to domestic organizations 10,000. 10,000. and domestic governments. See Part IV, line 21 Grants and other assistance to domestic individuals. See Part IV, line 22 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 Benefits paid to or for members Compensation of current officers, directors, 745,607. 864,515. 62,881. 56,027. trustees, and key employees Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) 9,428,595. 8,013,630. 782,094. 632,871. Other salaries and wages 7 Pension plan accruals and contributions (include 460,662. 402,647. 30,516. 27,499. section 401(k) and 403(b) employer contributions) 55,579. 1,720,179. 1,573,990. 90,610. Other employee benefits 9 021,385. 903,269. 50,523. 67,593. 10 Payroll taxes Fees for services (nonemployees): Management 13,385. 13,385. Legal 36,500. 36,500. Accounting Lobbying Professional fundraising services. See Part IV, line 17 77,772. 77,772. Investment management fees Other. (If line 11g amount exceeds 10% of line 25, 100,143. 617,438. 441,875. 75,420. column (A), amount, list line 11g expenses on Sch O.) 62,489.982,379. 919,270. 620. Advertising and promotion 12 799,216. 565,413. 57,479. 176,324. Office expenses 13 Information technology 14 15 Royalties 79,540. 963,621. 845,593. 38,488. 16 Occupancy 144,521. 41,561. 34,489. 68,471. 17 Travel Payments of travel or entertainment expenses 18 for any federal, state, or local public officials Conferences, conventions, and meetings 19 20 Payments to affiliates 21 190,417. 76,167. 57,125. 57,125. Depreciation, depletion, and amortization 22 29,022. 29,022. 23 Other expenses. Itemize expenses not covered 24 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 O.) 2,203,965. 40,691. 212,767.2,457,423. CONTRACT LABOR PRODUCTION EXPENSES 1,695,705. 1,694,863. 842. С d 153,859. 346,554. 132,848. 59,847. All other expenses 21,859,289. 18,570,698. 1,621,166. 1,667,425. Total functional expenses. Add lines 1 through 24e 25 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.

Form **990** (2022)

Check here

if following SOP 98-2 (ASC 958-720)

Form 990 (2022)

Part X | Balance Sheet

Pa	rt X	Balance Sheet					
		Check if Schedule O contains a response or note	to any	line in this Part X			
					(A) Beginning of year		(B) End of year
	1	Cash - non-interest-bearing	3,592,245.	1	1,065,278.		
	2	Savings and temporary cash investments				2	
	3	Pledges and grants receivable, net			2,036,846.	3	1,765,711.
	4	Accounts receivable, net			1,538,014.	4	1,834,254
	5	Loans and other receivables from any current or f					
		trustee, key employee, creator or founder, substa	ntial c	ontributor, or 35%			
		controlled entity or family member of any of these	perso	ons		5	
	6	Loans and other receivables from other disqualified	ed per	sons (as defined			
		under section 4958(f)(1)), and persons described	in sect	ion 4958(c)(3)(B)		6	
ts	7	Notes and loans receivable, net				7	
Assets	8	Inventories for sale or use				8	
Ä	9	Prepaid expenses and deferred charges			399,201.	9	385,698
	10a	Land, buildings, and equipment: cost or other					
		basis. Complete Part VI of Schedule D	10a	2,318,986.			
	b	Less: accumulated depreciation	10b	1,297,076.	869,794.	10c	1,021,910
	11	Investments - publicly traded securities			19,048,770.	11	18,275,458
	12	Investments - other securities. See Part IV, line 11	l		938,963.	12	743,631
	13	Investments - program-related. See Part IV, line 1	1			13	
	14	Intangible assets				14	
	15	Other assets. See Part IV, line 11			0.	15	176,437
	16	Total assets. Add lines 1 through 15 (must equal			28,423,833.	16	25,268,377
	17	Accounts payable and accrued expenses	ı	915,694.	17	1,243,132	
	18	Grants payable	2 505 054	18	2 655 604		
	19	Deferred revenue			3,587,254.	19	3,657,684
	20	Tax-exempt bond liabilities				20	
	21	Escrow or custodial account liability. Complete Pa				21	
es	22	Loans and other payables to any current or forme					
Liabilities		trustee, key employee, creator or founder, substa					
-ia		controlled entity or family member of any of these				22	
_	23	Secured mortgages and notes payable to unrelate				23	
	24	Unsecured notes and loans payable to unrelated				24	
	25	Other liabilities (including federal income tax, paya					
		parties, and other liabilities not included on lines	-	1	11,804.	0.5	102 269
	00	of Schedule D			4,514,752.	25	192,268. 5,093,084.
	26	Total liabilities. Add lines 17 through 25	k hore	<u>X</u>	4,314,732.	26	3,093,004
S		Organizations that follow FASB ASC 958, chec and complete lines 27, 28, 32, and 33.	K Here	; <u> </u>			
ü	27	• , , ,			9,187,787.	27	6,301,739
ala	28				14,721,294.	28	13,873,554.
D E	20	Organizations that do not follow FASB ASC 95			11,,21,231	20	13/0/3/331
Fu		and complete lines 29 through 33.	o, ciic	ck liefe			
ō	29	Capital stock or trust principal, or current funds		F		29	
ets	30	Paid-in or capital surplus, or land, building, or equ				30	
ASS	31	Retained earnings, endowment, accumulated incomment				31	
Net Assets or Fund Balances	32	Total net assets or fund balances			23,909,081.	32	20,175,293.
Z	33	Total liabilities and net assets/fund balances		·····	28,423,833.	33	25,268,377.
	, 55	retai nabilitios and net assets/fulla balances			_==,=, , ===,	55	Form 990 (202)

Form **990** (2022)

Pa	rt XI Reconciliation of Net Assets					<u> </u>
	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	16,	899	,19	93.
2	Total expenses (must equal Part IX, column (A), line 25)	2	21,	859	, 28	<u> 39.</u>
3	Revenue less expenses. Subtract line 2 from line 1	3	-4,	960	0,09	96.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	23,	909	, 08	31.
5	Net unrealized gains (losses) on investments	5	1,	226	, 30	08.
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	20,	175	, 29	3 3.
Pa	rt XII Financial Statements and Reporting					
	Check if Schedule O contains a response or note to any line in this Part XII	<u></u>	<u></u>			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	Х	
	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,				
	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 School	edule O.				
За	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the					
	Uniform Guidance, 2 C.F.R. Part 200, Subpart F?			3a		<u>X</u>
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required	ed audit	:			
	or audits, explain why on Schedule O and describe any steps taken to undergo such audits	<u></u>		3b		

Form **990** (2022)

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.

QUZZ
Open to Public

Inspection

OMB No. 1545-0047

Name of the organization

Employer identification number

OREGON SYMPHONY ASSOCIATION 93-0446527 Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions. 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))

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

(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	Section A. Public Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1	Gifts, grants, contributions, and						
	membership fees received. (Do not						
	include any "unusual grants.")	11488429.	6446767.	13053221.	16670994.	7913809.	55573220.
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	11488429.	6446767.	13053221.	16670994.	7913809.	55573220.
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)						6000672.
6	Public support. Subtract line 5 from line 4.						49572548.
	tion B. Total Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7	Amounts from line 4	11488429.	6446767.	13053221.		7913809.	55573220.
8	Gross income from interest,						
	dividends, payments received on						
	securities loans, rents, royalties,						
	and income from similar sources	189,131.	148,804.	64,778.	195,016.	255,417.	853,146.
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.)	302,694.	73,579.	102,579.	53,865.	40,766.	573,483.
11	Total support. Add lines 7 through 10						56999849.
12	Gross receipts from related activities,	etc. (see instruction	ns)			12 34	,480,501.
13	First 5 years. If the Form 990 is for the	ne organization's fir	st, second, third, 1	fourth, or fifth tax	year as a section 50	D1(c)(3)	
	organization, check this box and stop	here					
Sec	ction C. Computation of Publi	ic Support Per	centage				
14	Public support percentage for 2022 (ine 6, column (f), di	vided by line 11, o	olumn (f))		14	86.97 %
	Public support percentage from 2021					15	85.59 %
16a	33 1/3% support test - 2022. If the	organization did no	t check the box or	n line 13, and line	14 is 33 1/3% or m	ore, check this bo	
	stop here. The organization qualifies	as a publicly suppo	orted organization				X
b	33 1/3% support test - 2021. If the	organization did no	t check a box on l	ine 13 or 16a, and	line 15 is 33 1/3%	or more, check th	is box
	and stop here. The organization qua	lifies as a publicly s	upported organiza	ation			
17a	10% -facts-and-circumstances test	- 2022. If the org	anization did not d	heck a box on line	e 13, 16a, or 16b, a	nd line 14 is 10%	or more,
	and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization						
	meets the facts-and-circumstances to	est. The organizatio	n qualifies as a pu	blicly supported o	rganization		
b	10% -facts-and-circumstances test	- 2021. If the org	anization did not d	heck a box on line	e 13, 16a, 16b, or 1	7a, and line 15 is	10% or
	more, and if the organization meets the						
	organization meets the facts-and-circ	umstances test. Th	e organization qua	alifies as a publicly	supported organiz	ation	
18	Private foundation. If the organization						3
						Cala a duda A	(Form 990) 2022

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.)

Sec	tion A. Public Support	clow, picase comp	oicte i art ii.)				
Caler	ndar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not						
	include any "unusual grants.")						
	Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3	Gross receipts from activities that are not an unrelated trade or bus-						
	iness under section 513						
4	Tax revenues levied for the organ- ization's benefit and either paid to or expended on its behalf						
	The value of services or facilities furnished by a governmental unit to the organization without charge						
6	Total. Add lines 1 through 5						
7a	Amounts included on lines 1, 2, and 3 received from disqualified persons						
b	Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
С	Add lines 7a and 7b						
	Public support. (Subtract line 7c from line 6.) tion B. Total Support						
Caler	ndar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
	Amounts from line 6	, ,		, ,			
	Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
	Unrelated business taxable income						
	(less section 511 taxes) from businesses acquired after June 30, 1975						
С	Add lines 10a and 10b						
11	Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13	Total support. (Add lines 9, 10c, 11, and 12.)						
14	First 5 years. If the Form 990 is for th	ne organization's fi	rst, second, third,	fourth, or fifth tax	year as a section	501(c)(3) organization	on,
	check this box and stop here						
Sec	tion C. Computation of Publi	c Support Per	rcentage				
	Public support percentage for 2022 (I		•	column (f))		15	%
	Public support percentage from 2021					16	%
	tion D. Computation of Inves					T I	
	Investment income percentage for 20					17	%
	Investment income percentage from					18	<u>%</u>
	33 1/3% support tests - 2022. If the						7 is not
b	more than 33 1/3%, check this box ar 33 1/3% support tests - 2021. If the	organization did r	not check a box or	line 14 or line 19a	a, and line 16 is m	ore than 33 1/3%, a	and
	line 18 is not more than 33 1/3%, che	ck this box and st	top here. The orga	anization qualifies a	as a publicly supp	orted organization	
20	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	1 7

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Part IV | Supporting Organizations

(Complete only if you checked a box on line 12 of 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.)

	Yes	No
1		
2		
За		
3b		
3с		
4a		
4b		
4c		
5a		
5b		
5c		
6		
7		
8		
9a		
9b		
9с		
10a		<u> </u>
10b		

232024 12-09-22

Sche	dule A (Form 990) 2022 OREGON SYMPHONY ASSOCIATION 93-04	44652	7 Pa	age 5
Pai	t IV Supporting Organizations (continued)			
			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
а	A person who directly or indirectly controls, either alone or together with persons described on lines 11b and			
	11c below, the governing body of a supported organization?	11a		
b	A family member of a person described on line 11a above?	11b		
	A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide			
	detail in Part VI.	11c		
Sec	tion B. Type I Supporting Organizations			
			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s)			
	effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the			
_	supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1		
2	Did the organization operate for the benefit of any supported organization other than the supported			
	organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in			
	Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,			
	supervised, or controlled the supporting organization.	2		
Sec	tion C. Type II Supporting Organizations		1	
			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors			
	or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control			
	or management of the supporting organization was vested in the same persons that controlled or managed			
	the supported organization(s).	1		
Sec	tion D. All Type III Supporting Organizations			
			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the			
	organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax			
	year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the			
	organization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported			
	organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how			
3	the organization maintained a close and continuous working relationship with the supported organization(s). By reason of the relationship described on line 2, above, did the organization's supported organizations have a	2		
	significant voice in the organization's investment policies and in directing the use of the organization's			
	income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's			
	supported organizations played in this regard.	3		
Sec	tion E. Type III Functionally Integrated Supporting Organizations			
1	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions	s).		
а	The organization satisfied the Activities Test. Complete line 2 below.	•		
b	The organization is the parent of each of its supported organizations. <i>Complete</i> line 3 <i>below</i> .			
c	The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see in	netruction	10)	
2	Activities Test. Answer lines 2a and 2b below.	istraction.	Yes	No
– a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of		100	110
u	the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify			
	those supported organizations and explain how these activities directly furthered their exempt purposes,			
	how the organization was responsive to those supported organizations, and how the organization determined	2a		
h	that these activities constituted substantially all of its activities. Did the activities described on line 23, above, constitute activities that, but for the organization's involvement	Za		
b	Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement,			
	one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in			
	Part VI the reasons for the organization's position that its supported organization(s) would have engaged in	0'-		
2	these activities but for the organization's involvement. Perent of Supported Organizations. Answer lines 32 and 3h below.	2b		

232025 12-09-22

Schedule A (Form 990) 2022

За

a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If* "Yes" or "No" provide details in **Part VI.**

b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If* "Yes." *describe in* **Part VI** *the role played by the organization in this regard.*

Pa	rt V Type III Non-Functionally Integrated 509(a)(3) Support	ing Organ	izations			
1	Check here if the organization satisfied the Integral Part Test as a qualify			Part VI). See instructions.		
-	All other Type III non-functionally integrated supporting organizations mu		·			
Sect	Section 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				
5	Income tax imposed in prior year	5				
6	Distributable Amount. Subtract line 5 from line 4, unless subject to					
	emergency temporary reduction (see instructions).	6				
7	Check here if the current year is the organization's first as a non-function	ally integrate	ed Type III supporting orga	inization (see		

Schedule A (Form 990) 2022

instructions).

10	Line 8 amount divided by line 9 amount		10	<u> </u>
Sect	ion E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1	Distributable amount for 2022 from Section C, line 6			
2	Underdistributions, if any, for years prior to 2022 (reason-			
	able cause required - explain in Part VI). See instructions.			
3	Excess distributions carryover, if any, to 2022			
а	From 2017			
b	From 2018			
С	From 2019			
d	From 2020			
е	From 2021			
f	Total of lines 3a through 3e			
g	Applied to underdistributions of prior years			
h	Applied to 2022 distributable amount			
i	Carryover from 2017 not applied (see instructions)			
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4	Distributions for 2022 from Section D,			
	line 7:			
а	Applied to underdistributions of prior years			
	Applied to 2022 distributable amount			
С	Remainder. Subtract lines 4a and 4b from line 4.			
5	Remaining underdistributions for years prior to 2022, if			
	any. Subtract lines 3g and 4a from line 2. For result greater			
	than zero, explain in Part VI. See instructions.			
6	Remaining underdistributions for 2022. Subtract lines 3h			
	and 4b from line 1. For result greater than zero, explain in			
	Part VI. See instructions.			
7	Excess distributions carryover to 2023. Add lines 3j			
	and 4c.			
8	Breakdown of line 7:			
а	Excess from 2018			
b	Excess from 2019			
С	Excess from 2020			
d	Excess from 2021			
е	Excess from 2022			

Schedule A (Form 990) 2022

Schedule B

(Form 990)

Schedule of Contributors

Attach to Form 990 or Form 990-PF.

OMB No. 1545-0047

Schedule B (Form 990) (2022)

Department of the Treasury Internal Revenue Service Name of the organization Go to www.irs.gov/Form990 for the latest information.

Employer identification number

(OREGON SYMPHONY ASSOCIATION	93-0446527				
Organization type (chec						
Filers of:	Section:					
Form 990 or 990-EZ	$\boxed{\textbf{X}}$ 501(c)(3) (enter number) organization					
	4947(a)(1) nonexempt charitable trust not treated as a private foundation					
	527 political organization					
Form 990-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 organizatio	n 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 R	ule. See instructions.				
General Rule						
	tion filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling					
property) from a	any one contributor. Complete Parts I and II. See instructions for determining a contributo	r's total contributions.				
Special Rules						
X For an organiza	tion described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% suppor	t test of the regulations under				
	(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, a					
	ing the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i EZ, line 1. Complete Parts I and II.	Form 990, Part VIII, line 1h;				
01 (11) 1 01111 930-	LZ, line 1. Complete Farts Fand II.					
	tion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from					
	ing the year, total contributions of more than \$1,000 exclusively for religious, charitable, s ational purposes, or for the prevention of cruelty to children or animals. Complete Parts I					
•	n (b) instead of the contributor name and address), II, and III.	Chemig				
For an organiza	tion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from	any one contributor, during the				
-	year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box					
	er here the total contributions that were received during the year for an exclusively religio					
	complete any of the parts unless the General Rule applies to this organization because i able, etc., contributions totaling \$5,000 or more during the year	•				
religious, criarite	able, etc., contributions totaling \$6,000 or more during the year	Ψ				
•	n that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (• *				
	ine 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-P iling requirements of Schedule B (Form 990)	F, Part I, line 2, to certify				

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

Schedule B (Form 990) (2022) Page **2**

Name of organization Employer identification number

OREGON SYMPHONY ASSOCIATION

93-0446527

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		\$ 200,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2		\$ 500,700.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3		\$ 233,333.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
4	Name, address, and ZIF + 4	\$ 356,923.	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		\$560,000.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
6		\$357,400.	Person X Payroll Noncash (Complete Part II for noncash contributions.)

Schedule B (Form 990) (2022)

Name of organization

Employer identification number

OREGON SYMPHONY ASSOCIATION

93-0446527

Part I	Contributors (see instructions). Use duplicate copies of Part I if additional	I space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7		\$\$281,852.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
8		\$\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
9		\$\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
10		\$345,151.	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
		\$	Person Payroll Oncash Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions.)

Name of organization Employer identification number

OREGON SYMPHONY ASSOCIATION

93-0446527

Part II	Noncash Property (see instructions). Use duplicate copies of Part II	l if additional space is needed.	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
			Schedule B (Form 990) (2022)

Employer identification number

Name of organization

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 Advise	d Funds or Other Similar Funds o	or Accounts. Complete if the
	organization answered "Yes" on Form 990, Part IV, lin	ie 6.	
		(a) Donor advised 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	writing that the assets held in donor advise	d funds
	are the organization's property, subject to the organization's $% \left(1\right) =\left(1\right) \left(1$	exclusive legal control?	Yes No
6	Did the organization inform all grantees, donors, and donor a	dvisors in writing that grant funds can be u	sed only
	for charitable purposes and not for the benefit of the donor of	r donor advisor, or for any other purpose co	onferring
Par	TII Conservation Easements. Complete if the ore	ganization answered "Yes" on Form 990, Pa	art IV, line 7.
1	Purpose(s) of conservation easements held by the organization		
	Preservation of land for public use (for example, recrea	tion or education) Preservation of a	a historically important land area
	Protection of natural habitat	Preservation of a	a certified historic structure
	Preservation of open space		
2	Complete lines 2a through 2d if the organization held a qualit	fied conservation contribution in the form of	
	day of the tax year.		Held at the End of the Tax Year
	Number of conservation easements on a certified historic str		2c
d	Number of conservation easements included in (c) acquired a		
_	historic structure listed in the National Register		
3	Number of conservation easements modified, transferred, rel	eased, extinguished, or terminated by the c	organization during the tax
	year	tip la catad	
4	Number of states where property subject to conservation eas		
5	Does the organization have a written policy regarding the per violations, and enforcement of the conservation easements it		Yes No
6	Staff and volunteer hours devoted to monitoring, inspecting,		
Ū	otali and volunteer hours devoted to monitoring, inspecting,	Training of Violations, and emorning consc	i vation casements during the year
7	Amount of expenses incurred in monitoring, inspecting, hand	dling of violations, and enforcing conservation	on easements during the year
•	, who are or experience mounted in morning, inoperating, mane	aming of violatione, and emercing content valid	on casemente dannig the year
8	Does each conservation easement reported on line 2(d) above	re satisfy the requirements of section 170(h))(4)(B)(i)
9	In Part XIII, describe how the organization reports conservation		
	balance sheet, and include, if applicable, the text of the footr	·	
	organization's accounting for conservation easements.	· ·	
Par	t III Organizations Maintaining Collections of	f Art, Historical Treasures, or Oth	er 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 95	8, not to report in its revenue statement an	d balance sheet works
	of art, historical treasures, or other similar assets held for put	olic exhibition, education, or research in furt	therance of public
	service, provide in Part XIII the text of the footnote to its finar	ncial statements that describes these items	
b	If the organization elected, as permitted under FASB ASC 95	8, to report in its revenue statement and ba	alance sheet works of
	art, historical treasures, or other similar assets held for public	exhibition, education, or research in furthe	rance 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 tre	asures, or other similar assets for financial (
	the following amounts required to be reported under FASB A	SC 958 relating to these items:	
а	Revenue included on Form 990, Part VIII, line 1		\$
<u>b</u>	Assets included in Form 990, Part X		\$
LHA	For Paperwork Reduction Act Notice, see the Instructions	s for Form 990.	Schedule D (Form 990) 2022

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

OREGON	SYMPHONY	ASSOCIATION
OTCHOOT	O TITE ITOM T	TODOCTUTION

	t III Organizations Maintaining Co	ollections of Art	, Historical Tre	asures, or Othe	er Similar A	ssets _{(cor}		age Z
3	Using the organization's acquisition, accession							
	collection items (check all that apply):							
а	Public exhibition	d	Loan or excl	nange program				
b								
С								
4		llections and explain	how they further th	e organization's exe	empt purpose i	in Part XIII.		
5								
Ū	to be sold to raise funds rather than to be ma					Yes		No
Pai	t IV Escrow and Custodial Arrang							110
	reported an amount on Form 990, Par		to ii the organization	Tanoworda 100 0	111 01111 000, 1	artiv, iirio o,	OI .	
1a	Is the organization an agent, trustee, custodia	an or other intermedi	arv for contributions	or other assets not	included		-	
	on Form 990, Part X?		•			Yes		No
b	If "Yes," explain the arrangement in Part XIII a							
-		arra complete arra ren	oming talonon			Amo	unt	
c	Beginning balance				1c			
	Additions during the year							
e								
_	Distributions during the year				16			
f O-	Ending balance					Yes		□ NIa
					•	res	H	∐ No
	If "Yes," explain the arrangement in Part XIII. TV Endowment Funds. Complete it	Check here if the exp	Dianation has been p	provided on Part XII	10			
ı aı	T V Endowment Funds. Complete it					o book (a) E	0.117.1/0.076	hook
		(a) Current year	(b) Prior year	(c) Two years back	(d) Three year		our years	
1a	Beginning of year balance	15,599,802.	17,885,630.	10,858,263.	11,527		1,472,	
b							,981.	
С	Net investment earnings, gains, and losses	872,619.	72,6191,264,920. 4,012,3403				721,263.	
d	Grants or scholarships							
е	Other expenditures for facilities							
	and programs	740,186.	1,023,343.	680,868.	673	,249.	. 669,254.	
f	Administrative expenses							
g	End of year balance	16,091,731.	15,599,802.	17,885,630.	10,858	,263. 1	1,527,	523.
2	Provide the estimated percentage of the curre	ent year end balance	(line 1g, column (a)) held as:				
а	Board designated or quasi-endowment	18.1300	%					
b	Permanent endowment 62.0530	%	_					
С	Term endowment 19.8170	 %						
	The percentages on lines 2a, 2b, and 2c shou	uld equal 100%.						
За	Are there endowment funds not in the posses	· ·	tion that are held an	d administered for t	he			
	organization by:						Yes	No
	(i) Unrelated organizations					3a(i) X	
	(ii) Related organizations						_	Х
h	If "Yes" on line 3a(ii), are the related organizations	tions listed as require	nd on Schodula D2					
4	Describe in Part XIII the intended uses of the					<u>JL</u>	<u>, </u>	
Pai	t VI Land, Buildings, and Equipme		virient iunus.					
	Complete if the organization answered		Part IV line 11a S	ae Form 990 Part X	line 10			
	-		1			(4) D		
	Description of property	(a) Cost or ot basis (investm		1 ' '	Accumulated epreciation	(a) B	ook valu	ie
10	Land		54313	, s.r., u				
	Land							
	Buildings		2	9,125.			39,1	25
C	Leasehold improvements	I		5,621.	373,559		72,0	
d	Equipment			4,240.	923,517		$\frac{72,0}{10,7}$	
	Other				<i>34</i> 3,31/			
Гotа	. Add lines 1a through 1e. (Column (d) must ed	gual Form 990, Part >	(, column (B), line 10	Oc.)		<u>. 1,0</u>	21,9	<u> 10•</u>

Schedule D (Form 990) 2022

Part VII Investments - Other Securities.	Taura 000 Bart IV line	addle Coo Forms 000 Book V line 10	o I I o o I / age o
Complete if the organization answered "Yes" of (a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end	of year market value
	(b) book value	(c) Method of Valuation. Cost of end	Ol-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" of	on Form 990, Part IV, line	e 11c. See Form 990, Part X, line 13.	
(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end	of-year market value
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)			
Part IX Other Assets.			
Complete if the organization answered "Yes" o		e 11d. See Form 990, Part X, line 15.	
	Description		(b) Book value
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)	4=1		
Total. (Column (b) must equal Form 990, Part X, col. (B) line Part X Other Liabilities.	<u>15.)</u>		
Complete if the organization answered "Yes" of	on Form 990 Part IV line	a 11e or 11f See Form 990 Part X line 25	
	5111 51111 555, 1 411 17, 11116	7 110 01 111. 000 1 0111 000, 1 drex, iiii 20.	(b) Book value
1. (a) Description of liability (1) Federal income taxes			(b) Book value
(2) CHARITABLE GIFT ANNUITY			10,796.
(3) OPERATING LEASE LIABILITIE	.s		181,472.
(4)			101,472.
(5)			
(5) (6)			
(0) (7)			
(8)			
(9)			
Total. (Column (b) must equal Form 990. Part X. col. (B) line	25.)		192,268.
2 Liebility (2000) and the control of the control o	<u> </u>	- H	===,===

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) 2022

THE ORGANIZATIONS FOLLOW THE PROVISIONS OF FASB ASC 740 TOPIC ACCOUNTING

FOR UNCERTAINTY IN INCOME TAXES. MANAGEMENT HAS EVALUATED THE

ORGANIZATION'S TAX POSITIONS AND CONCLUDED THAT THERE ARE NO UNCERTAIN TAX

POSITIONS THAT REQUIRE ADJUSTMENT TO THE FINANCIAL STATEMENTS TO COMPLY

Schedule D (Form 990) 2022

Schedul	e D (Form 990) 2022		ORE	GON SYMPHONY	ASSOCIATION	93-0446527	Page 5
Part X	e D (Form 990) 2022 (III Supplementa	ıl Info	ormatio	(continued)			
WTTH	PROVISIONS	OF	THIS	TOPIC.			
*****	THOVEDEDING			101101			

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

2022

Open to Public Inspection

Name of the organization					Employer identification number			
OREGON	SYMPHONY ASSOCIATION	NC				93-0446	527	
Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.								
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)	(ii) Activity	(iii) fundr have co or con contribu	trol of	(iv) Gross receipts from activity	to (c	Amount paid or retained by) fundraiser ted in col. (i)	(vi) Amount paid to (or retained by) organization	
		Yes	No					
Fotal								
List all states in which the organizatio or licensing.	n is registered or licensed to solicit c		utions	or has been notified	it is e	exempt from re	gistration	

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

Schedule G (Form 990) 2022

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		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))
Φ			(event type)	(event type)	(total number)	35 (5)/
ň						
Revenue	1	Gross receipts	2,014,360.	57,750.		2,072,110.
ш						
	2	Less: Contributions	1,862,260.	57,750.		1,920,010.
			150 100			150 100
	3	Gross income (line 1 minus line 2)	152,100.			152,100.
	١.	Ocal carious				
	4	Cash prizes				
	5	Noncoch prizes				
Ø	3	Noncash prizes				
nse	6	Rent/facility costs	12,638.	5,000.		17,638.
Direct Expenses	١	Tient tability costs	12,000	3,000.		27,0301
サロ	7	Food and beverages	128,708.	31,050.		159,758.
Ji reć	•			0_70001		
	8	Entertainment				
	9	Other direct expenses				
	10		n 9 in column (d)			177,396.
	11	Net income summary. Subtract line 10 from li	ine 3, column (d)			-25,296.
Pa	ırt I		answered "Yes" on Form	990, Part IV, line 19, or r	reported more than	
		\$15,000 on Form 990-EZ, line 6a.	T			т
ē			(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue				niligo/progressive niligo		coi. (a) through coi. (c))
Вè						
_	1	Gross revenue				
	,	Cash prizes				
Expenses	-	54611 p.11255				
pen	3	Noncash prizes				
Ä						
Direct I	4	Rent/facility costs				
Ճ						
	5	Other direct expenses				
			Yes %	Yes %	Yes %	
	6	Volunteer labor	No	No No	No	
	7	Direct expense summary. Add lines 2 through	n 5 in column (d)			
		Not consider the constant of t	Character of a character (all)			
_	8	Net gaming income summary. Subtract line 7	from line 1, column (a)			
a	Ent	ter the state(s) in which the organization condu	icts gaming activities.			
		the organization licensed to conduct gaming a				Yes No
		No," explain:				
_						
	_					
10a	We	ere any of the organization's gaming licenses re	evoked, suspended, or te	rminated during the tax y	/ear?	Yes No
b	lf "	Yes," explain:				
	_					

Schedule G (Form 990) 2022

232082 10-27-22

Sch	edule G (Form 990) 2022 OREGON SYMPHONY ASSOCIATION 93-0	<u> </u>	<u> </u>	Page 3
11	Does the organization conduct gaming activities with nonmembers?	Y	'es	No
12	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?	Y	'es	No
13	Indicate the percentage of gaming activity conducted in:			
а	The organization's facility	13a		<u>%</u>
	An outside facility	13b		<u>%</u>
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?	🔲 Y	'es	☐ No
b	If "Yes," enter the amount of gaming revenue received by the organization \$ and the amount			
	of gaming revenue retained by the third party \$			
С	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:			
а	Is the organization required under state law to make charitable distributions from the gaming proceeds to			
	retain the state gaming license?	. L Y	'es	∟ No
b	Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the			
Do	organization's own exempt activities during the tax year \$			
Ра	Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Pa	rt III, line	s 9, 9	b, 10b,
	15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.			
		_		

Schedule G (Form 990) OREGON SYMPHONY ASSOCIATION	93-0446527 Page 4
Schedule G (Form 990) OREGON SYMPHONY ASSOCIATION Part IV Supplemental Information (continued)	
·	

SCHEDULE (Form 990)

Department of the Treasury Internal Revenue Service

Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

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.

OMB No. 1545-0047

Open to Public Inspection

No X **Employer identification number** Schedule I (Form 990) 2022 93-0446527 (h) Purpose of grant or assistance 2023 WONDER AWARD Yes 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 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 (g) Description of noncash assistance (f) Method of valuation (book, FMV, appraisal, other) 0 (e) Amount of assistance Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. recipient that received more than \$5,000. Part II can be duplicated if additional space is needed. (d) Amount of cash grant 10,000 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table (c) IRC section (if applicable) LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. OREGON SYMPHONY ASSOCIATION 501(C)(3) Enter total number of other organizations listed in the line 1 table 47-4159875 General Information on Grants and Assistance (p) EIN criteria used to award the grants or assistance? 1 (a) Name and address of organization or government 800 NW 6TH AVE STE 335 Name of the organization PORTLAND, OR 97209 OUTSIDE THE FRAME Part I Part II

(f) Description of noncash assistance

(e) Method of valuation (book, FMV, appraisal, other)

(d) Amount of noncash assistance

(c) Amount of cash grant

(b) Number of recipients

(a) Type of grant or assistance

Schedule I (Form 990) 2022 Part IV Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information. 40 232102 10-31-22

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.

2022

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

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

Employer identification number

OREGON SYMPHONY ASSOCIATION

93-0446527

Ta 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		Yes	No
Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. Tirst-class or charter travel Tild Housing allowance or residence for personal use			
First-class or charter travel X Housing allowance or residence for personal use			1
Travel for companions X Payments for business use of personal residence			
Traverse deliparies			
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:			
Receive a severance payment or change-of-control payment?	4a		X
b Participate in or receive payment from a supplemental nonqualified retirement plan?	4b		Х
c 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:	r-		v
a The organization?	5a		X
b Any related organization?	5b		
If "Yes" on line 5a or 5b, describe in Part III.			
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:			
	6a		х
a The organization?			X
b Any related organization?	6b		
If "Yes" on line 6a or 6b, describe in Part III. 7 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			
10 Hall and to all and the district of the dis	8		Х
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in	3		
Regulations section 53.4958-6(c)?	9		

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

93-0446527

Page 2

OREGON SYMPHONY ASSOCIATION

Schedule J (Form 990) 2022

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-2 and/or 1099-MISC and/or 1099-NEC compensation	2 and/or 1099-MISC compensation	and/or 1099-NEC	(C) Retirement and other deferred	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	
(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	(E)	403,020.	0	0.	15,250.	9,224.	427,494.	0
PRESIDENT/CEO	⊞	0	0	0	0	0	• 0	0
(2) DAVID DANZMAYR	(i)	273,614.	0	0.	0.	17,525.	291,139.	• 0
MUSIC DIRECTOR	(ii)	0	0	0.	0	0.	• 0	• 0
(3) SARAH KWAK	(i)	183,176.	0	0.	9,159.	7,463.	199,798.	• 0
CONCERTMASTER	⊞	0	0	0	0	0	• 0	0
(4) RUSSELL KELBAN	Ξ	167,348.	0	0.	8,210.	7,463.	183,021.	0
VP MARKETING & STRATEGIC ENGAGEMENT	(ii)	0	0	0.	0	0.	• 0	• 0
(5) HILARY BLAKEMORE	(i)	140,149.	0	0.	906'9	9,224.	156,279.	• 0
VP DEVELOPMENT	⊞	0	0	0	0	0	• 0	0
(6) STEVE WENIG	(i)	125,993.	0	0.	6,426.	19,702.	152,121.	• 0
VP & GM	⊞	0	0	0	0	0	• 0	0
	(i)							
	(ii)							
	Ξ							
	Œ.							
	Ξ							
	Œ							
	Ξ							
	<u>(ii</u>							
	Ξ							
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	Ξ							
	(ii)							
	Ξ							
	<u>(ii</u>							
	Ξ							
	<u>(ii</u>							
	Ξ							
	Œ							
	Ξ							
	(ii)							
							Schedu	Schedule J (Form 990) 2022

Schedule J (Form 990) 2022

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

LINE 1B H PART

- THE BOTH ARRANGEMENTS ABOVE ARE INCLUDED IN THE EMPLOYMENT CONTRACTS OF
- THE BOARD OF DIRECTORS. THESE ARE SIGNED BY STATED EMPLOYEES.

.. LINE PART I

- SCOTT SHOWALTER WAS GIVEN A DISCRETIONARY BONUS OF \$50K (ALLOWED тне сео,
- ОF THE EMPLOYMENT CONTRACT) IN DECEMBER 2022. AN ADDITIONAL BONUS FOR IN
- \$50K WAS ACCRUED IN JUNE 2023 AND PAID IN SEPTEMBER 2023

SCHEDULE M (Form 990)

Noncash Contributions

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

2022

OMB No. 1545-0047

Open to Public

Department of the Treasury Internal Revenue Service

Name of the organization

Attach to Form 990.

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

Inspection
Employer identification number

	OREGON SYMPH	ONY AS	SOCIATION		9:	3-0446	527	
Pai	t I 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 1g	Method noncash co	(d) of determin ntribution ar	_	s
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 (FOOD & BEVERAGE)	Х	17	43,734.	PURCHASE	PRICE		
26	Other (EVENT ITEMS)	Х	0		PURCHASE			
27	Other (TENT)	Х	1		PURCHASE			
28	Other ()							
29	Number of Forms 8283 received by the organiz	zation durino	the tax year for c	ontributions	•			
	for which the organization completed Form 828							
			J				Yes	No
30a	During the year, did the organization receive by	/ contributio	n any property rep	orted in Part I, lines 1 through	h 28, that it			
	must hold for at least 3 years from the date of							
	exempt purposes for the entire holding period?					30a		Х
b	If "Yes," describe the arrangement in Part II.							
31	Does the organization have a gift acceptance p	oolicy that re	quires the review	of any nonstandard contribu	tions?	31	Х	
	Does the organization hire or use third parties of				•••••			
	contributions?		•			32a		x
b	If "Yes," describe in Part II.							
33	If the organization didn't report an amount in c	olumn (c) fo	a type of property	for which column (a) is che	cked.			
	describe in Part II.	(5) 101	-, · P · O P O ()	(2) 13 0110				

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

232142 09-09-22

SCHEDULE 0 (Form 990)

Department of the Treasury

Internal Revenue Service

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 Open to Public Inspection

Name of the organization

OREGON SYMPHONY ASSOCIATION

Employer identification number 93-0446527

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: THE OREGON SYMPHONY INSPIRES AUDIENCES AND BUILDS COMMUNITY BY CREATING OUTSTANDING MUSICAL EXPERIENCES.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: THE OREGON SYMPHONY IS DEDICATED TO MOVING MUSIC FORWARD. OUR VISION IS BOLD AND ADVENTUROUS: TO INSPIRE AUDIENCES WITH EXHILARATING PERFORMANCES, PRESENT THE BEST MUSICIANS IN A WIDE RANGE OF STYLES, EXPLORE NEW ART FORMS, SHINE LIGHT ON CONTEMPORARY ISSUES AND BUILD A STRONGER COMMUNITY.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS: COMMUNITY NEEDS MUSIC MORE THAN EVER TO EDUCATE, UNITE, INSPIRE, AND HEAL. IN FY23, WE WERE PROUD TO MEET THAT NEED FOR THE NEARLY 350,000 CHILDREN AND ADULTS WHO EXPERIENCED THE OREGON SYMPHONY IN PERSON THROUGH A PERFORMANCE OR COMMUNITY EVENT AND FOR THE 25 MILLION GLOBALLY WHO HEARD US VIA BROADCAST. WHILE IT WAS A CHALLENGING YEAR FOR THE ARTSPARTICULARLY SO IN PORTLANDWE ARE NEVERTHELESS ENCOURAGED. TICKET SALES FOR OUR UPCOMING 23/24 SEASON ARE INCREASING SIGNIFICANTLY, DATA INDICATE THAT PEOPLE ARE LISTENING TO ORCHESTRAL MUSIC AT RECORD LEVELS, AND DOWNTOWN SAFETY APPEARS TO BE IMPROVING.

ALTHOUGH WE WILL CONTINUE TO FACE CHALLENGES AS THE ARTS SECTOR RECOVERS, WE ARE ADDRESSING THEM PROACTIVELY AND WILL CONTINUE TO LEAD THE WAY FOR THE ARTS IN OREGON. WHILE WE PREPARE FOR THAT FUTURE, CONTINUE TO BRING THE POWER OF MUSIC TO MORE PEOPLE IN NEW WAYSBOTH LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule O (Form 990) 2022

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

ONSTAGE AND OFF.

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

THE WORK, SUBTITLED CONVERSATIONS WITH THE UNKNOWN, REFERS TO "AN

INDIVIDUAL TRYING TO FIND AN INNER HARMONY WITH HIS OTHER SELF, AN

INNER VOICE (CONSCIENCE), GOD (IN THE ABSTRACT), OR WITH SOMEONE YOU DO

NOT KNOW BUT WISH TO HAVE AS A CLOSE FRIEND." IT WAS WRITTEN FOR AND

PERFORMED BY VIRTUOSO ISRAELI VIOLINIST VADIM GLUZMAN.

ADDITIONAL OUTSTANDING GUEST ARTISTS IN THE LATTER HALF OF OUR SEASON

INCLUDED PIANISTS EMANUEL AX AND AARON DIEHL, VIOLINIST BLAKE POULIOT,

ARTISTS-IN-RESIDENCE SIMONE LAMSMA (VIOLIN) AND XAVIER FOLEY (BASS),

CREATIVE ALLIANCE MEMBER ANDY AKIHO, AND GLOBAL SUPERSTAR ITZHAK

PERLMAN. WE FURTHER MADE INVESTMENTS IN LOCAL ARTISTS BY SHOWCASING

OREGON SYMPHONY MUSICIANS. BRUCE & JUDY THESENGA PRINCIPAL FLUTE MARTHA

LONG PERFORMED MOZART'S FLUTE CONCERTO IN G MAJOR. TRUMAN COLLINS, SR.

PRINCIPAL SECOND VIOLIN CHIEN TAN PERFORMED ALONGSIDE XAVIER FOLEY IN

BOTTESINI'S DOUBLE CONCERTO NO. 2. OUR "CONCERTO SPECTACULAR" FEATURED

SOLO AND CHAMBER WORKS BY PRINCIPAL TRUMPET JEFF WORK; MR. & MRS.

EDMUND HAYES, JR. PRINCIPAL CELLO NANCY IVES; PRINCIPAL CLARINET JAMES

SHIELDS; AND THE ENTIRE PERCUSSION SECTION.

TO ADVANCE OUR GOAL TO REACH MORE PEOPLE IN NEW WAYS, WE EXPERIMENTED

WITH CONCERT FORMATS TO INTEGRATE AUDIENCES WITH ARTISTS. HAITIAN

AMERICAN NATHALIE JOACHIMA MEMBER OF OUR CREATIVE ALLIANCE, WHOSE

DIVERSE COMPOSERS AND MUSICIANS BRING THEIR UNIQUE PERSPECTIVES TO

CREATE PIONEERING WORKS AND COMPELLING COLLABORATIONSHOSTED A SECOND

SEASON OF OPEN MUSIC. THESE INTIMATE EVENINGS COMBINED TALK AND

Schedule O (Form 990) 2022 Page 2

Name of the organization Employer identification number

OREGON SYMPHONY ASSOCIATION

PERFORMANCE TO EXPLORE THE PROCESS OF COMPOSING FOR GUESTS VIJAY IYER,

GABRIELA MONTERO, AND ANDY AKIHO. EACH GUEST CURATED A PROGRAM THAT

SHOWCASED THEIR APPROACH TO COMPOSITION AND SOURCES OF INSPIRATION.

CREATIVE CHAIR GABRIEL KAHANE ALSO CURATED TWO CHAMBER CONCERTS AT THE

RESER CENTER FOCUSED ON NEW MUSIC FROM FEMALE COMPOSERS AND COMPOSERS

OF COLOR, WHO ARE UNDERREPRESENTED IN THE CLASSICAL FIELD. THE FIRST

CONCERT FEATURED THE BLUE HOUR, A SONG CYCLE WRITTEN COLLABORATIVELY BY

COMPOSERS RACHEL GRIMES, ANGLICA NEGRN, SHARA NOVA, CAROLINE SHAW, AND

SARAH KIRKLAND SNIDER THAT EXPLORES THE BEAUTY, PAIN, AND FRAGILITY OF

LIFE FROM A FEMALE PERSPECTIVE. THE SECOND, ENTITLED THE LAW OF

MOSAICS, BROUGHT TOGETHER FOUR CENTURIES OF MUSIC AND CONSIDERED THE

WAYS IN WHICH ARTISTS, BY ENGAGING WITH EACH OTHER ACROSS TIME, HELP US

TO BETTER UNDERSTAND OURSELVES AND THE WORLD. IT PAIRED HISTORICAL

WORKS BY BACH, BEETHOVEN, MOZART AND FARRENC WITH CONTEMPORARY WORKS BY

LIGETI, ANDREW NORMAN, JESSIE MONTGOMERY, AND TED HEARNE.

BEYOND THE CLASSICAL SERIES, WE STRETCHED ARTISTICALLY TO COVER A

BREADTH OF GENRES. WE PRODUCED PROGRAMS WITH THE WORLD'S LEADING INDIAN

TABLA PLAYER, ZAKIR HUSSAIN, AND HIS MASTERS OF PERCUSSION; DRAG

PERFORMER THORGY THOR, WHO ROSE TO FAME ON "RUPAUL'S DRAG RACE"; THE

MUSIC OF ROCK LEGEND LED ZEPPELIN; CLASSIC TELEVISION THEMES; MOVIE

SCORES FROM FILMS LIKE "THE GOONIES" AND "WEST SIDE STORY"; AND VIDEO

GAME MUSIC FROM FINAL FANTASY. OUR MUSIC FOR FAMILIES SERIESHOUR-LONG,

MULTIMEDIA PERFORMANCES DESIGNED FOR YOUNG CHILDRENAGAIN PROVED

POPULAR. WE EVEN ADDED AN EXTRA SHOW OF PETER & THE WOLF IN APRIL TO

MEET DEMAND.

AS WE INVESTED IN LOCAL CLASSICAL ARTISTS, WE INVESTED IN LOCAL POPULAR

93-0446527

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

ARTISTS AS WELL. OVER THE YEARS, WE HAVE GIVEN ARTISTS LIKE PINK

MARTINI, BLIND PILOT, STORM LARGE, AND TAYLOR MAC THEIR ORCHESTRAL

DEBUTS, HELPING THEM TO REACH NEW AUDIENCES AND GROWING PORTLAND'S

CULTURAL FOOTPRINT. THIS SEASON, WE BUILT ON THAT LEGACY BY GIVING

ORCHESTRAL DEBUTS FOR RAPPER AMIN, PINK MARTINI'S CHINA FORBES, AND

ALT-ROCK LEGENDS THE DANDY WARHOLS.

WE INVESTED IN ARTISTIC EXCELLENCE ONSTAGE WHILE NAVIGATING CHALLENGES
WITH OUR CONCERT HALL. UNSAFE CONDITIONS RELATED TO INADEQUATE SNOW/ICE
REMOVAL IN WINTER AND FAILED COOLING SYSTEMS IN THE SPRING IMPEDED OUR
ABILITY TO HOST CONCERTS. THE SYMPHONY INCURRED TENS OF THOUSANDS OF
DOLLARS IN EXTRA COSTS DUE TO THESE PROBLEMS; PRESIDENT SCOTT SHOWALTER
PUBLICIZED ISSUES IN THE MEDIA TO APPLY PRESSURE TO LOCAL OFFICIALS TO
REMEDY THEM. HE CONTINUES THAT CAMPAIGN ON BEHALF OF ALL NONPROFIT ARTS
GROUPS, TESTIFYING IN SUMMER 2023 BEFORE METRO COUNCILORS AND MERC
COMMISSIONERS ABOUT PROBLEMS WITH THE HALL'S MANAGEMENT AND THEIR
HISTORIC COST INCREASES.

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

3-8 FROM SEVEN COUNTIES JOINED US FOR A YPC PERFORMANCE. STUDENTS

ENJOYED A WIDE VARIETY OF WORKS, FROM CLASSICAL MASTERS LIKE BEETHOVEN,

MUSSORGSKY, AND DEBUSSY TO LIVING COMPOSERS LIKE GABRIELA LENA FRANK,

ANDY AKIHO, FRANK PROTO, AND 14-YEAR-OLD PORTLAND COMPOSER ELAINA RAE

STUPPLER.

IN MARCH, WE HOSTED THREE LINK UP CONCERTS IN PORTLAND FOR

PARTICIPATING STUDENTS IN GRADES 3-5. DURING THE SCHOOL YEAR, STUDENTS

LEARNED TO SING AND PLAY THE RECORDER IN THEIR CLASSROOMS; THE LINK UP

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CURRICULUM CULMINATES WITH STUDENTS PERFORMING FROM THEIR SEATS IN OUR

HALL ALONGSIDE THE OREGON SYMPHONY. THIS YEAR, MORE THAN 5,500 STUDENTS

STUDIED IN OUR PROGRAM AND JOINED US IN THE HALL.

WE BROUGHT BACK OUR KINDERKONZERTS SERIES OF IN-SCHOOL PERFORMANCES FOR

STUDENTS IN GRADES K-2. THREE HOST SCHOOLSFAUBION SCHOOL IN NE

PORTLAND, WOODSTOCK ELEMENTARY IN SE PORTLAND, AND LINCOLN ST. SCHOOL

IN HILLSBOROENGAGED NEARLY 4,000 STUDENTS FOR UP-CLOSE PERFORMANCES BY

GROUPS OF OREGON SYMPHONY MUSICIANS. EACH PERFORMANCE FEATURED AN

ENSEMBLE OF STRING, WOODWIND, OR BRASS PLAYERS SHARING SHORT PIECES

THAT DEMONSTRATED THE TONE QUALITY AND CHARACTERISTICS OF EACH

INSTRUMENT. UNDER THE GUIDANCE OF A NARRATOR, STUDENTS WERE ENCOURAGED

TO MOVE WITH THE MUSIC, RESPOND TO QUESTIONS, CLAP AND SING, AND ENGAGE

VERBALLY THROUGHOUT EACH PERFORMANCE.

PRIOR TO EACH CLASSICAL CONCERT AND SELECT POPS AND SPECIALS CONCERTS

DURING THE SEASON, WE HOSTED STUDENT ENSEMBLES IN OUR LOBBY TO GIVE

PRELUDE PERFORMANCES. STUDENT PERFORMERS WERE RECOGNIZED FROM THE STAGE

BEFORE EACH CONCERT, AND THEY WERE INVITED TO ATTEND THE SYMPHONY

PERFORMANCE FREE OF CHARGE. MORE THAN 300 STUDENT MUSICIANS WERE

AFFORDED THIS UNIQUE OPPORTUNITY. WE ALSO WELCOMED HUNDREDS OF STUDENTS

TO WITNESS AND LEARN FROM ORCHESTRA REHEARSALS. ONE HIGH SCHOOL STUDENT

REMARKED, "IT WAS EYE-OPENING TO SEE HOW WELL THE MUSICIANS PLAYED EVEN

AT REHEARSAL, AND HOW THE SOUND CHANGED THE MORE THEY PLAYED TOGETHER."

OREGON SYMPHONY MUSICIANS AND OUR TWO ARTISTS-IN-RESIDENCE ALSO VISITED

SCHOOLS THROUGHOUT OUR REGION. THEY VISITED BAND AND ORCHESTRA

ENSEMBLES TO COACH STUDENT ARTISTS DURING IN-SCHOOL REHEARSALS, HOSTED

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MASTERCLASSES TO SHARE INNOVATIVE TEACHING TECHNIQUES WITH LARGE GROUPS

OF STUDENTS, AND VISITED ELEMENTARY SCHOOLS TO HOST INFORMATIONAL

PERFORMANCES ("INFORMANCES") THAT INSPIRE YOUNG STUDENTS TO STUDY

MUSIC.

BEYOND ITS ABILITY TO SUPPORT LEARNING, MUSIC SUPPORTS EMOTIONAL
WELLBEING FOR PEOPLE OF ALL AGES AND BACKGROUNDS. FOR INSTANCE, OUR
2023 LULLABY PROJECT IN PARTNERSHIP WITH PATH HOME SUPPORTED FAMILIES
IN HOUSING TRANSITION. WORKING WITH SYMPHONY MUSICIANS AND LOCAL
SINGER-SONGWRITERS, EACH FAMILY WROTE AND PROFESSIONALLY RECORDED A
LULLABY THAT HONORED THEIR FAMILY. WE DEBUTED THESE HEARTFELT SONGS
BEFORE 200+ COMMUNITY MEMBERS AT AN IN-PERSON FREE CONCERT AT THE
ALBERTA ROSE THEATER IN MAY; THE SONGS CONTINUE TO LIVE ON OUR WEBSITE.

RECOGNIZING THAT MANY PEOPLE WOULD BENEFIT FROM THE HEALING POWER OF

MUSIC WHO ARE UNABLE TO ATTEND AN IN-PERSON CONCERT, WE TAKE OUR

MUSICIANS TO MEET NEIGHBORS WHERE THEY ARE. IN APRIL, AN OREGON

SYMPHONY STRING QUARTET VISITED SANTIAM CORRECTIONAL INSTITUTE IN SALEM

TO AID INMATES' REHABILITATION. ONE MAN SAID, "LISTENING TO YOUR MUSIC

WAS THE MOST PEACEFUL I'VE FELT SINCE I GOT HERE." IN MAY, XAVIER FOLEY

PERFORMED FOR AND SPOKE WITH RESIDENTS OF ST. MARY'S HOME FOR BOYS. FOR

BOTH THESE GROUPS, MUSIC PROMOTES THE DEVELOPMENT OF POSITIVE BEHAVIORS

AND HELPS IMPROVE IMPULSE CONTROL.

OUR MUSICIANS HELPED TO MARK SIGNIFICANT CULTURAL OCCASIONS AS WELL. IN

RECOGNITION OF AANHPI HERITAGE MONTH, WE PARTNERED WITH THE PORTLAND

JAPANESE GARDEN TO PROVIDE A FULL DAY OF FREE PERFORMANCES FOR ALL

GARDEN VISITORS TO ENJOY. GROUPS OF MUSICIANS SHARED CULTURALLY

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RELEVANT MUSIC, CULMINATING IN SIMONE LAMSMA'S PERFORMANCE ALONGSIDE A

TRADITIONAL JAPANESE KOTO PLAYER AND REMARKS FROM PRINCIPAL GUEST

CONDUCTOR JUN MRKL ON HIS OWN JAPANESE HERITAGE. ALSO IN MAY, WE

PARTICIPATED IN THE SECOND ANNUAL OREGON RISE AGAINST HATE EVENT AT LAN

SU CHINESE GARDEN, HONORING AANHPI COMMUNITIES AND DEMANDING AN END TO

ANTI-ASIAN HATE AND DISCRIMINATION. OTHER EXAMPLES INCLUDED SYMPHONY

VIOLINIST INS VOLGAR BELGIQUE PERFORMING AT AN EVENT FOR THE LOCAL

NONPROFIT VENEZUELA'S VOICE IN OREGON, A PERCUSSION ENSEMBLE PLAYING AT

THE GRADUATION CEREMONY FOR THE RUSSIAN IMMERSION READING PROGRAM AT

KELLY ELEMENTARY SCHOOL IN SE PORTLAND, AND VADIM GLUZMAN PERFORMING

FOR STUDENTS AT CONGREGATION BETH ISRAEL.

AS WE DO EACH YEAR, WE OFFERED SPECIAL CONCERTS FOR FREE TO OUR

COMMUNITY. IN ADDITION TO THE WATERFRONT CONCERT DESCRIBED IN OUR

MID-YEAR REPORT, THIS SPRING WE HOSTED THE "IN HARMONY" CELEBRATION

CONCERT WHICH FILLED THE HALL WITH FAMILIES INVITED THROUGH OUR

NONPROFIT PARTNERS. FOR MANY ATTENDEES, SUCH A FREE SHOW MAY BE THEIR

ONLY OPPORTUNITY TO HEAR LIVE MUSIC. THIS CONCERT INCLUDED THE DEBUT OF

A PIECE, BORN OUT OF OUR PARTNERSHIP WITH OUTSIDE THE FRAME (OTF),

WHICH USES FILM AS AN ENGAGEMENT TOOL TO SUPPORT HOMELESS AND

MARGINALIZED YOUTH. CREATIVE CHAIR KAHANE WORKED WITH OTF YOUTH TO

COLLABORATIVELY WRITE A PIECE THAT INCLUDED ORIGINAL FOOTAGE THAT THE

STUDENTS HAD FILMED. THE EVENING ALSO INCLUDED A PIECE BY GIANCARLO

CASTRO, A PORTLAND-BASED, VENEZUELAN COMPOSER WHOSE COMMISSIONED WORK

WE WILL PREMIERE IN OUR UPCOMING SEASON.

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

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

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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
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

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

Department of the Treasury Internal Revenue Service

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

Open to Public Inspection

Attach to Form 990.

2022

OMB No. 1545-0047

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

Employer identification number 93-0446527Ξ **(e)** ਉ Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33. <u>ပ</u> OREGON SYMPHONY ASSOCIATION 9 <u>a</u> Name of the organization Part I

Name, address, and EIN (if applicable) of disregarded entity	Primary activity	Legal domicile (state or foreign country)	Total income	End-of-year assets	Direct controlling entity
Part II organizations during the tax - Exempt Organizations. Complete i	tions. Complete if the organization ans	if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt	t IV, line 34, because	e it had one or more re	lated tax-exempt

or more related tax-exempt	
34, because it had one or more relat	
, Part IV, line 34, b	
answered "Yes" on Form 990, Part IV, line 34	
ions. Complete if the organization ans	
Identification of Related Tax-Exempt Organization organizations during the tax year.	
PartII	

(a)	(q)	(c)	(p)	(e)	(£)	(6)	
Name, address, and EIN	Primary activity	Legal domicile (state or	Exempt Code	Public charity	Direct controlling	Section 512(b)(controlled	b)(13)
of related organization		foreign country)	section	status (if section	entity	entity?	
				501(c)(3))		Yes	No
OREGON SYMPHONY FOUNDATION - 93-1225609							
851 SW 6TH AVE, STE 385	SUPPORT OF THE OREGON			0	DREGON SYMPHONY		
PORTLAND, OR 97204	SYMPHONY ASSOCIATION	OREGON	501(C)(3)	LINE 12A, I P	ASSOCIATION	×	
OREGON SYMPHONY ASSOCIATION IN SALEM -	BRING SYMPHONIC MUSIC AND						
93-6031819, 851 SW 6TH AVE, STE 385,	THE OREGON SYMPHONY TO			0	OREGON SYMPHONY		
PORTLAND, OR 97204	SALEM	OREGON	501(C)(3)	LINE 10 P	ASSOCIATION	×	

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

OREGON SYMPHONY ASSOCIATION Schedule R (Form 990) 2022

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93-0446527

Identification 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 more related organizations treated as a partnership during the tax year.

Part III

(K	General or Percentage managing ownership partner?									
9	eneral or ıanaging ıartner?	esNo								
<u>(E)</u>	Code V-UBI General or amount in box managing 20 of Schedule partner?	K-1 (Form 1065) Y								
(L)	Disproportionate allocations?	No								
<u> </u>	Dispropo alloca	Yes								
(a)	Share of end-of-year	455615								
Œ	Share of total income									
(e)	Predominant income (related, unrelated, excluded from tax under	sections 512-514)								
(p)	Direct controlling entity									
(c)	Legal domicile (state or	roreign country)								
(q)	Primary activity									
(a)	Name, address, and EIN of related organization									

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. Part IV

l I I	l	l	l	l	l
(i) Section 512(b)(13) controlled entity? Yes No					
Sect 512(b contro					
(h) Percentage ownership					
(g) Share of end-of-year assets					
(f) Share of total income					
(e) Type of entity (C corp, S corp, or trust)					
(d) Direct controlling entity					
(c) Legal domicile (state or foreign country)					
(b) Primary activity					
(a) Name, address, and EIN of related organization					

Page 3

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

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.					Yes No	اه
1 During the tax year, did the organization engage in any of the following transactior	ns with one or more rel	transactions with one or more related organizations listed in Parts II-IV?	n Parts II-IV?			
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	rty			1 a	×	u
b Gift, grant, or capital contribution to related organization(s)				1 b	×	u
c Gift, grant, or capital contribution from related organization(s)				10	×	M
d Loans or loan guarantees to or for related organization(s)				1d	X	w l
- 3				1e	X	L L
f Dividends from related organization(s)				#	×	w l
g Sale of assets to related organization(s)				19	×	M
Purchase of assets from related organiza				두	×	L
				=	×	_
i Lease of facilities, equipment, or other assets to related organization(s)				Ę	×	L
				,		
k Lease of facilities, equipment, or other assets from related organization(s)				¥	×],,
	anization(s)			=	×	
m Performance of services or membership or fundraising solicitations by related organization(s)	anization(s)			1 m	X	L L
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	tion(s)			1-	×	_
o Sharing of paid employees with related organization(s)				10	×	_
p Reimbursement paid to related organization(s) for expenses				1p	X	
q Reimbursement paid by related organization(s) for expenses				19	X	
r Other transfer of cash or property to related organization(s)				1	X	_
s Other transfer of cash or property from related organization(s)				1s	×	u
2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.	who must complete this	s line, including covered r	elationships and transaction thresholds.			
(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved	volved		
(1) OREGON SYMPHONY ASSOCIATION IN SALEM	Ţ	202,080.	CASH			
(2)						
(3)						
(4)						
(5)						
(9)						

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

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.

(k) Percentage ownership		
General or limanaging partner?		
(h) (i) (j) (k) Disproportionate thousing amount in box 20 managing ownership of Schedule K-1 partner? Yes No (Form 1065) Yes No		
Disproportionate allocations?		
(g) Share of end-of-year assets Y		
Share of total income		
Are all partners sec. 501(c)(3) orgs.?		
Predominant income (related, unrelated, excluded from tau sections 512-514)		
(c) Legal domicile (state or foreign country)		
(b) Primary activity		
(a) Name, address, and EIN of entity		