

# CITY OF ASHLAND



## Application for Economic Development, Cultural, Tourism and Sustainability Grants

\*\*\*DUE NO LATER THAN 4:00 pm March 22, 2017\*\*\*

One (1) single sided, signed hard copy to

**NO STAPLES PLEASE**

In an envelope titled:

City of Ashland

Attn: Diana Shiplet, Administration Department

Grant Application

20 East Main Street, Ashland, OR 97520

<b>Applicant/Organization</b>	Youth Symphony of Southern Oregon		
<b>Mailing Address</b>	P.O. Box 4291 Medford, OR 97501		
<b>Contact Name</b>	Sharon Wilson, <i>Executive Director</i>	<b>Contact Phone #1</b>	541-858-8859
<b>Email #1</b>	info@ysso.org		
<b>Contact Name #2</b>	Amy Watson, <i>President</i>	<b>Contact Phone #2</b>	541-789-5031
<b>Email #2</b>	amy.watson@asante.org		
<b>Federal Tax ID</b>	██████████	<b>IRS Class (Exemption)</b>	501(c)(3)
		<b>Total Grant Request (\$5,000 min)</b>	\$8,000.00

### Application Submittal Checklist

In addition to the completed application form to be mailed and emailed, all submittals must contain the following;

1. ✓ List of all board members, their occupations, and years on the board;
2. ✓ Organizational client demographic profile;
3. ✓ Grant program budget (for activities/programs/events that are part of this grant application);
4. ✓ Organization's 501(c)(3) letter verifying non-profit status;
5. ✓ Organization's corporate bylaws;
6. ✓ Organization's most recent Form 990 IRS filing (summary page only);
7. ✓ Organization's previous year financial statement summarizing expenses and revenues.

# *Youth Symphony of Southern Oregon*

## **Application for Economic Development, Cultural, Tourism and Sustainability Grants**

1. Briefly describe the purpose and objectives of your organization and mission statement (*please limit to approximately 500 words*)

**Mission & Goals:** The Youth Symphony of Southern Oregon (YSSO) provides training and performances under the leadership of professional conductors and musicians and fosters lifelong appreciation of music and the arts. YSSO goals are to ensure access to training/performance opportunities; develop music technique, interpretive and performance skills; promote teamwork, discipline and empathy; strengthen communities and cultural networks; build audiences; supplement school programs; and provide affordable cultural enrichment.

**Values:** The YSSO organization believes that music is an important component of a comprehensive education. The YSSO believes in the instrumental role of music in learning and the intrinsic value of music in our lives. The YSSO believes the arts develop cognitive skills and address diverse learning styles. The YSSO believes that music and the arts must be available to all without regard for cultural, geographic or financial considerations. The YSSO organization is dedicated to artistic quality, educational excellence, thoughtful governance, professional management, fiscal integrity and responsible stewardship of resources. Founded in 1988, the YSSO has provided unique cultural offerings for young people, families and audiences for 29 years.

**Repertoire:** Concerts feature masterworks, film/opera scores, concerti, new music, arrangements, traditional and chamber music by a diverse array of composers including Dvorak, Beethoven, Brahms, Villa-Lobos, Bernstein, Williams, Hovhaness, Mendelssohn, Mahler, Tchaikovsky, Mozart and others. The YSSO also commissions music. In 2013, the *Youth Symphony* premiered Mark Eliot Jacobs' *The Orchard City: Medford, Oregon 1913. Crater Lake Fantasy: Another Sky at Our Feet*, also by Dr. Jacobs, premiered in 2015.

**Musicians:** This season, more than 135 public, private, home school and college musicians from Ashland, Phoenix, Talent, Medford, Jacksonville, Central Point, Eagle Point, Williams, Grants Pass and northern California have participated in the YSSO. The majority of YSSO musicians each year are high school, middle school and elementary school musicians; however, Southern Oregon University (SOU) students often play in the advanced symphony. SOU students may receive university credit by playing in the *Youth Symphony*.

The *Youth Symphony* includes advanced string, brass, woodwind and percussion musicians. Several *Youth Symphony* musicians also play in the Rogue Valley Symphony (RVS). The *Youth Symphony* has played in side-by-side performances with the RVS. The *Youth Symphony* played at a music educators conference held at the Hult Center for the Performing Arts in Eugene. *Youth Orchestra* includes intermediate-level musicians. Dr. Cynthia Hutton leads both orchestras. The orchestras rehearse weekly and musicians participate in *Sectional Rehearsals* (mini master classes) led by professional musicians, many of whom play in the RVS. The orchestras are featured in *Concert Series* performances in professional venues and present *Community Outreach Concerts*.

**Access/Inclusion:** It is the policy of the YSSO that all qualified musicians may participate regardless of financial circumstances. The YSSO offers tuition waiver and lesson assistance each season. This year to date, 37 percent of the musicians (50) have received *Scholarship* assistance (\$15,360 as of March 2017). The YSSO also offers *Complimentary Tickets* to students, teachers and YSSO musicians to *Concert Series* performances. As of the February 2017 concerts, 562 comp tickets have been provided to student musicians, music teachers and families (a value of \$2,810 in \$5 student tickets). Holders of the Oregon Trail Card are offered discounts for general admission tickets.

In addition to additional special initiatives (*Sectional Rehearsals, Scholarships* and *Complimentary Tickets*), the 30<sup>th</sup> *Anniversary Concert Season* will offer multi-performance *Concert Series* (November, February, May), a *Concerto Competition* and *Community Outreach Concerts*. The YSSO also will present a *Youth Symphony & Youth Symphony Alumni Concert* in celebration of the 30<sup>th</sup> *Anniversary Concert Season* in December 2017 and will partner with the Rogue Valley Chorale's Youth Choruses on the YSSO's *Winter Concert Series* performances in February 2018.

2. Reference the list of eligible activities provided in the 2012 Policy for Economic, Cultural, Tourism, and Sustainability Grant (page 10) to briefly describe how the City grant would be used and how your activities meet the eligibility criteria (*please limit to approximately 1,000 words*)

Funding from the City of Ashland for Youth Symphony of Southern Oregon concerts, programs and services will strengthen YSSO capacity to serve the community and it will leverage significant financial support from other funders. The YSSO has benefitted both from direct support awarded by the City of Ashland and through additional funding awarded as a result of this recognition of the value of the organization. Next season, funding from the City of Ashland will help underwrite *Sectional Rehearsal* mentoring (training) sessions, as well as *Concert Series* and the *Youth Symphony Alumni Concert* marketing and materials, concert production costs and concert venue rental/facility fees. Funding from the City of Ashland will help sustain high-quality learning opportunities for young people and support engaging, affordable and accessible concerts for audiences of all ages. The performances during the *2017-2018 Concert Season* will include three (fall, winter, spring) multi-performance *Concert Series*, three *Community Outreach Concerts*, a *Concerto Competition* and a special *Youth Symphony & Youth Symphony Alumni Concert* in honor of the 30<sup>th</sup> *Anniversary Concert Season*.

The YSSO continues to seek opportunities to partner with cultural arts groups including Brava! Opera Theater, Britt Festivals and the Rogue Valley Symphony (RVS). The YSSO works with Ashland Schools, the Medford School District, Grants Pass Schools, St. Mary's School and Southern Oregon University (SOU). Conductors and coaches are affiliated with SOU and/or local schools or organizations. School facilities and equipment are used for rehearsals and several of the concerts. The YSSO trades concert program advertising with many arts organizations to expand marketing to audiences. Last spring a YSSO/Brava! Opera Theater collaboration brought rising opera stars Lindsay Ohse, soprano, and José Rubio, baritone, back to the Rogue Valley to perform American musical theater selections with the *Youth Symphony*. Next season, the YSSO is working with the Rogue Valley Chorale's Youth Choruses on performances for the *Winter Concert Series*. Former musicians will return to play with the *Youth Symphony* in a *Youth Symphony & Youth Symphony Alumni Concert* as well.

The Youth Symphony of Southern Oregon offers high-level music education, delivers cultural offerings to citizens of all ages, augments learning and programs in schools, and enriches Ashland's vibrant cultural landscape. The YSSO organization programs and concerts have an impact on community life, benefit residents as well as visitors to the region, engage young people from diverse backgrounds, provide work for professional musicians, music educators and arts professionals, and contribute to the community's creative prosperity and educational excellence. The YSSO helps attract and retain families and enhances educational opportunities in Ashland and the region. The positive learning environment and exemplary performances connect hearts, hands, minds, people and communities through music. The YSSO is southern Oregon's only nonprofit 501(c)(3) youth organization that brings together young people from diverse localities to perform standard repertoire for full orchestra, concerti, film/opera scores and new music, as well as arrangements and chamber music. The YSSO mission, program scope and structure are unique. A musician observed that the YSSO offers an opportunity to "be part of a group where every person's sound contributes to the music."

In an era dominated by electronic communication and technology, people need opportunities to reflect and listen to each other; to develop interpersonal skills, think creatively and make connections with diverse cultures. YSSO musicians will be better citizens having met the intellectual and technical challenges presented by each work and by mastering the music as a team. In addition to music skills, involvement in music helps develop and refine life skills and behavior. Participation in music nurtures habits essential for lifelong success in any career path or enterprise. Learning to play an instrument requires an investment of time and effort in order to develop fine motor skills as well.

YSSO performances feature outstanding Ashland musicians every season. Violinist Lily Dunlap, a sophomore at Ashland High School (AHS) and winner of the 2016 *Concerto Competition*, was a featured soloist this season. One of last season's *Concerto Competition* winners was an AHS student and numerous other Ashland students have been featured soloists over the years. Two past *Youth Symphony* musicians – Ashland residents - were selected to play in the National Youth Orchestra of the USA in 2013 and 2014. YSSO concerts showcase young people from Ashland and the region, and the performances provide access to music for people of all economic circumstances. The YSSO organization adds to Ashland's creative prosperity, enhances the quality of life, increases the scope of affordable cultural offerings and expands educational programs.

2.1. If your grant request is for date specific events, programs or activities, please complete the following table

Program/Event Title	Anticipated Start (rehearsals)	Dates of Event	Funding Request
Fall Concert Series Rehearsals & Performances (OAC Recital Hall at SOU 11/05/17)	Sept. 24, 2017	Nov. 4 & 5, 2017	\$3,500
Concerto Competition (OAC Recital Hall at SOU 01/22/18)		Jan. 22, 2018	\$1,000
Spring Concert Series Rehearsals & Performances (OAC Recital Hall at SOU 05/18/18)	Mar. 11, 2018	May 18, 19 & 20, 2018	\$3,500

3. Which grant category (or categories) does your request fall under? (please check all that apply)

Grant Category	Grant Request
<b>Economic Development</b>	\$
Per Economic Development eligible activities (page 10), please explain how your activities qualify (please limit to approx. 250 words):	
<p><b>Economic Development:</b> Cultural institutions and arts endeavors mean business for communities and enhance economic development. The City of Ashland models how nurturing the arts and cultural institutions sustains a successful community. The Youth Symphony of Southern Oregon adds to this success by offering unique and affordable family-oriented cultural programming and services. The YSSO offers music to citizens of all ages, expands educational programs, develops workforce skills, and contributes to Ashland’s livability. Music participation helps develop habits and skills essential in local and global economies. An Ashland professional musician and Oregon Center for the Arts at SOU music department faculty member is employed as music director/conductor. Professional musicians, most of whom are members of the Rogue Valley Symphony or private music teachers (many of whom reside in Ashland), coach the musicians and often serve as adjudicators. The YSSO patronizes local businesses, rents Ashland venues and partners with educational institutions and organizations.</p>	
<input checked="" type="checkbox"/> <b>Cultural</b>	<b>\$8,000.00</b>
Per Cultural Development eligible activities (page 11), please explain how your activities qualify (please limit to approx. 250 words):	
<p><b>Cultural Development:</b> The Youth Symphony of Southern Oregon is an important cultural asset for the City of Ashland and the region. The YSSO provides training and presents performances led by professional conductors and musicians, and nurtures lifelong appreciation of the arts. The YSSO provides access to unique music opportunities; develops music skills; partners with professional musicians and cultural organizations; strengthens Ashland’s arts network; supplements learning in schools; builds audiences; and offers affordable arts programming. It brings together young musicians from throughout the region to learn and perform diverse repertoire for symphony orchestra. The organization augments Ashland’s highly-regarded performing arts sector and enhances the quality of life in Ashland. The YSSO strives to ensure access to programs and performances through affordable concerts and by offering access through support for tuition and lessons.</p> <p>Next season marks the organization’s 30<sup>th</sup> Anniversary Concert Season of performances in Ashland and the Rogue Valley. An investment in the Youth Symphony of Southern by the City of Ashland will strengthen the YSSO’s capacity to work with and on behalf of young people, families and citizens, and will help ensure access to affordable cultural arts programming. Additionally, funding from City of Ashland program will help underwrite performances and leverage financial support from other funders. YSSO musicians – <i>past and present</i> – family members, volunteers, audiences, patrons, governing board and staff wish to thank the City of Ashland for its long-time support of the arts, cultural programming and important educational endeavors.</p>	

	<b>Tourism</b>	\$
<p>Per Tourism eligible activities (page 11), please explain how your activities qualify (<i>please limit to approx. 250 words</i>):</p> <p><b>Tourism:</b> YSSO concerts and music resources add to the City of Ashland’s reputation as an important center for cultural arts excellence and as a community that values its creative workforce. The accessible and affordable performances help build arts audiences. Family members and friends of the musicians, personnel, staff and donors from both within the region and beyond the area patronize businesses and attend performances.</p>		
	<b>Sustainability</b>	\$
<p>Per Sustainability eligible activities (page 11), please explain how your activities qualify (<i>please limit to approx. 250 words</i>):</p> <p><b>Sustainability:</b> The YSSO enhances resources provided by schools, organizations and Southern Oregon University. YSSO training develops technical, musical and performance skills, and promotes workforce skills such as discipline, self-motivation, leadership, teamwork, empathy and cooperation. These attributes enhance achievement in school and contribute to success in in life. The skills and lessons learned through arts participation can be transferred across disciplines. The YSSO organization and the work of its governing board, staff, music coaches, volunteers, families and audiences help ensure the City of Ashland remains a socially resilient community.</p>		

Primary Grant Category	Grant Request
<b>Economic Development</b>	\$
<b>Cultural</b>	\$ 8,000.00
<b>Tourism</b>	\$
<b>Sustainability</b>	\$

4. If you do not receive the full amount of your request, describe how your organization would use a smaller amount of funds in each of the categories being applied for (*please limit to approximately 250 words*)

Beyond direct financial support for YSSO performances and concert production, orchestra management, music and other expenses, funding awarded by the City of Ashland leverages significant financial support from other foundations and agencies, and it attracts support from individuals.

Recognition by the City of Ashland will continue to have an impact on access to music training, performances and learning opportunities for many dedicated young people in the coming year. Although the YSSO organization will continue to seek funding from individuals, foundations and businesses, partial support from the City of Ashland might result in the reduction of programs, training and services.

The Youth Symphony of Southern Oregon appreciates the past support awarded by the City of Ashland and the organization hopes this proposal and description of it community service, cultural arts and education opportunities, and music programming will merit continued funding for the YSSO organization’s milestone *30<sup>th</sup> Anniversary Concert Season*.

5. Using the attached City of Ashland Policy for Economic, Cultural, Tourism and Sustainability Grants, Section III (page 12), please explain how you will measure success or desired outcomes. (*please limit to approximately 250 words*)

**Overall Evaluation/Assessment:** The Youth Symphony of Southern Oregon organization uses a variety of tools and methods to assess performance and to evaluate effectiveness including observation, questionnaires, surveys and recordings. Music coaches share observations with staff. Concert recordings are available to the conductor in order to measure the technical and artistic growth of the musicians. Musician questionnaires are distributed and board and staff review findings each year. Audience surveys have provided feedback from concert patrons. All of these methods help identify internal and external environmental challenges and opportunities. The tools help the organization collect evidence of proficiency and skills, as well as organizational effectiveness.

From the fall 2014 through the current season (2016-2017), the governing board and staff have been using a Balanced Scorecard (BSC) tool to identify issues, set targets and objectives, monitor engagement and progress, and to develop action plans. This tool and process aids in evaluating the effectiveness of programs/services and in assessing progress and performance.

Thank you for your time and efforts in preparing this information for consideration by the Grants Committee.

By signing below you certify that:

You, the grantee, understand that you must comply with all federal, state and local requirements applicable for the activities funded by this grant. Award of a grant by the City does not waive the grantee's obligation to obtain, at grantee's sole expense, all applicable permits that may be required for grantee's program or project.

And, that a grant may be conditioned on submission or other approvals to the City of a Certificate of General Liability Insurance in the amount of up to **\$1,000,000** naming the City of Ashland, its officers and employees as additional insured.

And, that you the undersigned have legal authority to submit the above information on behalf of the organization named above.

Name (print) Sharon S. Wilson

Name (signature) 

Title Executive Director

*Youth Symphony of Southern Oregon*  
Additional Information, Documents & Reports

*Governing Board*

*Demographic Profile*

*Grants Program Budget*

*IRS Determination Letter*

*Bylaws*



*IRS 990 Report for July 1, 2015-June 30, 2016*

*Statements of Financial Activity & Position for July 1, 2015-June 30, 2016*

*Governing Board - Approved Operating Budget for July 1, 2016-June 30, 2017*

Applicant Organization Board Member Information Reporting Sheet

**Youth Symphony of Southern Oregon  
Governing Board**

Name	Address	Phone	Occupation	Title	Term of Office
Stacy Brubaker	2065 Lawnridge Street Medford, OR 97504	541-816-5958	Division Manager <i>Jackson Co. Mental Health Services</i>	Director	July 1, 2016- June 30, 2018 <i>(1<sup>st</sup> two-year term)</i>
Anita Caster	1827 Roberts Road Medford, OR 97504	541-772-7737	Programs Advisor <i>Southern Oregon University</i>	Secretary	July 1, 2015- June 30, 2017 <i>(2<sup>nd</sup> two-year term)</i>
Ann Godwin	4260 Coleman Creek Rd. Medford, OR 97501	541-897-0620	Artist, Parent Community Volunteer	Vice- President	July 1, 2015- June 30, 2017 <i>(1<sup>st</sup> two-year term)</i>
Ursula Horstmann- Nash	1314-B Center Dr. #123 Medford, OR 97501	541-770-2070	Educator <i>Grants Pass School District</i>	Director (and a Past- President)	July 1, 2015- June 30, 2017 <i>(2<sup>nd</sup> two-year term)</i>
Frank Phillips	4756 Fern Valley Road Medford, OR 97504	541-535-4724	President/CEO <i>St. Mary's School</i>	Director (and a Past- President)	July 1, 2015- June 30, 2017 <i>(3<sup>rd</sup> two-year term)</i>
Denise Poisson	5795 Old Stage Road Central Point, OR 97502	541-301-5657	Parent Accounting/Finance	Treasurer	July 1, 2015- June 30, 2017 <i>(1<sup>st</sup> two-year term)</i>
Jill Savino	711 Medford Center #262 Medford, OR 97504	541-301-4061	Parent Community Volunteer	Director	July 1, 2016- June 30, 2018 <i>(1<sup>st</sup> two-year term)</i>
Traci Walker			Educator Community Volunteer	Director	July 1, 2016- June 30, 2018 <i>(1<sup>st</sup> two-year term)</i>
Amy Watson	4731 Cloucrest Drive Medford, OR 97504	541-773-4041	<i>Asante Pharmacy Manager National Baldrige Board of Examiners</i>	President	July 1, 2015- June 30, 2017 <i>(2<sup>nd</sup> two-year term)</i>
Eric Werner	1994 Woodside Drive Medford, OR 97501	541-301-7988	Owner, <i>Artistic Piano, LLC</i> Musician	Director	July 1, 2016- June 30, 2018 <i>(1<sup>st</sup> two-year term)</i>



## City of Ashland Customer Demographic Profile

The primary goal of the grant award process is to allocate funds to organizations that are providing economic, tourism, cultural and/or sustainability programs, services or events that reach a demographically diverse customer base, both locally and from outside our region. The following questions are intended to provide guidance for the possible types of customer demographics that would help the grant review/award sub-committee understand the customer types that your application would likely reach.

**\* If your organization tracks this data or other related data, in other formats, please feel free to submit that format directly. This form is provided as a template and is not required to be completed in this format, but customer demographic information is an application submittal requirement.**

Organization Name: Youth Symphony of Southern Oregon

Program/Event Name: 30<sup>th</sup> Anniversary Concert Season Performances & Concert Production

For the Twelve month period of: July 1, 2017-June 30, 2018

**I. Customer Age (percentage)**  
*(musicians only)*

Youth 0 to 17 years (6-18)	<u>95</u>	%
Adult 18 to 39 years	<u>5</u>	%
Adult 40 to 64 years	<u>        </u>	%
Adult 65 and over	<u>        </u>	%
Unknown	<u>        </u>	%
<b>Total</b>	<b><u>100</u></b>	<b>%</b>

Grades K-5	5%	Female	61%
Grades 6-8	35%	Male	39%
Grades 9-12	55%		
SOU/RCC	5%		

Public School	70%	Private	12%
SOU/RCC	5%	Home	13%

**II. Staff Residence (percentage)**

Ashland	<u>40</u>	%
Rogue Valley	<u>60</u>	%
Other	<u>        </u>	%
<b>Total</b>	<b><u>100</u></b>	<b>%</b>

**Customer Age (percentage)**  
*(families/volunteers, donors, audiences & musicians)*

Youth 0 to 17 years (6-18)	<u>20</u>	%
Adult 18 to 39 years	<u>24</u>	%
Adult 40 to 64 years	<u>34</u>	%
Adult 65 and over	<u>17</u>	%
Unknown	<u>5</u>	%
<b>Total</b>	<b><u>100</u></b>	<b>%</b>

**II. Customer Residence (percentage)**  
*(families/volunteers, donors, audiences & musicians)*

Ashland	<u>39</u>	%
Rogue Valley	<u>54</u>	%
Other (within 50 miles)	<u>3</u>	%
Other (greater than 50 miles)	<u>4</u>	%

**III. Of the Customers identified above, what percent do you estimate stayed overnight to attend your program, service or event? 3-4 %**

**CITY OF ASHLAND  
GRANTS PROGRAM BUDGET**

Please use this form to identify costs associated with the program, activity or event that you are requesting funds for. This form is provided as a template to use. If your organization tracks grant related financials in a different reporting format, please submit in that format if you choose.

APPLICANT/ORGANIZATION: Youth Symphony of Southern Oregon  
 PROGRAM/EVENT TITLE: 30<sup>th</sup> Anniversary Concert Season Performances & Concert Production  
 PROJECT PERIOD: July 1, 2017 to June 30, 2018

<b>REVENUE</b>		
City of Ashland Grant Funds		\$ 8,000.00
Jackson County Funds /Identify:		\$
Other State or Federal Funds /Identify: (Oregon Arts Commission)		\$ 5,500.00
Other Funds /Identify: Individual gifts/contributions, private foundations, program advertising, concert partners (sponsors), tickets, special events		\$ 96,812.00
<b>TOTAL REVENUE</b>		<b>\$110,312.00</b>
<b>EXPENDITURES</b>		
<b>A. PERSONAL SERVICES (List costs by job title or function)</b>		
Salaries/Fees	% of time related to project	\$ 51,196.00
<i>(training, concerts &amp; concert preparation/production; special music initiatives)</i>		
1. <u>Music Director/Conductor</u>	<u>100%</u> <u>\$17,092</u>	
2. <u>Orchestra Mgmt./Assistant</u>	<u>100%</u> <u>\$ 4,014</u>	
3. <u>Music Coaches (fees)</u>	<u>100%</u> <u>\$ 4,800</u>	
4. <u>Admin. Staff</u>	<u>40%</u> <u>\$25,290</u>	
Taxes/Benefits		\$ 6,461.00
1. <u>Music Director/Conductor</u>	<u>\$ 1,555</u>	
2. <u>Orchestra Mgmt./Assistant</u>	<u>\$ 365</u>	
3. <u>Admin. Staff (40%)</u>	<u>\$ 2,301</u>	
5. <u>Simple IRA</u>	<u>\$ 2,240</u>	
<b>TOTAL PERSONAL SERVICES</b>		<b>\$ 57,657.00</b>
<b>B. MATERIALS &amp; SERVICES:</b>		
Accompanist(s)/Adjudicators		\$ 2,300.00
Advertising/Publicity, Design/Printing of Concert & PR Materials ( <i>pro-rated</i> )		\$ 8,000.00
Concert Venue Fees ( <i>pro-rated</i> )		\$ 5,580.00
Equipment Acquisition & Rental Fees ( <i>music stands; percussion rental</i> )		\$ 1,425.00
Insurance ( <i>pro-rated</i> )		\$ 1,350.00
Licenses ( <i>ASCAP/BM.</i> ) & Dues ( <i>League of American Orchestras, Ashland Chamber of Commerce</i> )		\$ 1,000.00
Music Rental/Acquisition/Related Expenses		\$ 3,300.00
Rehearsal Facility Fees ( <i>season</i> )		\$ 3,500.00
Scholarship Assistance ( <i>tuition waiver &amp; lesson assistance</i> )		\$ 17,800.00
Transportation, Piano Services, Storage ( <i>pro-rated</i> )		\$ 900.00
Ticket Printing		\$ 150.00
Office/General Expenses/Postage/Other ( <i>pro-rated</i> )		\$ 5,250.00
Accountant/Bookkeeping Fees		\$ 2,100.00
<b>TOTAL MATERIALS &amp; SERVICES</b>		<b>\$ 52,655.00</b>
<b>TOTAL EXPENDITURES</b>		<b>\$110,312.00</b>

Internal Revenue Service

Department of the Treasury

P. O. Box 2508  
Cincinnati, OH 45201

Date: January 13, 2000

Person to Contact:  
Tonya Martin 31-03017  
Customer Service Representative

Youth Symphony of Southern Oregon  
P.O. Box 4291  
Medford, OR 97501-0163

Telephone Number:  
877-829-5500  
Fax Number:  
513-263-3756

Federal Identification Number:  
[REDACTED]

Dear Sir or Madam:

This letter is in response to your telephone call requesting a copy of your organization's determination letter. This letter will take the place of the copy you requested.

Our records indicate that a determination letter issued in February 1992 granting your organization exemption from federal income tax under section 501(c)(3) of the Internal Revenue Code. That letter is still in effect.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in section 509(a)(2).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

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

Youth Symphony of Southern Oregon  
[REDACTED]

Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on the Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

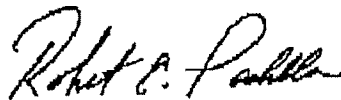
The law requires you to make your organization's annual return available for public inspection without charge for three years after the due date of the return. You are also required to make available for public inspection a copy of your organization's exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing. You can charge only a reasonable fee for reproduction and actual postage costs for the copied materials. The law does not require you to provide copies of public inspection documents that are widely available, such as by posting them on the Internet (World Wide Web). You may be liable for a penalty of \$20 a day for each day you do not make these documents available for public inspection (up to a maximum of \$10,000 in the case of an annual return).

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the organization's permanent records.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

This letter affirms your organization's exempt status.

Sincerely,



Robert C. Padilla  
Manager, Customer Service

# *Youth Symphony of Southern Oregon*

## **Bylaws**

### **ARTICLE I: NAME**

The name of the overall organization is the Youth Symphony of Southern Oregon, hereafter referred to as the YSSO.

### **ARTICLE II: PURPOSE & GOALS**

#### **SECTION 1. PURPOSE AND MISSION:**

The purpose of the YSSO is to operate exclusively for charitable, literary or educational purposes, including, but not limited to, receiving contributions and paying them over to one or more organizations described in Section 501(c)(3), and exempt from taxation under Section 501(a) of the Internal Revenue Code as now in force or hereafter amended. It is to engage in any lawful activity pursuant to ORS Chapter 61, but not in any event to engage in any activities prohibited to a corporation exempt under Section 501(c)(3) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States Internal Revenue Law). The mission of the YSSO is to provide exceptional performance experiences under the leadership of professional conductors and music coaches and to foster a lifelong appreciation of classical music and the arts.

### **ARTICLE III. MEMBERSHIP**

#### **SECTION I. QUALIFICATIONS:**

Members include only those persons and organizations that are members in good standing at the Associate level or above for the current operating year.

**SECTION 2. LEVELS:**

Member levels are set by the Governing Board.

**SECTION 3. MEETINGS OF THE MEMBERS:**

- (A) A meeting of the YSSO members in good standing shall be held annually, place and time at the discretion of the Governing Board. This may be a combination of business and social affairs. The primary business of the annual meeting shall be the election of the YSSO Governing Board, although members may also transact such other business of the YSSO as determined by the Governing Board.
- (B) Special meetings of the members may be called at the discretion of the President, subject to Governing Board approval, or by a Director upon a petition signed by 20 members of the YSSO or 10 percent, whichever is larger, having been presented to the Board Secretary. Notice of any special meetings, stating the time and place, shall be mailed to all members in good standing ten (10) days prior.
- (C) Each member in good standing shall have one (1) vote and such voting may not be done by proxy.
- (D) All meetings shall be guided by Roberts Rules of Order.

**ARTICLE IV. BOARD OF DIRECTORS**

**SECTION 1. BOARD SIZE AND COMPENSATION:**

The affairs of the YSSO shall be governed by a Governing Board comprised of no fewer than ten (10) Directors with representation including but not limited to, Medford, Grants Pass and Ashland areas respectively.

Directors serve without compensation.

**SECTION 2. TERM:**

The term of office for a Director shall be two (2) years. A Director may not serve for more than three consecutive terms.

**SECTION 3. ELECTIONS:**

The election of new and returning Directors shall be held annually. The Governance Committee shall submit name(s) to the President and Secretary of the Board for review and approval by the Governing Board prior to being placed in nomination. At the Annual Meeting, each member in good standing present shall be entitled to cast one (1) vote for each Director subject to election.

**SECTION 4. VACANCIES:**

The unexpired term caused by the departure of a Director may be filled by a person elected by simple majority of the Directors present at a regular meeting of the Governing Board.

**SECTION 5. REMOVAL & RESIGNATIONS:**

A Director may be removed with or without cause by a vote of two-thirds (2/3) of the Directors in office at a special meeting called for that purpose. Resignations of Directors shall be made by written notice to the President.

**SECTION 6. ATTENDANCE:**

It is the duty of each Director to notify the President if he/she is unable to attend a scheduled meeting of the governing board. Any Director with unexcused absences from 25 percent of the total number of Governing Board meetings during a year may be removed from the Governing Board and his/her term filled as per the provisions in Section 4 of this Article.

**SECTION 7. MEETINGS OF THE BOARD:**

- (A) The Governing Board shall meet a minimum of four times during each fiscal year and shall hold an annual retreat in addition to the quarterly meetings.
- (B) Special meetings of the Governing Board may be called by the President or upon written request of at least three (3) Directors. Special meetings of the Governing Board shall be called with a minimum of three (3) days' notice to each Director, given personally, by mail, telephone or by e-mail, which notice shall state the time, place and purpose of the meeting.
- (C) In accordance with state statutes and if deemed necessary by the President of the Governing Board, a director may participate in any regular or special meeting if he/she can simultaneously hear or read all communication during the meeting and communicate or send messages to all other participating directors. If a meeting is conducted during which a director is participating in this manner, all participating directors shall be informed that a meeting is taking place at which official business may be transacted and the director participating in the meeting by this means is deemed to be present in person at the meeting.
- (D) All meetings shall be guided by Roberts Rules of Order.

**SECTION 8. QUORUM AND VOTING:**

A majority of the current Directors in office shall constitute a quorum. When a quorum is present, the vote of the majority of Directors shall constitute the action of the Governing Board unless a greater vote is required by law, the Articles of Incorporation or these Bylaws.

Voting may not be done by proxy.



**ARTICLE V.            POWERS AND DUTIES OF THE BOARD OF DIRECTORS:**

Directors shall execute all of the powers of the YSSO and perform all acts which they deem in the best interest of the YSSO, subject to restrictions of law, the Articles of Incorporation, and these Bylaws.

**SECTION 1.            DUTIES OF THE BOARD:**

The Governing Board is responsible for and shall control and oversee the affairs and business of the YSSO. All Directors must act in good faith and exercise due diligence in all matters of governance (internal and external policies, board development, personnel), corporate compliance (records and inspection, state and federal law and regulations) and fiduciary responsibility (risk assessment, reporting, maintaining liability and other insurance, designating depositories, preventing misuse of YSSO funds). Directors are responsible for the financial health and well-being of the YSSO (annual budgeting, review of financial position and activity, ensuring adequate revenue and support to maintain the YSSO). All Directors must act in the best interest of the YSSO, understand the duties of loyalty, care and fairness, and adhere to a code of ethics and the conflict of interest policy.

The Governing Board shall hire and annually fix the compensation of the Music Director and Conductor, the Associate Conductor and Executive Director.

All Directors must be members in good standing of the YSSO.

**ARTICLE VI.            OFFICERS OF THE BOARD**

**SECTION I.            ENUMERATION:**

Officers of the Governing Board shall consist of a President, one or more Vice-President(s), Secretary and Treasurer, and such other offices as the YSSO Governing Board may deem necessary.

Only current Directors are eligible to be elected to serve as officers.

The offices of Secretary and Treasurer may be held by the same person, but no person shall simultaneously hold more than one of any other office.

**SECTION 2. TERM OF OFFICE:**

A term of office shall consist of one (1) fiscal year.

**SECTION 3. ELECTION:**

At the final Governing Board meeting of the fiscal year, the Directors shall elect officers from candidates presented by the Governance Committee.

Nominations from the floor are welcome as per Roberts Rules of Order.

**SECTION 4. VACANCIES:**

Vacated offices may be filled upon recommendation by the President, subject to the vote of the full Governing Board.

**SECTION 5. DUTIES:**

(A) **PRESIDENT:** The President of the Governing Board is the Chief Volunteer Officer of the YSSO. The President oversees governance of the YSSO and the maintenance of the policies and procedures in the Bylaws, and ensures that all orders and resolutions of the Governing Board are carried out. The President presides at Governing Board and Executive Committee meetings and the Annual Meeting. The President is responsible for executing official documents. The President coordinates the duties of other officers. The President appoints the chair of each Standing Committee except the Finance Committee and ensures that each Director serves on a Standing Committee. The President may establish *ad hoc* working groups as necessary. The President shall approve the appointment of any non-Director to a Standing Committee or an *ad hoc* working group.

The President ensures that Directors are aware of and fulfill governance responsibilities, comply with applicable laws and Bylaws, conduct business effectively and efficiently, and that they are accountable for their decisions, actions and the business of the YSSO. The President leads the Governing Board in strategic planning and helps guide and mediate actions with respect to priorities and governance. The President monitors financial planning, plays a leading role in all fund development activities, and ensures that structures and procedures are in place for securing the resources required by the organization. The President ensures that structures and procedures are in place for effective recruitment, training and evaluation of Directors. The President coordinates the Governing Board's employment, supervision, annual performance evaluation and termination of the Music Director, Associate Conductor and Executive Director. The President shall recommend the annual compensation levels for the Music Director, Associate Conductor and Executive Director. The President serves as primary spokesperson for the YSSO and may be called upon to represent the YSSO to the media, as well as to report Board decisions and actions to the public. The President performs all duties assigned to the office of President, as well as any other duties that may be required by these Bylaws or prescribed by the Governing Board. The President is an *ex-officio* member of all Standing Committees except the Governance Committee.

- (B) VICE-PRESIDENT(S): A Vice-President shall preside at all Governing Board, Executive Committee and Annual Meetings in the absence of the President. A Vice-President may be appointed by the President to chair a standing committee. A Vice President shall normally accede to the office of President upon the completion of the President's term. A Vice-President may be asked to perform other duties by the President.
- (C) SECRETARY: The Secretary keeps minutes of all Governing Board meetings and the Annual Meeting. The Secretary is the custodian of corporate records and provides oversight of corporate documents and reports. The Secretary ensures proper and timely notices required by law or by these Bylaws, and performs all duties incident to the office of Secretary and any other duties as may be required by law, by the Bylaws, or which may be assigned by the Governing Board or President. The Secretary serves as Parliamentarian at the request of the President.

- (D) **TREASURER:** The Treasurer is responsible for all YSSO accounts and funds and oversees and ensures the use of proper record-keeping and standard accounting practices for all YSSO properties and transactions. The Treasurer will provide regular financial reports to the Governing Board and Executive Committee. The Treasurer works with staff to develop the annual operating budget and presents it to the Governing Board for review and approval. The Treasurer will perform all duties assigned to the office of Treasurer, as well as any other duties that may be required by these Bylaws, prescribed by the Governing Board or assigned by the President. The Treasurer serves as Chair of the Finance Committee.

#### **ARTICLE VII. EXECUTIVE COMMITTEE:**

The Executive Committee shall be composed of the officers of the Governing Board. The President may appoint up to two additional at-large Directors to serve on the Executive Committee. The Executive Committee shall meet monthly or as needed to review reports and recommendations from committees and staff, discuss and act upon issues of concern and financial matters, conduct planning sessions and other such tasks directed by the President. The Executive Committee is empowered to act upon the Governing Board's direction. The Executive Committee shall be chaired by the President. In the President's absence a Vice-President or other officer will be appointed by the President to serve as temporary chair.

#### **ARTICLE VIII. STANDING COMMITTEES**

Standing Committees of the Governing Board shall meet monthly or as needed or directed by the President. The President shall set deadlines by which written reports and recommendations shall be provided to the Governing Board. Minutes of all meetings shall be recorded, provided to the President and kept on file. The President shall appoint chairs of committees unless otherwise specified in the Bylaws. Committee membership shall be limited to current Directors unless allowed in the Bylaws. The President shall serve as an *ex officio* member of all Standing

Committees. The President has the authority to create *ad hoc* working groups as needed to address issues, carry out tasks and make recommendations to the Governing Board for action. The Executive Director shall serve as an *ex officio* member of all relevant Standing Committees.

## **SECTION 1. GOVERNANCE COMMITTEE**

The Governance Committee is responsible for the general affairs of the Governing Board. The Committee is responsible for board development and preparing an annual slate of officers for election by the Governing Board. The Committee also assists staff with the development of board training materials, coordinating orientation sessions for new and returning board members, organizing orientation sessions and developing board self-assessments. The Committee is responsible for reviewing the organization's Bylaws and making recommendations on changes or other amendments for review and action by the Governing Board. The Committee is responsible for ensuring the articles and provisions of the Bylaws are consistent with corporate documents and records of the YSSO, as well as internal operating and administrative policies and guidelines, and state and federal regulations. The President will appoint at least three current Directors to serve on the Committee. A current officer shall chair the Committee.

## **SECTION 2. FINANCE COMMITTEE:**

The Finance Committee shall review the annual budget prepared by the Executive Director and Treasurer of the Governing Board. The Committee helps staff develop appropriate procedures for budget preparation and ensures consistency between the annual budget and organizational planning. The Committee shall advise the Governing Board on matters of financial planning and issues, risk assessment, reports and compliance, information systems and internal controls, and may recommend an audit as needed. The Treasurer shall chair the Committee.

## **SECTION 3. FUND DEVELOPMENT COMMITTEE:**

The Fund Development Committee shall oversee and lead the fund raising efforts of the Governing Board. The Committee creates an annual strategic fund development plan in

cooperation with the Executive Director and Finance Committee. The Committee monitors procedures and ensures compliance with ethical practices with regard to fund raising efforts and activities. A current Director shall chair the Committee.

#### **ARTICLE IX. AMENDMENTS**

These Bylaws may be amended or repealed by a majority vote at a legally constituted meeting of the Governing Board, provided at least 10 days previous notice has been given in writing to all Directors of the Governing Board regarding proposed amendments.

#### **ARTICLE X. INDEMNIFICATION & INSURANCE**

This Corporation shall defend, indemnify and hold harmless, every registered agent, Director or Officer and his family against liability and against expenses reasonably incurred by him in connection with any action, suit or proceeding to which he may be made a party by reason of his having been a Director or Officer of this Corporation, except in relation to matters as to which he/she shall be finally adjudged in such action suit or proceeding to be liable for willful misconduct. The foregoing rights shall be exclusive of other rights to which he/she may be entitled.

#### **ARTICLE XI. DISSOLUTION**

In case of dissolution and final liquidation of this nonprofit Corporation, all assets thereof, after payment of lawful debts and expenses, shall be assigned and delivered to one or more Corporation(s) operating as a nonprofit Corporation in the field of music and exempt under Section 501(c)(3) of the Internal Revenue Code (or corresponding provision of any future Internal Revenue Service law). The Corporation(s) shall be determined by the current Governing Board.

**ARTICLE XII MISCELLANEOUS**

**SECTION 1. NON-DISCRIMINATION:**

The Youth Symphony of Southern Oregon is committed to equal opportunity for all persons without regard to gender, age, race, color, religion, creed, country of origin, marital status, disability or sexual orientation. It is the policy of the Youth Symphony of Southern Oregon to comply with all federal, state and local laws and regulations regarding equal opportunity. In keeping with that policy, the Youth Symphony of Southern Oregon is committed to maintaining a work environment that is free of unlawful discrimination and harassment.

**SECTION 2. COMPLIANCE:**

These Bylaws are intended to comply with the applicable laws of the State of Oregon. In case of conflict with the provisions of Oregon statutes, the statutory provisions shall apply.

**SECTION 3. WAIVER:**

No restrictions, condition, obligation, or provision contained in these Bylaws shall be deemed to have been abrogated or waived by reason of any failure to enforce the same, irrespective of the number of violations or breaches thereof which may occur.

Proposed: December 17, 1990  
September 5, 2000  
Revised: August 6, 2002  
Amended: July 23, 2005 (Article III, Sections 1 & 3)

**Bylaws Committee Meetings:** May-December 2006  
**Proposed Amendments Drafted:** May, June, December, 2006  
**Reviewed by Board:** March 2007-January 2008  
**Proposed Amendments Adopted:** January 8, 2008

Amendments Proposed: January 8, 2008  
Proposed Amendments Adopted: April 8, 2008

Amendments Discussed: August 5, 2009  
Amendments Proposed: August 18, 2009  
Proposed Amendments Adopted: September 2, 2009

Governance Committee Meetings: January 14, 19, March 30, May 6, 2010  
Amendments Proposed: June 1, 2010  
Proposed Amendments Adopted: June 16, 2010

Governance Committee Meetings: January 23, March 4 & 11, May 20, 2014  
Amendments Proposed: May 23, 2014  
Proposed Amendments Adopted: June 11, 2014



**Short Form**  
**Return of Organization Exempt From Income Tax**  
 Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
 (except private foundations)

OMB No. 1545-1150

**2015**

Department of the Treasury  
 Internal Revenue Service

- ▶ Do not enter social security numbers on this form as it may be made public.
- ▶ Information about Form 990-EZ and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Open to Public  
 Inspection

**A** For the 2015 calendar year, or tax year beginning 7/01, 2015, and ending 6/30, 2016

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Final return/terminated  
 Amended return  
 Application pending

**C** **YOUTH SYMPHONY OF SOUTHERN OREGON**  
 P.O. BOX 4291  
 MEDFORD, OR 97501

**D** Employer identification number  
 [REDACTED]

**E** Telephone number  
 (541) 858-8859

**F** Group Exemption Number..... ▶

**G** Accounting Method:  Cash  Accrual Other (specify) ▶ \_\_\_\_\_

**H** Check  if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

**I** Website: ▶ WWW.YSSO.ORG

**J** Tax-exempt status (check only one) –  501(c)(3)  501(c) ( ) ◀(insert no.)  4947(a)(1) or  527

**K** Form of organization:  Corporation  Trust  Association  Other

**L** Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ..... ▶ \$ 150,912.

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)  
 Check if the organization used Schedule O to respond to any question in this Part I.....

		1	2	3	4	5 a	5 b	5 c	6 a	6 b	6 c	6 d	7 a	7 b	7 c	8	9	10	11	12	13	14	15	16	17	18	19	20	21						
REVENUE	1	Contributions, gifts, grants, and similar amounts received.....	110,386.																																
	2	Program service revenue including government fees and contracts.....	38,733.																																
	3	Membership dues and assessments.....																																	
	4	Investment income.....	1,793.																																
	5 a	Gross amount from sale of assets other than inventory.....																																	
	5 b	Less: cost or other basis and sales expenses.....																																	
	5 c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a).....																																	
	6	Gaming and fundraising events																																	
	6 a	Gross income from gaming (attach Schedule G if greater than \$15,000).....																																	
	6 b	Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000).....																																	
6 c	Less: direct expenses from gaming and fundraising events.....																																		
6 d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c).....																																		
7 a	Gross sales of inventory, less returns and allowances.....																																		
7 b	Less: cost of goods sold.....																																		
7 c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a).....																																		
8	Other revenue (describe in Schedule O).....																																		
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8..... ▶	150,912.																																	
EXPENSES	10	Grants and similar amounts paid (list in Schedule O).....																																	
	11	Benefits paid to or for members.....																																	
	12	Salaries, other compensation, and employee benefits.....	89,073.																																
	13	Professional fees and other payments to independent contractors.....	1,744.																																
	14	Occupancy, rent, utilities, and maintenance.....	9,000.																																
	15	Printing, publications, postage, and shipping.....	2,161.																																
	16	Other expenses (describe in Schedule O)..... <b>SEE SCHEDULE O</b>	50,825.																																
17	<b>Total expenses.</b> Add lines 10 through 16..... ▶	152,803.																																	
ASSETS	18	Excess or (deficit) for the year (Subtract line 17 from line 9).....	-1,891.																																
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return).....	116,532.																																
	20	Other changes in net assets or fund balances (explain in Schedule O).....																																	
	21	<b>Net assets or fund balances at end of year.</b> Combine lines 18 through 20..... ▶	114,641.																																



**Part II Balance Sheets** (see the instructions for Part II)    
 Check if the organization used Schedule O to respond to any question in this Part II

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	95,227.	93,817.
23 Land and buildings		
24 Other assets (describe in Schedule O) SEE SCHEDULE O	28,579.	27,596.
25 Total assets	123,806.	121,413.
26 Total liabilities (describe in Schedule O) SEE SCHEDULE O	7,274.	6,772.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	116,532.	114,641.

**Part III Statement of Program Service Accomplishments** (see the instructions for Part III)    
 Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose? SEE SCHEDULE O  
 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

	Expenses
28 SEE SCHEDULE O	
(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	28 a 150,074.
29	
(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	29 a
30	
(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	30 a
31 Other program services (describe in Schedule O)	
(Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	31 a
32 Total program service expenses (add lines 28a through 31a)	32 150,074.

**Part IV List of Officers, Directors, Trustees, and Key Employees** (list each one even if not compensated - see the instructions for Part IV)    
 Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
LAUREL DRYLAND DIRECTOR	1	0.	0.	0.
PAUL FINWALL VICE PRESIDENT	1	0.	0.	0.
ANASTASIA ANDERSON DIRECTOR	1	0.	0.	0.
LANA HAYNES DIRECTOR	1	0.	0.	0.
FRANK PHILLIPS PAST PRESIDENT	1	0.	0.	0.
URSULA HORSTMANN-NASH DIRECTOR	1	0.	0.	0.
ANITA CASTER SECRETARY	1	0.	0.	0.
DENISE POISSON TREASURER	1	0.	0.	0.
LYNN SJOLUND DIRECTOR	1	0.	0.	0.
AMY WATSON PRESIDENT	1	0.	0.	0.
SHARON WILSON EXECUTIVE DIR.	40	54,249.	1,627.	0.
MILES WILTROUT VICE PRESIDENT	1	0.	0.	0.
CYNTHIA HUTTON MUSIC DIRECTOR	8	16,111.	483.	0.
ANNE GODWIN DIRECTOR	1	0.	0.	0.

COPY

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in SEE SCHEDULE O the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V. [X]

33 Did the organization engage in any significant activity not previously reported to the IRS?
34 Were any significant changes made to the organizing or governing documents?
35 a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities?
35 b If 'Yes,' to line 35a, has the organization filed a Form 990-T for the year?
35 c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year?
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year?
37 a Enter amount of political expenditures, direct or indirect, as described in the instructions.
37 b Did the organization file Form 1120-POL for this year?
38 a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?
38 b If 'Yes,' complete Schedule L, Part II and enter the total amount involved.
39 Section 501(c)(7) organizations. Enter:
39 a Initiation fees and capital contributions included on line 9.
39 b Gross receipts, included on line 9, for public use of club facilities.
40 a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under:
40 b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ?
40 c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958.
40 d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization.
40 e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction?
41 List the states with which a copy of this return is filed

42 a The organization's books are in care of SHARON WILSON Telephone no. (541) 858-8859
Located at 925 WEST 8TH STREET MEDFORD OR ZIP + 4 97501

b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?
See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).
c At any time during the calendar year, did the organization maintain an office outside the U.S.?

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here.
and enter the amount of tax-exempt interest received or accrued during the tax year.

44 a Did the organization maintain any donor advised funds during the year?
44 b Did the organization operate one or more hospital facilities during the year?
44 c Did the organization receive any payments for indoor tanning services during the year?
44 d If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments?
45 a Did the organization have a controlled entity within the meaning of section 512(b)(13)?
45 b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)?



46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I. Yes No  
46

**Part VI Section 501(c)(3) organizations only**

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI.

47 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. Yes No  
47

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E. Yes No  
48

49a Did the organization make any transfers to an exempt non-charitable related organization? Yes No  
49a

b If 'Yes,' was the related organization a section 527 organization? Yes No  
49b

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
NONE				

f Total number of other employees paid over \$100,000. ▶

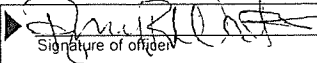
51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

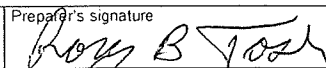
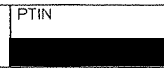

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation
NONE		

d Total number of other independent contractors each receiving over \$100,000. ▶

52 Did the organization complete Schedule A? Note: All section 501(c)(3) organizations must attach a completed Schedule A. Yes No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**  
 Signature of officer:  Date: 10/25/16  
 Type or print name and title: AMY WATSON PRESIDENT

**Paid Preparer Use Only**  
 Print/Type preparer's name: RORY B TOSH, CPA Preparer's signature:  Date: 11/14/16  
 Firm's name: KDP CERTIFIED PUBLIC ACCOUNTANTS, LLP Check  if self-employed PTIN:   
 Firm's address: 640 SUPERIOR CT MEDFORD, OR 97504-6181 Firm's EIN:   
 Phone no.: (541) 773-6633

May the IRS discuss this return with the preparer shown above? See instructions. Yes No

**SCHEDULE A**  
(Form 990 or 990-EZ)

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.  
▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2015**

Open to Public Inspection

Name of the organization

YOUTH SYMPHONY OF SOUTHERN OREGON

Employer identification number

[REDACTED]

**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 11, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  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: \_\_\_\_\_
- 5  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)**.
- 7  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.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  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.)
- 10  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11  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 in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
  - a  **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.**
  - 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.**
  - 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.**
  - d  **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.**
  - e  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.
  - f Enter the number of supported organizations: \_\_\_\_\_
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

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

Schedule A (Form 990 or 990-EZ) 2015

**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.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.) . . . . .						
2 Tax revenues levied for the organization'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 <b>Total.</b> Add lines 1 through 3 . . . . .						
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). . . . .						
6 <b>Public support.</b> Subtract line 5 from line 4. . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
7 Amounts from line 4. . . . .						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
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.) . . . . .						
11 <b>Total support.</b> Add lines 7 through 10. . . . .						
12 Gross receipts from related activities, etc. (see instructions) . . . . .					12	
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2015 (line 6, column (f) divided by line 11, column (f)). . . . .	14	%
15 Public support percentage from 2014 Schedule A, Part II, line 14. . . . .	15	%
16 a <b>33-1/3% support test – 2015.</b> If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization. . . . . ▶ <input type="checkbox"/>		
b <b>33-1/3% support test – 2014.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization. . . . . ▶ <input type="checkbox"/>		
17 a <b>10%-facts-and-circumstances test – 2015.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. . . . . ▶ <input type="checkbox"/>		
b <b>10%-facts-and-circumstances test – 2014.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. . . . . ▶ <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. . . . . ▶ <input type="checkbox"/>		

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

(Complete only if you checked the box on line 9 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.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants'.)	71,924.	113,462.	115,967.	124,615.	106,511.	532,479.
2 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.	36,741.	41,951.	44,678.	39,323.	38,733.	201,426.
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						0.
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						0.
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
6 Total. Add lines 1 through 5.	108,665.	155,413.	160,645.	163,938.	145,244.	733,905.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.	0.	0.	0.	0.	0.	0.
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.	0.	0.	0.	0.	0.	0.
c Add lines 7a and 7b.	0.	0.	0.	0.	0.	0.
8 Public support. (Subtract line 7c from line 6.)						733,905.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
9 Amounts from line 6.	108,665.	155,413.	160,645.	163,938.	145,244.	733,905.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources.	1,314.	1,311.	1,322.	255.	1,793.	5,995.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						0.
c Add lines 10a and 10b.	1,314.	1,311.	1,322.	255.	1,793.	5,995.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						0.
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). SEE PART VI.	22,395.	5,105.	3,080.	3,755.	3,875.	38,210.
13 Total support. (Add lines 9, 10c, 11, and 12.)	132,374.	161,829.	165,047.	167,948.	150,912.	778,110.

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2015 (line 8, column (f) divided by line 13, column (f)).	15	94.32 %
16 Public support percentage from 2014 Schedule A, Part III, line 15.	16	92.01 %

**Section D. Computation of Investment Income Percentage**

17 Investment income percentage for 2015 (line 10c, column (f) divided by line 13, column (f)).	17	0.77 %
18 Investment income percentage from 2014 Schedule A, Part III, line 17.	18	0.78 %

19a 33-1/3% support tests – 2015. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization.

b 33-1/3% support tests – 2014. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization.

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions.

Part IV Supporting Organizations

(Complete only if you checked a box in line 11 on Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

Table with columns for question number, description, Yes, and No. Rows include questions 1, 2, 3a, 3b, 3c, 4a, 4b, 4c, 5a, 5b, 5c, 6, 7, 8, 9a, 9b, 9c, 10a, and 10b.



**Part IV Supporting Organizations** (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a	
b A family member of a person described in (a) above?	11b	
c A 35% controlled entity of a person described in (a) or (b) above? If 'Yes' to a, b, or c, provide detail in Part VI.	11c	

**Section B. Type I Supporting Organizations**

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's 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 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	

**Section C. Type II Supporting Organizations**

	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	

**Section 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 the organization maintained a close and continuous working relationship with the supported organization(s).	2	
3 By reason of the relationship described in (2), did the organization's supported organizations have a 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	

**Section 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):

a  The organization satisfied the Activities Test. Complete line 2 below.

b  The organization is the parent of each of its supported organizations. Complete line 3 below.

c  The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).

2 Activities Test. Answer (a) and (b) below.

	Yes	No
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of 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 that these activities constituted substantially all of its activities.	2a	
b Did the activities described in (a) 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 these activities but for the organization's involvement.	2b	

3 Parent of Supported Organizations. Answer (a) and (b) below.

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? 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.

	Yes	No
a	3a	
b	3b	



**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

1  Check here if the organization satisfied the Integral Part Test as a qualifying trust on November 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A – Adjusted Net Income</b>		(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	<b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)	8	

<b>Section B – Minimum Asset Amount</b>		(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):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> 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 1-1/2% 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 .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

<b>Section C – Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 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	<b>Distributable Amount.</b> 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-functionally-integrated Type III supporting organization (see instructions).

**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D – Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions	
7 <b>Total annual distributions.</b> Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions	
9 Distributable amount for 2015 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E – Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2015	(iii) Distributable Amount for 2015
1 Distributable amount for 2015 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2015 (reasonable cause required – see instructions)			
3 Excess distributions carryover, if any, to 2015:			
a			
b			
c			
d From 2013			
e From 2014			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2015 distributable amount			
i Carryover from 2010 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2015 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2015 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2015, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions)			
6 Remaining underdistributions for 2015. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)			
7 <b>Excess distributions carryover to 2016.</b> Add lines 3j and 4c			
8 Breakdown of line 7:			
a			
b			
c Excess from 2013			
d Excess from 2014			
e Excess from 2015			

BAA

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
(See instructions.)

**PART III, LINE 12 - OTHER INCOME**

NATURE AND SOURCE	2015	2014	2013	2012	2011
ADVERTISING	\$ 3,875.	\$ 3,755.	\$ 3,080.	\$ 5,105.	\$ 22,395.
TOTAL	<u>\$ 3,875.</u>	<u>\$ 3,755.</u>	<u>\$ 3,080.</u>	<u>\$ 5,105.</u>	<u>\$ 22,395.</u>

Schedule B  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

2015

Name of the organization

YOUTH SYMPHONY OF SOUTHERN OREGON

Employer identification number

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Form 990-PF

Section:

- 501(c)( 3 ) (enter number) organization  
 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation  
 527 political organization

- 501(c)(3) exempt private foundation  
 4947(a)(1) nonexempt charitable trust treated as a private foundation  
 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization

YOUTH SYMPHONY OF SOUTHERN OREGON

Employer identification number

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CARPENTER FOUNDATION 824 EAST MAIN STREET MEDFORD, OR 97504	\$ 8,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	CARRICO FAMILY FOUNDATION PO BOX 4436 MEDFORD, OR 97501	\$ 12,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	COLLINS FOUNDATION 1618 SW FIRST AVENUE, SUITE 50 PORTLAND, OR 97201	\$ 7,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	CITY OF ASHLAND 20 EAST MAIN STREET ASHLAND, OR 97520	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	JAMES F & MARION L MILLER FOUNDATIO 520 SW YAMHILL STREET, # 520 PORTLAND, OR 97204	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	ANNA DUNLAP 180 WATERSIDE CIR, UNIT 201 MARCO ISLAND, FL 34145	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

YOUTH SYMPHONY OF SOUTHERN OREGON

**Part II** Noncash Property (see instructions). Use duplicate copies of Part II 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
	N/A		
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

YOUTH SYMPHONY OF SOUTHERN OREGON

Employer identification number

**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 information once. See instructions.) ..... \$ \_\_\_\_\_ N/A  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee



**SCHEDULE O**  
(Form 990 or 990-EZ)

**Supplemental Information to Form 990 or 990-EZ**

OMB No. 1545-0047

**2015**

Department of the Treasury  
Internal Revenue Service

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 990-EZ.  
▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Open to Public Inspection

Name of the organization

Employer identification number

YOUTH SYMPHONY OF SOUTHERN OREGON

**FORM 990-EZ, PART I, LINE 16  
OTHER EXPENSES**

ADJUDICATORS.....	\$	1,664.
ADVERTISING.....		2,720.
ADVERTISING AND PROMOTION.....		2,721.
ARTIST FEES & TRAVEL.....		4,500.
BANK FEES.....		1,318.
CHAMBER MUSIC SERIES.....		1,253.
COACHES.....		2,600.
DESIGN (BROCHURES, NEWSLETTER).....		565.
DESIGN (PROGRAMS, ADS, POSTERS).....		1,343.
DUES & MEMBERSHIPS.....		150.
FLOWERS.....		100.
FUNDRAISING.....		1,592.
INSURANCE.....		2,790.
LICENSES & FEES.....		615.
MUSIC RENTAL PURCHASE.....		3,484.
OFFICE EXPENSES.....		2,404.
PERFORMANCE VENUE.....		9,615.
POSTERS AND POSTCARDS.....		689.
PRINTING PROGRAMS.....		3,996.
RECEPTIONS.....		450.
REHEARSAL/AUDITION FACILITIES.....		2,465.
SCHOLARSHIPS & GRANTS.....		1,200.
SMALL EQUIPMENT.....		306.
STORAGE.....		540.
TAXES & FEES.....		87.
TICKET FEES.....		90.
TRANSPORTATION.....		1,117.
WORKSHOPS AND SEMINARS.....		451.
<b>TOTAL</b>	<b>\$</b>	<b>50,825.</b>

**FORM 990-EZ, PART II, LINE 24  
OTHER ASSETS**

	<u>BEGINNING</u>	<u>ENDING</u>
OCF ENDOWMENT.....	\$ 28,579.	\$ 27,596.
<b>TOTAL</b>	<b>\$ 28,579.</b>	<b>\$ 27,596.</b>

**FORM 990-EZ, PART II, LINE 26  
TOTAL LIABILITIES**

	<u>BEGINNING</u>	<u>ENDING</u>
DEFERRED REVENUE.....	\$ 3,800.	\$ 3,804.
PAYROLL LIABILITIES.....	3,474.	2,968.
<b>TOTAL</b>	<b>\$ 7,274.</b>	<b>\$ 6,772.</b>

**FORM 990-EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE**

THE YOUTH SYMPHONY OF SOUTHERN OREGON (YSSO) ORGANIZATION PROVIDES MUSIC EXPERIENCES AND TRAINING UNDER THE LEADERSHIP OF PROFESSIONAL CONDUCTORS AND MUSIC COACHES AND FOSTERS LIFELONG APPRECIATION OF CLASSICAL MUSIC AND THE ARTS. YSSO

Name of the organization

YOUTH SYMPHONY OF SOUTHERN OREGON

Employer identification number

**FORM 990-EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE (CONTINUED)**

ORGANIZATION GOALS ARE TO PROVIDE ACCESS TO HIGH-LEVEL TRAINING AND PERFORMANCE OPPORTUNITIES; TO DEVELOP MUSIC TECHNIQUE AND PERFORMANCE SKILLS; TO PROMOTE LIFELONG CREATIVE WORKFORCE SKILLS SUCH AS TEAMWORK, DISCIPLINE, EMPATHY AND COOPERATION; TO WORK WITH PROFESSIONAL MUSICIANS AND CULTURAL NETWORKS; TO SUPPLEMENT SCHOOL PROGRAMS; TO BUILD AUDIENCES AND PROVIDE AFFORDABLE CULTURAL ENRICHMENT. THE ORGANIZATION MARKED ITS 28TH CONCERT SEASON IN 2015-2016.

THE YSSO IS A 501(C) (3) ORGANIZATION FOUNDED IN 1988 TO PROVIDE YOUNG PEOPLE WITH OPPORTUNITIES TO EXPAND THEIR KNOWLEDGE OF CLASSICAL MUSIC BY LEARNING AND PERFORMING CHALLENGING SYMPHONIC REPERTOIRE, NEW AND COMMISSIONED MUSIC, CONCERTI, OPERA AND FILM LITERATURE, AND CHAMBER MUSIC. REVENUE FOR OPERATIONS, PROGRAMS AND INITIATIVES IS GENERATED THROUGH ANNUAL GIFTS AND CONTRIBUTIONS FROM INDIVIDUALS, FOUNDATION AND AGENCY GRANTS, CONCERT SERIES PROGRAM ADVERTISING, CONCERT SERIES PARTNER (SPONSOR) SUPPORT, FUND RAISING EVENTS AND TUITION.

LAST SEASON, THE YSSO ORGANIZATION INCLUDED YOUTH ORCHESTRA (INTERMEDIATE) AND YOUTH SYMPHONY (ADVANCED). EACH YEAR, THE MUSICIANS PLAY AN ARRAY OF WORKS BY BRAHMS, BEETHOVEN, HIGDON, MAHLER, JACOBS, VERDI, HOLST, SHOSTAKOVICH, TCHAIKOVSKY, HOVHANESS, MENDELSSOHN, BARBER, DVORAK, MOZART, WILLIAMS AND OTHERS. YSSO CONCERTS ARE APPROPRIATE FOR AND ACCESSIBLE TO AUDIENCES OF ALL AGES. DURING THE 2015-2016 CONCERT SEASON, MORE THAN 145 PUBLIC SCHOOL, PRIVATE SCHOOL, HOME SCHOOL AND COLLEGE MUSICIANS (AGES 6-23) FROM JACKSON, JOSEPHINE AND KLAMATH COUNTIES AND THE SURROUNDING REGION PARTICIPATED IN THE YSSO. PARTICIPANTS PAY TUITION; HOWEVER, ALL QUALIFIED MUSICIANS MAY PARTICIAPTE REGARDLESS OF FINANCIAL CIRCUMSTANCES. SCHOLARSHIP ASSISTANCE IS AVAILABLE TO CURRENT YSSO MUSICIANS. MORE THAN 40 PERCENT OF THE MUSICIANS RECEIVED FULL/PARTIAL TUITION WAIVERS AND/OR

Name of the organization

Employer identification number

YOUTH SYMPHONY OF SOUTHERN OREGON

**FORM 990-EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE (CONTINUED)**

LESSON ASSISTANCE IN 2015-2016.

THE YSSO ORGANIZATION HAS GROWN FROM ONE ENSEMBLE TO A REGIONAL ORGANIZATION WITH TWO FULL ORCHESTRAS, INDIVIDUAL MUSICIANS, AND CHAMBER GROUPS UNDER THE LEADERSHIP OF A PROFESSIONAL STAFF AND VOLUNTEER GOVERNING BOARD OF COMMUNITY LEADERS, AND PARENT VOLUNTEERS. THE SEASON HAS EXPANDED FROM THREE CONCERTS BY ONE ENSEMBLE TO A FULL SEASON OF PERFORMANCES OF STANDARD LITERATURE, MASTERWORKS, NEW AND COMMISSIONED MUSIC, CHAMBER MUSIC AND ARRANGEMENTS FOR PREPARATORY ENSEMBLES. THE YSSO ORGANIZATION'S MULTI-PERFORMANCE FALL, WINTER AND SPRING CONCERT SERIES ARE CENTRAL TO THE YSSO MISSION TO PROVIDE EXCEPTIONAL TRAINING, PERFORMANCE EXPERIENCES AND HIGH-QUALITY AFFORDABLE PROGRAMMING. LAST SEASON, YSSO EDUCATION & OUTREACH INITIATIVES INCLUDED SECTIONAL REHEARSALS, A CHAMBER MUSIC SERIES, COMPLIMENTARY TICKETS FOR STUDENTS, COMMUNITY OUTREACH CONCERTS AND SCHOLARSHIP ASSISTANCE (TUITION WAIVERS AND LESSON ASSISTANCE).

**FORM 990-EZ, PART III, LINE 28 - STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS**

THE YOUTH SYMPHONY OF SOUTHERN OREGON PROVIDES CLASSICAL MUSIC INSTRUCTION AND SYMPHONIC PERFORMANCE EXPERIENCES TO MORE THAN 145 YOUNG MUSICIANS AND PRESENTS PUBLIC PERFORMANCES FOR THE ROGUE VALLEY COMMUNITY.

**FORM 990-EZ, PART V - REGARDING TRANSFERS ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS**

(A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT?..... NO

(B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS, DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT?..... NO

# Youth Symphony of Southern Oregon

## Statement of Financial Position

July 1, 2015-June 30, 2016

### Assets

Current Assets	
Checking/Savings Accounts	
Umpqua Checking Account	49,844.14
U.S. Bank	2,527.36
Umpqua Bank CD	6,252.93
Umpqua Business MM	34,992.91
Total Checking/Savings	93,617.34
Other Current Assets	
Refundable Deposits	200.00
Total Current Assets	93,817.34
Other Assets	
OCF Investment (Endowment Partner Fund)	27,596.21
Total Other Assets	27,596.21
<b>TOTAL ASSETS</b>	<b>121,413.55</b>

### Liabilities & Equity

Liabilities	
Current Liabilities	
Other Current Liabilities	
Payroll Liabilities	
Charles Schwab (SIMPLE IRA)	1,016.18
Federal Taxes (941/944)	1,391.61
Oregon Employment Taxes	263.49
Oregon Income Tax	296.78
Payroll Taxes Payable	
State Payroll Taxes Payable	
Payroll Taxes Payable - Other	
Total Payroll Taxes Payable	
SIMPLE IRA Payable	
Total Payroll Liabilities	2,968.06
Total Other Current Liabilities	2,968.06
Total Current Liabilities	2,968.06
<b>Equity</b>	
Retained Earnings	119,836.33
Temporarily Restricted Net Assets	500.00
Net Income	-1,890.84
Total Equity	118,445.49
<b>TOTAL LIABILITIES &amp; EQUITY (preliminary 06/30/16)</b>	<b>121,413.55</b>

## Youth Symphony of Southern Oregon

## Financial Activity Summary

	Approved FY16 July 1, 2015- June 30, 2016	Actual FY16 July 1, 2015-June 30, 2016
<b>Revenue &amp; Support</b>		
Advertising (concert series program)	4,825.00	3,875.00
Cash Reserve - Asset Acquisition (tent. for riser purchase)	7,500.00	0.00
Concert Series Partners (sponsors)	30,000.00	2,500.00
Fees		
Concerto Competition (\$25 fee)	150.00	200.00
Fund Raising (events)	7,500.00	6,111.00
Grants	42,800.00	57,858.00
In-Kind (instruments, advertising)	1,250.00	3,875.00
Interest	300.00	11.95
Membership Contributions	32,500.00	39,067.00
Ticket Sales (sales + complimentary)	21,500.00	20,476.00
Ticket Sales (- complimentary)	-6,000.00	-6,700.00
Ticket Sales	15,500.00	13,776.00
Tuition (paid + waivers)	44,050.00	39,480.00
Tuition (- full/partial waivers)	-15,250.00	-14,523.00
Tuition (paid)	28,800.00	24,957.00
Tuition Fee (fee paid by families receiving tuition waivers)	1,000.00	775.00
<b>Total Revenue &amp; Support</b>	<b>172,125.00</b>	<b>153,005.95</b>
<b>Expenses</b>		
Asset Acquisition	7,500.00	305.50
Bank Charges	1,400.00	1,124.15
Chamber Music Series Concerts/Program	1,400.00	1,253.21
Concerts	27,000.00	25,869.90
Design (general)	1,715.00	565.00
Dues & Memberships	250.00	150.00
Fund Raising (cash)	2,750.00	1,591.86
Fund Raising (in-kind/non-cash)	0.00	0.00
Instrument Acquisition (in-kind/non-cash)	0.00	2,625.00
Instrument Repair	200.00	0.00
Insurance	3,350.00	2,789.51
Licenses & Business Fees (ASCAP, BMI)	650.00	615.00
Marketing/Professional Development	400.00	450.60
Merchandise (pencils for musicians)	150.00	187.88
Music Rental/Purchase/Duplication (cash)	2,400.00	3,483.64
Office	11,975.00	11,404.24
Pay (accompanist/adjudicator fees)	2,400.00	1,663.77
Payroll Expenses (staff wages, taxes, IRA)	95,540.00	89,073.86
Postage	1,700.00	1,058.85
Printing	1,990.00	1,101.55
Professional Services (accounting, bookkeeping)	1,700.00	1,743.73
Rehearsal/Audition Site	2,350.00	2,465.00
Scholarships (lesson assistance)	1,800.00	1,200.00
Sectional Rehearsals	2,880.00	2,600.00
Storage	540.00	540.00
Taxes (Oregon CT-12 Fee)	85.00	87.00
<b>Total Expenses</b>	<b>172,125.00</b>	<b>153,949.25</b>
<b>NET ORDINARY INCOME</b>	<b>0.00</b>	<b>-943.30</b>
<b>Other Income (Endowment Partner Fund)</b>		
Endowment Interest		373.60
Endowment Realized Gain/Loss		139.85
<b>Total Other Income</b>		<b>513.45</b>
<b>Other Expense (Endowment Partner Fund)</b>		
Endowment Investment Mgmt. Expense		69.82
Endowment OCF Fees		123.63
Endowment Unrealized Gain/Loss		1,267.54
<b>Total Other Expense</b>		<b>1,460.99</b>
<b>NET OTHER INCOME</b>		<b>-947.54</b>
<b>NET INCOME</b>		<b>-1,890.84</b>

**Youth Symphony of Southern Oregon**  
**FY16 Approved Budget & Actual Financial Activity**

Revenue & Support	Approved FY16 July 1, 2015-June 30, 2016	Actual FY16 July 1, 2015-June 30, 2016
Advertising	4,825.00	3,875.00
Cash Reserve - Asset Acquisition (tent. for riser purchase)	7,500.00	0.00
Concert Season & Concert Series Partners	30,000.00	2,500.00
<b>Fees</b>		
Concerto Competition (ea. \$25)	150.00	200.00
Fund Raising (special events)	7,500.00	6,111.00
Grants	42,800.00	57,858.00
In-Kind (instruments, advertising)	1,250.00	3,875.00
Interest	300.00	11.95
Membership Contributions	32,500.00	39,067.00
<b>Tickets</b>		
Tickets (cash sales & complimentary)	21,500.00	20,476.00
Tickets (\$5 complimentary for students/teachers/families)	-6,000.00	-6,700.00
<b>Tickets</b>	15,500.00	13,776.00
<b>Tuition</b>		
Tuition (total paid tuition + tuition waivers)	44,050.00	39,480.00
Tuition Waivers	-15,250.00	-14,523.00
<b>Tuition</b> (paid tuition less tuition waivers)	28,800.00	24,957.00
<b>Tuition Fee</b> (\$25 registration fee X tuition waiver musicians)	1,000.00	775.00
<b>Total Revenue &amp; Support</b>	<b>172,125.00</b>	<b>153,005.95</b>

**Expenses**

Asset Acquisition (riser repair/maintenance)	7,500.00	305.50
Bank Charges	1,400.00	1,124.15
<b>Chamber Music Series Program</b>		
Coaches	1,200.00	1,120.00
Other (music, facilities, program)	200.00	133.21
<b>Total Chamber Music Series Program</b>	<b>1,400.00</b>	<b>1,253.21</b>
<b>Concert Series &amp; Community Outreach</b>		
Advertising	2,500.00	2,720.17
Advertising (in-kind)	1,250.00	1,250.00
Artist Fee(s)	2,000.00	2,000.00
Artist Travel/Transportation/Other	2,500.00	2,500.00
Concert Dress Items (hosiery, socks, ties, etc.)	100.00	0.00
Design Fees (program, ads, posters)	1,250.00	1,343.00
Equipment & Equipment Rental Fees	300.00	100.36
Flowers (soloists, seniors, other)	250.00	0.00
Performance Sites	10,000.00	9,614.71
Piano Services	300.00	0.00
Poster and Postcards (printing)	750.00	689.00
Programs (printing)	4,200.00	3,995.95
Receptions	450.00	449.76
Recording (video capture & editing)		
Ticket Fees (ticket box cash/printing)	150.00	89.76
Transportation (truck rental, fuel)	1,000.00	1,117.19
<b>Total Concert Series &amp; Community Outreach Concerts</b>	<b>27,000.00</b>	<b>25,869.90</b>
<b>Design</b>		
Brochure/Rack Cards/Mini-Cards	325.00	65.00
Newsletter	550.00	500.00
Web Site/Management	840.00	0.00
<b>Total Design</b>	<b>1,715.00</b>	<b>565.00</b>
<b>Dues &amp; Memberships</b>	<b>250.00</b>	<b>150.00</b>
<b>Fund Raising Expenses (cash)</b>	<b>2,750.00</b>	<b>1,591.86</b>
<b>Fund Raising Expenses (non-cash)</b>		

**Youth Symphony of Southern Oregon**  
**FY16 Approved Budget & Actual Financial Activity**

Instrument Acquisition (in-kind/non-cash)			2,625.00
Instrument Repair		200.00	0.00
<b>Insurance</b>			
Directors & Officers	800.00		806.00
Liability	1,550.00		1,434.00
SAIF	1,000.00		768.51
SAIF Reimbursement/Rebate			-219.00
<b>Total Insurance</b>		3,350.00	2,789.51
<b>Licenses &amp; Business Fees</b>		650.00	615.00
<b>Marketing/Professional Development</b>			
Board Supplies & Meetings	100.00		203.35
Dues & Memberships (Chamber, League)			0.00
Professional Development Workshops & Consultancies	300.00		247.25
<b>Total Marketing/Professional Development</b>		400.00	450.60
<b>Merchandise</b>			
Pencils	150.00		187.88
<b>Total Merchandise</b>		150.00	187.88
<b>Music Rental/Purchase</b>			
Commission Fee			
Commissioned Work Printing/Duplication			
Rehearsal Music/Duplication	500.00		409.48
Youth Strings	100.00		0.00
Youth Symphony & Youth Orchestra	1,800.00		3,074.16
<b>Total Music Rental/Purchase</b>		2,400.00	3,483.64
<b>Music (non-cash)</b>			
<b>Office Expenses</b>			
Copying	400.00		264.96
Internet (web hosting fee)	225.00		275.76
Lease	9,000.00		9,000.00
Office Equipment	750.00		368.96
Office Supplies	750.00		744.13
Phone	850.00		750.43
<b>Total Office Expenses</b>		11,975.00	11,404.24
<b>Pay</b>			
Accompanist Fees	1,000.00		0.00
Adjudicators (auditions, competition)	1,400.00		1,663.77
<b>Total Pay (fees)</b>		2,400.00	1,663.77
<b>Payroll Expenses</b>			
SIMPLE IRA Company Contributions	2,200.00		2,154.15
Taxes	7,300.00		6,982.22
Wages	86,040.00		79,937.49
<b>Total Payroll Expenses</b>		95,540.00	89,073.86
<b>Postage (incl. annual fees)</b>		1,700.00	1,058.85
<b>Printing</b>			
Brochure/Rack Card/Mini-Card	800.00		168.00
Handbook			
Newsletter	800.00		599.05
Other (forms, remittance envelopes, misc.)	390.00		334.50
<b>Total Printing</b>		1,990.00	1,101.55
<b>Professional Services</b>			
Accounting Fees	650.00		650.00
Bookkeeping Fees & QB Payroll Fees	1,050.00		1,093.73
<b>Total Professional Services</b>		1,700.00	1,743.73
<b>Rehearsal/Audition Site</b>		2,350.00	2,465.00
<b>Scholarships (lessons)</b>		1,800.00	1,200.00

**Youth Symphony of Southern Oregon  
FY16 Approved Budget & Actual Financial Activity**

<b>Sectional Rehearsals</b>		
Music Coach Fees	2,400.00	2,320.00
Music Coaches (ringers- performances/rehearsals)	480.00	280.00
<b>Total Sectional Rehearsals</b>	<b>2,880.00</b>	<b>2,600.00</b>
<b>Storage</b>	<b>540.00</b>	<b>540.00</b>
<b>Taxes (Oregon CT-12 Fee)</b>	<b>85.00</b>	<b>87.00</b>
<b>Travel</b>	<b>0.00</b>	<b>0.00</b>
<b>Total Expenses</b>	<b>172,125.00</b>	<b>153,949.25</b>
<b>NET ORDINARY INCOME</b>	<b>0.00</b>	<b>-943.30</b>
<b>Other Income (Endowment Partner Fund)</b>		
Endowment Interest		373.6
Endowment Realized Gain/Loss		139.85
<b>Total Other Income</b>		<b>513.45</b>
<b>Other Expense (Endowment Partner Fund)</b>		
Endowment Investment Mgmt. Expense		69.82
Endowment OCF Fees		123.63
Endowment Unrealized Gain/Loss		1,267.54
<b>Total Other Expense</b>		<b>1,460.99</b>
<b>NET OTHER INCOME</b>		<b>-947.54</b>
<b>NET INCOME</b>		<b>-1,890.84</b>

*Note:* The income section of the 2015-2016 operating budget included \$7,500 (cash reserves) approved for the possible purchase of new risers in collaboration with another presenting organization. The expense section of the budget included \$7,500 for this cost (asset acquisition). However, the existing jointly-owned riser system was repaired instead of being replaced. Foundation support awarded to the partner organization was sufficient to underwrite riser maintenance, upgrades and repairs. The only cost to the YSSO organization (\$305.50) was for payment to logistics personnel to replace and repair parts.



## *Youth Symphony of Southern Oregon*

### **Statements of Financial Activity & Position Annual Operating Budget & Annual Reports**

The governing board of the Youth Symphony of Southern Oregon organization receives and reviews statements of financial activity & position prior to all meetings of the governing board. Financial statements are presented by the treasurer and executive director and discussed by the directors. Financial statements also are provided to standing committees as needed/requested. Annual reports are provided to the president and treasurer for review/approval and the reports are available to each director. The annual operating budget plan is prepared by the executive director and finance committee chaired by the treasurer, and is presented to the governing board for review, discussion and approval.

A handwritten signature in cursive script that reads "Amy Watson". The signature is written in black ink and is positioned above a horizontal line.

**Amy Watson, *President***  
**Governing Board**  
**Youth Symphony of Southern Oregon**