

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

Applicant/Organization	Brava! Opera Theater and James M. Collier Young Artist Program		
Mailing Address	2924 Siskiyou Blvd. Suite 204, Medford, OR 97504		
Contact Name	Lorrie Hall, General Director	Contact Phone #1	541-261-5776
Email #1	lorrie@bravaopera.com		
Contact Name #2	Willene Gunn, Artistic Director	Contact Phone #2	541-535-1145
Email #2	willene@bravaopera.com		
Federal Tax ID	██████████	IRS Class (Exemption)	501(c) (3)
		Total Grant Request (\$5,000 min)	\$5,000

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 501© letter verifying your no-profit status;
5. Organization 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.

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)

Brava! Opera Theater and James M. Collier Young Artist Program is an opera company created in 2010 by Artistic Director Willene Gunn, General Director Lorrie Hall with benefactor James M. Collier. Brava! Opera Theater was a fiscally sponsored project of Fractured Atlas starting in 2011 and received 501(c)3 status in August 2015. Since 2010, Brava! Opera Theater has held seven Opera Workshop/Master Classes with Concerts that trained 80 singers, presented the operas *The Telephone* and *Old Maid and the Thief* by Menotti, *The Turn of the Screw* by Britten, *The Impresario* by Mozart and *Breasts of Tirésias* by Poulenc, *Orpheus and Eurydice* by Gluck and *Don Pasquale* by Donizetti, held six Vocal Competitions with 431 singers from across the USA with \$33,000 in prizes distributed, and presented five Vocal Competition Winner's Concerts.

Brava! Opera Theater and James M. Collier Young Artist Program is a company with an emphasis in four areas of performance:

1. **Opera Master Class and Concert** involves one-on-one training from world-renowned singers or educators to help emerging and professional opera singers develop musical and theatrical tools essential to create and build a character for performance. The master class culminates in a concert showcasing the participants.

Objectives

1. Provide local and regional singers professional level training in the primary skills of performing in a concert (held at Rogue Valley Unitarian Universalist Church)
2. Improve acting skills and dramatic instincts of each participant
3. Present a Master Class Concert to southern Oregon audiences (at SOU Recital Hall) showcasing Opera Masterclass participants while educating the audience about the training of emerging opera singers.
4. Bring world-class singer/educators to the Rogue Valley

2. Our **Vocal Competition** recognizes and encourages promising young operatic talent, and is held each October in San Francisco. Cash prizes for the three winners total \$6,500. A **Winner's Concert** is held each spring at SOU Recital Hall featuring the first place winner.

Objectives

1. Provide promising young opera singers a showcase to display their talent
2. Draw national attention to Brava! Opera Theater and James M. Collier Young Artist Program through the competition
3. Present a professional concert at SOU Recital Hall featuring the winner
4. Award \$6,500 to top three singers to assist with their educational and career development (awards not included in grant request)

3. A fully staged professional **Opera** is presented each March in Ashland at Mountain Avenue Theater (AHS).

Objectives

1. Train and employ young performers, musicians and technical staff
2. Present the highest quality opera production to southern Oregon audiences
3. Enrich the lives of every attendee
4. Present two performances of *Carousel* March 16 and 18, 2018 at Mountain Avenue Theater
5. Provide invaluable training for four Ashland High School students who will work with our stage manager, light designer, sound and video designer, technical director and crew.

4. We give away free tickets via our Free Youth Tickets Program to students of all ages who show an interest in music but are unable to afford a ticket.

Objectives

1. Provide youth and disadvantaged youth the opportunity to attend opera productions and concerts
2. Enrich the lives of every ticket recipient
3. Develop new audiences amongst recipients
4. Develop appreciation for opera amongst recipients
5. Within one year of receipt of grant monies Brava! Opera will donate at least 75 event tickets to students

Our **mission** is to train the complete singer/actor, recognize and showcase young operatic talent and present high quality concerts and professional chamber operas.

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)

Economic Development

Programs and activities that improve local educational & technical skills to match local business workforce need

Performing our opera at Mountain Avenue Theater at Ashland High School permits multiple AHS students to be hired to assist with our production in the area of light design and run, stage management, crew, sound and video design, set design and theater management. During our 2017 opera Don Pasquale, seven AHS were employed and trained by professional theater technical folk. We also employ SOU students when we perform at SOU Recital Hall.

Increased Ashland Jobs: Many of our hired independent contractors are Ashland residents. With two concerts in Ashland and the opera now held at Mountain Avenue Theater, 90% of our hires are Ashland residents.

Cultural Development

Programs or activities that create cultural offerings unique from existing local offerings, activities or programs.

Our Vocal Competition Winner's Concert, Opera Master Class with Concert and annual Opera are not offered by any other organization between Eugene and Sacramento and therefore provide new cultural offerings in Ashland.

Expansion in size or scope of existing cultural offerings, activities or programs. Our three programs are unique and the opera is new to Ashland.

Expansion of audience access to those existing offerings, activities or programs. With performances at Mountain Avenue Theater (Ashland High School) and two events at SOU Recital Hall we offer 1,700 seats of operatic events not available through any other organization. By moving our annual opera to Mountain Avenue Theater in Ashland for two performances, there are now 822 new seats available for audience members to attend an opera.

Brava! Opera is providing unique cultural opportunities in southern Oregon including: the singer training programs (Opera Master Class with Concerts), encouraging promising young operatic talent and exposing southern Oregonians to world-class emerging opera singers (Vocal Competition with Winner's Concert) and highly theatrical professional operas presented in English in Ashland.

QUOTE FROM THE OPERA WORKSHOP/MASTER CLASSES WITH CONCERT

"What an excellent program. Thank you for your important work supporting emerging artists in the Rogue Valley. We are very fortunate to have you assisting all of us who are working on behalf of young singers. Outstanding work! I think all but one of the singers was an SOU student or former student, in any case, it was wonderful to hear such a great program."

Best, **Dr. Paul French, SOU Director of Choral/Vocal Studies**

QUOTE ABOUT OUR OPERAS

"The Turn of the Screw" was breathtaking! The talent on the stage as well as the direction and production values rivals any major theatrical company. Bravo to Brava Opera! Livia Genise, Camelot Theatre Artistic Director

About *Don Pasquale*: "Well, you won't hear anything better than that at San Francisco Opera!" an Ashland Patron

Tourism

Likelihood that the proposed activity or event will increase hotel/motel occupancy or increase local restaurant and retail business sales.

At our performances of Don Pasquale at Ashland High School March 17 and 19, 2017, 10% of our patrons came from 150 miles away or further. We estimate that at least 10% spent the night in local hotels. With patrons coming to our events from the coast, northern California and beyond, we know that patrons are spending money in local restaurants and hotels.

Marketing special events and festivals designed to attract tourists. All Brava! Opera events are marketed on our website, on Ashland Chamber of Commerce and general Tourism websites, in hotels, B & B's and various locations with paper brochures, posters and postcards as well as via regular mail and email from our database email list. We also advertise on Facebook targeting southern Oregon and northern California communities.

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

Program/Event Title	Anticipated Dates of Event		Funding Request
	Start	End	
Vocal Competition Winner's Concert (Competition 10-22. Winner's Concert is TBA in spring once winner selected)	10-22-17	Spring TBA	\$1,000
Opera Master Class with Concert	11-11-17	11-11	\$600

Carousel by Rodgers and Hammerstein	3-16-18	3-18-18	\$3,400
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3. Which grant category (or categories) does your request fall under? (please check all that apply)

<input checked="" type="checkbox"/>	Grant Category	Grant Request
	Economic Development	\$500
<p>Per Economic Development eligible activities (page 10), please explain how your activities qualify (<i>please limit to approx. 250 words</i>):</p> <p>Now that we perform all of our events in Ashland, 90% of the folks we hire are Ashland residents. The venues we utilize in Ashland are: SOU Music Recital Hall, Mountain Avenue Theater at Ashland High School, Ashland Presbyterian Church (for all rehearsals) and Ashland Unitarian Universalist Fellowship. We pay to rent these facilities and hire the associated support personnel. Because our audience members come from up 150 miles away, we also have an impact on area hotels, restaurants and businesses when our patrons utilize their services.</p>		
	Cultural	\$4,000
<p>Per Cultural Development eligible activities (page 11), please explain how your activities qualify (<i>please limit to approx. 250 words</i>):</p> <p>Brava! Opera is providing unique cultural opportunities in Ashland including: the singer training programs (Opera Master Class with Concerts), encouraging promising young operatic talent and exposing southern Oregonians to world-class emerging opera singers (Vocal Competition with Winner's Concert) and highly theatrical professional operas presented in English in Ashland at Mountain Avenue Theater. With our Free Youth Tickets Program we are able to provide free tickets to Ashland students age 7 to 21 and an accompanying parent or guardian to opera concerts, master classes and operas. We have connected to the Ashland music teachers at the elementary, middle, high school and college level as well as the LGBT and other groups who are unable to afford a ticket. Over 150 complimentary tickets were distributed in Ashland during our 2016-2017 Season providing invaluable exposure to youth and their families to classical music and opera.</p>		
	Tourism	\$500
<p>Per Tourism eligible activities (page 11), please explain how your activities qualify (<i>please limit to approx. 250 words</i>):</p> <p>All Brava! Opera events are marketed through the Ashland Chamber of Commerce, on social media, via our website, in regional newspapers and magazines (including JPR) and on all social media sites. We have statistics from all of our events via our ticket program that shows us that 10% of our audience members travel over 150 miles to attend our events.</p> <p>Because we are bringing world class singers to perform in the Vocal Competition Winner's Concert and our annual opera, as well as bringing world class teachers/singers (Deborah Voigt in 2016), people are willing to travel to Ashland to attend our events.</p>		

Sustainability	\$0
Per Sustainability eligible activities (page 11), please explain how your activities qualify (please limit to approx. 250 words):	

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)

We would divide any funds we receive on a percentage basis. That is the Opera Master Class Concert would be allocated 12%, the Opera 68% and the Vocal Competition with Winner's Concert 20%.

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)

All Brava! Opera programs have measurable goals and objectives that are assessed upon completion of each program. Opinions are solicited from voice teachers, participants, staff and audience members and will be analyzed by the Brava! Opera staff and Board of Directors. In addition, we email surveys to patrons and attendees. If attendees buy tickets with a check or credit card, we have their address and contact information. With our database we are able to track new attendees versus prior attendees and what is their city of origin. We hire and pay all independent contractors and therefore can report pay and number of additional jobs created. We have a system to distribute and track free tickets to youth and students. Our data collection will address the following criteria for evaluation and reporting requirements:

- Number of actual jobs created as a direct result of the City grant.
- Median wage of actual jobs created as a direct result of the City grant.
- Number of people who travelled to Ashland from over 50 miles away as a direct result of activities funded by the City's grant.
- Number of additional overnight stays in Ashland transient lodging businesses as a direct result of the City's grant.
- Number of additional events offered in Ashland as a direct result of the City's grant.
- Number of additional people who attended a cultural event in Ashland as a direct result of the City's grant.
- Number of additional children, seniors, or low income residents who attended a cultural event in Ashland as a direct result of the City's grant.

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) Lorrie Hall

Name (signature) 

Title General Director

ADDITIONAL SUBMITTAL INFORMATION & REFERENCE MATERIALS

The following requirements and forms are provided to assist applications in submitting a complete application package. Use of the form templates provided is not a submittal requirement, but rather an optional tool for the applicant to use if they choose to provide the required information in this format.

I. Grant Requirements (from 2012 Policy for Economic, Cultural, Tourism and Sustainability Grants)

- A. Grantee shall be registered as a 501(c) non-profit *
- B. Grantee shall be a non-government entity
- C. The minimum grant amount that can be applied for is \$5,000 and the minimum award granted is \$1,000 per category and \$5,000 per grant application
- D. Grant award shall be utilized consistent with the associated applicant proposal and shall be primarily oriented to the grantee's Ashland activities and programs. Grant funds may also be utilized for a proportionate share of Grantee's overall administrative expenses.
- E. An applicant can apply for grant funds from more than one category, however, it is the responsibility of the applicant to specify the categories and funds requested for each category and clearly describe how the proposal meets the criteria for each category.
- F. Grantees must submit the application to the City prior to the deadline, which is established each year by the City. **Absolutely no late applications will be accepted.**
- G. Incomplete applications (see application cover page) will NOT be forwarded to the grant review committee for consideration.
- H. Materials submitted beyond those required and listed on the application cover page and application form will NOT be forwarded to the grant review committee as part of the application packet.

II. Grant Submittal

- A. Grant applications for BN2017-19 are due on **March 22, 2017 by 4:00 p.m.**
- B. Completed application packets can delivered in person to the Utility Billing offices at City Hall, 20 East Main St ** or mailed to:

City of Ashland
c/o Diana Shiplet
20 East Main St
Ashland, OR 97520

- C. Questions regarding the BN 2017-19 Grant Program can be directed to Diana Shiplet, Administrative Analyst by phone at 541-552-2100 or diana.shiplet@ashland.or.us.

**If your organization is being sponsored by or legally affiliated with a registered non-profit, a letter from that organizations Board of Directors recognizing the affiliation and a copy of the 501 (c) verification of the sponsoring non-profit*

*** City of Ashland office hours are Monday to Friday 8:30am to 5:00pm.*

Tourism

As required by State law, a portion of the grant program funds must be awarded and utilized for specific tourism related activities. The grant program typically awards tourism funds in excess of the minimum amount required to meet Oregon Revised Statute (ORS) definition and criteria relating to tourism promotion.

Applicants requesting grant funds for activities that meet the ORS definition and criteria of tourism should highlight how the grant request meets the following ORS criteria:

§ 320.300₁

(6) 'Tourism' means economic activity resulting from tourists.

(7) 'Tourism promotion' means any of the following activities:

- (a) Advertising, publicizing or distributing information for the purpose of attracting and welcoming tourists;
- (b) Conducting strategic planning and research necessary to stimulate future tourism development;
- (c) Operating tourism promotion agencies; and
- (d) Marketing special events and festivals designed to attract tourists.

(10) 'Tourist' means a person who, for business, pleasure, recreation or participation in events related to the arts, heritage or culture, travels from the community in which that person is a resident to a different community that is separate, distinct from and unrelated to the persons community of residence, and that trip:

- (a) Requires the person to travel more than 50 miles from the community of residence; or
 (b) Includes an overnight stay.

Applicant Organization Board Member Information Reporting Sheet

Name	Address	Phone	Occupation	Title	Term of Office
Lorrie Hall	2650 Country Park Ln, Medford, OR 97504	541-734-9488	Gen Director Ret opera Singer Grant writer	President/General Director	19 mos
Willene Gunn	19 Logan Way, Talent, OR 97540	541-535-1145	Ret opera singer Opera Director Ret Director of Opera Programs San Francisco Conservatory of Music	Vice President/ Artistic Director	19 mos
Lauren Cypher	532 Eastwood Drive Medford, Oregon 97540	541-326-9500	Singer Non-profit Development Bookkeeper	Treasurer	19 mos
Dr. Michael Hall	2650 Country Park Ln, Medford, OR 97504	541-261-5946	So Or Endodontics Owner Endodontist	Secretary	19 mos
Ellie Holt Murray	205 Mobile Drive Ashland, OR 97520	541-482-3962	Ret opera singer Adjust SOU Music Voice Teacher	Member	19 mos
Alan Balzer	109 Suncrest Rd Talent, OR 97540	541-944-6852	Brand Manager KMVU Fox26 Producer, Director Charter (former)	Member	2 weeks

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: Brava! Opera Theater and James M. Collier Young Artist Program

Program/Event Name: 2017-2018 Season

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

I. Customer Age (percentage)

Youth 0 to 17 years	10	%
Adult 18 to 39 years	30	%
Adult 40 to 64 years	30	%
Adult 65 and over	30	%
Unknown		%
Total	100	%

II. Staff Residence (percentage)

Ashland	25	%
Rogue Valley	75	%
Other		%
Total	100	%

II. Customer Residence (percentage)

Ashland	62	%
Rogue Valley	33	%
Other (within 50 miles)	3	%
Other (greater than 50 miles)	2	%

III. Of the Customers identified above, what percent do you estimate stayed overnight to attend your program, service or event? 10 %

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: Brava! Opera Theater and James M. Collier Young Artist Program

PROGRAM/EVENT TITLE: 2017-2018 Season

PROJECT PERIOD: July 1, 2017 to June 30, 2018

REVENUE	
City of Ashland Grant Funds	\$5,000
Jackson County Funds /Identify:	\$0
Other State or Federal Funds /Identify:	\$
Other Funds /Identify (Foundations: Carpenter, Collins, Trust Management)	\$20,000
Other Funds (cont) Box Office sales, donations, application fees	\$74,000
	\$

TOTAL REVENUE	\$99,000
EXPENDITURES	
A. PERSONAL SERVICES <i>(List costs by job title or function)</i>	
Total Salaries (Indep. Contractor fees)	% of time to project
1. General Director _____	80 %
2. Artistic/Stage Director _____	90 %
3. Development Director _____	80 %
4. PR & Marketing Director _____	100 %
5. Pianist and Vocal Coach _____	100 %
	\$8,000
	\$8,000
	\$3,000
	\$3,000
	\$5,500
	See attached budgets for additional Independent Contractor fees
Total Benefits	\$
1. _____ N/A _____	
2. _____	
3. _____	
4. _____	
TOTAL PERSONAL SERVICES	\$27,500
B. MATERIALS & SERVICES:	
	\$
	\$
	\$
	\$
TOTAL MATERIALS & SERVICES	\$see attached budgets
TOTAL EXPENDITURES	\$ see attached budgets

2012
Economic, Cultural, Tourism and Sustainability
Grants Policy
Program Goals, Categories, Criteria, and Requirements

The City of Ashland collects a Transient Occupancy Tax, from people who stay in overnight lodging within the City limits. Over half (58%) of those funds are reserved for the City's General Fund and are used to support Police, Fire, Community Development, and Municipal Court. Slightly more than a quarter (26.67%) of those funds are used to support the tourism industry. The tourist funds are either allocated directly to groups that market Ashland to tourists or are spent on capital facilities that enhance the tourism experience within the community. The remaining funds are dedicated to the City's annual grant program. The amounts that go to each of these programs are allocated prior to the beginning of each fiscal year by the Ashland City Council, generally in February.

The City of Ashland reinvests a portion of the funds generated by the Transient Occupancy Tax (TOT) in community non-profits through an annual grant program. Through the grant program, the City is purchasing specific services from non-profits that it might otherwise provide directly. The grant program has four basic goals:

- **Economic Development.** The grant program will support the creation, retention, and expansion of businesses and other ventures that enrich our community by creating goods and services that provide employment opportunities while maintaining and enhancing the overall quality of life. The 2011 Economic Development Strategy provides both policy level and action level guidance for eligible grant application programs and activities.
- **Cultural Development.** The grant program will support increased diversity of and accessibility to the creative arts and cultural opportunities in Ashland for citizens and visitors and will support the visitor economy, maintain and promote job growth in this sector and enrich the overall quality of life in the community.
- **Tourism.** As a long standing pillar of Ashland's economy, tourism programs support programs, activities and events that act similarly to more traditional traded sector activity in that dollars from outside the community are brought in and circulated locally to the benefit of our local businesses.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 6 - 2015**

BRAVA OPERA THEATER
C/O ANNE F LORRIE HALL
2924 SISKLYOU BLVD STE 204
MEDFORD, OR 97504

Employer Identification Number:

DLN:

Contact Person:

MELISSA CONLEY

ID# 31692

Contact Telephone Number:

(877) 829-5500

Accounting Period Ending:

June 30

Public Charity Status:

170(b)(1)(A)(vi)

Form 990 Required:

Yes

Effective Date of Exemption:

February 11, 2015

Contribution Deductibility:

Yes

Addendum Applies:

No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

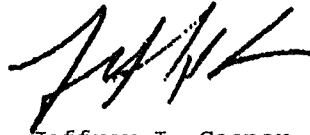
Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Letter 947

BRAVA OPERA THEATER

Sincerely,

A handwritten signature in black ink, appearing to read "Jeffrey I. Cooper". The signature is stylized and cursive, with a prominent initial "J" and a long horizontal stroke at the end.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

**BYLAWS
OF
BRAVA! OPERA THEATER**

ARTICLE 1 NAME, PURPOSE AND OBJECTIVES

1.1 Name

The name of this corporation is BRAVA! OPERA THEATER, a non-profit corporation under the laws of the State of Oregon.

1.2 Status

The corporation is organized exclusively for charitable and educational purposes within Section 501 (c) (3) of the Internal Revenue Code.

1.3 Purpose

Brava! Opera Theater is organized and operated exclusively for non-profit educational and artistic purposes under Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code. Brava! Opera Theater's mission is "to train the complete singer/actor, recognize and showcase young operatic talent and present high quality concerts and professional chamber operas". Brava! Opera Theater will carry out such other activities deemed suitable by the Board of Directors and not in conflict with the purposes as set forth above and not in conflict with the Articles of Incorporation as they now exist or may hereafter be amended or restated or in conflict with Section 501 (c) (3) of the Internal Revenue Code as it now exists or may hereafter be revised.

1.4 Objectives

- a. To have an Annual Singer Training Program with the purpose of helping emerging opera singers develop musical and theatrical tools essential to create and build a character for performance.
- b. To hold Annual Vocal Competition to encourage promising young operatic talent with cash prizes for the three winners. The first place winner presents a recital in southern Oregon.
- c. To produce and perform complete works of opera and operetta.
- d. To develop future audiences by having a Free Youth Tickets Program for students of all ages who show an interest in music.

ARTICLE 2 DIRECTORS

2.1 Powers

All corporate powers will be exercised by or under the authority of, and the affairs of the corporation will be managed under the direction of, the board of directors.

2.2 Qualifications

All directors must be individuals who are 18 years of age or older. Directors need not be residents or citizens of Oregon or of the United States of America.

2.3 Number

The board of directors will consist of not fewer than three persons and not more than ten persons. The number of directors may be fixed or changed periodically, within the minimum and the maximum, by the directors

2.4 Election and Tenure of Office

Directors will be elected at the final FY meeting in May. The term of each director will be one year. Directors may be reelected for any number of consecutive terms. Despite the expiration of a director's term, the director will continue to serve until the director's successor is elected and qualifies, or until there is a decrease in the number of directors. Except for designated or appointed directors, the terms of directors may not exceed five years.

2.5 Vacancies

A vacancy in the board of directors will exist on the death, resignation, or removal of any director. A vacancy in the board of directors may be filled by the board of directors. Each director so elected will hold office for the balance of the unexpired term of his or her predecessor. If the board of directors accepts the resignation of a director tendered to take effect at a future time, a successor may be elected to take office when the resignation becomes effective

2.6 Resignation

A director may resign at any time by delivering written notice to the president or the secretary. A resignation is effective when notice is effective under ORS 65.034 unless the notice specifies a later effective date. Once delivered, a notice of resignation is irrevocable unless revocation is permitted by the board of directors.

2.7 Removal

A director may be removed at any time, with or without cause, by vote of a majority of the directors.

2.8 Meetings

An annual meeting of the board of directors will be held on the last Tuesday of May, or within 30 days thereafter, at the same time and place as a regularly scheduled meeting. If the time and place of any other directors' meeting are regularly scheduled by the board of directors, the meeting is a regular meeting. All other meetings are special meetings. The board of directors may hold annual, regular, or special meetings in or out of Oregon.

2.9 Telephonic Participation

2.9.1 The board of directors may permit any or all of the directors to participate in a regular or special meeting by, or to conduct the meeting through, the use of any means of communication by which either (a) all directors participating may simultaneously hear or read each other's communications during the meeting or (b) all communications during the meeting are immediately transmitted to each participating director, and each participating director is able to immediately send messages to all other participating directors.

2.9.2 If a meeting is conducted through the use of a means described in Section 2.9.1, (a) all participating directors must be informed that a meeting is taking place at which official business may be transacted and (b) a director participating in the meeting by this means is deemed to be present in person at the meeting.

2.10 Action Without Meeting by Unanimous Written Consent

Any action required or permitted to be taken at a board of directors' meeting may be taken without a meeting if the action is taken by all members of the board of directors. The action must be evidenced by one or more written consents describing the action taken, be signed by each director, and be included in the minutes or filed with the corporate records reflecting the action taken. Action taken under this section is effective when the last director signs the consent, unless the consent specifies an earlier or later effective date. As used in this Section 2.10, "written" includes a communication that is transmitted or received by electronic means, and "sign" includes an electronic signature. A consent under this section has the effect of a meeting vote and may be described as such in any document.

2.11 Call and Notice of Meetings

Regular meetings of the board of directors may be held without notice of the date, time, place, or purpose of the meeting. Special meetings of the board of directors must be preceded by at least two days' notice, if given by first-class mail, or 48 hours' notice, if delivered personally or given by telephone, e-mail, or fax, to each director of the date, time, and place of the meeting. Except as specifically provided in these bylaws or applicable law, the notice need not describe the purposes of any meeting. The president or 50% of the directors then in office may call and give notice of a meeting of the board.

2.12 Waiver of Notice

A director may at any time waive any notice required by these bylaws. Except as provided in the following sentence, any waiver must be in writing, must be signed by the director entitled to the notice, must specify the meeting for which the notice is waived, and must be filed with the minutes or the corporate records. A director's

attendance at or participation in a meeting waives any required notice to the director of the meeting unless the director, at the beginning of the meeting or promptly on the director's arrival, objects to holding the meeting or transacting business at the meeting and does not thereafter vote for or assent to any action taken at the meeting.

2.13 Quorum and Voting

A quorum of the board of directors will consist of a one-third of the number of directors in office immediately before the meeting begins. If a quorum is present when a vote is taken, the affirmative vote of a majority of the directors present when the action is taken will be the act of the board of directors except to the extent that the articles of incorporation, these bylaws, or applicable law requires the vote of a greater number of directors. A director is considered present regardless of whether the director votes or abstains from voting.

2.14 Presumption of Assent

A director who is present at a meeting of the board of directors when corporate action is taken is deemed to have assented to the action taken unless:

- a. At the beginning of the meeting or promptly on the director's arrival, the director objects to holding the meeting or transacting the business at the meeting;
- b. The director's dissent or abstention from the action taken is entered in the minutes of the meeting; or
- c. The director delivers written notice of dissent or abstention to the presiding officer of the meeting before its adjournment or to the corporation immediately after adjournment of the meeting. The right of dissent or abstention is not available to a director who votes in favor of the action taken.

2.15 Board Committees

The board of directors may create one or more committees of the board of directors and appoint members of the board to serve on them or designate the method of selecting committee members. Each committee must consist of two or more directors who will serve at the pleasure of the board of directors. The creation of a committee and the appointment of directors to the committee or designation of a method of selecting committee members must be approved by a majority of all directors in office when the action is taken. The provisions of these bylaws governing meetings, action without meetings, notice and waiver of notice, and quorum and voting requirements of the board of directors will apply to committees and their members as well. Committees of the board of directors may, to the extent specified by the board of directors, exercise the authority of the board of directors, but no committee of the board of directors may:

- a. Authorize distributions, but this restriction does not apply to payment of value for property received or services performed or payment of benefits in furtherance of the corporation's purposes;
- b. Approve or recommend dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the corporation's assets;
- c. Elect, appoint, or remove directors or fill vacancies on the board or on any of its committees; or
- d. Adopt, amend, or repeal the articles of incorporation or bylaws.

2.16 Other Committees

The board of directors may create one or more other committees. Members of these committees need not be members of the board of directors, but at least one director must serve on each such committee. These committees will have no power to act on behalf of, or to exercise the authority of, the board of directors, but may make recommendations to the board of directors.

2.17 Compensation

Directors and members of committees may be reimbursed for any expenses that are determined by resolution of the board of directors to be just and reasonable. Directors will not otherwise be compensated for service in their capacity as directors.

2.18 Director Conflict of Interest

2.18.1 A conflict-of-interest transaction is a transaction with the corporation in which a director of the corporation has a direct or indirect conflict of interest.

2.18.2 For purposes of Section 2.18, a director of the corporation has an indirect interest in a transaction if (a) another entity in which the director has a material interest or in which the director is a general partner is a party to the transaction or (b) another entity of which the director is a director, officer, or

trustee is a party to the transaction, and the transaction is or should be considered by the board of directors of the corporation.

2.18.3 A conflict-of-interest transaction is neither voidable nor the basis for imposing liability on the director if the transaction is fair to the corporation when it was entered into or is approved as provided in Section 2.18.4.

2.18.4 A transaction in which a director has a conflict of interest may be approved either (a) by the vote of the board of directors or a committee of the board of directors if the material facts of the transaction and the director's interest are disclosed or known to the board of directors or committee of the board of directors or (b) by obtaining approval of (i) the Oregon Attorney General or (ii) an Oregon circuit court in an action in which the Attorney General is joined as party.

2.18.5 For purposes of clause (a) of Section 2.18.4, a conflict-of-interest transaction is authorized, approved, or ratified if it receives the affirmative vote of a majority of the directors on the board of directors or on the committee who have no direct or indirect interest in the transaction. A transaction may not be authorized, approved, or ratified under this section by a single director. If a majority of the directors who have no direct or indirect interest in the transaction votes to authorize, approve, or ratify the transaction, a quorum is present for the purpose of taking action under this section. The presence of, or a vote cast by, a director with a direct or indirect interest in the transaction does not affect the validity of any action taken under clause (a) of Section 2.18.4 if the transaction is otherwise approved as provided in Section 2.18.4.

SECTION 3 OFFICERS

3.1 Designation; Appointment

The officers of the corporation will be a president, a vice president, a secretary, a treasurer, and any other officer that the board of directors may from time to time appoint. The officers will be appointed by, and hold office at the pleasure of, the board of directors. The same person may simultaneously hold more than one office, except for the offices of president and secretary.

3.2 Compensation and Term of Office

3.2.1 The compensation, if any, and the term of office of each officer of the corporation will be fixed by the board of directors.

3.2.2 Any officer may be removed, with or without cause, at any time by action of the board of directors

3.2.3 Any officer may resign at any time by delivering notice to the board of directors, the president, or the secretary. A resignation is effective when the notice is effective under ORS 65.034 unless the notice specifies a later effective date. If a resignation is made effective at a later date and the corporation accepts the later effective date, the board of directors may fill the pending vacancy before the effective date if the board of directors provides that the successor does not take office until the effective date. Once delivered, a notice of resignation is irrevocable unless revocation is permitted by the board of directors.

3.2.4 No removal or resignation as provided in Section 3.2.2 or 3.2.3 will prejudice the rights of any party under a contract of employment.

3.3 President

The president will preside at meetings of the board of directors, will ensure that the board of directors is advised on all significant matters of the corporation's business, will act as a principal spokesperson and representative of the corporation, will be the chief executive officer of the corporation, will have the general powers and duties of management usually vested in a chief executive officer, and will have other powers and duties that may be prescribed by the board of directors or these bylaws.

3.4 Vice President

The vice president will preside at meetings of the board of directors at which the president is absent and, in the absence of the president, will have the other powers and perform the other duties of the president. The vice president also will have other powers and perform other duties that may be prescribed by the board of directors.

3.5 Secretary

The secretary will be responsible for preparing minutes of meetings of the board of directors and for authenticating records of the corporation. The secretary will keep or cause to be kept, at the principal office or such other place as the board of directors may order, a book of minutes of all meetings of directors. The secretary will also have other powers and perform other duties that may be prescribed by the board of directors or these bylaws.

3.6 Treasurer

3.6.1 The treasurer will be the chief financial officer of the corporation and will keep and maintain, or cause to be kept and maintained, adequate and correct books and records of accounts of the properties and business transactions of the corporation. The treasurer will deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the corporation with those depositories that may be designated by the board of directors, will disburse or cause to be disbursed funds of the corporation as may be ordered by the board of directors, and will have other powers and perform other duties that may be prescribed by the board of directors or these bylaws.

3.6.2 If required by the board of directors, the treasurer must give the corporation a bond in such amount and with such surety specified by the board of directors for the faithful performance of the duties of the treasurer's office and for restoration to the corporation of all of its books, papers, vouchers, money, and other property of every kind in the treasurer's possession or under the treasurer's control on the treasurer's death, resignation, retirement, or removal from office.

3.7 Assistants

The board of directors may appoint or authorize the appointment of assistants to the secretary or treasurer or both. Any such assistant may exercise the powers of the secretary or treasurer, as the case may be, and will perform those duties that are prescribed by the board of directors.

SECTION 4 NON DISCRIMINATION

The corporation will not discriminate in providing services, hiring employees, or otherwise, on the basis of gender, race, creed, marital status, sexual orientation, religion, color, age, national origin, disability, or familial status.

SECTION 5 GENERAL PROVISIONS

4.1 Amendment of Bylaws

4.1.1 The board of directors may amend or repeal these bylaws or adopt new bylaws by majority vote.

4.1.2 Whenever an amendment or a new bylaw is adopted, it will be copied in the minute book with the original bylaws in the appropriate place. If any bylaw is repealed, the fact of repeal and the date on which the repeal occurred will be stated in that book and place.

4.2 Inspection of Books and Records

All books, records, and accounts of the corporation will be open to inspection by the directors in the manner and to the extent required by law.

4.3 Checks, Drafts, etc.

All checks, drafts, and other orders for payment of money, notes, or other evidences of indebtedness issued in the name of or payable to the corporation must be signed or endorsed by the person or persons and in such manner that may be determined from time to time by resolution of the board of directors.

4.4 Deposits

All funds of the corporation not otherwise employed must be deposited to the credit of the corporation in those banks, trust companies, or other depositories as the board of directors or officers of the corporation designated by the board of directors select, or be invested as authorized by the board of directors.

4.5 Loans or Guarantees

The corporation may not borrow money and no evidence of indebtedness may be issued in its name unless authorized by the board of directors. This authority may be general or confined to specific instances. Except as

explicitly permitted by ORS 65.364(1), the corporation may not make a loan, guarantee an obligation, or modify a preexisting loan or guarantee to or for the benefit of a director or officer of the corporation.

4.6 Execution of Documents

The board of directors may, except as otherwise provided in these bylaws, authorize any officer or agent to enter into any contract or execute any instrument in the name of and on behalf of the corporation. This authority may be general or confined to specific instances. Unless authorized by the board of directors, no officer, agent, or employee will have any power or authority to bind the corporation by any contract or engagement, or to pledge its credit, or to render it liable for any purpose or for any amount.

4.7 Insurance

The corporation may purchase and maintain insurance on behalf of an individual against liability asserted against or incurred by the individual who is or was a director, officer, employee, or agent of the corporation, or who, while a director, officer, employee, or agent of the corporation, is or was serving at the request of the corporation as a director, officer, partner, trustee, employee, or agent of another foreign or domestic business or nonprofit corporation, partnership, joint venture, trust, employee benefit plan, or other enterprise; however, the corporation may not purchase or maintain such insurance to indemnify any director, officer, or agent of the corporation in connection with any proceeding charging improper personal benefit to the director, officer, or agent in which the director, officer, or agent was adjudged liable on the basis that personal benefit was improperly received by the director, officer, or agent.

4.8 Fiscal Year

The fiscal year of the corporation will begin on the first day of July and end on the last day of June in each year.

4.9 Severability

A determination that any provision of these bylaws is for any reason inapplicable, invalid, illegal, or otherwise ineffective will not affect or invalidate any other provision of these bylaws.

4.10 Dissolution

Upon the dissolution of this organization, assets shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.

* * * * *

The foregoing bylaws were duly adopted by the board of directors of Brava! Opera on 2-11-, 2015.

/s/ Michael C. Hall
[secretary's name]
Secretary

Form **990-EZ**

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

Open to Public Inspection

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.

A For the 2015 calendar year, or tax year beginning Aug 15, 2015, and ending Jun 30, 2016

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

C Name of organization
BRAVA! OPERA THEATER
 Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
2924 SISKIYOU BLVD 204
 City or town, state or province, country, and ZIP or foreign postal code
MEDFORD OR 97504

D Employer identification number
[REDACTED]

E Telephone number
(541) 261-5776

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.BRAVAOPERA.COM

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 ▶ \$ 90,251.

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
R E V E N U E	1	Contributions, gifts, grants, and similar amounts received																								70,457.			
	2	Program service revenue including government fees and contracts																								16,732.			
	3	Membership dues and assessments																											
	4	Investment income																											
	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 \$ <u>5,957.</u> of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)																								3,062.			
6 c	Less: direct expenses from gaming and fundraising events																								3,062.				
6 d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)																								0.				
7	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	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶																								87,189.				
E X P E N S E S	10	Grants and similar amounts paid (list in Schedule O)																											
	11	Benefits paid to or for members																											
	12	Salaries, other compensation, and employee benefits																								7,000.			
	13	Professional fees and other payments to independent contractors																								353.			
	14	Occupancy, rent, utilities, and maintenance																											
	15	Printing, publications, postage, and shipping																								1,554.			
	16	Other expenses (describe in Schedule O) See Form 990-EZ, Part I, Line 16, Other Expenses																								70,719.			
	17	Total expenses. Add lines 10 through 16 ▶																								79,626.			
18	Excess or (deficit) for the year (Subtract line 17 from line 9)																								7,563.				
A S S E T S	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)																											
	20	Other changes in net assets or fund balances (explain in Schedule O)																											
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ▶																								7,563.			

BAA For Paperwork Reduction Act Notice, see the separate instructions. Form 990-EZ (2015)

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	0.	7,743.
23 Land and buildings	0.	0.
24 Other assets (describe in Schedule O)	0.	0.
25 Total assets		7,743.
26 Total liabilities (describe in Schedule O)	0.	180.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)		7,563.

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 Organization's Primary Exempt Purpose
 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
 (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

28	<u>OPERA MASTER CLASS AND CONCERT INVOLVES ONE-ON-ONE TRAINING FROM WORLD-RENOWNED SINGER OR EDUCATORS TO HELP EMERGING AND PROFESSIONAL OPERA SINGERS DEVELOP MUSICAL AND THEATRICAL TOOLS ESSENTIAL TO CREATE AND BUILD A CHARACTER FOR PERFORMANCE, E-MASTER CLASS CULMINATES IN A CONCERT SHOWCASING THE PARTICIPANTS</u> (Grants \$ 1,488.) If this amount includes foreign grants, check here <input type="checkbox"/>	28 a	7,250.
29	<u>OUR VOCAL COMPETITION RECOGNIZES AND ENCOURAGES PROMISING YOUNG OPERATIC TALENT, AND IS HELD EACH OCTOBER IN SAN FRANCISCO. CASH PRIZES FOR THE THREE WINNERS TOTAL \$6,500. A WINNER'S CONCERT IS HELD EACH SPRING IN ASHLAND FEATURING THE FIRST PLACE WINNER.</u> (Grants \$ 3,197.) If this amount includes foreign grants, check here <input type="checkbox"/>	29 a	15,573.
30	<u>CHAMBER OPERA IS A FULLY STAGED PROFESSIONAL OPERA WHICH WILL BE PRESENTED EACH MARCH IN ASHLAND. CHAMBER OPERA WILL FEATURE A RICHLY TALENTED NATIONAL CAST OF PROFESSIONAL OPERA SINGERS FROM ACROSS THE COUNTRY AND INSTRUMENTALISTS.</u> (Grants \$ 8,815.) If this amount includes foreign grants, check here <input type="checkbox"/>	30 a	42,935.
31	Other program services (describe in Schedule O) . . . SEE ATTACHED. SCHEDULE. (Grants \$ 1,000.) If this amount includes foreign grants, check here <input type="checkbox"/>	31 a	3,747.
32	Total program service expenses (add lines 28a through 31a)	32	69,505.

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
<u>ANNE LORRIE HALL</u> PRESIDENT	20.00	0.	0.	0.
<u>WILLENE GUNN</u> VICE PRESIDENT	10.00	0.	0.	0.
<u>DR. MICHAEL HALL</u> SECRETARY	1.00	0.	0.	0.
<u>LAUREN CYPHER</u> TREASURER	2.00	0.	0.	0.
<u>ELLIE HOLT-MURRAY</u> OFFICER	2.00	0.	0.	0.

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

	Yes	No
33 Did the organization engage in any significant activity not previously reported to the IRS? If 'Yes,' provide a detailed description of each activity in Schedule O		X
34 Were any significant changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)		X
35 a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?		X
b If 'Yes,' to line 35a, has the organization filed a Form 990-T for the year? If 'No,' provide an explanation in Schedule O		
35 b		
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? If 'Yes,' complete Schedule C, Part III		X
35 c		
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N		X
36		
37 a Enter amount of political expenditures, direct or indirect, as described in the instructions . . . ▶ 37 a 0 .		
b Did the organization file Form 1120-POL for this year?		X
37 b		
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?		X
b If 'Yes,' complete Schedule L, Part II and enter the total amount involved	38 b	
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9	39 a	
b Gross receipts, included on line 9, for public use of club facilities	39 b	
40 a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶		
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? If 'Yes,' complete Schedule L, Part I	40 b	X
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 ▶		
d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T	40 e	X
41 List the states with which a copy of this return is filed ▶ <u>Oregon</u>		

42 a The organization's books are in care of ▶ ANNE LORRIE HALL Telephone no. ▶ (541) 261-5776
 Located at ▶ 2924 SISKIYOU BLVD, STE. 204 MEDFORD OR ZIP + 4 ▶ 97504

	Yes	No
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)?	42 b	X
If 'Yes,' enter the name of the foreign country: ▶ _____		
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.?	42 c	X
If 'Yes,' enter the name of the foreign country: ▶ _____		

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 ▶ **43**

	Yes	No
44 a Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44 a	X
b Did the organization operate one or more hospital facilities during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44 b	X
c Did the organization receive any payments for indoor tanning services during the year?	44 c	X
d If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O	44 d	
45 a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45 a	X
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)? If 'Yes,' Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)	45 b	X

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		X

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 X

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		X

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E

	Yes	No
48		X

49 a Did the organization make any transfers to an exempt non-charitable related organization?

	Yes	No
49 a		X

b If 'Yes,' was the related organization a section 527 organization?

	Yes	No
49 b		X

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	
	LORRIE HALL		11/11/16	
Type or print name and title		PRESIDENT		
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed
	BENJAMIN D BAGLEY, CPA	BENJAMIN D BAGLEY, CPA	11/15/16	
	Firm's name ▶ Bagley Accounting	PTIN		
	Firm's address ▶ 1175 E. Main Street Ste 2A Medford OR 97504	Firm's EIN ▶ [REDACTED]		
				Phone no. (541) 779-6059

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

Became 501c3 on
8-6-2015

4:22 PM
09/04/16
Accrual Basis

Brava! Opera Theater and James M. Collier YAP
Profit & Loss
August 15, 2015 through June 30, 2016

	Aug 15, '15 - Jun 30, 16
Ordinary Income/Expense	
Income	
Chase Bank	153.00
FOUNDATION GRANTS	
Grant	14,500.00
Total FOUNDATION GRANTS	14,500.00
DONATIONS	
Individ, Business Contributions	59,018.50
Total DONATIONS	59,018.50
PROGRAM INCOME	
Amazon Smile	5.00
YSSO Collaboration	4,500.00
Chamber Opera App Fees (YAP)	119.94
Chamber Opera Box Office	8,337.05
Opera Workshop App Fees	350.00
Vocal Comp. App Fees (YAP)	2,444.12
Vocal Comp Concert Box Office	1,038.11
Total PROGRAM INCOME	16,794.22
Total Income	90,465.72
Expense	
YSSO Collaboration	
Singer Fees	2,500.00
Travel and Meals	1,247.21
Total YSSO Collaboration	3,747.21
ADMINISTRATIVE COSTS	
Annual Mailing	496.21
Advertising and PR	
Website Hosting	127.60
Advertising and PR - Other	242.99
Total Advertising and PR	370.59
Business Licenses and Fees	80.00
General Director	7,000.00
Graphic Design	75.00
Insurance - Liability, D and O	808.85
Office Supplies	285.63
Postage	72.27
Printing	539.72
Professional Fees	
Accounting Services	353.00
Total Professional Fees	353.00
Travel and Meals	192.59
Total ADMINISTRATIVE COSTS	10,273.86
FUNDRAISING COSTS	
Donor Appreciation Gifts	495.35
Donor Events	
Piano Tuning	85.00
Donor Events - Other	1,231.25
Total Donor Events	1,316.25
Fundraising and Promotion	1,250.00
Total FUNDRAISING COSTS	3,061.60

Brava! Opera Theater and James M. Collier YAP
Profit & Loss
 August 15, 2015 through June 30, 2016

	<u>Aug 15, '15 - Jun 30, 16</u>
CHAMBER OPERA	
Artistic Costs	
Artistic/Stage Director	5,000.00
Auditions	1,200.00
Conductor	3,500.00
Choreographer	750.00
Costumes	1,139.11
Light Design & Run	1,200.00
Orchestra	3,560.00
Pianist	1,600.00
Set Design and Build	2,000.00
Singers	9,500.00
Sound/Video Design & Run	1,200.00
Wigs	1,500.00
Total Artistic Costs	<u>32,149.11</u>
Production Costs	
Advertising and PR	2,731.14
Crew	250.00
Dresser	250.00
Graphic Design	147.50
Mailing Scores	102.89
Music Rentals/Purchases	26.02
Piano Tuning	85.00
Printing	1,156.62
Props	150.00
Stage Manager	1,000.00
Travel and Meals	1,878.82
Venue Rental	1,800.00
Video & Photography	450.00
Welcome & Farewell Receptions	758.00
Total Production Costs	<u>10,785.99</u>
Total CHAMBER OPERA	42,935.10
VOCAL COMPETITION & CONCERTS	
Redund non US Citizen	70.00
Artistic Costs	
Artistic Director	300.00
Competition Awards	6,500.00
Judges Fees	1,200.00
Pianist	800.00
Total Artistic Costs	<u>8,800.00</u>
Production Costs	
Box Office Costs	100.49
Post Concert Dinner	237.80
Advertising and PR	547.66
Flowers	29.98
Graphic Design	427.50
Printing	395.23
Reception Expenses	125.00
Travel and Meals	3,424.68
Venue Rental	1,465.00
Welcome Gift	19.50
Total Production Costs	<u>6,772.84</u>
Total VOCAL COMPETITION & CONCERTS	15,642.84
OPERA WORKSHOP	
Artistic Costs	
Artistic Director	300.00
Faculty	3,000.00
Pianist	600.00
Total Artistic Costs	<u>3,900.00</u>

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09/04/16

Accrual Basis

Brava! Opera Theater and James M. Collier YAP

Profit & Loss

August 15, 2015 through June 30, 2016

	<u>Aug 15, '15 - Jun 30, 16</u>
Production Costs	
Advertising and PR	1,241.15
Graphic Design	250.00
Photography	100.00
Printing	293.60
Reception Expenses	150.00
Travel & Meals	1,015.40
Venue Rental	300.00
Total Production Costs	<u>3,350.15</u>
Total OPERA WORKSHOP	<u>7,250.15</u>
Total Expense	<u>82,910.76</u>
Net Ordinary Income	7,554.96
Other Income/Expense	
Other Income	
Smile Amazon	8.18
Total Other Income	<u>8.18</u>
Net Other Income	<u>8.18</u>
Net Income	<u><u>7,563.14</u></u>

BRAVA! OPERA THEATER ANNUAL BUDGET 2017-2018

REVENUES	PROJECTED	IN KIND
Application Fees YAP Tracker Season Auditions	\$590.00	
Application Fees YAP Tracker Vocal Competition (\$35 x 75 applicants)	\$2,625.00	
Box Office Proceeds Opera	\$17,500.00	
Box Office Proceeds Vocal Competition Winner's Concert	\$1,000.00	
Box Office Proceeds Master Class Concert	\$5,000.00	
Donations, Gifts	\$59,000.00	
Program Grants	\$17,000.00	
TOTAL REVENUES	\$102,715.00	
IN KIND		
Advertising and Promotions (General Ads exchanged with 4 arts groups)		\$1,500.00
Artistic Director time donation		\$8,000.00
Auto Rental		\$800.00
Computers & Social Media Maintained		\$500.00
Costume Construction and Dressing		\$1,000.00
Costumes, Sets and Props Loaned from Camelot		\$3,000.00
General Director time donation (includes grant writing)		\$15,000.00
Graphic Design & Printing Discounts		\$500.00
Lodging Donations Singers, Judges		\$5,000.00
Office Equipment		\$1,500.00
Office Space/Storage Space		\$6,000.00
Piano Rental Discount		\$500.00
Rehearsal Space Donations		\$1,000.00
TV Advertising Commercials all events (and ad creation)		\$10,000.00
Ushers		\$200.00
Wig Donation		\$550.00
TOTAL INCOME		\$55,050.00
EXPENSES		
Management and General		
Accounting + Book Keeping	\$800.00	
Administrative Costs	\$875.00	
Auditions Artistic Director (review on YAP and live auditions)	\$1,000.00	
Bank Charges (checking and CC)	\$400.00	
Dues and Memberships	\$420.00	
Food and Travel including annual donor reception	\$550.00	
General Director-General Administration (\$6,500) Grant Writing (\$2,500)	\$8,000.00	
Insurance Liability	\$559.00	
Merchant Service Fees (tickets)	\$400.00	
Office Supplies, stamps	\$250.00	
Postage (PR and Direct Mail)	\$1,100.00	
PR & Development Director Fees	\$6,000.00	
Printing (Invites, Thank You Notes, Season Brochure, Direct Mailings)	\$750.00	
Season Graphic Design	\$750.00	
Web Site and annual hosting	\$500.00	
Total Management and General	\$22,354.00	
Program Costs		
Opera <i>Carousel</i>	\$52,935.00	
Free Youth Tickets (\$2,500 donated ticket value, \$1,000 Administrative costs)	\$1,000.00	
Opera Master Class with Concert	\$8,200.00	
Vocal Competition	\$15,492.82	
Total Program Costs	\$77,627.82	
TOTAL ANNUAL EXPENSES	\$99,981.82	
NET INCOME (LOSS)	\$2,733.18	

BUDGET OCTOBER 2017 VOCAL COMPETITION WITH WINNER'S CONCERT	
REVENUES	PROJECTED
YAP Tracker Participant Entry Fees \$35 per person 80	\$2,625.00
Box Office Proceeds Concert (\$15 Adults, \$5 Students)	\$1,000.00
Donations	\$8,000.00
Grants	\$3,875.00
TOTAL REVENUES	\$15,500.00
EXPENSES	
Accompanist Fee for Ashland Concert	\$350.00
Accompanist Fee San Francisco Auditions	\$400.00
Advertising Winner's Concert PR & Marketing Fees (personnel for web, posters, MET HD talks, all in person PR, liaison with organizations)	\$750.00
Artistic Director/Judge Fee	\$1,500.00
Competition Judges	\$800.00
Competition Notices (all done via email and internet)	\$0.00
Competition winner's prize (1 st \$4,000, 2 nd \$1,500, 3 rd \$1,000)	\$6,500.00
Food & Beverage Concert Reception	\$100.00
Judges Food	\$100.00
Lodging San Francisco	\$1,500.00
Meals San Francisco	\$200.00
Postage (mailing awards)	\$3.08
Printing for tickets and programs	\$300.00
San Francisco Conservatory of Music Hall Rental (for competition)	\$700.00
Travel (car) San Francisco Travel	\$700.00
Winner's Concert Venue (SOU Recital Hall)	\$750.00
Winner's travel/lodging/meals fees	\$500.00
YAP Tracker processing fee and CC fee	\$339.74
TOTAL EXPENSES	\$15,492.82
NET INCOME	\$7.18

BUDGET 2017 MASTER CLASS WITH CONCERT	
REVENUES	PROJECTED
Grants	\$2,000.00
Box Office Proceeds Concert (\$20 Adults, \$5 Students)	\$5,000.00
Sponsorship of Ms. Voigt	\$1,500.00
TOTAL REVENUES	\$8,500.00
EXPENSES	
Deborah Voigt Fee	\$5,000.00
Deborah Voigt Travel and Lodging	\$550.00
Food & Beverage for class and reception	\$200.00
Music Director/Accompanist Fee	\$400.00
Photography and Video of Concer	\$100.00
PR & Marketing Fees (personnel for web, posters, MET HD talks, all in person PR, liaison with organizations)	\$750.00
Program printing	\$200.00
Rehearsal & Concert Venue Rental	\$1,000.00
TOTAL EXPENSES	\$8,200.00
NET INCOME	\$300.00

BUDGET FOR OPERA – CAROUSEL MARCH 16 & 18, 2018

REVENUES	PROJECTED
Box Office Proceeds (\$35 Adult \$15 Student)	\$17,500.00
Donations	\$24,000.00
Grants	\$11,000.00
YAP Tracker Audition Fees (60)	\$590.00
TOTAL REVENUES	\$53,090.00
EXPENSES	
Advertising (JPR, Newspaper, Posters, SOPTV, Sneak Prev)	\$2,800.00
Artistic & Stage Director	\$5,000.00
Cast (14)	\$14,800.00
Choreographer	\$500.00
Conductor/Arranger	\$3,500.00
Costumes, Costumer and Dresser	\$1,200.00
Graphic Design (Poster, program, ads, postcards)	\$725.00
Libretto score rental	\$300.00
Royalties	\$1,500.00
Lighting Design, hang and run and video run	\$2,500.00
Orchestra (11)	\$3,960.00
Orchestra score rental	\$600.00
Out of town Singer and Host Welcome Party and Cast Party	\$850.00
Photography & Video	\$400.00
Postage (mailing postcards)	\$115.00
PR & Marketing Fees (personnel for web, posters, MET HD talks, all in person PR, liaison with organizations)	\$1,000.00
Printing (program, postcards, posters, scores)	\$600.00
Rehearsal Pianist	\$1,500.00
Set Design/Build/Materials/Dispose	\$2,000.00
Sound/Video Designer	\$500.00
Stage & Production Manager	\$1,000.00
Ticket Processing and CC fees	\$225.00
Travel and Meals (singer flights, rental cars and meals)	\$1,800.00
Venue Rental (includes crew, tech, ASM, LT and ST)	\$4,620.00
Wigs, wig master, make up	\$700.00
YAP Tracker CC and Process Fee	\$240.00
TOTAL EXPENSES	\$52,935.00
NET INCOME	\$155.00

BRAVA! OPERA THEATER

and James M. Collier Young Artist Program

March 22, 2017

STAFF

ARTISTIC DIRECTOR
Willene Gunn

GENERAL DIRECTOR
Lorrie Hall

PR & DEVELOPMENT
Mary Witt

**PIANIST AND VOCAL
COACH**
Laurie Anne Hunter

BOARD OF DIRECTORS

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2924 Siskiyou Blvd.
Suite 204
Medford, Oregon
97504

Phone 541.261.5776
www.bravaopera.com

MISSION

Our mission is to train the complete singer/actor, recognize and showcase young operatic talent and present high quality concerts and professional operas.

Diana Shiplet
City of Ashland
20 East Main Street
Ashland, OR 97520

Dear Ms. Shiplet,

This is a request by Brava! Opera Theater and James M. Collier Young Artist Program to The City of Ashland for a grant in the amount of \$5,000. We are requesting funds to help support our 2017-2018 Season.

We are the only opera company between Eugene and Sacramento providing cultural (opera productions and concerts) and singer training opportunities (Opera Master Class). Our National Vocal Competition is one of the few on the west coast and draws promising young operatic talent from across the country.

Organization Name Brava! Opera Theater and James M. Collier Young Artist Program

Mailing Address 2924 Siskiyou Blvd. Suite 204 Medford, Oregon 97504

Website www.bravaopera.com **Brava! Opera EIN #** 47-3126062

Brava! Opera Phone 541-261-5776 **Contact Person** Lorrie Hall, General Director

Address 2650 Country Park Lane, Medford, Oregon 9750 **Phone** 541-734-9488

E-mail lorrie@bravaopera.com **Amount of the Request** \$5,000.00

Please note that we did not get our official 501(c)3 notice until early September 2015 so our 2015-2016 P & L is for a partial year (not July 1-June 30).

For additional information please don't hesitate to contact me. Again thank you so much for this opportunity!

Sincerely,



Lorrie Hall,
General Director
lorrie@bravaopera.com