

Return of Organization Exempt From Income Tax

2000

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Under section 501(c) of the Internal Revenue Code (except black lung benefit trust or private foundation), section 527, or section 4947(a)(1) nonexempt charitable trust

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

A For the 2000 calendar year, or tax year period beginning July 1, 2000, and ending June 30, 20 01

- B** Check if applicable:
- Change of address
 - Change of name
 - Initial return
 - Final return
 - Amended return

C Name of organization
Tulsa Opera, Inc

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
1610 S Boulder Ave

City or town state or country and ZIP code
Tulsa, OK 74119

D Employer identification number
73 0643311

E Telephone number
(918) 582-4035

F Check if application pending

G Organization type (check only one) ▶ 501(c) (3) ◀ (insert no) 527 or 4947(a)(1)

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ)

J Accounting method Cash Accrual Other (specify) ▶ **Fund**

K Check here if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS but if the organization received a Form 990 Package in the mail, it should file a return without financial data. Some states require a complete return

Note H and I are not applicable to section 527 orgs

H(a) Is this a group return for affiliates? Yes No

H(b) If "Yes," enter number of affiliates ▶

H(c) Are all affiliates included? Yes No (If "No" attach a list. See inst.)

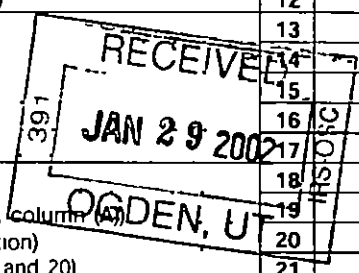
H(d) Is this a separate return filed by an organization covered by a group ruling? Yes No

I Enter 4 digit group exemption no. (GEN) ▶

L Check this box if the organization is not required to attach Schedule B (Form 990 or 990-EZ) ▶

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Specific Instructions on page 16)

Revenue	1	Contributions, gifts, grants, and similar amounts received				
	a	Direct public support	1a	1,073,960		
	b	Indirect public support	1b	174,299		
	c	Government contributions (grants)	1c	116,000		
	d	Total (add lines 1a through 1c) (cash \$ 1,221,699 noncash \$ 142,560)	1d		1,364,259	
	2	Program service revenue including government fees and contracts (from Part VII, line 93)	2		805,174	
	3	Membership dues and assessments	3			
	4	Interest on savings and temporary cash investments	4		8,360	
	5	Dividends and interest from securities	5			
	6a	Gross rents	6a			
	b	Less rental expenses	6b			
	c	Net rental income or (loss) (subtract line 6b from line 6a)	6c			
7	Other investment income (describe ▶)	7				
Revenue	8a	Gross amount from sales of assets other than inventory	(A) Securities	4,191	8a	
	b	Less cost or other basis and sales expenses		5,232	8b	
	c	Gain or (loss) (attach schedule) Stmt		(1,041)	8c	
	d	Net gain or (loss) (combine line 8c, columns (A) and (B))			8d	(1,041)
Revenue	9	Special events and activities (attach schedule)				
	a	Gross revenue (not including \$ _____ of contributions reported on line 1a) Statement 2	9a	342,543		
	b	Less direct expenses other than fundraising expenses	9b	174,968		
c	Net income or (loss) from special events (subtract line 9b from line 9a)	9c		167,575		
Revenue	10a	Gross sales of inventory, less returns and allowances	10a			
	b	Less cost of goods sold	10b			
	c	Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)	10c			
11	Other revenue (from Part VII, line 103)	11		61,412		
12	Total revenue (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)	12		2,405,739		
Expenses	13	Program services (from line 44, column (B))	13		1,539,915	
	14	Management and general (from line 44, column (C))	14		333,435	
	15	Fundraising (from line 44, column (D))	15		528,215	
	16	Payments to affiliates (attach schedule)	16			
	17	Total expenses (add lines 13 and 14, column (A))	17		2,401,565	
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 12)	18		4,174	
	19	Net assets or fund balances at beginning of year (from line 73, column (A))	19		542,937	
	20	Other changes in net assets or fund balances (attach explanation)	20			
	21	Net assets or fund balances at end of year (combine lines 18, 19 and 20)	21		547,111	



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Part IV Balance Sheets (See Specific Instructions on page 23)

Note		(A)		(B)
Where required attached schedules and amounts within the description column should be for end of year amounts only		Beginning of year		End of year
Assets	45 Cash—non-interest-bearing	320,278	45	341,224
	46 Savings and temporary cash investments		46	
	47a Accounts receivable			
	47b	17,351	47c	1,219
	b Less allowance for doubtful accounts			
	48a Pledges receivable			
	48b		48c	
	b Less allowance for doubtful accounts			
	49 Grants receivable	230,725	49	162,949
	50 Receivables from officers directors, trustees, and key employees (attach schedule)		50	
	51a Other notes and loans receivable (attach schedule)			
	51b		51c	
	b Less allowance for doubtful accounts			
	52 Inventories for sale or use		52	
	53 Prepaid expenses and deferred charges	82,526	53	105,980
54 Investments—securities (attach schedule)	5,737	54	72,015	
55a Investments—land buildings and equipment basis				
55b		55c		
b Less accumulated depreciation (attach schedule)				
56 Investments—other (attach schedule)		56		
57a Land, buildings, and equipment basis	747,994			
57b	373,295	333,505	57c	374,699
b Less accumulated depreciation (attach schedule) Statement 5				
58 Other assets (describe ▶)		58		
59 Total assets (add lines 45 through 58) (must equal line 74)	990,122	59	1,058,086	
Liabilities	60 Accounts payable and accrued expenses	38,203	60	31,813
	61 Grants payable		61	
	62 Deferred revenue	408,982	62	479,162
	63 Loans from officers, directors trustees, and key employees (attach schedule)		63	
	64a Tax-exempt bond liabilities (attach schedule)		64a	
	64b Mortgages and other notes payable (attach schedule)		64b	
	65 Other liabilities (describe ▶)		65	
66 Total liabilities (add lines 60 through 65)	447,185	66	510,975	
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 67 through 69 and lines 73 and 74			
	67 Unrestricted	366,937	67	367,101
	68 Temporarily restricted	176,000	68	180,010
	69 Permanently restricted		69	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 70 through 74			
	70 Capital stock, trust principal or current funds		70	
	71 Paid-in or capital surplus or land building, and equipment fund		71	
	72 Retained earnings endowment, accumulated income, or other funds		72	
	73 Total net assets or fund balances (add lines 67 through 69 OR lines 70 through 72 column (A) must equal line 19 and column (B) must equal line 21)	542,937	73	547,111
	74 Total liabilities and net assets / fund balances (add lines 66 and 73)	990,122	74	1,058,086

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization. How the public perceives an organization in such cases may be determined by the information presented on its return. Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

Part VI Other Information (See Specific Instructions on page 26)

Table with columns N/A, Yes, No. Rows include questions 76-92 regarding organizational activities, financials, and compliance. Includes specific entries for Tulsa Opera, Inc. and Oklahoma.

Part VII Analysis of Income-Producing Activities (See Specific Instructions on page 30)

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512 513 or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue					805,174
a _____					
b _____					
c _____					
d _____					
e _____					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					
95 Interest on savings and temporary cash investments			14	8,360	
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory			18	(1,041)	
101 Net income or (loss) from special events					167,575
102 Gross profit or (loss) from sales of inventory					
103 Other revenue a _____			03	61,412	
b _____					
c _____					
d _____					
e _____					
104 Subtotal (add columns (B), (D), and (E))				68,731	972,749
105 Total (add line 104, columns (B), (D), and (E))					1,041,480

Note Line 105 plus line 1d Part I, should equal the amount on line 12 Part I

Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes (See Specific Instructions on page 31)

Line No	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes)
93a	Subscriptions and ticket sales reflect proceeds generated by the various operas presented. These proceeds are used to continue our efforts to produce opera and enrich Tulsa's arts and humanities.
101	Proceeds from various fundraising events are used to produce opera and to inform the public of the events and services we offer.

Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities (See Specific Instructions on page 31)

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
	%			
	%			
	%			
	%			

Part X Information Regarding Transfers Associated with Personal Benefit Contracts (See Specific Instructions on page 31)

- (a) Did the organization during the year receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No
- (b) Did the organization, during the year, pay premiums directly or indirectly, on a personal benefit contract? Yes No

Note If "Yes" to (b), file Form 8870 and Form 4720 (see instructions)

Under penalty 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 and correct. Preparer's signature (other than officer) is based on all information of which preparer has any knowledge.

1-21-02 Date Scott H. Filstrup, President Type or print name and title

Date _____ Check if _____ Preparer's SSN or PTIN _____

SCHEDULE A
(Form 990 or 990-EZ)

Organization Exempt Under Section 501(c)(3)

OMB No 1545-0047

(Except Private Foundation) and Section 501(e), 501(f), 501(k),
501(n), or Section 4947(a)(1) Nonexempt Chantable Trust

2000

Department of the Treasury
Internal Revenue Service

▶ **MUST be completed by the above organizations and attached to their Form 990 or 990-EZ**

Name of the organization
Tulsa Opera, Inc

Employer identification number
73 0643311

Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees
(See page 1 of the instructions List each one If there are none, enter "None")

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
Carol I Crawford 1415 S Galveston, Tulsa, OK 74127	General Director	84,000	9,136	
Amanda Foust 1415 S Galveston, Tulsa, OK 74127	Director of Production	61,500	5,717	
Total number of other employees paid over \$50,000 ▶				

Part II Compensation of the Five Highest Paid Independent Contractors for Professional Services
(See page 1 of the instructions List each one (whether individuals or firms) If there are none, enter "None")

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
Tulsa Philharmonic 2901 S Harvard, Ste A, Tulsa, OK 74114	Provides Orchestra for opera performances	180,917
Total number of others receiving over \$50,000 for professional services ▶		

Part III Statements About Activities

Yes No

- 1 During the year has the organization attempted to influence national state or local legislation including any attempt to influence public opinion on a legislative matter or referendum?
If "Yes" enter the total expenses paid or incurred in connection with the lobbying activities ▶ \$ _____
Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A Other organizations checking "Yes" must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities
- 2 During the year has the organization, either directly or indirectly, engaged in any of the following acts with any of its trustees, directors, officers, creators, key employees, or members of their families or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary
 - a Sale, exchange, or leasing of property?
 - b Lending of money or other extension of credit?
 - c Furnishing of goods, services, or facilities? **Statement 11**
 - d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)? **St tmt 11**
 - e Transfer of any part of its income or assets?
If the answer to any question is "Yes," attach a detailed statement explaining the transactions
- 3 Does the organization make grants for scholarships, fellowships, student loans, etc.?
- 4a Do you have a section 403(b) annuity plan for your employees?
- b Attach a statement to explain how the organization determines that individuals or organizations receiving grants or loans from it in furtherance of its charitable programs qualify to receive payments. (See page 2 of the instructions.)

1		✓
2		
2a		✓
2b		✓
2c	✓	
2d	✓	
2e		✓
3		✓
4a	✓	
4b		

Part IV Reason for Non-Private Foundation Status (See pages 2 through 5 of the instructions)

The organization is not a private foundation because it is: (Please check only **ONE** applicable box.)

- 5 A church, convention of churches, or association of churches. Section 170(b)(1)(A)(i).
- 6 A school. Section 170(b)(1)(A)(ii). (Also complete Part V, page 5.)
- 7 A hospital or a cooperative hospital service organization. Section 170(b)(1)(A)(iii).
- 8 A Federal, state, or local government or governmental unit. Section 170(b)(1)(A)(v).
- 9 A medical research organization operated in conjunction with a hospital. Section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state ▶
- 10 An organization operated for the benefit of a college or university owned or operated by a governmental unit. Section 170(b)(1)(A)(iv). (Also complete the **Support Schedule** in Part IV-A.)
- 11a An organization that normally receives a substantial part of its support from a governmental unit or from the general public. Section 170(b)(1)(A)(vi). (Also complete the **Support Schedule** in Part IV-A.)
- 11b A community trust. Section 170(b)(1)(A)(vi). (Also complete the **Support Schedule** in Part IV-A.)
- 12 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 charitable, etc., 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). (Also complete the **Support Schedule** in Part IV-A.)
- 13 An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in (1) lines 5 through 12 above, or (2) section 501(c)(4), (5), or (6) if they meet the test of section 509(a)(2). (See section 509(a)(3).)

Provide the following information about the supported organizations. (See page 5 of the instructions.)

(a) Name(s) of supported organization(s)	(b) Line number from above

- 14 An organization organized and operated to test for public safety. Section 509(a)(4). (See page 5 of the instructions.)

Part IV-A Support Schedule (Complete only if you checked a box on line 10, 11, or 12.) *Use cash method of accounting.*
 Note: You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting.

Calendar year (or fiscal year beginning in)	(a) 1999	(b) 1998	(c) 1997	(d) 1996	(e) Total
15 Gifts, grants, and contributions received (Do not include unusual grants. See line 28.)	1,600,885	1,250,934	1,158,328	809,772	4,819,919
16 Membership fees received					
17 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is not a business unrelated to the organization's charitable etc. purpose	681,518	626,822	622,965	422,027	2,353,332
18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	6,044	9,375	16,760	19,401	51,580
19 Net income from unrelated business activities not included in line 18					
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					
21 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge.					
22 Other income. Attach a schedule. Do not include gain or (loss) from sale of capital assets.	199,588	139,988	194,999	109,953	644,528
23 Total of lines 15 through 22	2,488,035	2,027,119	1,993,052	1,361,153	7,869,359
24 Line 23 minus line 17	1,806,517	1,400,297	1,370,087	939,126	5,516,027
25 Enter 1% of line 23	24,880	20,271	19,930	13,612	
26 Organizations described on lines 10 or 11: a. Enter 2% of amount in column (e) line 24					110,321
b. Attach a list (which is not open to public inspection) showing the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1996 through 1999 exceeded the amount shown in line 26a. Enter the sum of all these excess amounts.					359,170
c. Total support for section 509(a)(1) test. Enter line 24, column (e).	51,580	0			5,516,027
d. Add amounts from column (e) for lines 18 and 22	644,528	359,170			1,055,278
e. Public support (line 26c minus line 26d total)					4,460,749
f. Public support percentage (line 26e (numerator) divided by line 26c (denominator))					80.87%
27 Organizations described on line 12: a. For amounts included in lines 15, 16, and 17 that were received from a disqualified person, attach a list (which is not open to public inspection) to show the name of and total amounts received in each year from each disqualified person. Enter the sum of such amounts for each year:	(1999)	(1998)	(1997)	(1996)	
b. For any amount included in line 17 that was received from a nondisqualified person, attach a list to show the name of and amount received for each year that was more than the larger of (1) the amount on line 25 for the year or (2) \$5,000. (Include in the list organizations described in lines 5 through 11, as well as individuals.) After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year:	(1999)	(1998)	(1997)	(1996)	
c. Add amounts from column (e) for lines 15 and 17					27c
d. Add line 27a total and line 27b total					27d
e. Public support (line 27c total minus line 27d total)					27e
f. Total support for section 509(a)(2) test. Enter amount on line 23, column (e).					27f
g. Public support percentage (line 27e (numerator) divided by line 27f (denominator))					27g %
h. Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))					27h %
28 Unusual Grants. For an organization described in line 10, 11, or 12 that received any unusual grants during 1996 through 1999, attach a list (which is not open to public inspection) for each year showing the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant. Do not include these grants in line 15. (See page 5 of the instructions.)					

Part V Private School Questionnaire (See page 5 of the instructions)
(To be completed ONLY by schools that checked the box on line 6 in Part IV)

	Yes	No
29 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?		
30 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions programs and scholarships?		
31 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If Yes, please describe. If No, please explain. (If you need more space, attach a separate statement.)		
32 Does the organization maintain the following:		
a Records indicating the racial composition of the student body, faculty, and administrative staff?		
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?		
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions programs and scholarships?		
d Copies of all material used by the organization or on its behalf to solicit contributions? If you answered No to any of the above, please explain. (If you need more space, attach a separate statement.)		
33 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		
b Admissions policies?		
c Employment of faculty or administrative staff?		
d Scholarships or other financial assistance?		
e Educational policies?		
f Use of facilities?		
g Athletic programs?		
h Other extracurricular activities? If you answered Yes to any of the above, please explain. (If you need more space, attach a separate statement.)		
34a Does the organization receive any financial aid or assistance from a governmental agency?		
b Has the organization's right to such aid ever been revoked or suspended? If you answered Yes to either 34a or b, please explain using an attached statement.		
35 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If No, attach an explanation.		

Part VI-A Lobbying Expenditures by Electing Public Charities (See page 7 of the instructions)
 (To be completed **ONLY** by an eligible organization that filed Form 5768)

Check here **a** if the organization belongs to an affiliated group
 Check here **b** if you checked "a" above and "limited control" provisions apply

Limits on Lobbying Expenditures		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
(The term expenditures means amounts paid or incurred)			
36	Total lobbying expenditures to influence public opinion (grassroots lobbying)	36	
37	Total lobbying expenditures to influence a legislative body (direct lobbying)	37	
38	Total lobbying expenditures (add lines 36 and 37)	38	
39	Other exempt purpose expenditures	39	
40	Total exempt purpose expenditures (add lines 38 and 39)	40	
41	Lobbying nontaxable amount Enter the amount from the following table— If the amount on line 40 is— The lobbying nontaxable amount is— Not over \$500,000 20% of the amount on line 40 Over \$500,000 but not over \$1,000,000 \$100,000 plus 15% of the excess over \$500,000 Over \$1,000,000 but not over \$1,500,000 \$175,000 plus 10% of the excess over \$1,000,000 Over \$1,500,000 but not over \$17,000,000 \$225,000 plus 5% of the excess over \$1,500,000 Over \$17,000,000 \$1,000,000	41	
42	Grassroots nontaxable amount (enter 25% of line 41)	42	
43	Subtract line 42 from line 36 Enter -0- if line 42 is more than line 36	43	
44	Subtract line 41 from line 38 Enter -0- if line 41 is more than line 38	44	

Caution If there is an amount on either line 43 or line 44 you must file Form 4720

4-Year Averaging Period Under Section 501(h)

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below
 See the instructions for lines 45 through 50 on page 9 of the instructions)

	Lobbying Expenditures During 4-Year Averaging Period				
	(a) 2000	(b) 1999	(c) 1998	(d) 1997	(e) Total
45	Lobbying nontaxable amount				
46	Lobbying ceiling amount (150% of line 45(e))				
47	Total lobbying expenditures				
48	Grassroots nontaxable amount				
49	Grassroots ceiling amount (150% of line 48(e))				
50	Grassroots lobbying expenditures				

Part VI-B Lobbying Activity by Nonelecting Public Charities
 (For reporting only by organizations that did not complete Part VI-A) (See page 9 of the instructions)

During the year did the organization attempt to influence national state or local legislation including any attempt to influence public opinion on a legislative matter or referendum through the use of	Yes	No	Amount
a Volunteers			
b Paid staff or management (Include compensation in expenses reported on lines c through h)			
c Media advertisements			
d Mailings to members legislators or the public			
e Publications or published or broadcast statements			
f Grants to other organizations for lobbying purposes			
g Direct contact with legislators, their staffs government officials, or a legislative body			
h Rallies demonstrations seminars conventions speeches lectures, or any other means			
i Total lobbying expenditures (add lines c through h)			

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities

**Schedule B
(Form 990 or 990-EZ)**

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Supplementary Information for line 1d of Form 990 or
line 1 of Form 990-EZ (see instructions)

OMB No 1545 0047

2000

Name of organization
Tulsa Opera, Inc

Employer identification number
73 0643311

Organization type (check one)—Section 501(c)(3) ◀ (enter number) 527 or 4947(a)(1) nonexempt charitable trust

A Section 501(c)(7), (8), or (10) organizations—

Check this box if the organization had no charitable contributors who contributed more than \$1 000 during the year (But see **General rule** below) ▶

Enter here the total gifts received during the year for a religious charitable, etc purpose ▶ \$

Note: *This form is generally not open to public inspection except for section 527 organizations*

General Instructions

Purpose of Form

Schedule B (Form 990 or 990-EZ) is used by organizations required to file **Form 990**, Return of Organization Exempt From Income Tax, or **Form 990-EZ**, Short Form Return of Organization Exempt From Income Tax, to provide the information regarding their contributors that is required for line 1d of Form 990 (or line 1 of Form 990-EZ)

Attach the Schedule B (Form 990 or 990-EZ) to Form 990 or 990-EZ. Attach Schedule B after Schedule A (Form 990 or 990-EZ), Organization Exempt Under Section 501(c)(3), if that return is required for the organization

Who Must File Schedule B (Form 990 or 990-EZ)

All organizations must file Schedule B (Form 990 or 990-EZ) unless they certify that they do not meet the filing requirements of Schedule B (Form 990 or 990-EZ) by checking the box in item L of the heading of their Form 990 or Form 990-EZ

See the instructions for item L in the Instructions for Form 990 and Form 990-EZ

Caution *Schedule B (Form 990 or 990-EZ) is not a substitute for the list of 'contributors' required for Part IV-A, Support Schedule of Schedule A (Form 990 or 990-EZ)*

Public Inspection

Schedule B (Form 990 or 990-EZ) is

- Open to public inspection for a section 527 political organization
- Generally not open to public inspection for the other organizations that must file this form

If a non-section 527 organization files a copy of Form 990 or Form 990-EZ, and attachments with any state, it should not include its Schedule B (Form 990 or 990-EZ) in the attachments for the state unless a schedule of contributors is specifically required by the state. States that do not require the information might make the schedule available for public inspection along with the rest of the Form 990 or Form 990-EZ

See the Instructions for Form 990 and Form 990-EZ for phone help and the public inspection rules for those forms and their attachments, which include Schedule B (Form 990 or 990-EZ)

Contributors Required To Be Listed on Part I

'Contributor' includes individuals, fiduciaries, partnerships, corporations, associations, trusts, and exempt organizations

General rule Unless the organization is covered by one of the special rules below, it must list on Part I every contributor who, during the year, gave the organization directly or indirectly money, securities, or any other type of property totaling \$5,000 or more for the year. Also complete Part II for a noncash contribution. In determining the \$5,000 amount, total all of the contributor's gifts of \$1,000 or more for the year

Section 501(c)(3) organizations For an organization described in section 501(c)(3) that meets the 33 1/3% support test of the Regulations under sections 509(a)(1)/170(b)(1)(A)(vi) (whether or not the organization is otherwise described in section 170(b)(1)(A))—

List in Part I only those contributors whose contribution of \$5,000 or more is greater than 2% of the amount reported on line 1d of Form 990 (or line 1 of Form 990-EZ) (Regulations section 1.6033-2(a)(2)(iii)(a))

Example A section 501(c)(3) organization of the type described above, reported \$700,000 in total contributions, gifts, grants, and similar amounts received on line 1d of its Form 990. The organization is only required to list in Parts I and II of its Schedule B (Form 990 or 990-EZ) each person who contributed more than the greater of \$5,000 or \$14,000 (2% of \$700,000). Thus, a contributor who gave a total of \$11,000 would not be reported in Parts I and II for this section 501(c)(3) organization. Even though the \$11,000 contribution to the organization exceeded \$5,000, it did not exceed \$14,000

Section 501(c)(7), (8), or (10) organizations For noncharitable contributions to one of these organizations, list in Part I contributors who gave \$5,000 or more as described in the **General rule** discussed above

If a section 501(c)(7), (8), or (10) organization received contributions or bequests for use exclusively for religious, charitable, etc., purposes (sections 170(c)(4), 2055(a)(3), or 2522(a)(3))—

List in Part I each contributor whose contributions total more than \$1,000 during the year that were for a religious, charitable, etc., purpose. To determine the \$1,000, aggregate all of a contributor's gifts for the year (regardless of amount). For a noncash contribution, complete Part II.

All section 501(c)(7), (8), or (10) organizations that received **any** charitable contributions and listed **any** charitable contributors on Part I must also complete Part III.

If a section 501(c)(7), (8), or (10) organization received charitable gifts, but is not required to list **any** charitable contributors on Part I, check the box on line A at the top of Schedule B (Form 990 or 990-EZ) and enter the amount of charitable contributions received in the space provided. The organization need not complete and attach Part III.

Specific Instructions

Note You may duplicate Parts I, II, and III if more copies are needed. Number each page of each Part.

Part I In column (a), identify the first contributor listed as no 1 and the second contributor as no 2, etc. Number consecutively. Show the contributor's name, address, aggregate contributions for the year, and the type of contribution (e.g., whether an individual, payroll, or noncash contribution). Report payroll contributions by listing the employer's name, address, and total amount given (unless an employee gave enough to be listed individually).

Part II In column (a), show the number that corresponds to the contributor's number in Part I. Describe the noncash contribution fully. Report on property with readily determinable market value (i.e., market quotations for securities) by listing its fair market value (FMV). For marketable securities registered and listed on a recognized securities exchange, measure market value by the average of the highest and lowest quoted selling prices (or the average between the bona fide bid and asked prices) on the contribution date. See Regulations section 20.2031-2 to determine the value of contributed stocks and bonds. When market value cannot be readily determined, use an appraised or estimated value. To determine the amount of a noncash contribution that is subject to an outstanding debt, subtract the debt from the property's fair market value.

Part III Section 501(c)(7), (8), or (10) organizations that received contributions or bequests for use exclusively for religious, charitable, etc., purposes must complete Parts I through III for those persons whose gifts totaled more than \$1,000 during the year. Show also in the heading of Part III total gifts that were \$1,000 or less and were for a religious, charitable, etc., purpose. Complete this information only on the first Part III page.

If an amount is set aside for a religious, charitable, etc., purpose, show in column (d) how the amount is held (e.g., whether it is mingled with amounts held for other purposes). If the organization transferred the gift to another organization, show the name and address of the transferee organization in column (e) and explain the relationship between the two organizations.

Name of organization
Tulsa Opera, IncEmployer identification number
73 0643311**Part I** Contributors

(a) No	(b) Name, address and zip code	(c) Aggregate contributions	(d) Type of contribution
<u>1</u>		\$ 30,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
<u>2</u>		\$ 81,070	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if a noncash contribution)
<u>3</u>		\$ 56,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
<u>4</u>		\$ 29,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
<u>5</u>		\$ 75,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
<u>6</u>		\$ 101,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)

Name of organization
Tulsa Opera, Inc

Employer identification number
73 0643311

Part I Contributors

(a) No	(b) Name, address and zip code	(c) Aggregate contributions	(d) Type of contribution
<u>7</u>		\$ 50,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
<u>8</u>		\$ 36,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
<u>9</u>		\$ 40,000	Individual <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
—		\$	Individual <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
—		\$	Individual <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)
—		\$	Individual <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if a noncash contribution)

Name of organization
Tulsa Opera, Inc

Employer identification number
73 0643311

Part II Noncash Property

(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	2300 Shares o	\$ 71,070	6 / 7 / 01
		\$	/ /
		\$	/ /
		\$	/ /
		\$	/ /
		\$	/ /
		\$	/ /

TULSA OPERA, INC

73-0643311

FORM 990, SCH A PART IV-A - ORGANIZATIONS DESCRIBED IN PART IV, BOX 10 OR 11

<u>DESCRIPTION</u>	<u>TOTAL CONTRIBUTION</u>	<u>MINUS 2% OF LINE 24</u>	<u>EXCESS CONTRIBUTION AMOUNT</u>
	122,500	110,321	12,179
	116,914	110,321	6,593
	220,000	110,321	109,679
	277,000	110,321	166,679
	115,000	110,321	4,679
	125,000	110,321	14,679
	155,000	110,321	44,679
			<u>359,170</u>

FORM 990, PART I - GAIN(LOSS) ON SALE OF ASSETS OTHER THAN INVENTORY

DESCRIPTION OF SECURITY	GAIN	LOSS	
Empire District Electric		44	
United Technologies Corporation	276		
Williams		287	
General Electric		42	
Exelon Corporation	217		
T Rowe Price Science & Technology Fund		297	
T Rowe Price Science & Technology Fund		1,657	
Intel		84	
Mueller Industries		163	
Helmerich & Payne	1,374		
Noble Affiliates		257	
BP Amoco		57	
Helmerich & Payne		20	
	<u>1,867</u>	<u>2,908</u>	(1,041)

TULSA OPERA, INC

73-0643311

FORM 990, PART I - SPECIAL FUNDRAISING EVENTS AND ACTIVITIES

DESCRIPTION	GROSS REVENUE	DIRECT EXPENSE	NET INCOME
OPERA BALL	289,258	145,082	144,176
WINTERMEZZO/OPERA AL FRESCO	26,495	3,157	23,338
OTHER	26,790	26,729	61
	<u>342,543</u>	<u>174,968</u>	<u>167,575</u>

FORM 990, PART II - STATEMENT OF FUNCTIONAL EXPENSES

Description	Total	Program Services	Management and General	Fundraising
Program Services				
Direct Expenses	\$ 1,231,734	\$ 1,231,734	\$ -	\$ -
Management and General				
Personnel Expenses	\$ 644,936	\$ 178,262	\$ 200,938	\$ 265,736
Administrative Expenses	\$ 175,074	\$ 62,499	\$ 112,575	
Plant Expenses	\$ 45,710	\$ 25,788	\$ 19,922	
Fund Raising				
Marketing Expenses	\$ 216,297			\$ 216,297
Fund Development	\$ 46,182			\$ 46,182
TOTALS	\$ 2,359,933	\$ 1,498,283	\$ 333,435	\$ 528,215

TULSA OPERA, INC

73-0643311

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

TULSA OPERA, INC OPERATES IN THE STATE OF OKLAHOMA FOR THE PRIMARY PURPOSE OF FURTHERING THE APPRECIATION OF MUSIC, PARTICULARLY OPERA, FOR THE GENERAL PUBLIC TULSA OPERA, INC PERFORMS SELECT OPERAS THROUGHOUT THE YEAR FOR THE PUBLIC IN ADDITION TO THESE PRODUCTIONS, TULSA OPERA CONDUCTS VARIOUS EDUCATIONAL PROGRAMS

TULSA OPERA, INC

73-0643311

FORM 990, PART IV - INVESTMENTS - SECURITIES

DESCRIPTION	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>
2300 Shares of Ralston Purina Group	0	71,070
50 Shares of Oracle Corporation	0	945
68 82 Shares of T Rowe Price Science and Technology Fund	4,266	0
25 Share of United Technologies	<u>1,471</u>	<u>0</u>
	<u>5,737</u>	<u>72,015</u>

Tulsa Opera Depreciation 00-01

D = Donated 73-0643311
Net Book Value

Date	Asset	Book Cost	No of Yrs	MTD	YTD	LTD	Net Book Value
1/1/1986	Equipment 1	30 465.00	10		0.00		30 465.00
1/1/1966	Equipment 2	9 784.00	10				9 784.00
1/1/1978	Equipment 3	1 039.00	10				1 039.00
1/1/1981	Furniture	5 877.00	10				5 877.00
1/1/1982	Printing Calculator	73.00	10				73.00
1/1/1982	Typewriter Stand	105.00	10				105.00
1/1/1982	File Cabinet	246.00	10				246.00
1/1/1983	Music Stands	127.00	10				127.00
1/1/1983	Files	630.00	10				630.00
1/1/1983	Green	105.00	10				105.00
1/1/1983	Stool	126.00	10				126.00
1/1/1983	File Cabinets	750.00	10				750.00
1/1/1985	Fields Down - Table	203.00	10				203.00
1/1/1985	Calculator	58.00	10				58.00
1/1/1985	File	99.00	10				99.00
1/1/1988	Furniture	145.00	10				145.00
9/1/1989	File Cabinet & Shelf	415.00	10				415.00
7/10/1990	2 Typewriters	375.00	10				375.00
6/6/1991	Projector Lenses	54 717.00	10	0.00	5013.00		54 717.00
8/7/1991	File	240.00	5				240.00
9/1/1992	Chairs	1 571.00	10	13.00	156.00		188.00
10/8/1992	Plan Rack	98.00	10	1.00	12.00		3.00
10/15/1992	Silo TV Monitors	527.00	12	4.00	48.00		127.00
10/27/1992	Video Monitor	519.00	12	4.00	48.00		124.00
12/1/1992	Computerland Printer	607.00	5				607.00
12/2/1992	Video Monitor	1 553.00	12	11.00	132.00		434.00
4/8/1993	BBC Typewriter	375.00	6				375.00
1/1/1994	HP Fax 800	860.00	6				860.00
8/12/1994	PowerMac 6100	2 274.00	5				2 274.00
8/12/1994	Apple keyboard	121.00	5				121.00
8/12/1994	Apple 14" Color Plus	339.00	5				339.00
8/12/1994	Apple Laserwriter	1 658.00	5				1 658.00
8/12/1994	Interex PhoneNet	36.00	5				36.00
2/6/1995	VCR	367.00	7	4.00	48.00		44.00
3/8/1995	Chair	268.00	7	3.00	36.00		33.00
3/8/1995	File Cabinet	199.00	7	2.00	24.00		32.00
5/22/1996	Computer Equipment	975.00	5				
5/31/1996	Computer Equipment	744.00	5				
6/28/1996	Computer Equipment	1 126.00	5				
	SUBTOTAL	119,796.00		42.00	5 809.00	5 809.00	965.00
8/31/1986	Macintosh processors (Citgo)	500.00	5	8.33	100.00		16.67
8/31/1986	Macintosh monitors (Citgo)	1 000.00	5	16.67	200.00		33.33
8/31/1986	Macintosh workstation (Citgo)	1 200.00	5	20.00	240.00		40.00
8/31/1986	Macintosh printer (Citgo)	300.00	5	5.00	60.00		10.00
	SUBTOTAL	3,000.00		50.00	600.00	600.00	100.00

1/14/2000	electric piano	2471 30	3	68 65	823 77	1235 65	1 235 65
2/4/2000	server and backup	4996 56	3	138 79	1665 52	2359 49	2 637 07
4/30/2000	ball stage	3288 00	7	39 26	471 14	549 86	2 748 34
4/30/2000	ball stage	3702 00	7	44 07	528 86	617 00	3 085 00
	SUBTOTAL	19542 86		431 75	5180 95	7654 57	11888 29
8/17/2000	Vken payment	20000 00	10	166 67	1668 67	1668 67	18 333 33
8/24/2000	Mac Computers and software	11288 81	3	313 58	3135 78	3135 78	8 153 03
10/20/2000	Keyboard case	128 43	2	5 35	42 81	42 81	85 62
3/31/2001	Surtile Machine	11025 00	7	131 25	393 75	393 75	10 631 25
8/1/2001	Vken payment	20000 00	10	166 67	166 67	166 67	19 833 33
8/1/2001	"Brent" printer	10293 00	3	285 92	285 92	285 92	10 007 08

SUBTOTAL		72 735 24		1,069 43	5,691 59	5,691 60	67 043 84
FF&E		295,132 88		2,915 04	32,943 86	188,923 73	106,209 15

1/11/1983	Building Improvement	25 097 74	12	1391 77	1391 77	25 097 74	
8/7/1992	Carpet	2 322 00	10	19	228	2,056 50	265 5
4/8/1993	Handicap Accessible	9,500 00	31	25	300	2 484 00	7 016 00
5/10/1993	Handicap Accessible	1 787 00	31	5	60	477	1 310 00
7/9/1993	Handicap Accessible	451	31	1	12	104	347
10/31/1994	Air Conditioner	5 949 00	7	71	852	5,745 00	204
4/30/1995	Roof	10,305 00	39	22	284	1 650 00	8 655 00
SUBTOTAL		55 411 74		1 534 77	3 107 77	37 614 24	17 797 50

10/1/1998	Carpet	1 200 00	10	10	120	560	640
10/1/1998	Blinds	360	10	3	36	168	192
SUBTOTAL		1 560 00		13	156	728	832

BUILDING IMPROVEMENTS		56,971 74		1,547 77	3,263 77	38,342 24	18,629 50
BUILDING		279,052 42		452	5,424 00	146,029 00	133,023 42

INTEREST IN SETS UNDER CONSTRUCTION		10,000 00					
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LAND		106,836 50					
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TOTAL		747,993 54	-	4,914 81	41,631 63	373,294 97	257,862 07
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FORM 990, PART IV-A - RECONCILIATION OF REVENUE PER AUDITForm 990, Part IV-A - Reconciliation of Revenue Per Audit
Financial Statements with Revenue Per Return

Expenses related to President's Council	(30,734)
Change In Temporarily Restricted Assets	4,010
Direct Expenses Related to Line 9b	<u>(174,968)</u>
	<u>(201,692)</u>

FORM 990, PART IV-A - RECONCILIATION OF EXPENSES PER AUDIT

Expenses related to President's Council	(30,734)
Direct Expenses to Line 9b	<u>(174,968)</u>
	<u>(205,702)</u>

FORM 990, PART V - LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

Ms	Carole	Ashcraft	1861 E 15th St	Tulsa	OK	74101
Mr	John	Athens	1537 E 27th St	Tulsa	OK	74136
Mr	Rolf	Blom	6418 S Sandusky	Tulsa	OK	74136
Ms	Courtney	Cabaniss	1777 S Erie Pl	Tulsa	OK	74112
Mr	Frank	Chitwood	1350 S Boulder, #600	Tulsa	OK	74114
Mr	Casey	Cooper	100 W 5th St, Ste 800	Tulsa	OK	74103
Mr	David	Crisp	2303 N Osage Ave	Tulsa	OK	74106
Mr	Kendrick	Ferdeson	PO Box 598	Altus	OK	73522
Mr	Scott	Filstrup	7633 E 63rd Pl, Ste 332	Tulsa	OK	74133
Mr	John	Fischer	6163 S Marion	Tulsa	OK	74013
Mr	John	Fowler	6811 S Florence Ave	Tulsa	OK	74119
Mrs	Barbara	Gardner	12902 E 51st St	Tulsa	OK	74105
Ms	Elizabeth	Geer	4323 S Quincy Pl	Tulsa	OK	74105
Mr	Eric	Grimshaw	1350 S Boulder, Ste 1100	Tulsa	OK	74152
Mr	Donald	Hamilton	6804 S 74th E Ave	Tulsa	OK	74133
Mrs	Alvina	Hart	2308 S Cincinnati Ave	Tulsa	OK	74114
Mrs	Evelyn	Hatfield	6661 Sevanston Circle	Tulsa	OK	74136
Mr	Jono	Helmerich	321 S Boston #100	Tulsa	OK	74103
Mrs	Peggy	Helmerich	2121 S Yorktown #12	Tulsa	OK	74105
Mr	Robert	Hunt	PO Box 701051	Tulsa	OK	74104
Mr	Brent	Johnson	11335 S Yale	Tulsa	OK	74114
Mr	Michael	Johnson	One Williams Center	Tulsa	OK	74172
Mr	Arno	Kahn	3771 E 47th St	Tulsa	OK	74105
Dr	Frank	Letcher	1145 S Utica, Ste 903	Tulsa	OK	74101
Mrs	Mel	Littlefield	6229 S Indianapolis	Tulsa	OK	74136
Mr	Mike	Lodes	1270 E 25th St	Tulsa	OK	74114
Mr	William	Lunn	320 S Boston, Ste 2001	Tulsa	OK	74103
Mr	Kenneth	Miles	2626 E 34th St	Tulsa	OK	74137
Mr	Berry	Miller	PO Box 2300	Tulsa	OK	74114
Ms	Eunna	Park	2660 S Birmingham Pl	Tulsa	OK	74114
Mr	Bruce	Parks	320 S Boston, Ste 1200	Tulsa	OK	74103
Mr	Stephen	Peters	1924 S Utica, Ste 700	Tulsa	OK	74104
Ms	Linda	Potter	4715 E 105th Pl	Tulsa	OK	74137
Ms	Kelley	Rash	302 S Main St	Broken Arrow	OK	74012
Mrs	Lucy	Rooney	7 Springcreek Rd	Muskogee	OK	74105
Ms	Katherine	Saunders	1002 E 20th St	Tulsa	OK	74120
Mrs	Mary	Shaw	401 S Forest Ridge Blvd	Broken Arrow	OK	74014
Mr	Laven	Sowell	3540 S Wheeling	Tulsa	OK	74137
Mr	Bruce	Stoesser	1919 S Wheeling #700	Tulsa	OK	74104
Ms	Kathy	Taylor	1132 S Lewis Ave	Tulsa	OK	74104
Mr	Burl	Watson	3442 E 61st Pl	Tulsa	OK	74136
Ms	Randi	Wightman	2125 E 32 Pl	Tulsa	OK	74105

TULSA OPERA, INC

73-0643311

FORM 990, PART VI - OTHER INFORMATION

	<u>ID NUMBER</u>
Tulsa Opera Endowment Trust #2	73-6212218
The Tulsa Opera Endowment Trust #1	73-1214668

FORM 990, SCH A PART III- STATEMENTS ABOUT ACTIVITIES

- 2c Many members of the Tulsa Opera board are contributors to the organization and volunteer their services to assist the organization

- 2d The organization compensates its employees. The extent that any board member is a member of the Tulsa Opera Chorus, he or she receives the same nominal compensation as other chorus members for performances in the operas