

Form 990

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2024

Open to Public Inspection

Department of the Treasury
Internal Revenue ServiceUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

A For the 2024 calendar year, or tax year beginning SEP 1, 2024 and ending AUG 31, 2025

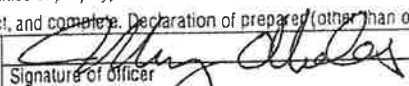
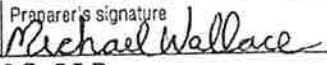
B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	C Name of organization NEW YORK SHAKESPEARE FESTIVAL		D Employer identification number 13-1844852
	Doing business as THE PUBLIC THEATER; JOE'S PUB		E Telephone number (212) 539-8500
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite 425 LAFAYETTE STREET		G Gross receipts \$ 80,142,065.
	City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10003		H(a) Is this a group return for subordinates? ☐ Yes ☒ No
	F Name and address of principal officer: PATRICK WILLINGHAM SAME AS C ABOVE		H(b) Are all subordinates included? ☐ Yes ☐ No If "No," attach a list. See instructions
I Tax-exempt status: ☒ 501(c)(3) ☐ 501(c)() (insert no.) ☐ 4947(a)(1) or ☐ 527			
J Website: WWW.PUBLICTHEATER.ORG			
K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other			
L Year of formation: 1954 M State of legal domicile: NY			

Part I Summary

1 Briefly describe the organization's mission or most significant activities: SEE SCHEDULE O		
2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.		
Activities & Governance	3 Number of voting members of the governing body (Part VI, line 1a) 3	
	4 Number of independent voting members of the governing body (Part VI, line 1b) 4	
	5 Total number of individuals employed in calendar year 2024 (Part V, line 2a) 884	
	6 Total number of volunteers (estimate if necessary) 46	
7a Total unrelated business revenue from Part VIII, column (C), line 12 0.	7b 0.	
b Net unrelated business taxable income from Form 990-T, Part I, line 11		
Revenue	8 Contributions and grants (Part VIII, line 1h) 39,736,942.	49,498,019.
	9 Program service revenue (Part VII, line 2g) 10,801,953.	9,568,679.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 2,727,522.	1,521,880.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 7,865,782.	11,277,032.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) 61,132,199.	71,865,610.
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 516,954.	32,805.
	14 Benefits paid to or for members (Part IX, column (A), line 4) 0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 31,318,316.	29,906,939.
	16a Professional fundraising fees (Part IX, column (A), line 11e) 1,031,543.	1,205,239.
	16b Total fundraising expenses (Part IX, column (D), line 25) 6,854,029.	
Expenses	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 20,111,311.	23,397,249.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 52,978,124.	54,542,232.
	19 Revenue less expenses. Subtract line 18 from line 12 8,154,075.	17,323,378.
	Beginning of Current Year End of Year	
	20 Total assets (Part X, line 16) 175,040,479.	211,099,194.
	21 Total liabilities (Part X, line 26) 47,084,322.	61,597,828.
	22 Net assets or fund balances. Subtract line 21 from line 20 127,956,157.	149,501,366.

Part II Signature Block

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 June 16, 2026
	MURRAY ABELES, CHIEF FINANCIAL OFFICER	
Paid Preparer Use Only	Preparer's name MICHAEL WALLACE	Preparer's signature 
	Firm's name LUTZ AND CARR, CPAS LLP	Firm's EIN 13-1655065
Firm's address 551 FIFTH AVENUE, SUITE 400		Phone no. 212-697-2299
NEW YORK, NY 10176		

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

LHA For Paperwork Reduction Act Notice, see the separate instructions.

432001 12-10-24

Form 990 (2024)

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒

- 1 Briefly describe the organization's mission:
AS THE NATION'S FOREMOST PRODUCER OF SHAKESPEARE AND NEW WORK, THE PUBLIC THEATER IS DEDICATED TO ACHIEVING ARTISTIC EXCELLENCE WHILE DEVELOPING AN AMERICAN THEATER THAT IS ACCESSIBLE AND RELEVANT TO ALL PEOPLE THROUGH PRODUCTIONS OF CHALLENGING NEW PLAYS, MUSICALS AND
- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No
 If "Yes," describe these new services on Schedule O.
- 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☒ Yes ☐ No
 If "Yes," describe these changes on Schedule O.
- 4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.
- 4a (Code:) (Expenses \$ 17,300,992. including grants of \$) (Revenue \$ 5,912,707.)
ANNUAL SEASON
THE PUBLIC THEATER'S FLAGSHIP SEASON AT 425 LAFAYETTE STREET AND ASTOR PLACE FEATURES A DIVERSE LINEUP OF NEW PLAYS, MUSICALS, SHAKESPEARE, AND OTHER CLASSICS ACROSS FIVE THEATERS. PROGRAMMING ENGAGES AUDIENCES, BOTH ONSTAGE AND OFF, WITH SOME OF TODAY'S MOST IMPORTANT IDEAS AND SOCIAL ISSUES. HIGHLIGHTS OF THE 2024-25 SEASON INCLUDE THREE NORTH AMERICAN PREMIERES: COUNTING AND CRACKING WRITTEN BY S. SHAKTHIDHARAN AND PRESENTED IN PARTNERSHIP WITH NYU SKIRBALL; DEEP HISTORY BY DAVID FINNIGAN; AND GLASS. KILL. WHAT IF IF ONLY. IMP. BY CARYL CHURCHILL. THE SEASON ALSO FEATURED TWO NEW YORK PREMIERES: GOOD BONES BY JAMES IJAMES AND SUMO BY LISA SANAYE DRING, THE LATTER PRESENTED IN
- 4b (Code:) (Expenses \$ 5,950,841. including grants of \$) (Revenue \$)
FREE SHAKESPEARE IN THE PARK
FREE SHAKESPEARE IN THE PARK AT THE DELACORTE THEATER EXEMPLIFIES THE PUBLIC'S MISSION TO PROVIDE WORLD-CLASS PRODUCTIONS AT NO COST. SINCE ITS LAUNCH, MORE THAN 6 MILLION PEOPLE HAVE ATTENDED OVER 160 PRODUCTIONS, FEATURING PERFORMANCES BY BOTH RISING AND RENOWNED ARTISTS. TICKETS ARE DISTRIBUTED FREE OF CHARGE ACROSS ALL FIVE BOROUGHES THROUGH A VARIETY OF ACCESS-FOCUSED METHODS. IN 2025, FOLLOWING AN 18-MONTH HIATUS FOR A COMPLETE REVITALIZATION OF THE DELACORTE THEATER, FREE SHAKESPEARE IN THE PARK RETURNED TO CENTRAL PARK WITH AN ALL-STAR PRODUCTION OF TWELFTH NIGHT.
- 4c (Code:) (Expenses \$ 7,560,742. including grants of \$) (Revenue \$ 3,587,559.)
JOE'S PUB
JOE'S PUB REFLECTS THE DIVERSITY OF ITS COMMUNITY THROUGH A WIDE RANGE OF PERFORMANCES IN MUSIC, FILM, AND DANCE. THE VENUE PRESENTS APPROXIMATELY 700 SHOWS ANNUALLY TO MORE THAN 100,000 PEOPLE AND HAS HOSTED OVER 18,000 PERFORMANCES BY GRAMMY AWARD WINNERS, BROADWAY STARS, AND EMERGING ARTISTS ACROSS NUMEROUS GENRES. THE 24/25 SEASON FEATURED NIGHTLY PERFORMANCES BY BOTH RETURNING AND NEW ARTISTS, INCLUDING PATTI SMITH, CAMERON WINTER, TANYA TAGAQ, JUSTIN VIVIAN BOND, SARAH JONES, MATHIS PICARD, GIANMARCO SORESI, CHARLENE KAYE, YOUNGMI MAYER, AND SANDRA BERNHARD. IN 2024, JOE'S PUB HOSTED ITS FOURTH ANNUAL HABIBI FESTIVAL, A WEEK-LONG CELEBRATION OF MIDDLE EASTERN AND NORTH
- 4d Other program services (Describe on Schedule O.)
 (Expenses \$ 8,683,751. including grants of \$ 32,805.) (Revenue \$ 426,122.)
- 4e Total program service expenses 39,496,326.

Form 990 (2024)

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules (continued)

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

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable		
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	

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

		Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 884		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X	
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b	X	
4a 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)?	4a		X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7 Organizations that may receive deductible contributions under section 170(c).			
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	X	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8		
9 Sponsoring organizations maintaining donor advised funds.			
a Did the sponsoring organization make any taxable distributions under section 4966?	9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10 Section 501(c)(7) organizations. Enter:			
a Initiation fees and capital contributions included on Part VIII, line 12	10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b		
11 Section 501(c)(12) organizations. Enter:			
a Gross income from members or shareholders	11a		
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
a Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b		
c Enter the amount of reserves on hand	13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a		X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15		X
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16		X
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17		

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

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

☒**Section A. Governing Body and Management**

	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year 1a 48		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
b Enter the number of voting members included on line 1a, above, who are independent 1b 46		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5	X
6 Did the organization have members or stockholders?	6	X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a	X
b Each committee with authority to act on behalf of the governing body?	8b	X
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O	9	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a	X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
b Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X
13 Did the organization have a written whistleblower policy?	13	X
14 Did the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official	15a	X
b Other officers or key employees of the organization	15b	X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed NY, NJ, PA, CA, GA, FL, IL, MA, MI, MN, RI, VA

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☒ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records
MARK ROWAN - 212-539-8500
425 LAFAYETTE STREET, NEW YORK, NY 10003

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) LUIS MIRANDA, JR. CO-CHAIR	6.00	X		X				0.	0.	0.
(2) PAT FILI-KRUSHEL CO-CHAIR	5.00	X		X				0.	0.	0.
(3) KENNY LEON CO-VICE CHAIR	3.00	X		X				0.	0.	0.
(4) ALISA AMAROSA WOOD CO-VICE CHAIR	3.00	X		X				0.	0.	0.
(5) MYCHAL HARRISON TREASURER	4.00	X		X				0.	0.	0.
(6) GORDON J. DAVIS, ESQ. SECRETARY	3.00	X		X				0.	0.	0.
(7) KWAME ANTHONY APPIAH BOARD MEMBER	1.00	X						0.	0.	0.
(8) ANDREA E. BERNSTEIN BOARD MEMBER	1.00	X						0.	0.	0.
(9) JASON BLUM BOARD MEMBER	1.00	X						0.	0.	0.
(10) MICHAEL BOSWORTH BOARD MEMBER	1.00	X						0.	0.	0.
(11) MARY SCHMIDT CAMPBELL BOARD MEMBER	1.00	X						0.	0.	0.
(12) KURT CHAUVIERE BOARD MEMBER	1.00	X						0.	0.	0.
(13) LEE DANIELS BOARD MEMBER	1.00	X						0.	0.	0.
(14) LISA E. DAVIS BOARD MEMBER	1.00	X						0.	0.	0.
(15) YRTHYA DINZEY-FLORES BOARD MEMBER	2.00	X						0.	0.	0.
(16) SUSAN EDELSTEIN BOARD MEMBER	1.00	X						0.	0.	0.
(17) ERIC ELLENBOGEN BOARD MEMBER	1.00	X						0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) HILARY C. FESHBACH BOARD MEMBER	1.00	X						0.	0.	0.
(19) PETER FINE BOARD MEMBER	1.00	X						0.	0.	0.
(20) DANAI GURIRA BOARD MEMBER	1.00	X						0.	0.	0.
(21) ANNE HATHAWAY BOARD MEMBER	1.00	X						0.	0.	0.
(22) CHRIS HOGGIN BOARD MEMBER	1.00	X						0.	0.	0.
(23) MAXINE ISAACS BOARD MEMBER	1.00	X						0.	0.	0.
(24) ASHLEY LEEDS BOARD MEMBER	1.00	X						0.	0.	0.
(25) KIM LEW BOARD MEMBER	1.00	X						0.	0.	0.
(26) JAYNE LIPMAN BOARD MEMBER	2.00	X						0.	0.	0.
1b Subtotal								0.	0.	0.
c Total from continuation sheets to Part VII, Section A								4,018,479.	0.	607,706.
d Total (add lines 1b and 1c)								4,018,479.	0.	607,706.

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

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- 3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual
- 4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual
- 5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

	Yes	No
3		X
4	X	
5		X

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
YORKE CONSTRUCTION CORPORATION 140 WEST 31ST STREET, NEW YORK, NY 10001	CONSTRUCTION MANAGEMENT AND SERVI	33,935,330.
ENNEAD ARCHITECTS LLP 320 WEST 13TH STREET, NEW YORK, NY 10014	ARCHITECTURAL DESIGN AND CONSULTATION	670,326.
COMMUNITY COUNSELLING SERVICE, 527 MADISON AVENUE, 5TH FLOOR, NEW YORK, NY 10022	CAPITAL PROJECTS FUNDRAISING CONSULTA	553,321.
JIXAW TECHNOLOGIES, 107-8828 HEATHER STREET, VANCOUVER, BC, CANADA V6P 3S8	ONLINE FUNDRAISING SUPPORT AND WEBSITE	478,245.
VENABLE LLP 750 EAST PRATT STREET, BALTIMORE, MD 21202	LEGAL SERVICES	420,261.

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

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SEE PART VII, SECTION A CONTINUATION SHEETS

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) HANS MORRIS BOARD MEMBER	1.00	X						0.	0.	0.
(28) GAIL MERRIFIELD PAPP BOARD MEMBER	1.00	X						0.	0.	0.
(29) JULIA PERSHAN BOARD MEMBER	1.00	X						0.	0.	0.
(30) JULIO PETERSON BOARD MEMBER	1.00	X						0.	0.	0.
(31) MICHAEL PRICE BOARD MEMBER	1.00	X						0.	0.	0.
(32) JANICE COOK ROBERTS BOARD MEMBER	2.00	X						0.	0.	0.
(33) WENDI ROSE BOARD MEMBER	1.00	X						0.	0.	0.
(34) ALEXANDRA SHIVA BOARD MEMBER	1.00	X						0.	0.	0.
(35) JIM STEINBERG BOARD MEMBER	2.00	X						0.	0.	0.
(36) STEVEN C. TAUB BOARD MEMBER	1.00	X						0.	0.	0.
(37) ARIELLE TEPPER BOARD MEMBER	1.00	X						0.	0.	0.
(38) TERESA TSAI BOARD MEMBER	2.00	X						0.	0.	0.
(39) ANGELA VALLOT BOARD MEMBER	1.00	X						0.	0.	0.
(40) ALEX VOLCKHAUSEN BOARD MEMBER	2.00	X						0.	0.	0.
(41) SAM WATERSTON BOARD MEMBER	1.00	X						0.	0.	0.
(42) AUDREY WILF BOARD MEMBER	1.00	X						0.	0.	0.
(43) FRANCES WILKINSON BOARD MEMBER	1.00	X						0.	0.	0.
(44) ANNE CLARKE WOLFF BOARD MEMBER	1.00	X						0.	0.	0.
(45) JULIAN YAP BOARD MEMBER	1.00	X						0.	0.	0.
(46) SASCIA YUAN BOARD MEMBER	1.00	X						0.	0.	0.
Total to Part VII, Section A, line 1c										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(47) PAUL EUSTIS ARTISTIC DIRECTOR	40.00	X		X				898,137.	0.	227,488.
(48) PATRICK WILLINGHAM EXECUTIVE DIRECTOR	40.00	X		X				687,758.	0.	48,459.
(49) MURRAY ABELES CHIEF FINANCIAL OFFICER	40.00			X				250,338.	0.	9,459.
(50) KRISTINA G HOGE SENIOR DIRECTOR OF DEVELOPMENT	40.00				X			278,181.	0.	54,107.
(51) THOMAS MCCANN CHIEF MARKETING OFFICER	40.00				X			211,209.	0.	30,427.
(52) SARAH E ROSEN SENIOR DIRECTOR, HUMAN RESOURCES	40.00				X			194,309.	0.	27,130.
(53) PETER DEAN DIRECTOR OF PRODUCTION	40.00				X			189,437.	0.	23,906.
(54) JEREMY A ADAMS GENERAL MANAGER	40.00				X			177,573.	0.	34,441.
(55) SAHEEM ALI ASSOCIATE ARTISTIC DIRECTOR/RESIDENT	40.00					X		278,192.	0.	49,942.
(56) FREEDOME BRADLEY-BALLENTINE DIRECTOR OF ARTISTIC PROGRAMS	40.00					X		270,922.	0.	18,345.
(57) ALEXA SMITH DIRECTOR, ANTI-RACISM, EQUITY AND BE	40.00					X		208,036.	0.	44,997.
(58) CHIARA KLEIN DIRECTOR OF PRODUCING & ARTISTIC PLA	40.00					X		191,527.	0.	17,951.
(59) KRISTEN GONGORA DIRECTOR OF STRATEGIC ADVANCEMENT	40.00					X		182,860.	0.	21,054.
Total to Part VII, Section A, line 1c								4,018,479.		607,706.

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a			
	b Membership dues	1b			
	c Fundraising events	1c	3,089,950.		
	d Related organizations	1d			
	e Government grants (contributions)	1e	2,430,806.		
	f All other contributions, gifts, grants, and similar amounts not included above	1f	43,977,263.		
	g Noncash contributions included in lines 1a-1f	1g \$	1,788,675.		
	h Total. Add lines 1a-1f		49,498,019.		
Program Service Revenue		Business Code			
	2 a BOX OFFICE INCOME	711110	7,143,692.	7,143,692.	
	b CO-PRODUCTION FEES, ENHANCEMENT I	900099	2,424,987.	2,424,987.	
	c				
	d				
	e				
	f All other program service revenue				
	g Total. Add lines 2a-2f		9,568,679.		
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		646,458.		646,458.
	4 Income from investment of tax-exempt bond proceeds				
	5 Royalties		9,860,178.		9860178.
		(i) Real (ii) Personal			
	6 a Gross rents	6a	1,059,145.		
	b Less: rental expenses	6b	0.		
	c Rental income or (loss)	6c	1,059,145.		
	d Net rental income or (loss)		1,059,145.		1059145.
	7 a Gross amount from sales of assets other than inventory	(i) Securities (ii) Other			
	7a	8,808,921.			
	b Less: cost or other basis and sales expenses	7b	7,933,499.		
	c Gain or (loss)	7c	875,422.		
	d Net gain or (loss)		875,422.		875,422.
	8 a Gross income from fundraising events (not including \$ 3,089,950. of contributions reported on line 1c). See Part IV, line 18	8a	342,956.		
	b Less: direct expenses	8b	342,956.		
	c Net income or (loss) from fundraising events		0.		
	9 a Gross income from gaming activities. See Part IV, line 19	9a			
	b Less: direct expenses	9b			
c Net income or (loss) from gaming activities					
10 a Gross sales of inventory, less returns and allowances	10a				
b Less: cost of goods sold	10b				
c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code			
	11 a CONCESSION	900099	287,325.	287,325.	
	b MISCELLANEOUS INCOME	900099	70,384.	70,384.	
	c				
	d All other revenue				
	e Total. Add lines 11a-11d		357,709.		
12 Total revenue. See instructions		71,865,610.	9,926,388.	0.	12441203.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	10,000.	10,000.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	20,000.	20,000.		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	2,805.	2,805.		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	3,494,277.	2,622,216.	516,365.	355,696.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	21,282,923.	15,825,537.	3,315,223.	2,142,163.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,236,627.	918,973.	193,278.	124,376.
9 Other employee benefits	2,086,937.	1,552,054.	324,788.	210,095.
10 Payroll taxes	1,806,175.	1,344,553.	279,574.	182,048.
11 Fees for services (nonemployees):				
a Management	243,472.	51,182.	186,200.	6,090.
b Legal	606,932.	163,584.	433,771.	9,577.
c Accounting	145,435.	8,050.	137,385.	
d Lobbying	226,000.		225,467.	533.
e Professional fundraising services. See Part IV, line 17	1,205,239.			1,205,239.
f Investment management fees	109,969.		109,969.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	4,473,732.	3,785,837.	452,212.	235,683.
12 Advertising and promotion	1,320,809.	979,507.	97,470.	243,832.
13 Office expenses	1,716,514.	1,123,916.	388,890.	203,708.
14 Information technology	893,605.	572,300.	102,010.	219,295.
15 Royalties	634,792.	634,792.		
16 Occupancy	2,932,357.	2,179,196.	405,408.	347,753.
17 Travel	2,505,636.	1,495,683.	201,551.	808,402.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	3,533,754.	2,563,301.	525,373.	445,080.
23 Insurance	444,057.	322,109.	66,019.	55,929.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a PRODUCTION COSTS	3,154,586.	3,143,954.	3,306.	7,326.
b MISCELLANEOUS	290,318.	102,835.	180,832.	6,651.
c PROFESSIONAL DEVELOPMEN	149,125.	73,942.	30,630.	44,553.
d BAD DEBT	16,156.		16,156.	
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	54,542,232.	39,496,326.	8,191,877.	6,854,029.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	4,507,456.	1	292,418.
	2 Savings and temporary cash investments	10,082,892.	2	12,159,478.
	3 Pledges and grants receivable, net	27,896,930.	3	30,185,500.
	4 Accounts receivable, net	2,448,743.	4	2,646,304.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	1,800,257.	9	2,855,458.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 88,056,198.		
	b Less: accumulated depreciation	10b 15,616,808.		
	11 Investments - publicly traded securities	31,072,926.	10c	72,439,390.
	12 Investments - other securities. See Part IV, line 11	27,687,388.	11	27,903,406.
	13 Investments - program-related. See Part IV, line 11	8,499,163.	12	13,192,927.
	14 Intangible assets		13	
	15 Other assets. See Part IV, line 11		14	
16 Total assets. Add lines 1 through 15 (must equal line 33)	61,044,724.	15	49,424,313.	
17 Accounts payable and accrued expenses	175,040,479.	16	211,099,194.	
Liabilities	18 Grants payable	10,182,171.	17	12,180,220.
	19 Deferred revenue		18	
	20 Tax-exempt bond liabilities	988,461.	19	1,419,291.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		20	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		21	
	23 Secured mortgages and notes payable to unrelated third parties		22	
	24 Unsecured notes and loans payable to unrelated third parties	15,277,194.	23	32,114,027.
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		24	
	26 Total liabilities. Add lines 17 through 25	20,636,496.	25	15,884,290.
	27 Net assets without donor restrictions	47,084,322.	26	61,597,828.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here ☒ and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	62,953,894.	27	101,268,780.
	28 Net assets with donor restrictions	65,002,263.	28	48,232,586.
	Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
32 Total net assets or fund balances	127,956,157.	32	149,501,366.	
33 Total liabilities and net assets/fund balances	175,040,479.	33	211,099,194.	

Form 990 (2024)

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	71,865,610.
2	Total expenses (must equal Part IX, column (A), line 25)	2	54,542,232.
3	Revenue less expenses. Subtract line 2 from line 1	3	17,323,378.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	127,956,157.
5	Net unrealized gains (losses) on investments	5	3,084,290.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	1,137,541.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	149,501,366.

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
1 Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	X	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? _____		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____		

Form 990 (2024)

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

NEW YORK SHAKESPEARE FESTIVAL

13-1844852

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

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

g Provide the following information about the supported organization(s).						
(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	45014557.	43288819.	29187998.	39736942.	49498019.	206726335
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	45014557.	43288819.	29187998.	39736942.	49498019.	206726335
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						1774802.
6 Public support. Subtract line 5 from line 4.						204951533

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
7 Amounts from line 4	45014557.	43288819.	29187998.	39736942.	49498019.	206726335
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	1677193.	18596581.	13755724.	8352164.	11565781.	53947443.
9 Net income from unrelated business activities, whether or not the business is regularly carried on			3,931.	663.		4,594.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	11,193.	197,732.	324,162.	310,787.	357,709.	1201583.
11 Total support. Add lines 7 through 10						261879955
12 Gross receipts from related activities, etc. (see instructions)					12 36,365,784.	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f))	14	78.26 %
15 Public support percentage from 2023 Schedule A, Part II, line 14	15	76.93 %
16a 33 1/3% support test - 2024. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☒	
b 33 1/3% support test - 2023. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☐	
17a 10% -facts-and-circumstances test - 2024. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	☐	
b 10% -facts-and-circumstances test - 2023. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	☐	
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	☐	

Schedule A (Form 990) 2024

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge ...						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources ...						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2023 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2024 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2023 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2024. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2023. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1	
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.	2	

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).	1	

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1	
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).	2	
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.	3	

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year(see instructions).		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.	2a	
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.	2b	
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI .	3a	
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.	3b	

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

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

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	

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

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

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2024 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2024	(iii) Distributable Amount for 2024
1	Distributable amount for 2024 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2024 (reasonable cause required - explain in Part VI). See instructions.		
3	Excess distributions carryover, if any, to 2024		
a	From 2019		
b	From 2020		
c	From 2021		
d	From 2022		
e	From 2023		
f	Total of lines 3a through 3e		
g	Applied to under distributions of prior years		
h	Applied to 2024 distributable amount		
i	Carryover from 2019 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2024 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2024 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.		
6	Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.		
7	Excess distributions carryover to 2025. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2020		
b	Excess from 2021		
c	Excess from 2022		
d	Excess from 2023		
e	Excess from 2024		

Schedule A (Form 990) 2024

Part VI

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

SCHEDULE C
(Form 990)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under Section 501(c) and Section 527
Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public
Inspection

If the organization answered "Yes" on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then:

- Section 501(c)(3) organizations: Complete Parts I-A and I-B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and I-C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes" on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then:

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes" on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions), or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then:

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization NEW YORK SHAKESPEARE FESTIVAL	Employer identification number (EIN) 13-1844852
Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.	

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.

2 Political campaign activity expenditures \$

3 Volunteer hours for political campaign activities

Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 \$

2 Enter the amount of any excise tax incurred by organization managers under section 4955 \$

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No

4a Was a correction made? ☐ Yes ☐ No

b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities \$

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527
exempt function activities \$

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL,
line 17b \$

4 Did the filing organization file Form 1120-POL for this year? ☐ Yes ☐ No

5 Enter the names, addresses, and EINs of all section 527 political organizations to which the filing organization made payments. For each
organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were
promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC).
If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-

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

Schedule C (Form 990) 2024

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A** Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grassroots lobbying)			
b Total lobbying expenditures to influence a legislative body (direct lobbying)		226,000.	
c Total lobbying expenditures (add lines 1a and 1b)		226,000.	
d Other exempt purpose expenditures		46,943,993.	
e Total exempt purpose expenditures (add lines 1c and 1d)		47,169,993.	
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.		1,000,000.	
IF the amount on line 1e, column (a) or (b), is:	THEN the lobbying nontaxable amount is:		
not over \$500,000	20% of the amount on line 1e.		
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.		
g Grassroots nontaxable amount (enter 25% of line 1f)		250,000.	
h Subtract line 1g from line 1a. If zero or less, enter -0-		0.	
i Subtract line 1f from line 1c. If zero or less, enter -0-		0.	
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?			☐ Yes ☐ No

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 separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2021	(b) 2022	(c) 2023	(d) 2024	(e) Total
2a Lobbying nontaxable amount	1,000,000.	1,000,000.	1,000,000.	1,000,000.	4,000,000.
b Lobbying ceiling amount (150% of line 2a, column(e))					6,000,000.
c Total lobbying expenditures	180,000.	261,000.	268,000.	226,000.	935,000.
d Grassroots nontaxable amount	250,000.	250,000.	250,000.	250,000.	1,000,000.
e Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000.
f Grassroots lobbying expenditures					

Schedule C (Form 990) 2024

SCHEDULE D

(Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

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

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

OMB No. 1545-0047

Open to Public
Inspection

Name of the organization

NEW YORK SHAKESPEARE FESTIVAL

Employer identification number

13-1844852

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No		
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No		

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (for example, recreation or education)	☐ Preservation of a historically important land area
☐ Protection of natural habitat	☐ Preservation of a certified historic structure
☐ Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included on line 2a	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4 Number of states where property subject to conservation easement is located

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1 \$

(ii) Assets included in Form 990, Part X \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 \$

b Assets included in Form 990, Part X \$

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

Schedule D (Form 990) (Rev. 12-2024)

LHA 432051 01-02-25

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets(continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

a ☐ Public exhibition

d ☐ Loan or exchange program

b ☐ Scholarly research

e ☐ Other _____

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

Part V Endowment Funds Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	35,776,791.	32,149,422.	31,568,514.	29,277,354.	20,519,005.
b Contributions	559,166.	709,914.		5,950,000.	5,000,000.
c Net investment earnings, gains, and losses	4,119,138.	4,205,634.	1,693,165.	-2,773,840.	4,643,349.
d Grants or scholarships					
e Other expenditures for facilities and programs	-1,415,127.	-1,288,179.	-1,112,257.	-885,000.	-885,000.
f Administrative expenses					
g End of year balance	39,039,968.	35,776,791.	32,149,422.	31,568,514.	29,277,354.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment .0000 %

b Permanent endowment 71.5695 %

c Term endowment 28.4305 %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations? ☐ Yes ☒ No

(ii) Related organizations? ☐ Yes ☒ No

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ Yes ☐ No

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		86,422,297.	14,819,555.	71,602,742.
d Equipment		1,443,660.	625,616.	818,044.
e Other		190,241.	171,637.	18,604.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				72,439,390.

Schedule D (Form 990) (Rev. 12-2024)

Part VII Investments - Other Securities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A) HCP PRIVATE EQUITY FUND		
(B) VIII, L.P.	2,930,169.	END-OF-YEAR MARKET VALUE
(C) MERCER PIP VI - PRIVATE		
(D) EQUITY	1,828,291.	END-OF-YEAR MARKET VALUE
(E) HCP WPPE PRIVATE EQUITY		
(F) FUND XII, L.P.	532,018.	END-OF-YEAR MARKET VALUE
(G) MERCER PIP VI - PVT DEBT	945,141.	END-OF-YEAR MARKET VALUE
(H)		
Total. (Col. (b) must equal Form 990, Part X, line 12, col. (B))	13,192,927.	

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, line 13, col. (B))		

Part IX Other Assets

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

(a) Description	(b) Book value
(1) BONDS, DEPOSITS AND OTHER ASSETS	60,478.
(2) CONSTRUCTION IN PROGRESS	332,000.
(3) OPERATING LEASE RIGHT-OF-USE-ASSETS	11,323,399.
(4) DUE FROM CITY OF NEW YORK	37,708,436.
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 15, col. (B))	49,424,313.

Part X Other Liabilities

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) ACCRUED PENSION LIABILITY	2,123,225.
(3) OPERATING LEASE LIABILITIES	13,761,065.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	15,884,290.

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

Schedule D (Form 990) (Rev. 12-2024)

SCHEDULE G
(Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

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

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

Open to Public
Inspection

Name of the organization

NEW YORK SHAKESPEARE FESTIVAL

Employer identification number

13-1844852

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a ☒ Mail solicitations e ☒ Solicitation of nongovernment grants
b ☒ Internet and email solicitations f ☒ Solicitation of government grants
c ☒ Phone solicitations g ☒ Special fundraising events
d ☒ In-person solicitations

2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☒ Yes

☐ No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
GURA ASSOCIATES, LTD - 505 WEST END AVENUE, NEW YORK, NY	MAJOR GIFT CONSULTING		X	0.	410,000.	0.
CCS FUNDRAISING - 527 MADISON AVE, NEW YORK, NY 10022	CAPITAL CAMPAIGN CONSULTANTS		X	0.	553,321.	0.
SD&A TELESERVICES - 5757 W CENTURY BLVD #300, LOS	TELESALES SUPPORT		X	0.	181,726.	0.
ADVANCE NYC, INC. - 226 TULIP AVE, FLORAL PARK, NY 11001	INSTITUTIONAL GIVING SUPPORT		X	0.	60,192.	0.
Total					1,205,239.	

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

NY, NJ, PA, CA, GA, FL, IL, MA, MI, MN, RI, VA, CO, CT, DC, WA

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

Schedule G (Form 990) (Rev. 12-2024)

SEE PART IV FOR CONTINUATIONS

LHA 432081 01-14-25

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

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))
		ANNUAL GALA (event type)	(event type)	NONE (total number)	
Revenue	1 Gross receipts	3,432,906.			3,432,906.
	2 Less: Contributions	3,089,950.			3,089,950.
	3 Gross income (line 1 minus line 2)	342,956.			342,956.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages	277,226.			277,226.
	8 Entertainment				
	9 Other direct expenses	65,730.			65,730.
	10 Direct expense summary. Add lines 4 through 9 in column (d)				342,956.
	11 Net income summary. Subtract line 10 from line 3, column (d)				0.

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

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d)				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

- 11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13 Indicate the percentage of gaming activity conducted in:
- | | 13a | % |
|-------------------------------|-----|---|
| a The organization's facility | | |
| b An outside facility | 13b | |
- 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name _____

Address _____

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization \$ _____ and the amount of gaming revenue retained by the third party \$ _____

c If "Yes," enter the name and address of the third party:

Name _____

Address _____

- 16 Gaming manager information:

Name _____

Gaming manager compensation \$ _____

Description of services provided _____

☐ Director/officer ☐ Employee ☐ Independent contractor

- 17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$ _____

Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

SCHEDULE G, PART I, LINE 2B, LIST OF TEN HIGHEST PAID FUNDRAISERS:

(I) NAME OF FUNDRAISER: GURA ASSOCIATES, LTD

(I) ADDRESS OF FUNDRAISER: 505 WEST END AVENUE, NEW YORK, NY 10024

(I) NAME OF FUNDRAISER: CCS FUNDRAISING

(I) ADDRESS OF FUNDRAISER: 527 MADISON AVE, NEW YORK, NY 10022

(I) NAME OF FUNDRAISER: SD&A TELESERVICES

(I) ADDRESS OF FUNDRAISER: 5757 W CENTURY BLVD #300, LOS ANGELES, CA 90045

(I) NAME OF FUNDRAISER: ADVANCE NYC, INC.

(I) ADDRESS OF FUNDRAISER: 226 TULIP AVE, FLORAL PARK, NY 11001

Part IV	Supplemental Information <i>(continued)</i>
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Grants and Other Assistance to Organizations, Governments, and Individuals in the United States

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047

Open to Public Inspection

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

Name of the organization

Employer identification number	13-1844852
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NEW YORK SHAKESPEARE FESTIVAL

Part I	General Information on Grants and Assistance
--------	--

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

[illegible]

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

Schedule I (Form 990) (Rev. 12-2024)

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
PASSTHROUGH GRANT	2	20,000.	0.		

Part IV **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:
GRANTEE IS REQUIRED TO SUBMIT A BUDGET FOR APPROVAL. ONCE APPROVED, NYSF MAINTAINS THE BUDGET AND MONITORS GRANT EXPENSES AGAINST IT. PAYMENT TO THE GRANTEE IS USUALLY IN THE FORM OF REIMBURSEMENT. GRANTEE IS REQUIRED TO SUBMIT RECEIPTS AND SUPPORTING DOCUMENTATION IN ORDER TO BE REIMBURSED. DEPENDING ON THE PROJECT, INTERIM PROGRESS REPORTS MAY BE REQUIRED. A FINAL REPORT AND ACCOUNTING STATEMENT IS REQUIRED AT THE END OF THE PROJECT.

A MULTI-YEAR BUDGET HAS BEEN INCORPORATED INTO THE AFFILIATION AGREEMENT BETWEEN NYSF AND THE SHAKESPEARE SOCIETY OF AMERICA, INC. NYSF REVIEWS THE BUDGET AND EXPENSES DURING THE YEAR. INTERIM FINANCIAL REPORTS ARE REVIEWED REGULARLY. A FINAL REPORT AND ACCOUNTING STATEMENT IS REQUIRED AT THE END OF THE YEAR.

PART III

GRANTEE IS REQUIRED TO SUBMIT A BUDGET FOR APPROVAL. GRANTEE REPORTS ON

Part IV Supplemental Information

THE ACTIVITIES AND, IF REQUIRED, SUBMITS A FINAL REPORT AND ACCOUNTING STATEMENT AT THE END OF THE PROJECT.

**SCHEDULE J
(Form 990)**

(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

**Open to Public
Inspection**

Name of the organization

NEW YORK SHAKESPEARE FESTIVAL

Employer identification number

13-1844852

Part I Questions Regarding Compensation

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

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

Schedule J (Form 990) (Rev. 12-2024)

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

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

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

(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) PAUL EUSTIS	(i) 898,137.	0.	0.	222,371.	5,117.	1,125,625.	0.
ARTISTIC DIRECTOR	(ii) 0.	0.	0.	0.	0.	0.	0.
(2) PATRICK WILLINGHAM	(i) 642,758.	45,000.	0.	40,324.	8,135.	736,217.	0.
EXECUTIVE DIRECTOR	(ii) 0.	0.	0.	0.	0.	0.	0.
(3) MURRAY ABELIS	(i) 250,338.	0.	0.	7,606.	1,853.	259,797.	0.
CHIEF FINANCIAL OFFICER	(ii) 0.	0.	0.	0.	0.	0.	0.
(4) KRISTINA G HOGE	(i) 278,181.	0.	0.	17,760.	36,347.	332,288.	0.
SENIOR DIRECTOR OF DEVELOPMENT	(ii) 0.	0.	0.	0.	0.	0.	0.
(5) THOMAS MCCANN	(i) 211,209.	0.	0.	17,817.	12,610.	241,636.	0.
CHIEF MARKETING OFFICER	(ii) 0.	0.	0.	0.	0.	0.	0.
(6) SARAH E ROSEN	(i) 194,309.	0.	0.	12,563.	14,567.	221,439.	0.
SENIOR DIRECTOR, HUMAN RESOURCES	(ii) 0.	0.	0.	0.	0.	0.	0.
(7) PETER DEAN	(i) 189,437.	0.	0.	8,405.	15,501.	213,343.	0.
DIRECTOR OF PRODUCTION	(ii) 0.	0.	0.	0.	0.	0.	0.
(8) JEREMY A ADAMS	(i) 177,573.	0.	0.	22,464.	11,977.	212,014.	0.
GENERAL MANAGER	(ii) 0.	0.	0.	0.	0.	0.	0.
(9) SAHEEM ALI	(i) 278,192.	0.	0.	23,481.	26,461.	328,134.	0.
ASSOCIATE ARTISTIC DIRECTOR/RESIDENT	(ii) 0.	0.	0.	0.	0.	0.	0.
(10) FREEDOME BRADLEY-BALLENTINE	(i) 270,922.	0.	0.	-18,313.	36,658.	289,267.	0.
DIRECTOR OF ARTISTIC PROGRAMS	(ii) 0.	0.	0.	0.	0.	0.	0.
(11) ALEXA SMITH	(i) 208,036.	0.	0.	4,600.	40,397.	253,033.	0.
DIRECTOR, ANTI-RACISM, EQUITY AND BE	(ii) 0.	0.	0.	0.	0.	0.	0.
(12) CHIARA KLEIN	(i) 191,527.	0.	0.	4,865.	13,086.	209,478.	0.
DIRECTOR OF PRODUCING & ARTISTIC PLA	(ii) 0.	0.	0.	0.	0.	0.	0.
(13) KRISTEN GONGORA	(i) 182,860.	0.	0.	10,749.	10,305.	203,914.	0.
DIRECTOR OF STRATEGIC ADVANCEMENT	(ii) 0.	0.	0.	0.	0.	0.	0.
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						

Part III **Supplemental Information**

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

PART I, LINE 1A:
THE ARTISTIC DIRECTOR AND EXECUTIVE DIRECTOR ARE PERMITTED TO BOOK UPGRADED SEATING ON OVERNIGHT FLIGHTS THAT ARE SIX HOURS OR LONGER WITH PRIOR APPROVAL BY THEIR COUNTERPART.

PAUL EUSTIS RECEIVED GROSS-UP PAYMENTS FOR IMPUTED TAXES ON HIS CONTRACTUAL LIFE INSURANCE POLICY AND 403B CONTRIBUTIONS.

PART I, LINE 4B:
PURSUANT TO HIS EMPLOYMENT AGREEMENT, PAUL J. EUSTIS PARTICIPATES IN AN NONQUALIFIED DEFERRED COMPENSATION ARRANGEMENT UNDER SECTION 457(F) OF THE INTERNAL REVENUE CODE, WHICH IS DESIGNED TO PROVIDE A NONQUALIFIED RETIREMENT BENEFIT UPON COMPLETION OF THE CONTRACT TERM, AND IS SUBJECT TO A SUBSTANTIAL RISK OF FORFEITURE. THE RETIREMENT BENEFIT IS BEING ACCRUED RATABLY OVER THE CONTRACT TERM. \$159,493 WAS VESTED DURING THE 2024 CALENDAR YEAR AND THE ACCRUAL IS BEING REPORTED AS DEFERRED COMPENSATION.

PURSUANT TO HIS EMPLOYMENT AGREEMENT, PATRICK WILLINGHAM PARTICIPATES IN AN NONQUALIFIED DEFERRED COMPENSATION ARRANGEMENT UNDER SECTION 457(F) OF THE INTERNAL REVENUE CODE, WHICH IS DESIGNED TO PROVIDE A NONQUALIFIED RETIREMENT BENEFIT UPON COMPLETION OF THE CONTRACT TERM, AND IS SUBJECT TO A SUBSTANTIAL RISK OF FORFEITURE. THE RETIREMENT BENEFIT IS BEING ACCRUED RATABLY OVER THE CONTRACT TERM. \$5,201 WAS VESTED DURING THE 2024 CALENDAR YEAR AND THE ACCRUAL IS BEING REPORTED AS DEFERRED COMPENSATION.

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public
Inspection

Name of the organization

NEW YORK SHAKESPEARE FESTIVAL

Employer identification number

13-1844852

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	44	1,788,675.	FAIR MARKET VALUE
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ()				
26 Other ()				
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions
for which the organization completed Form 8283, Part V, Donee Acknowledgement

29

0

30a During the year, did the organization receive by contribution any property reported on Part I, lines 1 through 28, that it
must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for
exempt purposes for the entire holding period?

	Yes	No
30a		X

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

31	X	
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32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash
contributions?

32a	X	
-----	---	--

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked,
describe in Part II.

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

Schedule M (Form 990) 2024

Part II

Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, PART I, LINE 32B:

MERRILL LYNCH WEALTH MANAGEMENT HOLDS THE ORGANIZATION'S BROKERAGE
ACCOUNTS TO RECEIVE STOCK GIFTS. STOCK GIFTS ARE SOLD UPON RECEIPT.

**SCHEDULE O
(Form 990)**

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

**Open to Public
Inspection**

Name of the organization

NEW YORK SHAKESPEARE FESTIVAL

Employer identification number

13-1844852

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

THROUGH THE PUBLIC THEATER, SHAKESPEARE IN THE PARK AND JOE'S PUB, NYSF IS DEDICATED TO DEVELOPING AN AMERICAN THEATER THAT IS ACCESSIBLE AND RELEVANT TO ALL PEOPLE.

**FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
INNOVATIVE STAGINGS OF THE CLASSICS.**

FORM 990, PART III, LINE 3, CHANGES IN PROGRAM SERVICES:
IN 2024, NEW YORK SHAKESPEARE FESTIVAL COMMENCED A MAJOR CAPITAL PROJECT INVOLVING THE REBUILD OF THE DELACORTE THEATER, HOME OF SHAKESPEARE IN THE PARK. CONSTRUCTION WAS SUBSTANTIALLY COMPLETED IN 2025, WITH INAUGURAL PERFORMANCES MARKING THE RETURN OF SHAKESPEARE IN THE PARK IN THE NEWLY CONSTRUCTED DELACORTE THEATER.

IN 2025, NEW YORK SHAKESPEARE FESTIVAL FORMALLY DISSOLVED ITS SUBSIDIARY, SHAKESPEARE SOCIETY, AND INTEGRATED ALL OPERATIONS INTO THE PARENT ORGANIZATION.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:
PARTNERSHIP WITH MA-YI THEATRE COMPANY. IN ADDITION, GATZ RETURNED WITH ELEVATOR REPAIR SERVICE FOR ITS FINAL NEW YORK CITY PRODUCTION.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:
AFRICAN ARTISTS. VANGUARD RESIDENT ARTIST MARGARET CHO CURATED A QUARTERLY SERIES THAT CULMINATED IN A PERFORMANCE AT THE ANNUAL JOE'S PUB GALA.

**FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:
CIVIC ARTISTIC PROGRAMS**

CIVIC ARTISTIC PROGRAMS IS THE PUBLIC'S HUB FOR EXPANDING ACCESS, FOSTERING CIVIC ENGAGEMENT, AND ADVANCING COMMUNITY-FOCUSED ARTISTIC INNOVATION BY BUILDING MEANINGFUL CONNECTIONS WITH COMMUNITY ORGANIZATIONS AND THEIR MEMBERS.

THE MOBILE UNIT
THE MOBILE UNIT REACHES PAST ECONOMIC AND GEOGRAPHIC BARRIERS TO THE ARTS BY MEETING COMMUNITIES WHERE THEY ARE, STAGING THEATER PRODUCTIONS AND PROGRAMS AT NO COST IN LOCAL NEIGHBORHOOD VENUES AND SPACES ACROSS NYC'S FIVE BOROUGHES. IN 2025, THE MOBILE UNIT PRESENTED A BI-LINGUAL ADAPTATION OF MUCH ADO ABOUT NOTHING BY JULIAN MESRI AND REBECCA MARTINEZ.

PUBLIC WORKS
PUBLIC WORKS AIMS TO RESTORE AND BUILD COMMUNITY BY CONNECTING PEOPLE THROUGH THE CREATION OF EXTRAORDINARY WORKS OF ART. IN 2025, PUBLIC WORKS PRESENTED A FREE CONCERT EXPERIENCE OF PERICLES, CONCEIVED BY TROY ANTHONY, INVOLVING HUNDREDS OF COMMUNITY MEMBERS AND PRESENTED AT THE CATHEDRAL OF ST. JOHN THE DIVINE. ADDITIONALLY, PUBLIC WORKS PROVIDED YEAR-ROUND PROGRAMMING THROUGH WEEKLY CLASSES, MONTHLY

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

Schedule O (Form 990) (Rev. 12-2024)

LHA 432211 01-15-25

Name of the organization	NEW YORK SHAKESPEARE FESTIVAL	Employer identification number	13-1844852
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GATHERINGS, WORKSHOPS, AND ACCESS TO PERFORMANCES. THESE ACTIVITIES WERE OFFERED IN PARTNERSHIP WITH EIGHT LONG-STANDING ORGANIZATIONS: CHILDREN'S AID (MANHATTAN), THE FORTUNE SOCIETY (QUEENS), DREAMYARD (BRONX), BROWNSVILLE RECREATION CENTER (BROOKLYN), DOMESTIC WORKERS UNITED (STATEN ISLAND AND CITYWIDE), CASITA MARIA CENTER FOR ARTS AND EDUCATION (BRONX), CENTER FOR FAMILY LIFE IN SUNSET PARK (BROOKLYN), AND MILITARY RESILIENCE FOUNDATION (CITYWIDE).

NEW WORK DEVELOPMENT & ANCILLARY PROGRAMS

THE PUBLIC'S EARLY CAREER WORKING GROUP SUPPORTS EARLY-CAREER ARTISTS WITH COLLABORATIVE PROGRAMS THAT NURTURE TALENT AND PROVIDE RESOURCES AT CRITICAL MOMENTS IN THEIR DEVELOPMENT.

EMERGING WRITERS GROUP (EWG) FOSTERS ARTISTIC AND PROFESSIONAL GROWTH FOR PLAYWRIGHTS AND OTHER GENERATIVE ARTISTS IN THE EARLY STAGES OF THEIR CAREERS. WRITERS ARE SELECTED BIENNIALY FOR A TWO-YEAR FELLOWSHIP THAT INCLUDES A STIPEND, BI-WEEKLY GROUP SESSIONS, AND SPECIAL SESSIONS WITH ESTABLISHED PLAYWRIGHTS. THE RESIDENCY CULMINATES IN THE SPOTLIGHT SERIES, A FESTIVAL OF NEW WORK BY MEMBERS OF THE EWG COHORT. IN 24/25, THE PUBLIC DEEPENED ITS SUPPORT FOR THE PROGRAM BY:

- TAILORING ARTISTIC DEVELOPMENT AND GROUP RETREATS TO THE COHORT'S EVOLVING NEEDS

- PRODUCING THE SPOTLIGHT SERIES, FEATURING TEN READINGS OF NEW PLAYS BY THE MEMBERS OF THE EWG.

- EXPANDING NETWORKING OPPORTUNITIES WITH LEADERS IN FILM AND TELEVISION

THE 23/25 EWG COHORT INCLUDED KARINA BILLINI, TOMMY ENDTER, JESSE JAE HOON, HUMAIRA IQBAL, CELESTE JENNINGS, NINA KI, GLORIA OLADIPO, VALEN-MARIE SANTOS, AMITA SHARMA, AND AL SIERRA.

JOE'S PUB WORKING GROUP

JOE'S PUB WORKING GROUP (JPWG) SUPPORTS 4-6 EARLY-CAREER MUSICIANS AND PERFORMANCE ARTISTS ANNUALLY, OFFERING CURATORIAL SUPPORT, REHEARSAL SPACE, AND MANY ADMINISTRATIVE RESOURCES. ARTISTS ARE SELECTED FOR THEIR STRONG NARRATIVE VOICES AND ENCOURAGED TO EXPLORE PERFORMANCE-BASED STORYTELLING AND SONGWRITING. THE 2025-2026 JPWG COHORT INCLUDES DANIEL EMOND, GREGORY RICHARDSON, KATE DOUGLAS, MAFER BANDOLA, AND POOJA REDDY.

NEW YORK VOICES

NEW YORK VOICES WAS CREATED IN RESPONSE TO THE DECLINE IN ALBUM SALES AND AIMS TO SUPPORT MUSICIANS IN DEVELOPING NEW LIVE PERFORMANCE WORK. THE PROGRAM COMMISSIONS AT LEAST THREE ARTISTS PER YEAR, HELPING THEM DEVELOP A FULL SHOW, ACCESS FUNDING, AND EXPAND TOURING POTENTIAL. ARTISTS ALSO RECEIVE FINISHING FUNDS TO COMPLETE THEIR PROJECTS. THE 2024-2025 COHORT INCLUDED DAN FISHBACK, MALI OBOMSAWIN & JAKE BLOUNT, BARSHA & JO LAMPERT, AND SARAH ELIZABETH CHARLES.

ARTISTS-IN-RESIDENCE

THE PUBLIC THEATER OFFERS SALARIED RESIDENCIES TO GIVE ARTISTS TIME, SPACE, AND RESOURCES TO DEVELOP THEIR WORK.

- WRITER-IN-RESIDENCE: SUZAN-LORI PARKS

- ARTIST-IN-RESIDENCE: SHAINA TAUB

- RESIDENCY: THE APOTHEAE: A TWO-YEAR COLLABORATION WITH ACTOR AND DISABILITY RIGHTS ADVOCATE GREGG MOZGALA TO EXPLORE SHAKESPEARE THROUGH A DISABILITY LENS.

- TOW PLAYWRIGHT-IN-RESIDENCE: ELSE WENT

Name of the organization	NEW YORK SHAKESPEARE FESTIVAL	Employer identification number	13-1844852
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-DIRECTING FELLOW: EMMA WENT

EXPENSES \$ 8,683,751. INCLUDING GRANTS OF \$ 32,805. REVENUE \$ 426,122.

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

THE ORGANIZATION HAS AN EXECUTIVE COMMITTEE CONSISTING OF THE CHAIR, OTHER OFFICERS OF THE BOARD, THE CHAIRS OF THE AUDIT, FINANCE AND NOMINATING COMMITTEES AND SUCH ADDITIONAL TRUSTEES AS MAY BE ELECTED BY THE BOARD. THE EXECUTIVE COMMITTEE SHALL HAVE AND MAY EXERCISE ALL THE POWERS OF THE BOARD PERMITTED BY LAW WHEN THE BOARD IS NOT IN SESSION, EXCEPT FOR CERTAIN SPECIFIC MATTERS PURSUANT TO THE ORGANIZATION'S BY-LAWS.

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

MANAGEMENT (INCLUDING BUT NOT LIMITED TO THE EXECUTIVE DIRECTOR) REVIEWS THE FORM 990 WITH THE AUDIT COMMITTEE. AFTER THAT EVALUATION, THE DRAFT 990 IS CIRCULATED TO THE EXECUTIVE COMMITTEE FOR REVIEW AND APPROVAL. THE PUBLIC VERSION OF THE 990 IS THEN CIRCULATED TO THE FULL BOARD FOR COMMENTS AND QUESTIONS PRIOR TO FILING.

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

THROUGHOUT THE FISCAL YEAR, BOARD MEMBERS ARE REMINDED TO DISCLOSE ANY CONFLICTS THEY MAY HAVE TO MANAGEMENT OR THE AUDIT COMMITTEE. AT THE END OF EACH FISCAL YEAR, CONFLICT OF INTEREST FORMS ARE FILLED OUT BY TRUSTEES, AND THE AUDIT COMMITTEE OR ITS CHAIR EVALUATES THE DISCLOSURES TO DETERMINE WHETHER THEY INVOLVE MATERIAL CONFLICTS AND MAKES A RECOMMENDATION. INTERESTED BOARD MEMBERS RECUSE THEMSELVES FROM DISCUSSION AND VOTING RELATING TO ANY CONFLICTED MATTER. HOWEVER, AS A MEMBER OF THE BOARD OR COMMITTEE, THE INTERESTED BOARD MEMBER MAY BE COUNTED IN DETERMINING THE ESTABLISHMENT OF THE QUORUM AT SUCH A MEETING.

AT THIS TIME, ONLY TRUSTEES ARE REQUIRED TO DISCLOSE. A POLICY IS BEING DRAFTED TO REQUIRE THE SAME OF OFFICERS AND KEY EMPLOYEES.

FORM 990, PART VI, SECTION B, LINE 15:

THE ARTISTIC DIRECTOR'S CONTRACT WAS RENEWED EFFECTIVE JUNE 2018 AND RUNS THROUGH JULY 2028. THE EXECUTIVE DIRECTOR'S CONTRACT RUNS THROUGH DECEMBER 2025 AND WAS RENEWED IN JANUARY 2026 THROUGH 2029. THE EXECUTIVE COMMITTEE RECEIVED A REPORT FROM AN INDEPENDENT CONSULTANT WITH COMPARATIVE DATA FROM PEER CULTURAL INSTITUTIONS IN BUDGET AND PROGRAM SIZE IN NEW YORK CITY AND ACROSS THE COUNTRY. USING THIS DATA, THE COMMITTEE DETERMINED A COMPARABLE COMPENSATION LEVEL.

FOR THE KEY POSITIONS OF PRODUCTION EXECUTIVE, CHIEF FINANCIAL OFFICER, CHIEF MARKETING OFFICER, THE SENIOR DIRECTOR OF HUMAN RESOURCES AND/OR INDEPENDENT CONSULTANT GARNERS INFORMATION USING COMPARATIVE DATA FROM SIMILARLY-SIZED, NONPROFIT ARTS INSTITUTIONS. THE INFORMATION IS CULLED FROM FORM 990S AND FROM INDUSTRY SURVEYS. USING THIS DATA, THE EXECUTIVE DIRECTOR AND HR DETERMINE COMPENSATION.

FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:
NY,NJ,PA,CA,GA,FL,IL,MA,MI,MN,RI,VA,CO,CT,WA,DC

FORM 990, PART VI, SECTION C, LINE 19:

GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICIES AND FINANCIAL STATEMENTS ARE NOT MADE AVAILABLE TO THE PUBLIC.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

Name of the organization

NEW YORK SHAKESPEARE FESTIVAL

Employer identification number

13-1844852

PENSION-RELATED CHANGES OTHER THAN PERIODIC PENSION COST

1,137,541.

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

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

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		X
b Gift, grant, or capital contribution to related organization(s)		X
c Gift, grant, or capital contribution from related organization(s)	X	
d Loans or loan guarantees to or for related organization(s)		X
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		X
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		X
l Performance of services or membership or fundraising solicitations for related organization(s)	X	
m Performance of services or membership or fundraising solicitations by related organization(s)		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	X	
o Sharing of paid employees with related organization(s)	X	
p Reimbursement paid to related organization(s) for expenses		X
q Reimbursement paid by related organization(s) for expenses		X
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) THE SHAKESPEARE SOCIETY OF AMERICA, INC.	C	99,726.	AMOUNT OF GRANT FROM THE SOCIETY
(2)			
(3)			
(4)			
(5)			
(6)			

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

PART II, IDENTIFICATION OF RELATED TAX-EXEMPT ORGANIZATIONS:

NAME OF RELATED ORGANIZATION:

THE SHAKESPEARE SOCIETY OF AMERICA, INC.

PRIMARY ACTIVITY: INCREASING ENJOYMENT, UNDERSTANDING, AND APPRECIATION OF SHAKESPEARE'S WORKS

PART II, IDENTIFICATION OF RELATED-TAX EXEMPT ORGANIZATIONS:

THIS ORGANIZATION WAS DISSOLVED ON SEPTEMBER 24, 2024.