

## MEMORANDUM

To: Dr. Mark Light  
From: Mallory Rubin  
Subject: Agency Choice  
Date: January 14, 2015

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### Introduction

For the Strategic Planning project, I chose to study Hubbard Street Dance Company. Hubbard Street meets the characteristics that are required for the project. With my dance background, I am interested in analyzing a dance organization and meeting contacts in the arts field. In this memo, I will describe the organization and explain why it meets the selection rationale

### Organization Description

Hubbard Street Dance Company is a nonprofit dance organization based in Chicago. Hubbard Street's mission is to "bring artists, art and audiences together to enrich, engage, educate, transform, and change lives through the experience of dance" (Hubbard Street Dance Chicago, 2015, Company History section). Hubbard Street fulfills this mission through its professional performing companies, dance studio, and community outreach programs.

### Selection Rationale

Hubbard Street fits the required agency characteristics. Hubbard Street is located in the West side of Chicago. I have access to three recent contiguous IRS 990 forms. I have included the three 990 forms in the Appendix. Hubbard Street's revenue in the fiscal year 2012-2013 was \$5,657,683. Hubbard Street employs over 30 full-time staff. Hubbard Street had positive net assets of \$7,185,372 in the fiscal year 2012-2013.

Hubbard Street mostly fits the ideal agency selection criteria. I have taken dance classes at the studio and have watched performance videos online. I do not have a contact at the organization, but I would like to use this project as an opportunity to meet staff members. Hubbard Street has a comprehensive website, and I have access to the annual reports.

### Summary

Hubbard Street Dance Company meets the selection criteria for the Strategic Planning project. I aspire to work in an arts organization in the future. By analyzing Hubbard Street, I will gain insight into strategizing for an arts nonprofit organization.

Appendix

COPY FOR PUBLIC DISCLOSURE

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No. 1545-0047  
**2012**  
Open to Public Inspection

Form **990**  
Department of the Treasury  
Internal Revenue Service

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

**A For the 2012 calendar year, or tax year beginning** 09/01, 2012, and ending 08/31, 2013

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Terminated  
 Amended return  
 Application pending

**C** Name of organization  
HUBBARD STREET DANCE CHICAGO  
Doing Business As  
Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
1147 W. JACKSON BLVD  
City or town, state or country, and ZIP + 4  
CHICAGO, IL 60607-2905

**D** Employer identification number  
36-2950283

**E** Telephone number  
(312) 850-9744

**F** Name and address of principal officer: MEG CALLAHAN  
1147 W. JACKSON BLVD. CHICAGO, IL 60607

**G** Gross receipts \$ 6,175,050.

**H(a)** Is this a group return for affiliates?  Yes  No  
**H(b)** Are all affiliates 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.HUBBARDSTREETDANCE.COM

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

**L** Year of formation: 1977 **M** State of legal domicile: IL

**Part I Summary**

**1** Briefly describe the organization's mission or most significant activities:  
 THE CORE PURPOSE OF HUBBARD STREET DANCE CHICAGO IS TO BRING ARTISTS, ART AND AUDIENCES TOGETHER TO ENRICH, ENGAGE, AND CHANGE LIVES THROUGH THE EXPERIENCE OF DANCE.

**2** Check this box  if the organization discontinued its operations or disposed of more than 25% of its net assets.

<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	3	34.
<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	4	34.
<b>5</b> Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	96.
<b>6</b> Total number of volunteers (estimate if necessary)	6	95.
<b>7a</b> Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	0
<b>7b</b> Net unrelated business taxable income from Form 990-T, line 34	7b	0

	Prior Year	Current Year
<b>8</b> Contributions and grants (Part VIII, line 1h)	2,784,595.	2,448,168.
<b>9</b> Program service revenue (Part VIII, line 2g)	2,387,418.	2,875,348.
<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	128,400.	176,423.
<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	315,105.	157,744.
<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	5,615,518.	5,657,683.
<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	57,545.	61,050.
<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	0	0
<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,737,737.	2,968,778.
<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	0	0
<b>16b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ 343,516.		
<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	2,649,991.	3,206,448.
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,445,273.	6,236,276.
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	170,245.	-578,593.

	Beginning of Current Year	End of Year
<b>20</b> Total assets (Part X, line 16)	9,698,694.	9,442,420.
<b>21</b> Total liabilities (Part X, line 26)	2,027,413.	2,257,048.
<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	7,671,281.	7,185,372.

**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 \_\_\_\_\_  
**JASON PALMQUIST** EXECUTIVE DIRECTOR  
 Type or print name and title

**Paid Preparer Use Only**  
 Print/Type preparer's name \_\_\_\_\_ Preparer's signature \_\_\_\_\_ Date \_\_\_\_\_ Check if self-employed  PTIN \_\_\_\_\_  
 Firm's name \_\_\_\_\_ EIN \_\_\_\_\_  
 Firm's address \_\_\_\_\_ Phone no. \_\_\_\_\_

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Form **990**

COPY FOR PUBLIC DISCLOSURE  
**Return of Organization Exempt From Income Tax**  
 Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No. 1545-0047

**2011**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

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

**A For the 2011 calendar year, or tax year beginning** 09/01, 2011, and ending 08/31, 2012

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input checked="" type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C Name of organization</b> HUBBARD STREET DANCE CHICAGO <b>Doing Business As</b> Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1147 W. JACKSON BLVD City or town, state or country, and ZIP + 4 CHICAGO, IL 60607-2905	<b>D Employer identification number</b> 36-2950283
	<b>E Telephone number</b> (312) 850-9744	
	<b>F Name and address of principal officer:</b> MARC MILLER 1147 W. JACKSON BLVD. CHICAGO, IL 60607	
	<b>G Gross receipts \$</b> 5,998,866.	
<b>H(a) Is this a group return for affiliates?</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <b>H(b) Are all affiliates included?</b> Yes <input type="checkbox"/> No <input type="checkbox"/> If "No," attach a list. (see instructions)		
<b>I Tax-exempt status:</b> X 501(c)(3) 501(c) ( ) (insert no.) 4947(a)(1) or 527		
<b>J Website:</b> WWW.HUBBARDSTREETDANCE.COM		
<b>K Form of organization:</b> X Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		
<b>L Year of formation:</b> 1977		<b>M State of legal domicile:</b> IL

**Part I Summary**

<b>1</b>	Briefly describe the organization's mission or most significant activities: THE CORE PURPOSE OF HUBBARD STREET DANCE CHICAGO IS TO BRING ARTISTS, ART AND AUDIENCES TOGETHER TO ENRICH, ENGAGE, AND CHANGE LIVES THROUGH THE EXPERIENCE OF DANCE.	
<b>2</b>	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.	
<b>3</b>	Number of voting members of the governing body (Part VI, line 1a)	3 36.
<b>4</b>	Number of independent voting members of the governing body (Part VI, line 1b)	4 36.
<b>5</b>	Total number of individuals employed in calendar year 2011 (Part V, line 2a)	5 76.
<b>6</b>	Total number of volunteers (estimate if necessary)	6 60.
<b>7a</b>	Total gross unrelated business revenue from Part VIII, column (C), line 12	7a 0
<b>7b</b>	Net unrelated business taxable income from Form 990-T, line 34	7b 0
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	3,060,735. 2,784,595.
	<b>9</b> Program service revenue (Part VIII, line 2g)	2,394,653. 2,387,418.
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	125,282. 128,400.
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	60,827. 315,105.
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	5,641,497. 5,615,518.
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	34,182. 57,545.
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	0 0
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,611,836. 2,737,737.
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	0 0
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ 335,210.	
<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	2,876,844. 2,649,991.	
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,522,862. 5,445,273.	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	118,635. 170,245.	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	9,387,484. 9,698,694.
	<b>21</b> Total liabilities (Part X, line 26)	2,058,022. 2,027,413.
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	7,329,462. 7,671,281.

**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.

<b>Sign Here</b>	Signature of officer JASON PALMQUIST	Date			
	Type or print name and title EXECUTIVE DIRECTOR				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	Firm's name	EIN			
	Firm's address	Phone no.			

May the IRS discuss this return with the preparer shown above? (see instructions) X Yes  No

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

Form **990** (2010)

JSA  
1E1065 1.000

33710.33710

Form **990**

COPY FOR PUBLIC DISCLOSURE  
**Return of Organization Exempt From Income Tax**  
 Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No. 1545-0047

**2010**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

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

**A For the 2010 calendar year, or tax year beginning** 09/01, 2010, and ending 08/31, 2011

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Terminated  
 Amended return  
 Application pending

**C Name of organization**  
HUBBARD STREET DANCE CHICAGO

**D Employer identification number**  
36-2950283

**E Telephone number**  
(312) 850-9744

**F Name and address of principal officer:** MARC MILLER  
1147 W. JACKSON BLVD. CHICAGO, IL 60607

**G Gross receipts \$** 6,111,837.

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

**H(b) Are all affiliates included?** Yes  No   
If "No," attach a list. (see instructions)

**I Tax-exempt status:** X 501(c)(3) 501(c) ( ) ◀ (insert no.) 4947(a)(1) or 527

**J Website:** WWW.HUBBARDSTREETDANCE.COM

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

**L Year of formation:** 1977

**M State of legal domicile:** IL

**H(c) Group exemption number** ▶

**Part I Summary**

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: THE CORE PURPOSE OF HUBBARD STREET DANCE CHICAGO IS TO BRING ARTISTS, ART AND AUDIENCES TOGETHER TO ENRICH, ENGAGE, AND CHANGE LIVES THROUGH THE EXPERIENCE OF DANCE.	
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.	
	3	Number of voting members of the governing body (Part VI, line 1a)	3 36.
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4 36.
	5	Total number of individuals employed in calendar year 2010 (Part V, line 2a)	5 96.
	6	Total number of volunteers (estimate if necessary)	6 60.
	7a	Total gross unrelated business revenue from Part VIII, column (C), line 12	7a
7b	Net unrelated business taxable income from Form 990-T, line 34	7b	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year 2,602,673. Current Year 3,060,735.
	9	Program service revenue (Part VIII, line 2g)	2,349,959. 2,394,653.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	88,476. 125,282.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	13,281. 60,827.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	5,054,389. 5,641,497.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	36,718. 34,182.
	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)	2,711,202. 2,611,836.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0. 0.
	16b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 397,992.	
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	2,849,631. 2,876,844.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,597,551. 5,522,862.
19	Revenue less expenses. Subtract line 18 from line 12	-543,162. 118,635.	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year 9,089,293. End of Year 9,387,484.
	21	Total liabilities (Part X, line 26)	2,149,100. 2,058,022.
	22	Net assets or fund balances. Subtract line 21 from line 20	6,940,193. 7,329,462.

**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: JASON PALMQUIST  
 Date: EXECUTIVE DIRECTOR

**Paid Preparer Use Only**

Print/Type preparer's name: BAKER TILLY VIRCHOW KRAUSE, LLP  
 Preparer's signature: [Signature]  
 Date: 03/21/2012  
 Check if self-employed:   
 PTIN: 39-0859910  
 Firm's address: 205 N MICHIGAN AVE 28TH FLOOR CHICAGO, IL 60601-5927  
 Phone no.: 312-729-8000

May the IRS discuss this return with the preparer shown above? (see instructions) X Yes  No

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2010)

## References

Hubbard Street Dance Company. (2015). *Company History & Financials*.

Retrieved from

[http://www.hubbardstreetdance.com/index.php?option=com\\_content&view=article&id=99&Itemid=92](http://www.hubbardstreetdance.com/index.php?option=com_content&view=article&id=99&Itemid=92)