

Form **990**

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

2008

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 2008 calendar year, or tax year beginning **JUL 1, 2008** and ending **JUN 30, 2009**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type. See Specific Instructions.	C Name of organization SAN JOSE MUSEUM OF ART ASSOCIATION Doing Business As Number and street (or P.O. box if mail is not delivered to street address) Room/suite 110 SOUTH MARKET STREET City or town, state or country, and ZIP + 4 SAN JOSE, CA 95113-2383	D Employer identification number 23-7062028 E Telephone number 408-271-6840
		F Name and address of principal officer: SUSAN KRANE SAME AS C ABOVE	G Gross receipts \$ 5,787,232. H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) H(c) Group exemption number ▶
		I Tax-exempt status: <input checked="" type="checkbox"/> 501(c) (3) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527	
		J Website: ▶ WWW.SJMUSART.ORG	
		K Type of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶	L Year of formation: 1969 M State of legal domicile: CA

Part I Summary			
	1	Briefly describe the organization's mission or most significant activities: SJMA FOSTERS APPRECIATION AND AWARENESS OF THE CONTRIBUTION OF ART AND ARTISTS TO SOCIETY.	
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets.	
Activities & Governance	3	Number of voting members of the governing body (Part VI, line 1a)	29
	4	Number of independent voting members of the governing body (Part VI, line 1b)	29
	5	Total number of employees (Part V, line 2a)	104
	6	Total number of volunteers (estimate if necessary)	200
	7a	Total gross unrelated business revenue from Part VIII, line 12, column (C)	8,994.
		7b	Net unrelated business taxable income from Form 990-T, line 34
Revenue	8	Contributions and grants (Part VIII, line 1h)	3,042,151.
	9	Program service revenue (Part VIII, line 2g)	572,488.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	532,298.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	631,235.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	4,778,172.
	Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)
14		Benefits paid to or for members (Part IX, column (A), line 4)	
15		Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,667,469.
16a		Professional fundraising fees (Part IX, column (A), line 11e)	
b		Total fundraising expenses (Part IX, column (D), line 25) ▶ 553,890.	
17		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	2,654,907.
Net Assets or Fund Balances	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,322,376.
	19	Revenue less expenses. Subtract line 18 from line 12	-544,204.
	20	Total assets (Part X, line 16)	9,103,445.
	21	Total liabilities (Part X, line 26)	1,097,609.
	22	Net assets or fund balances. Subtract line 21 from line 20	8,005,836.

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 SUSAN KRANE, EXECUTIVE DIRECTOR Type or print name and title	Date		
Paid Preparer's Use Only	Preparer's signature ▶ LAWRENCE S. KUECHLER Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ BERGER/LEWIS ACCOUNTANCY CORP. 55 ALMADEN BLVD., STE 600 SAN JOSE, CA 95113	Date 02/02/10	Check if self-employed <input type="checkbox"/>	Preparer's identifying number (see instructions) EIN ▶ Phone no. ▶ (408) 494-1200

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

Part III Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission: SEE SCHEDULE O FOR CONTINUATION THE SAN JOSE MUSEUM OF ART (SJMA) REFLECTS THE DIVERSE CULTURES AND INNOVATIVE SPIRIT OF SILICON VALLEY. THROUGH ITS EXHIBITIONS, EDUCATIONAL PROGRAMS, SCHOLARSHIP, AND COLLECTIONS, SJMA CONNECTS THE PRESENT AND THE PAST AND THE ART OF THE WEST COAST AND THE WORLD. THE

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 [X] 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 [X] No If "Yes", describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

SEE SCHEDULE O FOR CONTINUATION(S)

4a (Code:) (Expenses \$ 1,718,077. including grants of \$) (Revenue \$ 308,728.)

EXHIBITIONS

THE SAN JOSE MUSEUM OF ART IS A LEADING SHOWCASE IN THE BAY AREA FOR MODERN AND CONTEMPORARY ART. THE MUSEUM HAS EARNED A REPUTATION FOR ITS FRESH, DISTINCTIVE EXHIBITIONS, WHICH ARE CONCEIVED TO ENGAGE MUSEUM VISITORS OF MANY AGES, INCOME LEVELS, AND CULTURAL BACKGROUNDS. SJMA'S EXHIBITIONS ADDRESS MAJOR TRENDS IN INTERNATIONAL CONTEMPORARY ART, WITH AN ONGOING COMMITMENT TO HIGHLIGHT THE WORK OF EMERGING ARTISTS AND THE HISTORY OF CALIFORNIA ART. THE MUSEUM STRIVES TO MAKE SIGNIFICANT CONTRIBUTIONS TO ART-HISTORICAL SCHOLARSHIP; ADDRESS PRESCIENT ISSUES OF INTEREST TO THE GENERAL PUBLIC; AND OFFER PROGRAMS THAT REFLECT THE RICH ETHNIC AND RACIAL DIVERSITY OF ITS COMMUNITIES. THE MUSEUM PRESENTS NINE TO TWELVE EXHIBITIONS EACH YEAR, INCLUDING

4b (Code:) (Expenses \$ 877,690. including grants of \$) (Revenue \$ 49,704.)

EDUCATIONAL PROGRAMS

THE MUSEUM EXPERIENCE AND EDUCATION DEPARTMENT IS DEDICATED TO PROVIDING ENRICHING VISUAL ART EXPERIENCES TO A BROAD SPECTRUM OF THE COMMUNITY. THE DEPARTMENT IS WIDELY KNOWN FOR ITS COMMITMENT TO ACCESSIBILITY; HANDS-ON FAMILY ACTIVITY STATIONS IN THE GALLERIES; AND AWARD-WINNING HIGH-TECH INTERPRETATION. (SJMA WAS THE FIRST MUSEUM TO ADOPT CELL PHONE TOURS AND IS A LEADER IN IPOD USAGE.) SJMA IS THE LARGEST PROVIDER OF ARTS EDUCATION IN THE SCHOOLS IN GREATER SANTA CLARA COUNTY. SJMA IS DEDICATED TO FURTHERING ONLINE AND E-LEARNING CAPABILITIES AND TO OPENING 21ST-CENTURY DOORWAYS TO ART - TO PIONEERING DYNAMIC NEW WAYS TO PROVIDE RICH CONTEXT FOR THE ART ON VIEW AND TO AMPLIFY AUDIENCES' EXPERIENCES. SJMA HAS BEEN RECOGNIZED BY TWO

4c (Code:) (Expenses \$ 174,731. including grants of \$) (Revenue \$ 209,294.)

MUSEUM STORE

THE MUSEUM STORE IS LOCATED OFF THE MAIN LOBBY OF SJMA. THIS ACTIVE GIFT AND BOOK STORE CARRIES MISSION-RELATED PRODUCTS THAT ARE EDUCATIONAL, FOSTER CREATIVITY, AND ENCOURAGE THE APPRECIATION OF ART. THE MUSEUM STORE ALSO FEATURES CUSTOM PRODUCTS BY AREA ARTISTS AND CRAFTSMEN AS WELL AS MERCHANDISE RELEVANT TO EACH CURRENT SEASON OF EXHIBITIONS. THE STORE IS STAFFED BY MUSEUM EMPLOYEES AS WELL AS AN ACTIVE CONTINGENT OF LONGTIME VOLUNTEERS.

4d Other program services. (Describe in Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses \$ 2,770,498. (Must equal Part IX, Line 25, column (B).)

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>	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	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>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>		
6 Did the organization maintain any donor advised funds or any accounts where 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>		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>		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>	X	
9 Did the organization report an amount in Part X, line 21; 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>		X
10 Did the organization hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	X	
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	X	
12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII</i>	X	
13 Is the organization a school as described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the U.S.?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? <i>If "Yes," complete Schedule F, Part I</i>	X	
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>		X
17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20 Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>		X
21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X
22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? <i>If "Yes," complete Schedule J</i>	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? <i>If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25</i>		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) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	X	
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>		X

Part IV Checklist of Required Schedules (continued)

		Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee:		
a	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b	Have a family member who had a direct or indirect business relationship with the organization? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29	X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	X
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32	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? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	34	X
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35	X
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36	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? <i>If "Yes," complete Schedule R, Part VI</i>	37	X

Form 990 (2008)

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable		
	1a 74		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
	1b 0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
	1c		
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 104		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	X	
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	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)?		X
b	If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
	5c		
6a	Did the organization solicit any contributions that were not tax deductible?		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 provide goods or services in exchange for any quid pro quo contribution of more than \$75?	X	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
	7c		
d	If "Yes," indicate the number of Forms 8282 filed during the year		
	7d		
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
	7g		
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
	7h		
8	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
	8		
9	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.		
a	Did the organization make any taxable distributions under section 4966?		
b	Did the organization make a distribution to a donor, donor advisor, or related person?		
	9a		
	9b		
10	Section 501(c)(7) organizations. Enter: N/A		
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: N/A		
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 N/A		
	12b		

Part VI Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

Section A. Governing Body and Management

		Yes	No
For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.			
1a	Enter the number of voting members of the governing body		
		29	
b	Enter the number of voting members that are independent		
		29	
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?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a material diversion of the organization's assets?		X
6	Does the organization have members or stockholders?		X
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
b	Each committee with authority to act on behalf of the governing body?	X	
9a	Does the organization have local chapters, branches, or affiliates?		X
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
10	Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	X	
11	Is there any officer, director or 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 in Schedule O		X

Section B. Policies

		Yes	No
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	X	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	X	
13	Does the organization have a written whistleblower policy?	X	
14	Does the organization have a written document retention and destruction policy?	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?	X	
b	Other officers or key employees of the organization?	X	
	Describe the process in 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?		X
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

17	List the states with which a copy of this Form 990 is required to be filed ▶ CA
18	Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply. <input checked="" type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ▶ BRIAN SPANG - (408)271-6873 110 SOUTH MARKET STREET, SAN JOSE, CA 95113-2383

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- 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 and/or Box 7 of Form 1099-MISC) 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.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if the organization did not compensate any officer, director, trustee, or key employee.

(A) Name and Title	(B) Average hours per week	(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			
PETER LIPMAN PRESIDENT	5.00	X		X			0.	0.	0.	
STEVE SPENO VICE PRESIDENT	2.50	X		X			0.	0.	0.	
WILLIAM FAULKNER SECRETARY	2.50	X		X			0.	0.	0.	
ANNEKE DURY CHIEF FINANCIAL OFFICER	2.50	X		X			0.	0.	0.	
DORIS BURGESS TRUSTEE	0.50	X					0.	0.	0.	
MICHAEL COLE TRUSTEE	0.50	X					0.	0.	0.	
PETER CROSS TRUSTEE	0.50	X					0.	0.	0.	
RUSSELL DAULTON TRUSTEE	0.50	X					0.	0.	0.	
S.K. GUPTA TRUSTEE	0.50	X					0.	0.	0.	
MARIE OH HUBER TRUSTEE	0.50	X					0.	0.	0.	
MARILYN KATZ TRUSTEE	0.50	X					0.	0.	0.	
WENDY KIRST TRUSTEE	0.50	X					0.	0.	0.	
MICHELE KLEIN TRUSTEE	0.50	X					0.	0.	0.	
KAREN LANTZ TRUSTEE	0.50	X					0.	0.	0.	
HEATHER STALLINGS LITTLE TRUSTEE	0.50	X					0.	0.	0.	
MARY MOCAS TRUSTEE	0.50	X					0.	0.	0.	
EVELYN NEELY TRUSTEE	0.50	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	(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			
T. MICHAEL NEVENS TRUSTEE	0.50	X					0.	0.	0.	
BARBARA OSHMAN TRUSTEE	0.50	X					0.	0.	0.	
CHARLES PARCHMENT TRUSTEE	0.50	X					0.	0.	0.	
CAROL PARKER TRUSTEE	0.50	X					0.	0.	0.	
DEBORAH RAPPAPORT TRUSTEE	0.50	X					0.	0.	0.	
MARTIN ROBINSON TRUSTEE	0.50	X					0.	0.	0.	
SARAH RATCHYE TRUSTEE	2.50	X					0.	0.	0.	
BYRON RYONO TRUSTEE	0.50	X					0.	0.	0.	
HILDY SHANDELL TRUSTEE	0.50	X					0.	0.	0.	
JOAN SHARROCK TRUSTEE	0.50	X					0.	0.	0.	
1b Total							459,615.	0.	55,361.	

2 Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization 2

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
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	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person		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.

(A) Name and business address	(B) Description of services	(C) Compensation
US SECURITY ASSOCIATES PO BOX 931703, ATLANTA, GA 31193	SECURITY SERVICES	188,373.

2 Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization 1

SEE SCHEDULE J-2 FOR PART VII, SECTION A CONTINUATION

Part VIII Statement of Revenue			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1 a Federated campaigns	1a					
	b Membership dues	1b	229,541.				
	c Fundraising events	1c	395.				
	d Related organizations	1d					
	e Government grants (contributions)	1e	866,785.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	247,956.2.				
	g Noncash contributions included in lines 1a-1f: \$		100,922.				
	h Total. Add lines 1a-1f			3,576,283.			
	Program Service Revenue	2 a PUBLIC PROGRAMS	Business Code	713990	245,327.	245,327.	
b ART CLASS CONTRACTS AN			713990	49,704.	49,704.		
c TRAVELING EXHIBITIONS			713990	32,330.	32,330.		
d							
e							
f All other program service revenue							
g Total. Add lines 2a-2f				327,361.			
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			150,817.		150,817.	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross Rents	(i) Real	188,421.				
		(ii) Personal					
		b Less: rental expenses					
		c Rental income or (loss)	188,421.				
	d Net rental income or (loss)			188,421.		188,421.	
	7 a Gross amount from sales of assets other than inventory	(i) Securities	1227745.				
		(ii) Other					
		b Less: cost or other basis and sales expenses	1581259.				
		c Gain or (loss)	-353514.				
	d Net gain or (loss)			-353,514.		-353,514.	
	8 a Gross income from fundraising events (not including \$ 395. of contributions reported on line 1c). See Part IV, line 18	a	22,717.				
b Less: direct expenses		19,591.					
c Net income or (loss) from fundraising events				3,126.		3,126.	
9 a Gross income from gaming activities. See Part IV, line 19	a	1,242.					
	b Less: direct expenses	47.					
	c Net income or (loss) from gaming activities			1,195.		1,195.	
10 a Gross sales of inventory, less returns and allowances	a	225,108.					
	b Less: cost of goods sold	112,335.					
	c Net income or (loss) from sales of inventory			112,773.	103,779.	8,994.	
Miscellaneous Revenue		Business Code					
11 a CAFE INCOME		722210	36,467.			36,467.	
b MISC REVENUE		713990	31,071.	31,071.			
c							
d All other revenue							
e Total. Add lines 11a-11d			67,538.				
12 Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e			4,074,000.	462,211.	8,994.	26,512.	

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) but are not required to complete columns (B), (C), and (D).

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 governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	388,904.	143,920.	132,737.	112,247.
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	1,746,139.	1,321,341.	235,032.	189,766.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	81,728.	60,782.	13,610.	7,336.
9 Other employee benefits	187,718.	136,170.	25,638.	25,910.
10 Payroll taxes	118,014.	81,582.	19,977.	16,455.
11 Fees for services (non-employees):				
a Management				
b Legal	7,206.	95.	7,111.	
c Accounting	49,213.		49,213.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other	195,212.	84,407.	48,460.	62,345.
12 Advertising and promotion	82,664.	75,099.	1,082.	6,483.
13 Office expenses	189,663.	41,804.	69,053.	78,806.
14 Information technology	10,000.	6,000.	2,000.	2,000.
15 Royalties				
16 Occupancy	6,413.	3,271.	1,667.	1,475.
17 Travel	40,251.	9,608.	26,353.	4,290.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	19,751.	1,615.	1,359.	16,777.
20 Interest	6,415.		6,415.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	56,229.	50,607.	2,811.	2,811.
23 Insurance	35,708.	20,503.	15,205.	
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a SECURITY	322,993.	317,912.		5,081.
b SHIPPING AND STORAGE	159,416.	154,447.	4,908.	61.
c PURCHASED ART COLLECTIO	94,000.	94,000.		
d EXHIBITION COST	71,209.	71,209.		
e MATERIALS	68,462.	59,137.	9,325.	
f All other expenses	68,915.	36,989.	9,879.	22,047.
25 Total functional expenses. Add lines 1 through 24f	4,006,223.	2,770,498.	681,835.	553,890.
26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation ...				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year			
Assets	1	Cash - non-interest-bearing	7,400.	1	48,891.		
	2	Savings and temporary cash investments	485,478.	2	2,318,261.		
	3	Pledges and grants receivable, net	919,000.	3	1,248,508.		
	4	Accounts receivable, net	840.	4	15,612.		
	5	Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L	21,603.	5	18,490.		
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6			
	7	Notes and loans receivable, net		7			
	8	Inventories for sale or use	136,223.	8	120,240.		
	9	Prepaid expenses and deferred charges		9	38,849.		
	10a	Land, buildings, and equipment: cost basis ..	10a	1,710,296.			
	b	Less: accumulated depreciation. Complete Part VI of Schedule D	10b	1,476,218.	228,240.	10c	234,078.
	11	Investments - publicly traded securities	33,060.	11	3,454,507.		
	12	Investments - other securities. See Part IV, line 11	142,398.	12			
	13	Investments - program-related. See Part IV, line 11		13			
	14	Intangible assets		14			
	15	Other assets. See Part IV, line 11	7,129,203.	15	930,117.		
16	Total assets. Add lines 1 through 15 (must equal line 34)	9,103,445.	16	8,427,553.			
Liabilities	17	Accounts payable and accrued expenses	462,064.	17	370,138.		
	18	Grants payable		18			
	19	Deferred revenue	141,695.	19	35,562.		
	20	Tax-exempt bond liabilities		20			
	21	Escrow account liability. Complete Part IV of Schedule D		21			
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22			
	23	Secured mortgages and notes payable to unrelated third parties	493,850.	23	381,322.		
	24	Unsecured notes and loans payable		24	100,000.		
25	Other liabilities. Complete Part X of Schedule D		25				
26	Total liabilities. Add lines 17 through 25	1,097,609.	26	887,022.			
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.						
	27	Unrestricted net assets	506,911.	27	-444,911.		
	28	Temporarily restricted net assets	180,399.	28	666,916.		
	29	Permanently restricted net assets	7,318,526.	29	7,318,526.		
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.						
	30	Capital stock or trust principal, or current funds		30			
	31	Paid-in or capital surplus, or land, building, or equipment fund		31			
	32	Retained earnings, endowment, accumulated income, or other funds		32			
33	Total net assets or fund balances	8,005,836.	33	7,540,531.			
34	Total liabilities and net assets/fund balances	9,103,445.	34	8,427,553.			

Part XI Financial Statements and Reporting

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a	X
b	Were the organization's financial statements audited by an independent accountant?	2b	X
c	If "Yes" to lines 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?	2c	X
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	X
b	If "Yes," did the organization undergo the required audit or audits?	3b	

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

Department of the Treasury
Internal Revenue Service

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

2008
Open to Public Inspection

Name of the organization **SAN JOSE MUSEUM OF ART ASSOCIATION** Employer identification number **23-7062028**

Part I Reason for Public Charity Status (All organizations must complete this part.) (see instructions)

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

- 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.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).** (Attach Schedule H.)
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete the Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).** (see instructions)
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
 - a Type I b Type II c Type III - Functionally integrated d Type III - Other
- e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box _____
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? 11g(i)		
(ii) A family member of a person described in (i) above? 11g(ii)		
(iii) A 35% controlled entity of a person described in (i) or (ii) above? 11g(iii)		
- h Provide the following information about the organizations the organization supports.

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	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.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	4565332.	4226621.	4279392.	3299778.	3576283.	19947406.
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	1404000.	1638000.	2574000.	2059200.	1638001.	9313201.
4 Total. Add lines 1 - 3	5969332.	5864621.	6853392.	5358978.	5214284.	29260607.
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)						2450793.
6 Public Support. Subtract line 5 from line 4.						26809814.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	5969332.	5864621.	6853392.	5358978.	5214284.	29260607.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	397,436.	509,837.	635,702.	578,577.	363,197.	2484749.
9 Net income from unrelated business activities, whether or not the business is regularly carried on	-1,740.	-1,716.	-467.	5,711.	8,994.	10,782.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	9,361.	53,393.	92,898.	133,849.	36,467.	325,968.
11 Total support. Add lines 7 through 10						32082106.
12 Gross receipts from related activities, etc. (see instructions)					12	1,949,572.
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	83.57	%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	82.21	%
16a 33 1/3% support test - 2008. 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	<input checked="" type="checkbox"/>		
b 33 1/3% support test - 2007. 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	<input type="checkbox"/>		
17a 10% -facts-and-circumstances test - 2008. 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 IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
b 10% -facts-and-circumstances test - 2007. 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 IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
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	<input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(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 - 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 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
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) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(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 in 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 IV.)						
13 Total support (Add lines 9, 10c, 11, and 12.)						

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	%

19a 33 1/3% support tests - 2008. 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 - 2007. 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

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No. 1545-0047

2008

Name of the organization

Employer identification number

SAN JOSE MUSEUM OF ART ASSOCIATION

23-7062028

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

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

General Rule

For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ _____

Caution. Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

SAN JOSE MUSEUM OF ART ASSOCIATION

23-7062028

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>1</u>		\$ <u>90,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
<u>2</u>		\$ <u>864,785.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
<u>3</u>		\$ <u>250,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
<u>4</u>		\$ <u>123,797.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
<u>5</u>		\$ <u>367,499.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
<u>6</u>		\$ <u>155,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

SAN JOSE MUSEUM OF ART ASSOCIATION

23-7062028

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
7		\$ 75,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
8		\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Schedule D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

SAN JOSE MUSEUM OF ART ASSOCIATION

Employer identification number

23-7062028

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate 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 may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? Yes No

Part II Conservation Easements. Complete if the organization answered "Yes" to 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 (e.g., recreation or pleasure) Preservation of an historically important land area
- Protection of natural habitat Preservation of certified historic structure
- Preservation of open space
- 2 Complete lines 2a-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 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 in (a) | 2c |
| d Number of conservation easements included in (c) acquired after 8/17/06 | 2d |
- 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable 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, violations, and enforcement of the conservation easements it holds? Yes No
- 6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ▶ _____
- 7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$ _____
- 8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No
- 9 In Part XIV, 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" to Form 990, Part IV, line 8.

- 1a If the organization elected, as permitted under SFAS 116, 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 XIV, the text of the footnote to its financial statements that describes these items.
- b If the organization elected, as permitted under SFAS 116, 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) Revenues included in 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 SFAS 116 relating to these items:
- a Revenues included in Form 990, Part VIII, line 1 ▶ \$ **5,631.**
- b Assets included in Form 990, Part X ▶ \$ _____

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

- 3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange programs
 - e Other
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.
- 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 Trust, Escrow and Custodial Arrangements. Complete if organization answered "Yes" to 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 XIV and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | |
| d Additions during the year | |
| e Distributions during the year | |
| f Ending balance | |
- 2a Did the organization include an amount on Form 990, Part X, line 21? Yes No
- b If "Yes," explain the arrangement in Part XIV.

Part V Endowment Funds. Complete if organization answered "Yes" to 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	7,318,526.				
b Contributions					
c Investment earnings or losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	7,318,526.				

- 2 Provide the estimated percentage of the year end balance held as:
- a Board designated or quasi-endowment %
 - b Permanent endowment 100.00 %
 - c Term endowment %
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|-----------------------------|-----|-------------------------------------|
| (i) unrelated organizations | | <input checked="" type="checkbox"/> |
| (ii) related organizations | | <input checked="" type="checkbox"/> |
- b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?
- 4 Describe in Part XIV the intended uses of the organization's endowment funds.

Part VI Investments - Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		613,310.	545,822.	67,488.
d Equipment		745,768.	666,884.	78,884.
e Other		351,218.	263,512.	87,706.
Total. Add lines 1a-1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				234,078.

Part VII Investments - Other Securities. 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
Financial derivatives and other financial products		
Closely-held equity interests		
Other		
Total. (Col (b) should equal Form 990, Part X, col (B) line 12.) ▶		

Part VIII Investments - Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
Total. (Col (b) should equal Form 990, Part X, col (B) line 13.) ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
BENEFICIAL INTEREST IN PERPETUAL TRUST	930,117.
Total. (Column (b) should equal Form 990, Part X, col (B) line 15.) ▶	930,117.

Part X Other Liabilities. See Form 990, Part X, line 25.

(a) Description of liability	(b) Amount
Federal income taxes	
Total. (Column (b) should equal Form 990, Part X, col (B) line 25.) ▶	

In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	4,074,000.
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	4,006,223.
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	67,777.
4	Net unrealized gains (losses) on investments	4	-533,082.
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net). Add lines 4-8	9	-533,082.
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10	-465,305.

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	6,317,634.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	1,912,154.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	112,335.
e	Add lines 2a through 2d	2e	2,024,489.
3	Subtract line 2e from line 1	3	4,293,145.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	-219,145.
c	Add lines 4a and 4b	4c	-219,145.
5	Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5	4,074,000.

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	6,782,939.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	1,912,154.
b	Prior year adjustments	2b	
c	Losses reported on Form 990, Part IX, line 25	2c	
d	Other (Describe in Part XIV)	2d	864,562.
e	Add lines 2a through 2d	2e	2,776,716.
3	Subtract line 2e from line 1	3	4,006,223.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.)	5	4,006,223.

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b.

PART III, LINE 1A: PERMANENT ART COLLECTION - THE COLLECTION CONSISTS OF
TWENTIETH AND TWENTY-FIRST CENTURY ARTWORK, INCLUDING PAINTINGS,
SCULPTURES, INSTALLATIONS, NEW MEDIA, PHOTOGRAPHY, DRAWINGS AND PRINTS,
ACQUIRED THROUGH PURCHASE OR CONTRIBUTION. THE COLLECTION IS NOT
RECOGNIZED AS AN ASSET IN THE STATEMENT OF FINANCIAL POSITION. EACH WORK
OF ART IS INVENTORIED AND CARED FOR, AND ACTIVITIES VERIFYING THE
COLLECTION'S INTEGRITY ARE PERFORMED CONTINUOUSLY. PURCHASES OF ART ARE
RECORDED AS NON-OPERATING DECREASES IN THE UNRESTRICTED NET ASSETS IN THE

Part XIV Supplemental Information (continued)

YEAR IN WHICH ITEMS ARE ACQUIRED. CONTRIBUTED COLLECTION ITEMS ARE NOT REFLECTED IN THE FINANCIAL STATEMENTS. PROCEEDS FROM ANY DEACCESSIONS OR INSURANCE RECOVERIES ARE REQUIRED TO BE USED TO ACQUIRE OTHER WORKS OF ART.

PART III, LINE 4: THE MUSEUM'S PERMANENT COLLECTION IS A VALUABLE RESOURCE AND LEGACY FOR THE COMMUNITY. THE COLLECTION OF ABOUT 2000 WORKS INCLUDES PRIMARILY AMERICAN ART OF THE POST-WORLD WAR II PERIOD, WITH AN EMPHASIS ON CONTEMPORARY ART AND WEST COAST ART. RECENT EFFORTS FOCUS ON INCREASING HOLDINGS OF NEW MEDIA, CERAMIC SCULPTURES, ARTISTS FROM PACIFIC RIM CULTURES, AND INCREASING CULTURAL AND GENDER DIVERSITY. CURRENT TRENGTHS OF THE COLLECTION ARE SECOND-GENERATION MINIMALISM, PHOTOGRAPHY, TRADITIONALIST REPRESENTATIONAL PAINTING; AND EMERGING CALIFORNIA ARTISTS. IN ADDITION, AS PART OF A COMMITMENT TO FOSTERING AWARENESS OF ARTISTS' BROAD CONTRIBUTIONS TO SOCIETY, THE MUSEUM COLLECTS ARTWORKS THAT IT DEEMS HISTORICALLY IMPORTANT. SPECIFICALLY, THE MUSEUM HAS BUILT A COLLECTION THAT DOCUMENTS TRENDS IN CALIFORNIA ART THAT ARE NOT TO BE FOUND IN OTHER INSTITUTIONS, HELPING TO KEEP THE HISTORY ALIVE THROUGH PRESERVING THE ART OF OUR TIME. THE MUSEUM ALSO COMMISSIONS NEW WORKS BY LIVING ARTISTS THAT SERVE TO CONNECT OUR VISITORS WITH THE VITALITY OF THE CREATIVE PROCESS. STELLAR WORKS FROM THE PERMANENT COLLECTION ARE REGULARLY SHOWCASED IN THE GALLERIES IN TIMELY, THEMATIC CONTEXTS THAT ADDRESS PIVOTAL APSECTS OF ART HISTORY, CULTURAL CONCERNS, AND PUBLIC INTERESTS. THE COLLECTION IS DISCUSSED FURTHER IN SCHEDULE O.

PART V, LINE 4: GENERAL OPERATING FUNDS IN SUPPORT OF THE MUSEUM'S MISSION AS DIRECTED BY THE DONORS.

Part XIV Supplemental Information (continued)

PART XII, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD: 112335.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

ENDOWMENT INVESTMENT INCOME: 134369.

REALIZED INVESTMENT LOSS: -353514.

PART XIII, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD: 112335.

REALIZED INVESTMENT LOSS: 353514.

ENDOWMENT INVESTMENT INCOME: -134369.

UNREALIZED LOSS: 533082.

SCHEDULE D PART X FIN 48 FINANCIAL STATEMENTS FOOTNOTE

IN JUNE 2006, THE FINANCIAL ACCOUNTING STANDARDS BOARDS (FASB) ISSUED INTERPRETATION NO. 48, ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES - AN INTERPRETATION OF FASB STATEMENT NO. 109, (FIN 48). FIN 48 PROVIDES GUIDANCE ON RECOGNITION AND MEASUREMENT OF UNCERTAINTIES IN INCOME TAXES RECOGNIZED IN FINANCIAL STATEMENTS BY PRESCRIBING A MORE-LIKELY-THAN-NOT RECOGNITION THRESHOLD AND MEASUREMENT ATTRIBUTE OF TAX POSITIONS TAKEN OR EXPECTED TO BE TAKEN ON A TAX RETURN. ON DECEMBER 30, 2008 FASB STAFF POSITION (FSP) FIN 48-3 WAS ISSUED AND ALLOWS FOR THE DEFERRAL OF FIN 48 FOR FISCAL YEARS BEGINNING AFTER DECEMBER 15, 2008.

IN ACCORDANCE WITH THIS PROVISION, THE MUSEUM ELECTED TO DEFER THE APPLICATION OF FIN 48. BASED ON MANAGEMENT'S ANALYSIS OF THE MUSEUM'S TAX POSITIONS, THE ACCOUNTING FOR ANY UNCERTAINTY IN ITS TAX

Part XIV Supplemental Information *(continued)*

POSITIONS IS NOT EXPECTED TO HAVE A MATERIAL IMPACT ON THE FINANCIAL STATEMENTS.

Lined area for supplemental information.

**Schedule F
(Form 990)**

Statement of Activities Outside the United States

OMB No. 1545-0047

2008

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 990. Complete if the organization answered "Yes" to
Form 990, Part IV, line 14b, line 15, or line 16.

Open to Public
Inspection

Name of the organization

Employer identification number

SAN JOSE MUSEUM OF ART ASSOCIATION

23-7062028

Part I General Information on Activities Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

1 For grantmakers. 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? Yes No

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

3 Activities per Region. (Use Schedule F-1 (Form 990) if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures in region
EUROPE (INCLUDING ICELAND & GREENLAND)	0	0	PROGRAM SERVICES	THERE WAS A LOAN OF ART WORK TO A MUSEUM IN DENMARK FOR A FEE OF \$18,000. AFTER A \$20	0.
Totals					

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

Schedule F (Form 990) 2008

SEE PART IV FOR COLUMN (E) DESCRIPTIONS

Part II Grants and Other Assistance to Organizations or Entities Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Check this box if no one recipient received more than \$5,000

Use Schedule F-1 (Form 990) if additional space is needed.

Table with 9 columns: (a) Name of organization, (b) IRS code section and EIN (if applicable), (c) Region, (d) Purpose of grant, (e) Amount of cash grant, (f) Manner of cash disbursement, (g) Amount of non-cash assistance, (h) Description of non-cash assistance, (i) Method of valuation (book, FMV, appraisal, other)

2 Enter total number of organizations that are recognized as charities by the foreign country or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter

3 Enter total number of other organizations or entities

Part III Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 16.

Use Schedule F-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of non-cash assistance	(g) Description of non-cash assistance	(h) Method of valuation (book, FMV, appraisal, other)

Part IV Supplemental Information

Complete this part to provide the information required by Part I, line 2, and any other additional information.

PART I, LINE 3, COLUMN (E):

REGION: EUROPE (INCLUDING ICELAND & GREENLAND)

(E) SPECIFIC TYPES OF SERVICES IN REGION: THERE WAS A LOAN OF ART WORK TO A MUSEUM IN DENMARK FOR A FEE OF \$18,000. AFTER A \$20 BANK FEE, SJMA RECEIVED \$17,980 ON OCT 14, 2008.

THERE WERE NO EXPENDITURES. THE BORROWING INSTITUTION COVERED ALL EXPENSES ASSOCIATED WITH THE LOAN.

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

**Supplemental Information Regarding
Fundraising or Gaming Activities**

▶ Attach to Form 990 or Form 990-EZ. Must be completed by organizations that answer "Yes" to Form 990, Part IV, lines 17, 18, or 19, and by organizations that enter more than \$15,000 on Form 990-EZ, line 6a.

OMB No. 1545-0047

2008
Open To Public
Inspection

Name of the organization

SAN JOSE MUSEUM OF ART ASSOCIATION

Employer identification number

23-7062028

Part I Fundraising Activities. Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

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

- | | | | |
|----------------------------|-------------------------|----------------------------|---------------------------------------|
| a <input type="checkbox"/> | Mail solicitations | e <input type="checkbox"/> | Solicitation of non-government grants |
| b <input type="checkbox"/> | Email solicitations | f <input type="checkbox"/> | Solicitation of government grants |
| c <input type="checkbox"/> | Phone solicitations | g <input type="checkbox"/> | Special fundraising events |
| d <input type="checkbox"/> | 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 ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990-EZ filers are not required to complete this table.

(i) Name 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			

Total

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

Part II Fundraising Events. Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. 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))
		MUSEUM STORE GUILD 2009 (event type)	(event type)	NONE (total number)	
Revenue	1	Gross receipts	23,112.		23,112.
	2	Less: Charitable contributions	395.		395.
	3	Gross revenue (line 1 minus line 2)	22,717.		22,717.
Direct Expenses	4	Cash prizes			
	5	Non-cash prizes			
	6	Rent/facility costs			
	7	Other direct expenses	19,591.		19,591.
	8	Direct expense summary. Add lines 4 through 7 in column (d)			(19,591.)
	9	Net income summary. Combine lines 3 and 8 in column (d)			3,126.

Part III Gaming. Complete if the organization answered "Yes" to 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	Non-cash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
	6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No
	7	Direct expense summary. Add lines 2 through 5 in column (d)			()
	8	Net gaming income summary. Combine lines 1 and 7 in column (d)			

9	Enter the state(s) in which the organization operates gaming activities: _____	Yes	No
a	Is the organization licensed to operate gaming activities in each of these states? _____	9a	
b	If "No," Explain: _____ _____		
10a	Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? _____	10a	
b	If "Yes," Explain: _____ _____		
11	Does the organization operate gaming activities with nonmembers? _____	11	
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? _____	12	

13 Indicate the percentage of gaming activity operated in:

- a The organization's facility

13a	%
13b	%
- b An outside facility

14 Provide 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? 15a

- 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 name and address:

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? 17a
- b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ _____

	Yes	No
13a		
13b		
14		
15a		
16		
17a		

**SCHEDULE J
(Form 990)**

Compensation Information

OMB No. 1545-0047

2008

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

Department of the Treasury
Internal Revenue Service

Name of the organization

SAN JOSE MUSEUM OF ART ASSOCIATION

Employer identification number

23-7062028

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 in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. <input type="checkbox"/> First-class or charter travel <input type="checkbox"/> Travel for companions <input type="checkbox"/> Tax indemnification and gross-up payments <input type="checkbox"/> Discretionary spending account <input checked="" type="checkbox"/> Housing allowance or residence for personal use <input type="checkbox"/> Payments for business use of personal residence <input type="checkbox"/> Health or social club dues or initiation fees <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)		
b	If line 1a is 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	X	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?		X
3	Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply. <input type="checkbox"/> Compensation committee <input type="checkbox"/> Independent compensation consultant <input type="checkbox"/> Form 990 of other organizations <input checked="" type="checkbox"/> Written employment contract <input checked="" type="checkbox"/> Compensation survey or study <input checked="" type="checkbox"/> Approval by the board or compensation committee		
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a:		
a	Receive a severance payment or change of control payment?		X
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?		X
c	Participate in, or receive payment from, an equity-based compensation arrangement?		X
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.		
Only 501(c)(3) and 501(c)(4) organizations must complete lines 5-8.			
5	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
a	The organization?		X
b	Any related organization?		X
	If "Yes," to line 5a or 5b, describe in Part III.		
6	For persons listed in 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?		X
b	Any related organization?		X
	If "Yes" to line 6a or 6b, describe in Part III.		
7	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III		X
8	Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III		X

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

Schedule J (Form 990) 2008

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space is needed.

For each individual whose compensation must be reported in 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 are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other compensation				
PATRICIA MCLEOD	(i)	165,973.	0.	0.	0.	26,257.	192,230.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
DEB NORBERG	(i)	140,469.	0.	0.	0.	15,690.	156,159.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

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

PART I, LINE 1A: PAYMENTS WERE MADE IN ACCORDANCE WITH A WRITTEN EMPLOYMENT AGREEMENT APPROVED BY THE BOARD OF TRUSTEES.

SCHEDULE J-2
(Form 990)

Continuation Sheet for Form 990

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▶ Attach to Form 990 to list additional information for Form 990, Part VII, Section A, line 1a.

Name of the Organization

SAN JOSE MUSEUM OF ART ASSOCIATION

Employer Identification number

23-7062028

Part I Continuation of Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name and Title	(B) Average hours per week	(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			
SHEILA TRIPP TRUSTEE	0.50	X					0.	0.	0.	
ELIZABETH YOUNT TRUSTEE	2.50	X					0.	0.	0.	
SUSAN KRANE EXEC. DIR. FROM SEP 08	40.00			X			57,692.	0.	169.	
MARK FAZELI FINANCE DIRECTOR	40.00			X			53,200.	0.	3,856.	
LYNN SCHULER-KING FINANCE HEAD TILL JUL 08	40.00			X			42,281.	0.	9,389.	
PATRICIA MCLEOD DEPUTY DIRECTOR DVLDP	40.00				X		165,973.	0.	26,257.	
DEB NORBERG DEPUTY DIRECTOR OPERATIO	40.00					X	140,469.	0.	15,690.	

SCHEDULE L
(Form 990 or 990-EZ)

Department of the Treasury
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Transactions with Interested Persons

▶ Attach to Form 990 or Form 990-EZ.
▶ To be completed by organizations that answered
"Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c,
or Form 990-EZ, Part V, lines 38a or 40b.

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Name of the organization **SAN JOSE MUSEUM OF ART ASSOCIATION** Employer identification number **23-7062028**

Part I Excess Benefit Transactions (section 501(c)(3) and section 501(c)(4) organizations only).

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ \$ _____

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$ _____

Part II Loans to and/or From Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a.

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c) Original principal amount	(d) Balance due	(e) In default?		(f) Approved by board or committee?		(g) Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
	DEB NORBERG - SEE				X	44,000.	18,490.		X	X
Total				▶ \$	18,490.					

Part III Grants or Assistance Benefiting Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of grant or type of assistance

Part IV Business Transactions Involving Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, lines 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No

SEE SCHEDULE O FOR SCHEDULE L CONTINUATIONS

**SCHEDULE M
(Form 990)**

NonCash Contributions

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▶ To be completed by organizations that answered
"Yes" on Form 990, Part IV, lines 29 or 30.

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▶ Attach to Form 990.

Name of the organization **SAN JOSE MUSEUM OF ART ASSOCIATION** Employer identification number **23-7062028**

Part I	Types of Property	(a) Check if applicable	(b) Number of contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1	Art - Works of art	X	48	0.	
2	Art - Historical treasures				
3	Art - Fractional interests	X	1	0.	
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	2	35,952.	TRADING PRICE
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 ▶ (<u>EVENTS GOODS,</u>)	X	16	45,730.	FMV
26	Other ▶ (<u>AUCTION ITEMS</u>)	X	340	19,240.	SALES PRICE
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 IV, Donee Acknowledgment **29** **9**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?		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 non-standard contributions?		X
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II.		

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

Schedule M (Form 990) 2008

Part II **Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33.
Also complete this part for any additional information.

SCHEDULE M, LINE 33: EFFECTIVELY JULY 2003, THE ASSOCIATION ELECTED TO CHANGE ITS METHOD OF ACCOUNTING FOR ITS PERMANENT ART COLLECTION FOR FINANCIAL REPORTING PURPOSES. PRIOR TO JULY 1, 2003, SJMA CAPITALIZED ITS ART COLLECTION. ALL PURCHASED ART WAS RECORDED AT COST AND DONATED ART OBJECTS WERE RECORDED AS CONTRIBUTIONS AT THEIR ESTIMATED FAIR VALUE. EFFECTIVE JULY 1, 2003, THE ASSOCIATION EXPENSES ALL PURCHASED ART AND DOES NOT RECORD DONATED ART ITEMS. THE CHANGE REFLECTS THE PREFERRED METHOD OF ACCOUNTING FOR A PERMANENT COLLECTION AMONG MUSEUMS.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

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

MUSEUM FOSTERS AWARENESS OF ARTISTS' BROAD CONTRIBUTIONS TO SOCIETY: IT ENGAGES AUDIENCES WITH THE ART OF OUR TIME AND THE VITALITY OF THE CREATIVE PROCESS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS

ONE-PERSON AND THEMATIC GROUP EXHIBITIONS THAT RANGE FROM TRADITIONAL PAINTING TO EXPLORATORY NEW-MEDIA INSTALLATIONS. THE CURATORIAL STAFF ORGANIZES ABOUT HALF OF THE EXHIBITIONS IN A GIVEN SEASON. IN-HOUSE EXHIBITIONS ARE FREQUENTLY ACCOMPANIED BY SCHOLARLY PUBLICATIONS, E.G. THE ART OF ENGAGEMENT: VISUAL POLITICS IN CALIFORNIA AND BEYOND (2006), JENNIFER STEINKAMP (2006), AND TODD SCHORR (2009). SJMA FREQUENTLY TRAVELS ITS EXHIBITIONS NATIONALLY, TO VENUES SUCH AS THE AMERICAN UNIVERSITY MUSEUM AT THE KATZEN ART CENTER (WASHINGTON, D.C); THE ALBRIGHT-KNOX ART GALLERY (BUFFALO, NY); KEMPER MUSEUM OF CONTEMPORARY ART (KANSAS CITY, MO); AND BOISE ART MUSEUM (BOISE, ID), AMONG MANY OTHERS.

GIVEN ITS LOCATION IN THE HEART OF THE HIGH-TECHNOLOGY CULTURE OF SILICON VALLEY, THE MUSEUM HAS A SUBSTANTIAL COMMITMENT TO NEW WORK IN NEW MEDIA. SUCH PROJECTS INCLUDE CROSS SECTIONS: CATHERINE WAGNER (2001), BRIDES OF FRANKENSTEIN (2005), AND ROBOTS: THE EVOLUTION OF A CULTURAL ICON (2008). IN 2006, SJMA INAUGURATED A SERIES OF PROJECTS THAT EXPLORE THE INTERSECTION OF ART AND TECHNOLOGY, IN CONJUNCTION WITH THE CITY-WIDE BIENNIAL FESTIVAL ZEROONE, INCLUDING EDGE CONDITIONS (2006), SUPERLIGHT (2008), AND BUILD YOUR OWN WORLD (2010). IN

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ADDITION, SJMA ORGANIZES PIVOTAL CONCURRENT EXHIBITIONS: JENNIFER STEINKAMP (2006) AND LEO VILLAREAL (2010). SJMA ALSO INITIATES SPECIAL ARTISTIC COMMISSIONS THAT REFLECT THE CULTURAL DIVERSITY AND CHARACTER OF ITS REGION, SUCH AS THOSE WITH TAM VAN TRAN AND BARI KUMAR IN 2009 AND A PROJECT IN PROCESS WITH HIROSHI WATANABE TO DOCUMENT SAN JOSE'S JAPANTOWN (2009-2010).

THE MUSEUM'S PERMANENT COLLECTION INCLUDES CA. 2000 WORKS OF ART, MORE THAN 35% OF WHICH HAVE BEEN ACQUIRED SINCE 2000. THE MUSEUM DOES NOT HAVE AN ENDOWMENT FUND FOR ACQUISITIONS, AS DO MOST MUSEUMS: 90% OF ACQUISITIONS ARE DONATIONS, MANY SPECIFICALLY SOLICITED FROM COLLECTORS AND ARTISTS.

THE COLLECTIONS COMMITTEE, (THE MEMBERS OF WHICH EACH CONTRIBUTE A MINIMUM OF \$5,000 ANNUALLY), HAS ENABLED THE PURCHASE OF 91 WORKS OF ART SINCE ITS ESTABLISHMENT IN 1991, THE MAJORITY BY CALIFORNIA ARTISTS. THE COLLECTIONS COMMITTEE APPROVES ALL PURCHASES, DONATIONS, AND LOANS OF ARTWORKS.

THE COUNCIL OF 100, THE MUSEUM'S LARGEST UPPER-LEVEL DONOR GROUP, DEDICATES 10% OF ITS ANNUAL MEMBERSHIP DUES TO THE PURCHASE OF WORKS OF ART. SINCE ITS INCEPTION (CA. 1995), THE COUNCIL HAS FUNDED THE ACQUISITION OF TWENTY WORKS.

SJMA'S COLLECTION INCLUDES PRIMARILY AMERICAN ART OF THE POST-WORLD WAR II PERIOD, WITH AN EMPHASIS ON CONTEMPORARY ART AND WEST COAST ART.

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

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AMONG THE STRENGTHS OF THE COLLECTION ARE HISTORICAL BAY AREA ART;
SECOND-GENERATION MINIMALISM; PHOTOGRAPHY; TRADITIONALIST
REPRESENTATIONAL PAINTING; AND EMERGING CALIFORNIA ARTISTS. RECENTLY,
EFFORTS HAVE FOCUSED ON INCREASING THE MUSEUM'S HOLDINGS OF NEW MEDIA,
CERAMIC SCULPTURE, ARTISTS FROM PACIFIC RIM CULTURES, AND INCREASING
CULTURAL AND GENDER DIVERSITY.

HIGHLIGHTS OF THE COLLECTION INCLUDE WORKS BY: ROBERT ARNESON, RUTH
ASAWA, JUDY BACA, RAY BELDNER, RUTH BERNHARD, ELMER BISCHOFF,
CHRISTOPHER BROWN, EDWARD BURTYNSKY, JIM CAMPBELL, ALEXANDER CALDER,
ENRIQUE CHAGOYA, BINH DANH, JAY DEFEO, STEPHEN DE STAEBLER, VIOLA FREY,
ANDY GOLDSWORTHY, GEORGE HERMS, LYNN HERSHMAN, MILDRED HOWARD, IL LEE,
AN TE LIU, HUNG LIU, FRANK LOBDELL, MICHAEL LIGHT, RICHARD MISRACH, VIK
MUNIZ, DAVID NASH, LONG NGUYEN, MANUEL OCAMPO, NATHAN OLIVEIRA, GORDON
ONSLAW-FORD, TONY OURSLER, ALAN RATH, BEN RUBIN AND MARK HANSEN,
RICHARD SHAW, KATHERINE SHERWOOD, JENNIFER STEINKAMP, MASAMI TERAOKA,
BILL VIOLA, CATHERINE WAGNER, GAIL WIGHT, WILLIAM WILEY, AND BETTY
WOODMAN.

AROUND 63,580 PEOPLE WERE SERVED DURING THE YEAR.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS

"MUSE" AWARDS FROM THE AMERICAN ASSOCIATION OF MUSEUMS FOR ITS USE OF
NEW INTERACTIVE, TECH-BASED ACTIVITIES IN THE GALLERIES AND ON THE WEB,
E.G. YOUTUBE, FLICKR, FACEBOOK, PODCASTS, DIGITAL TIMELINES, AND IPOD
TOUCH TOURS. THE MUSEUM IS PROUD TO OFFER A SPECTRUM OF EDUCATIONAL

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PROGRAMMING THAT PROVIDES CRITICAL EARLY EXPOSURE TO THE VISUAL ARTS

FOR TENS OF THOUSANDS OF STUDENTS IN GRADES KINDERGARTEN THROUGH

TWELVE—TOURS, WORKSHOPS, IN-CLASS PRESENTATIONS, CURRICULUM GUIDES.

THE MUSEUM SERVES OVER 37,000 YOUNG PEOPLE WHO PARTICIPATE IN OVER

50,000 HANDS-ON EXPERIENCES. THE MUSEUM PROVIDES LECTURES, SYMPOSIA,

EDUCATOR-LED TOURS IN THE GALLERIES (OFTEN PAIRED WITH HANDS-ON ART

ACTIVITIES); AN IN-SCHOOL ART DOCENT PROGRAM THAT TEACHES VISUAL

THINKING SKILLS; SEQUENTIAL IN-SCHOOL ART-MAKING WORKSHOPS (OFTEN

COMBINED WITH GALLERY TOURS); PROFESSIONAL DEVELOPMENT OPPORTUNITIES

FOR TEACHERS; FREE FAMILY-ORIENTED COMMUNITY DAYS WITH HANDS-ON

ACTIVITIES AND A VARIETY OF PERFORMANCES; KIDS SUMMER ART CAMP,

WEEK-LONG ADVENTURES INTO ART-MAKING THAT ARE LINKED TO CURRENT

EXHIBITIONS; AND PROGRAMS WITH ARTISTS THAT GIVE THE PUBLIC CLOSE

ACCESS TO THE CREATIVE PROCESS. IN ADDITION, THE EMPLOYEES OF

CORPORATE PARTNERS ARE INVITED TO A BIENNIAL EVENT CALLED TECH CONNECT

WHICH IS AN IMMERSIVE NIGHT OF ART, DOCENT TOURS, HANDS-ON ART-MAKING

PROJECTS, AND INTERACTIVE INTERPRETATION ACTIVITIES IN THE GALLERIES.

THE MUSEUM IS MIDSTREAM IN THE PROCESS OF REVAMPING ITS WEBSITE, THE

FIRST SUCH INITIATIVE IN TEN YEARS, TO BE COMPLETED IN JANUARY 2010.

THE NEW WEBSITE WILL ENABLE SMOOTHER INFORMATION DELIVERY, WEB-BASED

ACCESS TO THE COLLECTION, A MORE DYNAMIC GRAPHIC INTERFACE, AND

ADDITIONAL PARTICIPATORY EDUCATIONAL AND CURATORIAL ONLINE PROJECTS.

SJMA'S WEB SITE IS INTENDED TO HARNESS NEW WEB CAPABILITIES TO FURTHER

SJMA'S REACH AND ABILITY TO ENGAGE VISITORS; FORGE NEW CONNECTIONS TO

ITS COMMUNITIES; AND ENCOURAGE REPEAT VISITATION. THE ART OF OUR TIME

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

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IS COMPLEX, CHALLENGING, AND AS EMOTIONALLY POWERFUL AS ANY EVER
CREATED. SJMA'S MISSION IS TO CONNECT ITS AUDIENCES -BOTH LIVE AND
VIRTUAL - WITH TODAY'S ART AND ARTISTS. THE GOAL OF THIS NEW WEBSITE
IS TO CREATE A CONTEMPORARY ART EXPERIENCE VIA THE WEB THAT WILL
CULTIVATE VISITORS' INVESTMENT IN SJMA AS WELL AS FURTHER
UNDERSTANDING, ENTHUSIASM, RELEVANCY, AND APPRECIATION.

SJMA WILL USE ITS WEBSITE TO ENGAGE VISITORS VIA VISUAL LEARNING THAT
SPANS A LIFETIME. EARLY EDUCATION IS ESPECIALLY IMPORTANT: SJMA IS A
COMMUNITY LEADER IN CREATING PROGRAMS THAT CONNECT YOUNG PEOPLE TO ART.
SJMA AIMS TO ADVANCE ONLINE AND E-LEARNING CAPABILITIES THAT OPEN
21ST-CENTURY DOORWAYS TO ART. THE NEW SITE WILL INTEGRATE DYNAMIC
FEATURES THAT OFFER VISITORS A MORE PERSONALIZED ONLINE EXPERIENCE,
ENHANCED NAVIGATION, AND ACCESS TO SJMA'S COLLECTION, EXHIBITIONS, AND
EDUCATIONAL RESOURCES THROUGH A FLUID NEW INTERFACE THAT BRINGS THE
VOICES AND PERSPECTIVES OF SJMA'S AUDIENCES TO THE FOREFRONT.

THE SAN JOSE MUSEUM OF ART'S PERMANENT COLLECTION INCLUDES PAINTINGS,
SCULPTURE, INSTALLATIONS, NEW-MEDIA WORKS, PHOTOGRAPHY, DRAWINGS,
PRINTS, AND ARTIST'S BOOKS. OBJECTS FROM THE PERMANENT COLLECTION ARE
INCREASINGLY THE FOCUS OF THEMATIC EXHIBITIONS IN THE GALLERIES. FOR
ITS NEW WEBSITE, THE MUSEUM WILL USE THE EMBARK WEB KIOSK TO TURN ITS
COLLECTION DATA FILES INTO A VIRTUAL GALLERY THAT CAN BE SEARCHED AND
CONFIGURED. THE WEB KIOSK OFFERS THREE OPTIONS FOR VISITORS TO EXPLORE
SJMA'S COLLECTION. THE COLLECTION CAN BE SEARCHED BY USING KEYWORDS OR
DATA FIELDS; BY PRE-SELECTING GROUPS OF RELATED RECORDS FROM THE INDEX

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(E.G. ALL LANDSCAPE IMAGERY); OR BY USING THE INDEX TREE AS A VIRTUAL TOUR GUIDE TO THE ENTIRE COLLECTION. THE WEB KIOSK WILL CREATE MUCH GREATER AND BROADER AWARENESS OF THE COLLECTION AND ACCESS TO BACKUP REFERENCE MATERIALS, SUCH AS THE PREPARATORY STUDIES FOR A PAINTING AND SHORT VIDEO INTERVIEWS WITH THE ARTISTS. IT WILL ALSO ALLOW VISITORS TO SELF-CURATE AN ON-LINE 'GALLERY.' IN ADDITION, THE NEW WEB SITE WILL MAKE INFORMATION MORE EASILY ACCESSIBLE FOR STAFF.

FORM 990, PART VI, SECTION A, LINE 10: THE PROCESS THE SAN JOSE MUSEUM OF ART USES TO REVIEW THE FORM 990 IS SET FORTH IN ITS RISK MANAGEMENT AND FISCAL OPERATING POLICIES. PRIOR TO FILING WITH THE I.R.S., THE ANNUAL TAX RETURN FORM 990 IS REVIEWED BY THE FINANCE AND EXECUTIVE COMMITTEES AND PROVIDED TO THE BOARD OF TRUSTEES.

FORM 990, PART VI, SECTION B, LINE 12C: ALL TRUSTEES, STAFF MEMBERS AND COMMUNITY MEMBERS OF BOARD COMMITTEES MUST FILL OUT AND SIGN AN ANNUAL CONFLICT OF INTEREST DISCLOSURE STATEMENT. THIS DISCLOSURE STATEMENT ASKS IF THE RESPONDENTS ARE AWARE OF ANY AFFILIATIONS, EMPLOYMENT OR OTHER MATTERS INVOLVING THE INDIVIDUAL OR ANY OF IMMEDIATE FAMILY THAT MIGHT BE PERCEIVED TO COMPROMISE THEIR OBLIGATIONS TO THE MUSEUM AND SHOULD THEREFORE BE REPORTED IN LIGHT OF THE CODES OF ETHICS POLICIES. SPECIFICALLY, THE DISCLOSURE STATEMENT ASKS IF SJMA HAS A BUSINESS RELATIONSHIP WITH ANY ENTITY FROM WHICH THE INDIVIDUAL OR HIS/HER IMMEDIATE FAMILY MEMBERS HAVE RECEIVED ANY COMPENSATION, INCOME, LOANS OR GIFTS OR OF WHICH THE INDIVIDUAL OR HIS/HER IMMEDIATE FAMILY MEMBERS ARE A TRUSTEE, OFFICE, DIRECTOR OR EMPLOYEE. IN ADDITION, DISCLOSURE IS REQUIRED IF THE

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Supplemental Information to Form 990

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INDIVIDUAL OR IMMEDIATE FAMILY MEMBERS HOLD AN OWNERSHIP INTEREST IN A CLOSELY HELD COMPANY OR A 5% OWNERSHIP INTEREST IN A PUBLIC COMPANY WITH WHICH THE MUSEUM HAS A BUSINESS RELATIONSHIP. ALL RESPONDENTS ARE ASKED TO SUPPLEMENT THE INFORMATION IN THE EVENT OF ANY CHANGES BEFORE THE NEXT ANNUAL DISCLOSURE. ALL STAFF RESPONSES ARE REVIEWED BY THE EXECUTIVE DIRECTOR. ALL OTHER RESPONSES ARE REVIEWED BY THE SECRETARY OF THE BOARD OF TRUSTEES. IF A RESPONSE ON A DISCLOSURE IDENTIFIES A CONFLICT, THE INTERESTED TRUSTEE, STAFF MEMBER OR VOLUNTEER (A COMMUNITY MEMBER OF A BOARD COMMITTEE) SHALL REFRAIN FROM PARTICIPATING IN OR ATTEMPTING TO INFLUENCE ANY DECISION OF THE BOARD, BOARD COMMITTEE, OR STAFF ON ANY MATTER WHICH MAY INVOLVE A POTENTIAL OR ACTUAL CONFLICT OF INTEREST AND SHALL ABSTAIN FROM VOTING ON ANY SUCH MATTER.

FORM 990, PART VI, SECTION B, LINE 15: THE BOARD OF TRUSTEES OF SJMA HAS ESTABLISHED A COMPENSATION PHILOSOPHY THAT BALANCES TWO OBJECTIVES: APPROPRIATE STEWARDSHIP OF ITS FINANCIAL RESOURCES; AND MAINTAINING THE VITALITY OF THE INSTITUTION AND EXCELLENCE OF ITS PROGRAMMING. THE RESULTING COMPENSATION DESIGN IS TO PAY IN THE TOP 50% OF COMPARABLE SALARIES FOR NEXT-STAGE PEER INSTITUTIONS. IN SJMA'S EXPERIENCE, THESE ARE THE MOST RELEVANT FACTORS IN COMPETITION FOR TALENT. INDIVIDUAL COMPENSATION IS THEN ESTABLISHED COMMENSURATE WITH EXPERIENCE, RELEVANT ACADEMIC CREDENTIALS AND PROFESSIONAL TRAINING. THE BOARD OF TRUSTEES HAS APPROVED THAT PHILOSOPHY IN LIGHT OF THE HIGH COST OF LIVING IN THE SAN FRANCISCO BAY AREA, IN AN EFFORT TO ATTRACT, RETAIN AND MOTIVATE THE TALENT NEEDED TO MAINTAIN THE REQUISITE STANDARDS OF QUALITY AND REPUTATION OF THE MUSEUM AS A LEADER IN THE FIELD.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

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IN ADDITION TO SALARY, SJMA ENDEAVORS TO PROVIDE HEALTH AND RETIREMENT BENEFITS COMMENSURATE WITH THE ABOVE PHILOSOPHY. HOWEVER, DURING THE CURRENT RECESSION, THE BOARD OF TRUSTEES HAS SUSPENDED CONTRIBUTIONS TO RETIREMENT BENEFITS AND INCREASED THE EMPLOYEE CONTRIBUTIONS TO HEALTH INSURANCE PREMIUMS AND CO-PAYMENTS. THE BOARD INTENDS TO RE-ESTABLISH A PENSION CONTRIBUTION AS SOON AS ECONOMIC CIRCUMSTANCES ALLOW.

THE SALARIES OF THE EXECUTIVE DIRECTOR; DEPUTY DIRECTOR, DEVELOPMENT; THE DEPUTY DIRECTOR, OPERATIONS; AND THE DIRECTOR OF FINANCE WERE ESTABLISHED AND APPROVED BY THE BOARD OF TRUSTEES IN ACCORDANCE WITH THIS COMPENSATION PHILOSOPHY, BASED ON THE ANNUAL SALARY SURVEY OF THE ASSOCIATION OF ART MUSEUM DIRECTORS, WHICH IS THE STANDARD RESOURCE IN THE FIELD AND THE MOST COMPREHENSIVE, PUBLIC INDUSTRY DATA AVAILABLE. PERFORMANCE EVALUATIONS OF THESE STAFF MEMBERS ARE REVIEWED ANNUALLY BY THE BOARD OF TRUSTEES. THE SALARY AND BENEFIT PACKAGE OF THE EXECUTIVE DIRECTOR WAS ESTABLISHED AFTER A REVIEW OF COMPARABLE EXECUTIVE COMPENSATION FURNISHED BY THE EXECUTIVE SEARCH FIRM ENGAGED BY THE BOARD AND APPROVED BY THE BOARD ON JULY 24, 2008. IN THE COURSE OF BUDGET CUTS DURING FY 08-09, THE EXECUTIVE DIRECTOR VOLUNTARILY DELAYED OR REDUCED ITEMS OF THE BENEFIT PACKAGE.

FORM 990, PART VI, SECTION C, LINE 19: THE SAN JOSE MUSEUM OF ART POSTS ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS ON ITS WEBSITE.

FORM 990 PART XI LINE 2C

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

Schedule O (Form 990) 2008

832211
12-18-08

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

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OVERSIGHT OF AUDIT

THE AUDIT COMMITTEE CONSISTS OF A CHAIR PERSON AND 4 MEMBERS, ONE OF WHOM IS A TRUSTEE IN ACCORDANCE WITH BYLAWS. THE CHARTER OF THE AUDIT COMMITTEE IS TO ASSIST THE BOARD OF TRUSTEES IN FULFILLING THE BOARD'S OVERSIGHT RESPONSIBILITIES AS THEY RELATE TO THE ASSOCIATION'S AUDIT.

FOR FY 09, REQUESTS FOR PROPOSALS WERE SENT TO 4 LOCAL ACCOUNTING FIRMS. AFTER IN PERSON INTERVIEWS WERE CONDUCTED, BERGER/LEWIS WAS SELECTED BASED ON THEIR EXPERTISE WITH NON-PROFIT ORGANIZATIONS. A TIME LINE FOR THE FY08-09 AUDIT PROCESS WAS ESTABLISHED IN CONJUNCTION WITH STAFF, MANAGEMENT, AND THE AUDIT COMMITTEE CHAIR. AUDIT FIELD WORK COMMENCED JULY 13, 2009 AND WAS CONCLUDED BY MID NOVEMBER 2009. DURING THAT TIME BERGER/LEWIS MET WITH THE AUDIT COMMITTEE 4 TIMES AND PRESENTED THE DRAFT AUDIT REPORT TO THE FULL BOARD OF TRUSTEES ON NOVEMBER 19, 2009.

SCHEDULE L, PART II, LOANS TO AND FROM INTERESTED PERSONS:

(A) NAME OF PERSON: DEB NORBERG

(A) PURPOSE OF LOAN: SEE DESCRIPTION IN SCHEDULE O

(B) LOAN TO OR FROM ORGANIZATION? = FROM

(C) ORIGINAL PRINCIPAL AMOUNT \$ 44000. (D) BALANCE DUE \$ 18490.

(E) LOAN IN DEFAULT? = NO

(F) APPROVED BY BOARD OR COMMITTEE? = YES

(G) WRITTEN AGREEMENT? = YES

SCHEDULE L PART II

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

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LOAN TO INTERESTED PERSONS

THE NOTE RECEIVABLE BALANCE PERTAINS TO A \$44K LOAN TO DEPUTY DIRECTOR OF OPERATIONS, DEBORAH NORBERG. PRIOR TO ADOPTION OF THE EMPLOYEE BENEFIT PLAN, THE ASSOCIATION ACCRUED DEFERRED COMPENSATION TO DEBORAH THE BALANCE OF WHICH WAS HELD IN A SEPARATE ACCOUNT REGISTERED TO THE MUSEUM. THE ACCRUAL TO THIS ACCOUNT CEASED AFTER THE ADOPTION OF THE PLAN. IN JAN 2003, DEBORAH BORROWED \$44K FROM SJMA AT 5% INTEREST PER ANNUM WITH THE BALANCE DUE ON JAN 31, 2013. THE MUSEUM APPLIES THE PRINCIPAL PORTION OF THE PAYMENTS TOWARD THE OUTSTANDING LOAN BALANCE AND THE INTEREST PORTION TO DEFERRED COMPENSATION.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	FURNITURE & FIXTURES											
1	FURNITURES AND FIXTURES	VARIES		.000	16	161,002.			161,002.	147,829.		4,162.
	* 990 PAGE 10 TOTAL FURNITURE & FIXTURES					161,002.		0.	161,002.	147,829.	0.	4,162.
	MACHINERY & EQUIPMENT											
2	MACHINERY & EQUIPMENT	VARIES		.000	16	543,919.			543,919.	429,136.		36,322.
3	NETWORK	VARIES		.000	16	201,849.			201,849.	189,209.		12,217.
	* 990 PAGE 10 TOTAL MACHINERY & EQUIPMENT					745,768.		0.	745,768.	618,345.	0.	48,539.
	OTHER											
4	SOFTWARE	VARIES		.000	16	190,216.			190,216.	81,729.		29,792.
5	LEASEHOLD IMPROVEMENTS	VARIES		.000	16	613,310.			613,310.	535,921.		9,901.
6	ADJ	VARIES		.000	16					36,165.		-36,165.
	* 990 PAGE 10 TOTAL OTHER					803,526.		0.	803,526.	653,815.	0.	3,528.
	* GRAND TOTAL 990 PAGE 10 DEPR					1710296.		0.	1710296.	1419989.	0.	56,229.