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Form 990-EZ

Short Form Return of Organization Exempt From Income Tax

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

▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990 All other organizations with gross receipts less than $1,000,000 and total assets less than $2,500,000 at the end of the year may use this form

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

Department of the Treasury
Internal Revenue Service

OMB No 1545-1150

2008

Open to Public Inspection

A For the 2008 calendar year, or tax year beginning August 1 , 2008, and ending July 31 , 20 09

B Check if applicable
- ☐ Address change
- ☐ Name change
- ☑ Initial return
- ☐ Termination
- ☐ Amended return
- ☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization
Harper Parent Teacher Organization

Number and street (or P O box, if mail is not delivered to street address) Room/suite
Dartmouth at Greenwood

City or town, state or country, and ZIP + 4
Wilmette, IL 60091

D Employer identification number
36 3835275

E Telephone number
(847) 256-6754

F Group Exemption Number . . ▶

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

G Accounting method ☑ Cash ☐ Accrual
Other (specify) ▶

I Website: ▶ www.harperpto.com

J Organization type (check only one) – ☑ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

H Check ▶ ☑ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

K Check ▶ ☐ if the organization is not a section 509(a)(3) supporting organization **and** its gross receipts are normally **not** more than $25.000 A return is not required, but if the organization chooses to file a return, be sure to file a complete return

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if $1,000,000 or more, file Form 990 instead of Form 990-EZ ▶ $

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)

Revenue	1	Contributions, gifts, grants, and similar amounts received			1 4,784
	2	Program service revenue including government fees and contracts			2 49,932
	3	Membership dues and assessments			3 6,885
	4	Investment income			4 1,437
	5a	Gross amount from sale of assets other than inventory	5a 0		
	b	Less: cost or other basis and sales expenses	5b 0		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)			5c 0
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from **gaming**, check here ▶ ☐			
	a	Gross revenue (not including $ 0 of contributions reported on line 1)	6a 94,214		
	b	Less: direct expenses other than fundraising expenses	6b 35,485		
	c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)			6c 58,729
	7a	Gross sales of inventory, less returns and allowances	7a 53,952		
	b	Less: cost of goods sold	7b 44,632		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)			7c 9,320
	8	Other revenue (describe ▶ None)			8 0
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ▶			9 131,087
Expenses	10	Grants and similar amounts paid (attach schedule)			10 70,678
	11	Benefits paid to or for members			11 0
	12	Salaries, other compensation, and employee benefits			12 0
	13	Professional fees and other payments to independent contractors			13 1,406
	14	Occupancy, rent, utilities, and maintenance			14 0
	15	Printing, publications, postage, and shipping			15 855
	16	Other expenses (describe ▶ Program Service Expenses)			16 92,551
	17	**Total expenses.** Add lines 10 through 16 ▶			17 165,490
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)			18 -34,403
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)			19 127,567
	20	Other changes in net assets or fund balances (attach explanation)			20 0
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ▶			21 93,164

Part II Balance Sheets. If Total assets on line 25, column (B) are $2,500,000 or more, file Form 990 instead of Form 990-EZ

(See the instructions for Part II.)

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	127,567	22	93,164
23	Land and buildings	0	23	0
24	Other assets (describe ▶)	0	24	0
25	**Total assets**	127,567	25	93,164
26	**Total liabilities** (describe ▶)	0	26	0
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	127,567	27	93,164

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P 1 of

Part III Statement of Program Service Accomplishments (See the instructions for Part III.)

What is the organization's primary exempt purpose? **Enrich the overall learning experience at Harper School**

Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each program title.

Expenses (Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts, optional for others.)

28	**To enrich and supplement curriculum in the areas of ine arts, sciences, performing arts, teacher supported activities, athletics, safety and school related activities. All students and staff are included in these activities** (Grants $) If this amount includes foreign grants, check here ▶ ☐	28a	69,690
29	**To provide support to the school's community through communications, building support and other miscellaneous programs; and to enhance the overall elementary experience for all students.** (Grants $) If this amount includes foreign grants, check here ▶ ☐	29a	22,861
30	(Grants $) If this amount includes foreign grants, check here ▶ ☐	30a	0
31	Other program services (attach schedule) (Grants $ 0) If this amount includes foreign grants, check here ▶ ☐	31a	0
32	**Total program service expenses** (add lines 28a through 31a) ▶	32	92,551

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.)

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-.)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
See attached schedule A				
All are volunteers.		0	0	0
The organization has NO employees.				

Part V Other Information (Note the statement requirements in the instructions for Part VI.)

			Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33		✓
34	Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	34		✓
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but **not** reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.			
a	Did the organization have unrelated business gross income of $1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?	35a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	35b		✓
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N	36		✓
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a 0			
b	Did the organization file **Form 1120-POL** for this year?	37b		✓
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee **or** were any such loans made in a prior year and still unpaid at the start of the period covered by this return?	38a		✓
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b			
39	Section 501(c)(7) organizations. Enter:			
a	Initiation fees and capital contributions included on line 9 39a			
b	Gross receipts, included on line 9, for public use of club facilities 39b			
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ 0 ; section 4912 ▶ 0 ; section 4955 ▶ 0			
b	Section 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I	40b		✓
c	Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0			
d	Enter amount of tax on line 40c reimbursed by the organization ▶ 0			
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.	40e		✓
41	List the states with which a copy of this return is filed. ▶ Illinolis			
42a	The books are in care of ▶ Cliff Ruemmler, Treasurer Telephone no. ▶ (847) 853-9344			
	Located at ▶ 2121 Schiller Avenue, Wilmette, IL ZIP + 4 ▶ 60091-2325			
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		✓
	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.**			
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c		✓
	If "Yes," enter the name of the foreign country: ▶			
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041**—Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43			
			Yes	No
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44		✓
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45		✓

Part VI **Section 501(c)(3) organizations only.** All section 501(c)(3) organizations must answer questions 46–49 and complete the tables for lines 50 and 51.

		Yes	No
46	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		✓
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II		✓
48	Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		✓
49a	Did the organization make any transfers to an exempt non-charitable related organization?		✓
b	If "Yes," was the related organization(s) a section 527 organization?		✓

50 Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than $100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each employee paid more than $100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
None				
Total number of other employees paid over $100,000 ▶				

51 Complete this table for the five highest compensated independent contractors who each received more than $100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than $100,000	(b) Type of service	(c) Compensation
None		
Total number of other independent contractors each receiving over $100,000 ▶		

Sign Here

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

▶ _____ 11-25-09
Signature of officer — Date

▶ **Cliff Ruemmler, Treasurer**
Type or print name and title

Paid Preparer's Use Only

Preparer's signature ▶	Date	Check if self-employed ▶ ☐	Preparer's Identifying Number (See instructions)
Firm's name (or yours if self-employed), address, and ZIP + 4 ▶		EIN ▶	
		Phone no ▶ ( )	

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

Harper Parent Teacher Organization
36-3835275
Schedule A

EXECUTIVE BOARD	First	Last	Address	Town	State	Zip
President	Kitty	Curran	1207 Ridge Rd	Wilmette	IL	60091
President-Elect	Holly	Francis	2512 Iroquois Rd	Wilmette	IL	60091
Secretary	Danielle	Boersma	1027 Cherokee Rd	Wilmette	IL	60091
Room Parents	Carlee	Bilello	2014 Beechwood Ave	Wilmette	IL	60091
Room Parents	Monica	McGregor	2045 Greenwood Ave	Wilmette	IL	60091
Student Enrichment	Lisa	Kerpan	1030 Romona Rd	Wilmette	IL	60091
Student Enrichment	Maureen	Szafran	1034 Pawnee Rd	Wilmette	IL	60091
Ways & Means	Ann	Garrison	2133 Greenwood Ave	Wilmette	IL	60091
Ways & Means	Kerrily	Jednorowicz	2218 Greenwood Ave	Wilmette	IL	60091
Treasurer	Cliff	Ruemmler	2121 Schiller Ave	Wilmette	IL	60091
Communications/Webmaster	Lisa	Charpentier	2228 Kenilworth Ave	Wilmette	IL	60091
GENERAL BOARD						
4th Gr. End of the Year Party	Diane	Baer	2112 Chestnut Ave	Wilmette	IL	60091
4th Gr. End of the Year Party	Kim	O'Donoghue	1047 Cherokee Rd	Wilmette	IL	60091
After School Programs	Roxy	Freel	2436 Thornwood Ave	Wilmette	IL	60091
After School Programs	Sherri	Ramsey	1233 Colgate St	Wilmette	IL	60091
After School Assistant-Chess	Sarita	D'Souza	2841 Illinois Rd	Wilmette	IL	60091
After School Assistant	Deidre	Redding	2131 Washington	Wilmette	IL	60091
After School Assistant	Cheri	Weber	2040 Elmwood Ave	Wilmette	IL	60091
Assistant Treasurer	Monica	Childs	2000 Elmwood Ave	Wilmette	IL	60091
Benefit	Susie	Birdsell	2343 Greenwood Ave	Wilmette	IL	60091
Benefit	Margaret	Lake	1046 Cherokee Rd	Wilmette	IL	60091
Benefit	Terri	Lorenz	2335 Thornwood Ave	Wilmette	IL	60091
Book Fair	Tim	Boudos	2201 Greenwood Ave	Wilmette	IL	60091
Book Fair	Susan	Mackesey	2130 Greenwood Ave	Wilmette	IL	60091
Book Fair	Tika	Walsh	2132 Greenwood Ave	Wilmette	IL	60091
Bulletin Board	Amy	DiPatri	2015 Beechwood Ave	Wilmette	IL	60091
Bulletin Board	Cheri	Weber	2040 Elmwood Ave	Wilmette	IL	60091
Cafeteria	Jamie	Bruno	2334 GreenwoodAve	Wilmette	IL	60091
Cafeteria	Ouida	Curry	2140 Kenilworth Ave	Wilmette	IL	60091
Chorus	Cindy	Mydlach	2418 Greenwood Ave	Wilmette	IL	60091
Civics & Safety	Sue	Smith	2235 Washington Ave	Wilmette	IL	60091
Civics & Safety	Kelly	Dondanville	2024 Chestnut Ave	Wilmette	IL	60091
Civics & Safety Daily Captain	Laura	Carlson	25 Locust Rd	Winnetka	IL	60093
Civics & Safety Daily Captain	Kathleen	Connelly	2121 Kenilworth Ave	Wilmette	IL	60091
Civics & Safety Daily Captain	Mindy	Fauntleroy	67 Indian Hill Rd	Winnetka	IL	60091
Civics & Safety Daily Captain	Julie	Jenkins	1020 Illinois Rd	Wilmette	IL	60091
Civics & Safety Daily Captain	Hannah	McNulty	2145 Thornwood Ave	Wilmette	IL	60091
Civics & Safety Daily Captain	Jody	Franson	2327 Kenilworth Ave	Wilmette	IL	60091
Civics & Safety Daily Captain	Deanne	Roggekamp	2505 Thornwood Ave	Wilmette	IL	60091
CRC	Mindy	Fauntleroy	67 Indian Hill Rd	Winnetka	IL	60093
CRC	Diane	Phillips	1230 Colgate St	Wilmette	IL	60091
Directory	Rachel	Kuhn	930 Yale St	Wilmette	IL	60091
District 39 Educational Foundation Liaiso	Bev	Kruger	2105 Greenwood Ave	Wilmette	IL	60091
Duplicating (Backpack & Summer Heralc	Beth	Carmody	2150 Chestnut Ave	Wilmette	IL	60091
Duplicating (Backpack & Summer Heralc	Julie	Duffy	932 Illinois Road	Wilmette	IL	60091
Duplicating (Backpack & Summer Heralc	Terri	Gianni	2236 Kenilworth Ave	Wilmette	IL	60091
Duplicating (Backpack & Summer Heralc	Michelle	Paul	2029 Greenwood Ave	Wilmette	IL	60091

Harper Parent Teacher Organization
36-3835275
Schedule A

Enrichment Assistant-Kindergarten	Barb	Sheridan	2226 Schiller Ave	Wilmette	IL	60091
Enrichment Assistant -- First Grade	Anne	Fitzpatrick	2236 Greenwood Ave	Wilmette	IL	60091
Enrichment Assistant -- Second Grade	Katie	Clarke	2033 Chestnut Ave	Wilmette	IL	60091
Enrichment Assistant -- Third Grade	Kristyn	Gibson	2030 Kenilworth Ave	Wilmette	IL	60091
Enrichment Assistant -- Fourth Grade	Debbie	Greif	2350 Greenwood Ave	Wilmette	IL	60091
Environmental Issues	Kristin	Merk	2125 Greenwood Ave	Wilmette	IL	60091
Environmental Issues	Stephanie	VanWinkle	2624 Kenilworth Ave	Wilmette	IL	60091
Fall Party (Hoedown) chairs	Amy	Munson	919 Pawnee Rd	Wilmette	IL	60091
Fall Party (Hoedown) chairs	Michelle	Paul	2029 Greenwood Ave	Wilmette	IL	60091
Family Awareness Network (FAN)	Tika	Walsh	2132 Greenwood Ave	Wilmette	IL	60091
Fish Tank	Rachael	Nocera	2301 Greenwood Ave	Wilmette	IL	60091
Garden Committee	Charlotte	Bryant	2242 Chestnut Ave	Wilmette	IL	60091
Garden Committee	Diane	Schaffner	2413 Thornwood Ave	Wilmette	IL	60091
Garden Committee	Sara	Cohan	2716 Blackhawk Road	Wilmette	IL	60091
Garden Committee	Mary Beth	Surman	915 Amherst Lane	Wilmette	IL	60091
Great Books	Carrie	Armour	2316 Schiller Ave.	Wilmette	IL	60091
Great Books	Jane	Hutson	2238 Schiller Ave	Wilmette	IL	60091
Harper Bazaar	Mindy	Fauntleroy	67 Indian Hill Rd	Winnetka	IL	60093
Harper Bazaar	Ilene	Hechtman	1018 Knoll Ln	Wilmette	IL	60091
Harper Herald Editor- Summer Only	Shannon	Geier	2034 Beechwood Ave.	Wilmette	IL	60091
Hospitality	Ruth	Borushek	2245 Kenilworth Ave	Wilmette	IL	60091
Hospitality	Becca	Lyman	2207 Washington Ave	Wilmette	IL	60091
Hospitality	Molly	Higgins	1030 Pontiac Rd	Wilmette	IL	60091
Landscaping	Patti	Toole	2101 Birchwood Ave	Wilmette	IL	60091
Legislation	Janet	Le Vee	2121 Greenwood Ave	Wilmette	IL	60091
Membership	Lisa	Maatman	83 Indian Hill Rd	Winnetka	IL	60093
Presidential Advisor	Jody	Franson	2327 Kenilworth Ave	Wilmette	IL	60091
Teacher/Staff Appreciation	Candy	Gibson	2301 Iroquois Rd	Wilmette	IL	60091
Teacher/Staff Appreciation	Sabine	Eikens	1018 Cherokee Rd	Wilmette	IL	60091
Teacher/Staff Appreciation	Margaret	Burton	1023 Cherokee Rd	Wilmette	IL	60091
Teacher/Staff Appreciation	Amy	Munson	919 Pawnee Rd	Wilmette	IL	60091
Volunteer Coordinator	Jane	Westhoff	2141 Greenwood Ave	Wilmette	IL	60091
Ways & Means Assistant	Michelle	Swan	2144 Beechwood Ave	Wilmette	IL	60091
Ways & Means Assistant	Candy	Gibson	2301 Iroquois Rd	Wilmette	IL	60091
Ways & Means Assistant	Katie	Clarke	2033 Chestnut Ave	Wilmette	IL	60091
Ways & Means Assistant	Sally	McQueen	2103 Washington Ave	Wilmette	IL	60091
Ways & Means Assistant	Katy	Reichert	2811 Iroquois Rd	Wilmette	IL	60091
Ways & Means Assistant	Carolyn	Stearns	1224 Cleveland St	Wilmette	IL	60091
Ways & Means Assistant	Julie	Economos	2530 Kenilworth Ave.	Wilmette	IL	60091
Ways & Means Assistant	Bev	Kruger	2105 Greenwood Ave	Wilmette	IL	60091
Welcoming	Tiffany	Flannagan	2347 Greenwood Ave	Wilmette	IL	60091
Yearbook Editor	Kelly	Bryla	1215 Hunter Rd	Wilmette	IL	60091
Yearbook Editor	Karen	Tobey	2401 Thornwood Ave.	Wilmette	IL	60091
Yearbook Editor	Lori	Pawelczyk	2244 Greenwood Ave	Wilmette	IL	60091
Yearbook Editor	Kerrily	Jednorowicz	2218 Greenwood Ave	Wilmette	IL	60091

Harper Parent Teacher Organization
Line 10 - Schedule of Grants and similar amounts paid
36-3835275

	Aug '08 - Jul 09
Donation	
Book Fair Proceeds	$ 3,667 33
Community Donations	201 28
District 39 Angel Fund	0 00
FAN Family Awareness Network	300 00
Harper Angel Fund	0 00
Outdoor Education	10,000 00
School Gifts	51,602 98
Garden - Compensation	550 00
Garden - Other	4,356 06
	$ 70,677 65