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Form **990-EZ**Department of the Treasury
Internal Revenue Service**Short Form**
Return of Organization Exempt From Income TaxUnder 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 \$500,000 and total assets less than \$1,250,000 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.

OMB No 1545-1150

2009**Open to Public Inspection****A** For the 2009 calendar year, or tax year beginning **June 1**, 2009, and ending **May 31**, 20 **10****B** Check if applicable:

- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Terminated
- ☐ Amended return
- ☐ Application pending

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

C Name of organization

Arizona Aloha Festivals, Inc.

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

2514 S. Kachina Circle

City or town, state or country, and ZIP + 4

Tempe, AZ 85282

D Employer identification number

86-0921384

E Telephone number

602-697-1824

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.azalohafest.org**J** Tax-exempt status (check only one) — ☒ 501(c) (3) ◀ (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 Form 990-EZ or Form 990 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 \$500,000 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	14,118
	2	Program service revenue including government fees and contracts	
	3	Membership dues and assessments	
	4	Investment income	794
	5a	Gross amount from sale of assets other than inventory	
	5b	Less: cost or other basis and sales expenses	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here ☐	
	6a	Gross revenue (not including \$ of contributions reported on line 1)	
	6b	Less: direct expenses other than fundraising expenses	
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)		
7a	Gross sales of inventory, less returns and allowances		
7b	Less: cost of goods sold		
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		
8	Other revenue (describe ► See attached schedule)	97,976	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	112,888	
Expenses	10	Grants and similar amounts paid (attach schedule)	11,589
	11	Benefits paid to or for members	
	12	Salaries, other compensation, and employee benefits	
	13	Professional fees and other payments to independent contractors	
	14	Occupancy, rent, utilities, and maintenance	
	15	Printing, publications, postage, and shipping	4,004
	16	Other expenses (describe ► See attached schedule)	94,470
	17	Total expenses. Add lines 10 through 16	110,063
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	2,825
	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)	116,773
	20	Other changes in net assets or fund balances (attach explanation)	Rounding (1)
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	119,597

Part II Balance Sheets. If Total assets on line 25, column (B) are \$1,250,000 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	116,773
23	Land and buildings	
24	Other assets (describe ►)	
25	Total assets	116,773
26	Total liabilities (describe ►)	
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	116,773

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat No 106421

Form **990-EZ** (2009)

SCANNED OCT 13 2010

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Expenses

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

28	None		
	(Grants \$) If this amount includes foreign grants, check here	☒	28a
29			
	(Grants \$) If this amount includes foreign grants, check here	☐	29a
30			
	(Grants \$) If this amount includes foreign grants, check here	☐	30a
31	Other program services (attach schedule)		
	(Grants \$) If this amount includes foreign grants, check here	☐	31a
32	Total program service expenses (add lines 28a through 31a)		32

[illegible]

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

	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		☒
34 Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes		☒
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 why the organization did not report the income on Form 990-T.		
a Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?		☒
b If "Yes," has it filed a tax return on Form 990-T for this year?		
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N		☒
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?		☒
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 outstanding at the end of the period covered by this return?		☒
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 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I 40b		☒
c Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 40c		
d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization 40d		
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. 41		
42a The organization's books are in care of Robert O. Bacon Telephone no. 602-697-1824 Located at 2514 S. Kachina Cir, Tempe, AZ ZIP + 4 85282		
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. 42b		
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. 42c		
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		☐
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 and section 4947(a)(1) nonexempt charitable trusts only. All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46–49b and complete the tables for lines 50 and 51.

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	46	Yes	No
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	47		✓
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48		✓
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a		✓
b	If "Yes," was the related organization a section 527 organization?	49b		✓
50	Complete this table for the organization's 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."			

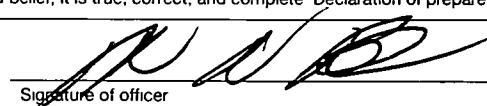
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
None				

f Total number of other employees paid over \$100,000 **0**

51 Complete this table for the organization's 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		

d Total number of other independent contractors each receiving over \$100,000 **0**

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.			
	 Signature of officer		Date 9/13/10	
Paid Preparer's Use Only	Type or print name and title Robert O. Bacon - Secretary/Treasurer		Check if self-employed ☐	Preparer's identifying number (See instructions)
	Preparer's signature			
	Firm's name (or yours if self-employed), address, and ZIP + 4			
May the IRS discuss this return with the preparer shown above? See instructions			☐ Yes ☐ No	

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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	5,470	7,185	6,872	13,550	14,118	47,195
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	18,535	20,993	17,173	0	0	56,701
4 Total. Add lines 1 through 3	24,005	28,178	24,045	13,550	14,118	103,896
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)						0
6 Public support. Subtract line 5 from line 4						103,896

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	24,005	28,178	24,045	13,550	14,118	103,896
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	1,884	2,936	2,373	841	794	8,828
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
11 Total support. Add lines 7 through 10						112,724
12 Gross receipts from related activities, etc. (see instructions)					12	112,888
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 ► ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6 column (f) divided by line 11, column (f))	14	92.17 %
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	92.88 %
16a 33⅓ % support test—2009. If the organization did not check the box on line 13, and line 14 is 33⅓ % or more, check this box and stop here. The organization qualifies as a publicly supported organization ► ☒		
b 33⅓ % support test—2008. If the organization did not check a box on line 13 or 16a, and line 15 is 33⅓ % or more, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐		
17a 10%-facts-and-circumstances test—2009. 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 ► ☐		
b 10%-facts-and-circumstances test—2008. 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 ► ☐		
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 ► ☐		

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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(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 2009 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	%

- 19a 33⅓% support tests—2009.** If the organization did not check the box on line 14, and line 15 is more than 33⅓%, and line 17 is not more than 33⅓%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐
- b 33⅓% support tests—2008.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33⅓%, and line 18 is not more than 33⅓%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐
- 20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV

Supplemental Information. Complete this part to provide the explanations required by Part II, line 10, Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

[illegible]

Arizona Aloha Festivals, Inc.
2514 S. Kachina Circle
Tempe, AZ 85282
E.I.N. 86-0921384

2009 Form 990 EZ
Attachment

Form 990 EZ, Part 1, Line 1
Schedule Of Contributors

	\$ 4,840
	6,000
t	2,348
	930
	<u>\$14,118</u>

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2009 Form 990 EZ
Attachment

Form 990 EZ, Part 1, Line 8
Other Revenue

Sponsorship Fees	\$ 4,800
Vendor Fees	63,540
Advertising Revenue	855
T-Shirt Sales	5,545
Soda, Poi & Water Sales	13,956
Raffle Proceeds	6,315
ATM Fees	1,675
Miscellaneous Revenue	1,290
Total	<u>\$97,976</u>

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2009 Form 990 EZ
Attachment

Form 990 EZ, Part 1, Line 10
Grants and Similar Amounts Paid

Samoa Red Cross Society	\$ 11,589
Apia, Samoa – Tsunami Relief	
Total	<u>\$ 11,589</u>

Arizona Aloha Festivals, Inc.
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Tempe, AZ 85282
E.I.N. 86-0921384

2009 Form 990 EZ
Attachment

Form 990 EZ, Part 1, Line 16
Other Expenses

Booth/Chair/Table Rentals	\$ 19,099
Stage Rental and Supplies Expense	12,245
Sound	6,755
Recognition/Awards/Opening Ceremonies	871
Soda, Poi & Water Expense	5,816
Communication/Security Expense	14,071
Liability Insurance	6,213
Facility Charge	3,855
Volunteer Expenses	2,212
Administrative/Office Expense	3,804
T-Shirt Expense	2,254
Raffle Expense	2,591
Maintenance & Sanitation	7,880
Cultural Activities/Guest Artists	6,183
Miscellaneous Expense	529
Bank & Credit Card Fees	92
Total	<u>\$94,470</u>

Form 990 EZ Part III

Primary Purpose

The primary purpose of this non-profit corporation is to plan and produce a festival that provides an opportunity to educate the general public about the culture and lifestyles of Hawaii and the other islands of Polynesia.

Part III

This year's festival was held at Tempe Beach Park at Tempe Town Lake on the weekend of March 13 and 14, 2010 and was available free to the public. Cultural performances and entertainment was provided during all festival operating hours (10:00 a.m. to 5:00 p.m., both days) on two stages. More than 25 performing groups, representing over 275 individuals, provided their services at no charge to the festival. These performances consisted of music, dance, chants, and other cultural displays that showcased the cultures of the Polynesian islands.

Our Discoveries area provides a more detailed approach to learning about Polynesia through the use of smaller, more intimate lectures, discussions and performances. Through the use of grant and sponsorship funds the 2010 Arizona Aloha Festival was able to bring three artists from Hawaii: Kawika Eskaran, Kimo Hussey, and Chadwick Pang.

Kawika Eskaran is an artist that's been in the "field" for 30 years or more. Kawika works primarily in wood, but is also known for his work in other materials. His works are found in the libraries of U.S. presidents and the collections of other world leaders. Kawika also works on voyaging canoes, and is one of the builders and captains of the voyaging canoe Josepa which belongs to the Hawaiian Studies Department at BYU Hawaii.

Kimo Hussey, co-author of the defining book of Hawaiian ukulele music called He Mele Aloha, is both an accomplished musician and founder of the Pacific Music Foundation, dedicated to preserving ukulele music. According to Kimo, "Years of musical experiences teaching and playing throughout the world have consistently shown me what I most enjoy about music and *ukulele* is being a part of music's creative process. That's the fun part and I have a notion that is the fun part for you as well. The process massages the soul."

Chadwick Pang is currently pursuing his Doctorate in Ethnomusicology at the University of Hawaii at Manoa. He is the Hawaiian Ensemble instructor at the UH Music Department. With training and experience in both western choral and

Hawaiian music traditions, he hopes to teach a holistic approach to music in Hawai'i. In addition, his busy schedule includes performing with the award-winning performing group Manoa Voices.

Our guest artists each made two presentations in our Hale Mana'o (House of Knowledge) program areas covering their specialties. Kavika's on Hawaiian Scultural Carving included many items handed around for participants to handle and examine in detail, all with long tradition in Hawaiian cultural arts. Kimo taught a workshop on ukulele techniques and followed up with encouraging musicians to use Hawaiian ukulele music for soothing outreach to people in nursing homes, programs for at-risk children, and other situations. Chadwick taught the traditions of choral singing and introduced his participants to ukulele techniques in modern interpretations of Hawaiian styling.

Both performing artists held workshops outside the event. Kimo held two workshops for ukulele while they were here for the Festival. Kimo introduced both technique and Hawaiian music to a group of musicians new to the instrument and/or new to Hawaiian-style music. The second drew a varied group of musicians to not only learn new techniques but also jam together in a new-found ukulele 'network' that we hope exists long after this guest artist appearance. Chad hosted a workshop on the synergy between musicians and hula dancers called 'Awaken the Hula'.

Our guest artists were chosen to enrich arts that exist in this community as well as provide exposure to art forms that the mainstream community may not be familiar with. They were all very popular.

In addition to the stage presentations, various games and art activities were provided for children and adults attending the festival. Examples of provided activities were making paper flower leis, learning simple chords on the ukulele, and making mini replicas of a traditional Maori percussion instrument, *poi balls*. All activities are provided free of charge. Three Arizona outrigger canoe clubs displayed and discussed the history and tradition of outrigger canoes. Area clubs and organizations provided displays and networked with each other as well as reached out to the broader community to tell of their culture and activities. Free space was provided to the U.S. Census to assist in outreach to the Asian/Polynesian population and encouraging their participation in the census.

Photo and artifact displays provided opportunities to learn about the native people of Micronesia. Commercial vendors sold various Hawaiian and Polynesian related products and foods. Over 90 vendors participated in this year's Festival.

Attendance at this year's Festival was estimated to be approximately 175,000.

Arizona Aloha Festivals, Inc
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2009 Form 990 EZ
Attachment

Next year's festival is scheduled to be held at Tempe Beach Park at Tempe Town Lake, on the weekend of March 12 and 13, 2011. A grant from the Arizona Commission on the Arts has already been obtained to assist the Festival in meeting its goals and objectives. Unfortunately, the Festival has been notified that, due to budget restrictions, the City of Tempe will be unable to provide assistance for the 2011 event. Additional displays and exhibits are being considered, depending on grant and sponsorship availability.

Direct Expenses for the March 2010 Festival were \$110,063.

Contributions provided by the City of Tempe related entities totaled \$6,000.

Contributions provided by the Arizona Commission on the Arts totaled \$2,348.