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Form **990-EZ**

Department of the Treasury
Internal Revenue Service

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 $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 JULY 1 **, 2009, and ending** JUNE 30, 2010

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 Instruc-tions.

C Name of organization: ROTARY CLUB OF DAVIS-SUNRISE

Number and street (or P O box, if mail is not delivered to street address): PO BOX 4531 — Room/suite:

City or town, state or country, and ZIP + 4: DAVIS, CA 95617

D Employer identification number: 68-0338919

E Telephone number: 530-758-6060

F Group Exemption Number ▶ 0573

- *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) ▶

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

I Website: ▶ www.davisrotary.org

J Tax-exempt status (check only one) - ☒ 501(c) (4) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

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 . . ▶ $ 85,792

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	1,133
	2	Program service revenue including government fees and contracts		2	
	3	Membership dues and assessments		3	59,921
	4	Investment income		4	496
	5a	Gross amount from sale of assets other than inventory	5a		
	5b	Less cost or other basis and sales expenses	5b		
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	0
	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)	6a	24,221	
	6b	Less direct expenses other than fundraising expenses	6b	5,154	
	6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)		6c	19,067
	7a	Gross sales of inventory, less returns and allowances	7a		
	7b	Less cost of goods sold	7b		
	7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	0
	8	Other revenue (describe ▶ FARMERS MKT COIN-DROP)		8	21
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8		9	80,638
Expenses	10	Grants and similar amounts paid (attach schedule)		10	21,626
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	
	13	Professional fees and other payments to independent contractors		13	
	14	Occupancy, rent, utilities, and maintenance		14	2,755
	15	Printing, publications, postage, and shipping		15	364
	16	Other expenses (describe ▶ SEE ATTACHED STATEMENT)		16	57,742
	17	**Total expenses.** Add lines 10 through 16		17	82,487
Net Assets or Fund Balances	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	(1,849)
	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	43,124
	20	Other changes in net assets or fund balances (attach explanation)		20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20		21	41,275

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	37,636	22	49,047
23	Land and buildings		23	
24	Other assets (describe ▶ DUE FROM MBRS, FIXTURES/EQUIP)	10,112	24	5,746
25	**Total assets**	47,748	25	54,793
26	**Total liabilities** (describe ▶ SPECIAL FUNDS, DUE TO AFFILIATES	4,624	26	14,151
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	43,124	27	40,642

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

What is the organization's primary exempt purpose? COMMUNITY, YOUTH, INTERNATIONAL SERVICE

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, and other relevant information for each program title

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

28	SEE ATTACHED STATEMENT (Grants $) If this amount includes foreign grants, check here ▶ ☐	28a	18,796
29	TRANSFERS TO AFFILIATED ROTARY CLUBS AND ROTARY FOUNDATION FOR JOINT PROJECTS AND ORGANIZATIONAL OUTREACH (Grants $) If this amount includes foreign grants, check here ▶ ☐	29a	2,830
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	21,626

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
DUNCAN HAY 39794 MORNING DOVE PL, DAVIS, CA 95616	PRESIDENT PART	-0-	-0-	-0-
WILLIAM PORTELLO 520 - 12th STREET, DAVIS, CA 95616	V-PRES PART	-0-	-0-	-0-
MARK PRATT 410 DRESBACH WAY, DAVIS, CA 95616	SEC'Y PART	-0-	-0-	-0-
THOMAS READ 424 F STREET, DAVIS, CA 95616	TREAS PART	-0-	-0-	-0-

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	33		X
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	34		X
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?	35a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	35b	–	–
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	36		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a			
b	Did the organization file **Form 1120-POL** for this year?	37b		X
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?	38a		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b N/A			
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 ▶ N/A , section 4912 ▶ N/A , section 4955 ▶ N/A			
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		X
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 ▶ -0-			
d	Section 501(c)(3) and 501(c)(4) organizations 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		X
41	List the states with which a copy of this return is filed ▶ CALIFORNIA			
42a	The organization's books are in care of ▶ THOMAS READ Telephone no ▶ 530-758-6060 Located at ▶ 424 F ST, DAVIS, CA ZIP + 4 ▶ 95616			
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)? If "Yes," enter the name of the foreign county ▶ See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of Foreing Bank and Financial Accounts.**	42b		X
c	At any time during the calendar year, did the organization maintain an office outside of the U S ? If "Yes," enter the name of the foreign country ▶	42c		X
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		X
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		X

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. N/A

			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	46		
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

f Total number of other employees paid over $100,000 ▶

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

d Total number of other independent contractors 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

▶ Signature of officer — Date: 11-5-10

▶ THOMAS S READ, 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

PART I, LINE 9 - SPECIAL EVENTS

CLUB SPECIAL EVENTS INCLUDED SPECIAL MEALS, COMMUNITY BARBEQUES, AND SILENT AUCTIONS AT EVENTS

PART I, LINE 13 - PROGRAM SERVICES

SHELTER BOX USA	5,000
HAITI RELIEF	817
DAVIS CHAMBER OF COMMERCE	205
YOLO BASIN FOUNDATION	800
FOOD BANK OF YOLO COUNTY	125
DAVIS ART CENTER	300
TREE DAVIS	1,577
DAVIS SHORT-TERM EMERGENCY ACTION COMMITTEE	2,050
DAVIS BLUE & WHITE FOUNDATION	2,050
ENGINEERS WITHOUT BORDERS-Water Proect-Uganda	1,000
LEON NICARAUGUA Medical Clinic - Opthamologic Laser Equipment (Leon Rotary Club)	933
DAVIS JT UNIFIED SCHOOL DISTRICT-Friendship Day	750
DAVIS JT UNIFIED SCHOOL DISTRICT-Grad Night	539
YOLO COUNTY ROTARY CLUBS - Joint Project at Yolo County Fairgrounds	1,600
UC DAVIS ROTORACT CLUB	700
ROTARY FOUR-WAY TEST SPEECH COMPETITION	350
ROTARY CLUB OF BAKERSFIELD-Water Proj-Baja, Mexico	250
ROTARY CLUB OF DAVIS-Child Abuse Prevention Project	250
ROTARY DISTRICT 5160 - Literacy Project	180
ROTARY FOUNDATION - Economic Development Proj	1,500
ROTARY FOUNDATION - Rotoplast	650
TOTAL	21,626

PART II, LINE 43a - OTHER EXPENSES

CLUB MEETING EXPENSES	34,198
SPEAKER RECOGNITIONS	377
OFFICE/ADMINISTRATION EXPENSES	510
ROTARY INTERNATIONAL/DISTRICT DUES	8,627
ROTARY VISITORS, REGALIA AND AWARDS	129
CONFERENCES/PRESIDENT'S TRAINING	3,592
ADVERTISING/WEBSITE	799
ROTARY YOUTH EXCHANGE & LEADERSHIP PROGRAMS	4,675
DAVIS HIGH SCHOOLS- "STUDENT OF THE MONTH" PROGRAM	4,835
TOTAL	57,742

PART III, a. - PROGRAM STATEMENT

DURING THE CURRENT PERIOD THE ORGANIZATION MADE CASH CONTRIBUTIONS TO LOCAL/INTERNATIONAL ORGANIZATIONS AND PUBLIC SCHOOLS FOR DISASTER RELIEF, YOUTH LEADERSHIP/ACTIVITY PROGRAMS, COMMUNITY DEVELOPMENT/HEALTH, EDUCATION AND WELFARE.