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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 private foundations)

OMB No. 1545-1150

2014**Open to Public Inspection**Department of the Treasury
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-EZ and its instructions is at www.irs.gov/form990.**A** For the 2014 calendar year, or tax year beginning July 1, 2014, and ending June 30, 2015**B** Check if applicable:

- ☐ Address change
☒ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organizationCarlisle Parent Teacher Organization

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

P.O. Box 4

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

Carlisle MA 01741**D** Employer identification number04 6130387**E** Telephone number**F** Group Exemption Number ▶**G** Accounting Method: ☒ Cash ☐ Accrual Other (specify) ▶**I** Website: ▶Carlislemapto.org**J** Tax-exempt status (check only one) — ☒ 501(c)(3) ☐ 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** Form of organization: ☐ Corporation ☐ Trust ☐ Association ☐ Other**L** Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets

(Part II, column (B) below) are \$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)Check if the organization used Schedule O to respond to any question in this Part I ☒

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	<u>2774</u>
	2	Program service revenue including government fees and contracts	2	<u>26294</u>
	3	Membership dues and assessments	3	<u>13186</u>
	4	Investment income	4	<u>18</u>
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less: cost or other basis and sales expenses	5b	
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
	6	Gaming and fundraising events		
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
b	Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b		
c	Less: direct expenses from gaming and fundraising events	6c		
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d		
7a	Gross sales of inventory, less returns and allowances	7a		
b	Less: cost of goods sold	7b		
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		
8	Other revenue (describe in Schedule O)	8		
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	<u>42,272</u>	
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	<u>36165</u>
	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	
	15	Printing, publications, postage, and shipping	15	<u>2372</u>
	16	Other expenses (describe in Schedule O)	16	<u>31050</u>
	17	Total expenses. Add lines 10 through 16	17	<u>69587</u>
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	<u>(27,315)</u>
	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	<u>86,864</u>
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	<u>59,549</u>

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 106421

Form 990-EZ (2014)

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Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V ☐

	Yes	No
33 Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O		X
34 Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)		X
35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?		X
b If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O		
c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III		
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		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?		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 tax year covered by this return?		X
b If "Yes," complete Schedule L, Part II and enter the total amount involved		
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9		
b Gross receipts, included on line 9, for public use of club facilities		
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶		
b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		X
c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶		
d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶		
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		X
41 List the states with which a copy of this return is filed ▶ <u>MA</u>		
42a The organization's books are in care of ▶ <u>Allison Becker</u> Telephone no. ▶ <u>646 318 1500</u> Located at ▶ <u>43 Prospect Street Carlisle MA</u> ZIP + 4 ▶ <u>01741</u>		
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 country: ▶ See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		X
c At any time during the calendar year, did the organization maintain an office outside the U.S.? If "Yes," enter the name of the foreign country: ▶		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		
44a Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		X
b Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		X
c Did the organization receive any payments for indoor tanning services during the year?		X
d If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)		X

- 46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I

	Yes	No
46		☒

Part VI Section 501(c)(3) organizations only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI ☐

- 47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II

	Yes	No
47		☒
48		☒
49a		☒
49b		

- 48 Is the organization 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 a section 527 organization?

- 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 title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
NONE				

- 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."

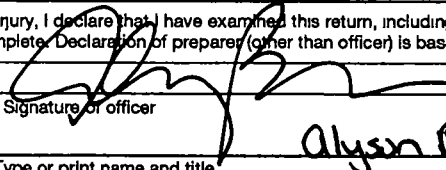
(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation
NONE		

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

- 52 Did the organization complete Schedule A? **Note.** All section 501(c)(3) organizations must attach a completed Schedule A

☒ Yes ☐ No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer 	Date 11.10.15
	Type or print name and title Alyson Becker, Treasurer	

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

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

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2015

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Name of the organization Carlisle Parent Teacher Organization	Employer identification number 04-6136387
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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: (For lines 1 through 11, check only one box.)

- 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 (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 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)(vii).** (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 Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 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 in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
 - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
 - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–9 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
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 or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
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						
4 Total. Add lines 1 through 3						
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)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
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 VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
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 2015 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2014 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test—2015. 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 ☐		
b 33 1/3% support test—2014. 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 ☐		
17a 10%-facts-and-circumstances test—2015. 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 VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐		
b 10%-facts-and-circumstances test—2014. 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 VI 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 or if the organization failed to qualify under Part II.)

If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	2010 (a) 2011	2011 (b) 2012	2012 (c) 2013	2013 (d) 2014	2014 (e) 2015	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	14,403	12,603	16,539	16,396	15,960	75,900
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	77,689	34,343	49,539	78,263	26,312	266,136
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	92,092	46,946	66,078	94,658	42,272	342,076
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.)						342,076

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	2010 (a) 2011	2011 (b) 2012	2012 (c) 2013	2013 (d) 2014	2014 (e) 2015	(f) Total
9 Amounts from line 6	92,092	46,946	66,078	94,658	42,272	342,076
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	302	25	7	13	18	
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	302	25	7	13	18	365
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 VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)	92,394	47,001	66,085	94,671	42,290	342,441
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 2015 (line 8, column (f) divided by line 13, column (f))	15	99.89 %
16 Public support percentage from 2014 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2015 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2014 Schedule A, Part III, line 17	18	%

- 19a **33 1/3% support tests—2015.** 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—2014.** 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 ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 11 on Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked 11a or 11b in Part I, answer (b) and (c) below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

Carlisle Parent Teacher Organization

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a	
b A family member of a person described in (a) above?	11b	
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.	11c	

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1	
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.	2	

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).	1	

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1	
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).	2	
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.	3	

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test. Answer (a) and (b) below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.	2a	
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.	2b	
3 Parent of Supported Organizations. Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.	3a	
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.	3b	

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3	4		
5 Depreciation and depletion	5		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
8 Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8		

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
e Discount claimed for blockage or other factors (explain in detail in Part VI):			
2 Acquisition indebtedness applicable to non-exempt-use assets	2		
3 Subtract line 2 from line 1d	3		
4 Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	4		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6 Multiply line 5 by .035	6		
7 Recoveries of prior-year distributions	7		
8 Minimum Asset Amount (add line 7 to line 6)	8		

Section C - Distributable Amount		Current Year	
1 Adjusted net income for prior year (from Section A, line 8, Column A)	1		
2 Enter 85% of line 1	2		
3 Minimum asset amount for prior year (from Section B, line 8, Column A)	3		
4 Enter greater of line 2 or line 3	4		
5 Income tax imposed in prior year	5		
6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6		

7 ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	
4	Amounts paid to acquire exempt-use assets	
5	Qualified set-aside amounts (prior IRS approval required)	
6	Other distributions (describe in Part VI). See instructions.	
7	Total annual distributions. Add lines 1 through 6.	
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9	Distributable amount for 2015 from Section C, line 6	
10	Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)		(i) Excess Distributions	(ii) Underdistributions Pre-2015	(iii) Distributable Amount for 2015
1	Distributable amount for 2015 from Section C, line 6			
2	Underdistributions, if any, for years prior to 2015 (reasonable cause required-see instructions)			
3	Excess distributions carryover, if any, to 2015:			
a				
b				
c				
d	From 2013			
e	From 2014			
f	Total of lines 3a through e			
g	Applied to underdistributions of prior years			
h	Applied to 2015 distributable amount			
i	Carryover from 2010 not applied (see instructions)			
j	Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4	Distributions for 2015 from Section D, line 7: \$			
a	Applied to underdistributions of prior years			
b	Applied to 2015 distributable amount			
c	Remainder. Subtract lines 4a and 4b from 4.			
5	Remaining underdistributions for years prior to 2015, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).			
6	Remaining underdistributions for 2015. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).			
7	Excess distributions carryover to 2016. Add lines 3j and 4c.			
8	Breakdown of line 7:			
a				
b				
c	Excess from 2013			
d	Excess from 2014			
e	Excess from 2015			

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Area with horizontal dashed lines for supplemental information.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2015

Open to Public
Inspection

Name of the organization

Carlisle Parent Teacher Organization

Employer identification number

04-6130387

Form 990-EZ, Part I, Line 10 - Grants and similar amounts paid

Teacher Grants to Carlisle Public Schools: \$ 23,429

Cultural Curriculum Enrichment Programs:

Plymouth Plantation 1,244

Mass. Audubon's Drumlin Farm 445

Wingmasters 335

Shakespeare and Co. ~~2,700~~
~~1,800~~

Native American Perspectives 588

Razias Ray of Hope 500

Center for Parents + Teachers 2,000

Drumlin Farm (Kindergarten) 535

Young Audiences (assembly) 514

Bay Colony educators 750

Rob Buryea (author) 550

Young Audiences (assembly pt 2) 514

Living Voices (podcast) 2061

12,736

Total Line 10 \$ 36,165

Name of the organization

Carlisle Parent Teacher Organization

Employer identification number

04-6130387

Form 990-EZ Part I, Line 16 Other Expenses

Expense

Kindergarten supplies	315
skating party + events	354
book fair	6862
tax filing fee	35
web hosting / business exp	352
hospitality	247
teacher luncheon / retirement party	884
7 th grade theater production	2565
middle school events / class trip	15436
8 th grade class gift to school	4000

Total, Line 16

\$ 30,050

Form 990-EZ, Part III Primary Exempt purpose

To support the Carlisle Public School System, providing teacher grants, curriculum enrichment programs, educational supplies, travel costs for field trips, and other programs that enhance the school community

BYLAWS
CARLISLE Parent Teacher Organization
(Amended 6/4/2015)

ARTICLE I
NAME AND ORGANIZATION

The name of this organization shall be the Carlisle Parent Teacher Organization (PTO).

The Carlisle PTO shall be non-profit, and shall be organized and operated in accordance with Section 501(c)(3) of the Internal Revenue Code as it applies to organizations carrying out charitable, scientific, literary or educational purposes. The organization shall be noncommercial, non-sectarian, and non-partisan. The name of the organization shall not be used to endorse or promote commercial enterprises or political candidates, nor shall it be used for any purpose not appropriately related to promotion of the objectives of the organization.

ARTICLE II
OBJECTIVES

The objectives of the PTO shall be:

- To work with the Carlisle Public Schools to provide quality education and to help raise the educational standards of the Carlisle Public Schools to their highest possible level
- To act as a liaison between the school, parents and the community, by encouraging communication and an exchange of ideas and information
- To support the school and staff in ways that will benefit the education of its students
- To encourage appropriate parental and community involvement, and to organize events that foster a sense of community
- To organize and sponsor fundraisers, as well as conduct additional means of fundraising, to raise money for PTO-sponsored grants, gifts, donations, and other support towards activities at the Carlisle Public Schools
- These objectives may be promoted through programs, newspaper articles, study committees, grants, cultural enrichment programs, gifts, and other special projects as determined by the Board of Directors

ARTICLE III
MEMBERS

Section 1, Membership Eligibility

Any Carlisle family or individual, with or without children in the Carlisle Public Schools, or members of the school staff, shall be eligible for membership. Membership will commence upon payment of full annual dues, regardless of when paid during the CSA Fiscal Year.

Section 2, Dues

Annual dues are payable at the beginning of each Fiscal Year. Dues shall be recommended by the Board of Directors and voted upon at Annual Meeting by a majority of members voting. Proposed changes in the dues shall be published to the membership prior to the Annual Meeting.

Section 3, Annual Meeting

The Annual Meeting of the members shall be held during the fourth quarter of the PTO Fiscal Year. The time and place shall be determined by the Board of Directors. The purposes of the Annual Meeting are to elect the Board of Directors, if necessary to amend the bylaws and change dues, and to conduct any other business as specified by the President, by the Board of Directors, or by five or more members who are entitled to vote at the meeting.

Section 4, Special Membership Meetings

The frequency and dates of other membership meetings (i.e., meetings of the full membership held in addition to the Annual Meeting) shall be determined by the Board of Directors.

Section 5, Notice of Membership Meetings

A written notice of the place, date and hour of all meetings of the membership stating the purposes of the meeting shall be publicized at least five days prior to the meeting.

Section 6, Quorum

A minimum of fifteen members present at a duly noticed Annual Meeting or Special Membership Meeting shall constitute a quorum.

Section 7, Action at Meetings of the Membership

The action of the membership on any matter properly brought before such meeting, including elections, shall be decided by the majority present and voting, except where a different vote is required by law or these bylaws.

Section 8, General Membership Access to PTO Meetings and Records

As a nonprofit organization, it is PTO's goal to operate in the best interests of the children and families in the Carlisle Public Schools. As such, PTO's Board meetings are open to PTO members. In addition, PTO meeting minutes and financial books and records are open to inspection by members at mutually convenient locations and times.

However, meeting minutes from Special Board Meetings and/or Executive Sessions as authorized in Article IV, Section 6, may be kept confidential as authorized by law.

ARTICLE IV

BOARD OF DIRECTORS

Section 1, Composition

The Board of Directors shall consist of the four elected Officers of PTO and and between three and seven additional elected Directors, the number of which will be determined by the Board of Directors with input from the Nominating Committee. No person shall be elected or shall continue to serve as a member of the Board of Directors unless that person is a voting member of PTO.

Section 2, Election and Term of Office

The Board Directors shall serve a term of one year beginning June 1st, or immediately after adjournment of the Annual Meeting if the Annual Meeting occurs after June 1st. Members of the Board of Directors are to be elected at the Annual Meeting by the general membership. The following election procedures shall be followed. The report of the Nominating Committee of its nominations for the Board shall be publicized prior to the date of the election. The slate

of nominations shall be presented by the Nominating Committee to the membership at Annual Meeting. Further nominations may be made from the floor by any voting member of PTO, provided the consent of the nominee shall have been secured. The election shall be by ballot when there is more than one candidate; when there is but one nominee for any board position, the secretary maybe instructed to cast the ballot for the nominee. A majority vote of the members qualified to vote and voting shall constitute an election. Absentee or proxy voting shall not be permitted.

Section 3, Vacancies

Any vacancy occurring in the Board of Directors may be filled for the remainingunexpired term by a majority vote of the Board of Directors.

Section 4, Duties

The Board of Directors shall manage the business and affairs of the PTO, including establishing a budget and appropriating funds, and establishing Committees and Coordinators to carry out the work of PTO. The Board of Directors shall exercise all powers of the PTO not expressly reserved by the members. The PTO Board shall also have charge of the property and funds belonging to PTO, with full power and authority to manage and appropriate the same.

Section 5, Board Meetings

There shall be at least four meetings of the Board of Directors annually. The President may call additional meetings and shall call a meeting upon the written request of five members of PTO. Meetings of the Board shall be open to all members (unless as limited by Section 6 of this Article).

Section 6, Special Board Meetings and Executive Sessions

In special, limited situations where closed Board meetings are determined to be necessary, the President or three members of the Board of Directors may call a special Board meeting open only to Board members. In addition, parts of regular Board meetings where special situations will be discussed can be held in Executive Session and closed to the general membership. Criteria for closed meetings include matters involving potential litigation, sensitive personnel matters, tactical negotiation sessions, and other matters deemed too sensitive to be discussed in an open meeting. Minutes are required to be maintained of these closed meetings and maintained by PTO in non-public files.

Section 7, Notice of Meetings

Board of Directors shall receive notification of time, location and purpose of regular Board meetings at least two days prior to the meeting and at least 24 hours prior to special Board meetings.

Section 8, Quorum and Action at Meetings

A majority of the members of the Board of Directors shall constitute a quorum and a majority of the Board members in attendance at any Board meeting shall, in the presence of a quorum, decide its action.

ARTICLE V

OFFICERS

Section 1, Enumeration

The Officers in order of rank are President, Executive Vice President, Treasurer and Secretary. No person shall be elected or shall continue to serve as an Officer unless that person is a voting member of PTO.

Section 2, Duties of the President

The President shall preside at all meetings of PTO and of the Board of Directors, shall be a member ex-officio of all committees except the Nominating Committee, and shall perform all other duties usually pertaining to the office. In the absence or disability of the Treasurer, the President shall sign or endorse checks, drafts, and notes.

Section 3, Duties of the Executive Vice-President

The Executive Vice-President shall act as aide to the President and perform the duties of the President in his/her absence. Generally, the Executive Vice-President succeeds to the Office of the President in the following Fiscal Year, provided that the nominee is successfully voted in by the membership in accordance with the procedures for nominating and voting for Board members as identified in Article IV, Section 2.

Section 4, Duties of the Treasurer

The Treasurer shall receive all monies of PTO, shall keep an accurate record of receipts and expenditures and shall disperse funds only in such manner as authorized by the Board. The Treasurer shall present a statement of account at every Board meeting, at Annual Meeting and at other times when requested by the Board.

Section 5, Duties of the Secretary

The Secretary shall keep a record of all the meetings of PTO and of the Board of Directors, act as custodian of records and other materials of PTO, maintain a current membership list, and notify members of membership meeting dates.

ARTICLE VI

COMMITTEES AND COORDINATORS

Section 1, Committee Purposes and Establishment

The Board of Directors shall appoint Committee Chairs or activity Coordinators as deemed necessary to carry out the work of the PTO. When a Committee or Coordinator is identified as needed in advance of an Annual Meeting, the Nominating Committee shall make recommendations to the Board for the positions of Committee Chairs or Coordinators, with votes on the positions taken at the Annual Meeting. Votes for Committee Chairs and Coordinators can be taken as a single slate vote. When the need for a Committee or Coordinator arises during the Fiscal Year and outside of the normal CSA voting cycle, the Board may appoint, based on a majority vote of the Board, a Committee Chair or Coordinator mid-year. Committee Chairs and Coordinators serve for the Fiscal Year for which they are elected or appointed.

Section 2, Committee Membership or Coordinator Teams

Committee Chairs may establish Committee membership based on available volunteers, whether obtained through recruitment, volunteers, or otherwise. Coordinators may establish teams to conduct their activities, also through recruitment, volunteers, or otherwise.

Section 3, Committee Meetings

The meetings of Committees and Coordinators shall be at the call of the Committee Chair or Coordinator. Committee Chairs and Coordinators must report on the status of Committee and other activities to the Board on an ongoing basis.

Section 4, Authority

No Committee or Coordinator has the authority to make any commitments on behalf of PTO unless specifically authorized by the Board of Directors. Committee Chairs and Coordinators are authorized to obligate up to \$250 of PTO funds provided that the obligations are in accordance with the Committee or Coordinator's charter or charge. Expenditures above \$250 require discussion with the Treasurer or Board of Directors prior to being authorized, unless specifically authorized in advance. Any Committee or Coordinator expenditures are subject to the availability of funds to pay for the activity.

ARTICLE VII

NOMINATING COMMITTEE

Section 1, Enumeration and Term of Office

The Nominating Committee shall serve a one-year term and consist of at least five members. Two members, who shall not be members of the Board of Directors, shall be elected by the membership at Annual Meeting. One member shall be the Executive Vice-President. One member shall be appointed by the Board of Directors and shall be a member of the Board. One member shall be the Immediate Past President of PTO. Additional members may be appointed by the Board of Directors as they see fit.

Section 2, Vacancies

Vacancies occurring in the Nominating Committee shall be filled by the Board of Directors.

Section 3, Duties

The duties of the Nominating Committee are to present to the members at Annual Meeting a slate of nominations for Officers and Board of Directors, and to recommend Committee Chairs and Coordinators that are identified in advance of the Annual Meeting.

ARTICLE VIII

FISCAL YEAR

The fiscal year of Carlisle PTO shall in each year begin on July 1 and end on June 30.

ARTICLE IX

PARLIAMENTARY AUTHORITY

The rules contained in *Roberts Rules of Order Newly Revised* shall govern Carlisle PTO in all cases to which they are applicable and in which they are not inconsistent with these bylaws.

ARTICLE X

DISSOLUTION OF Carlisle PTO

In the event of dissolution of Carlisle PTO the assets of the organization remaining after paying or adequately providing for the debts and obligations of the organization shall be distributed for one or more of the exempt purposes specified in Section 501(c)(3) of the Internal Revenue Code of 1954 as from time to time amended.

ARTICLE XI

AMENDMENTS

These bylaws may be amended by a two-thirds vote of the voting members present at Annual Meeting, provided the amendments are published and made available to the membership in advance of the meeting.

Amended 5/6/86

ARTICLE XII

INDEMNIFICATION

Carlisle PTO and any person who is or was a party or has been threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative by reason of the fact that he or she is or was serving on the Board of Directors or a Committee or as a Coordinator of Carlisle PTO, or as Carlisle PTO staff, shall be indemnified by Carlisle PTO against expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonable incurred by him or her in connection with such acts, suit or proceeding if he or she acted in good faith and in a manner reasonably believed to be in, or not opposed to, the best interests of Carlisle PTO.

ARTICLE XIII

Carlisle PTO OBLIGATIONS

Carlisle PTO shall hold the Carlisle Public Schools harmless and free from responsibility for any financial obligations of Carlisle PTO.

ARTICLE XIV

OPERATING PROCEDURES

The Board of Directors may develop mission statements and/or procedural guidelines, which may be revised from time to time and include matters such as frequency of meetings, reports, budgets and other items deemed relevant.

ARTICLE XV

SEVERABILITY

In the event that any of the provisions, or portions thereof, of these Bylaws are held to be unenforceable or invalid by any court or administrative body, the validity and enforceability of the remaining provisions or portions thereof shall not be affected thereby.