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)

▶ 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.

OMB No. 1545-1150

2016

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2016 calendar year, or tax year beginning July 1 , 2016, and ending June 30 , 20 17

B Check if applicable.
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
Bloomington Normal Sunrise Rotary

Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
PO Box 5905

City or town, state or province, country, and ZIP or foreign postal code
Bloomington, IL 61702-5905

D Employer identification number
37-1257553

E Telephone number
309-664-4500

F Group Exemption Number ▶ 0573

G Accounting Method: ☐ Cash ☑ Accrual Other (specify) ▶

I Website: ▶ www.bnsunriserotary.org

J Tax-exempt status (check only one) – ☐ 501(c)(3) ☑ 501(c) (4) ◀ (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 ▶ $ $130,039

SCANNED DEC 05 2017

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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	0
	2	Program service revenue including government fees and contracts		2	0
	3	Membership dues and assessments		3	76,528
	4	Investment income		4	236
	5a	Gross amount from sale of assets other than inventory	5a 0		
	b	Less: cost or other basis and sales expenses	5b 0		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	0
	6	Gaming and fundraising events			
	a	Gross income from gaming (attach Schedule G if greater than $15,000)	6a 0		
	b	Gross income from fundraising events (not including $ 0 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 44,564		
	c	Less: direct expenses from gaming and fundraising events	6c 31,686		
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		6d	12,878
	7a	Gross sales of inventory, less returns and allowances	7a 0		
	b	Less: cost of goods sold	7b 0		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	0
	8	Other revenue (describe in Schedule O)		8	8,711
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶		9	98,353
Expenses	10	Grants and similar amounts paid (list in Schedule O)		10	20,811
	11	Benefits paid to or for members		11	0
	12	Salaries, other compensation, and employee benefits		12	0
	13	Professional fees and other payments to independent contractors		13	0
	14	Occupancy, rent, utilities, and maintenance		14	0
	15	Printing, publications, postage, and shipping		15	0
	16	Other expenses (describe in Schedule O)		16	77,325
	17	**Total expenses.** Add lines 10 through 16 ▶		17	98,136
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	215
	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	45,873
	20	Other changes in net assets or fund balances (explain in Schedule O)		20	-1,100
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ▶		21	44,988

10

Part II Balance Sheets (see the instructions for Part II)
Check if the organization used Schedule O to respond to any question in this Part II . . . . . ☐

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	48,823	22	49,358
23	Land and buildings	0	23	
24	Other assets (describe in Schedule O)	8,480	24	2,413
25	**Total assets**	57,303	25	51,771
26	**Total liabilities** (describe in Schedule O)	11,430	26	6,783
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	45,873	27	44,988

Part III Statement of Program Service Accomplishments (see the instructions for Part III)
Check if the organization used Schedule O to respond to any question in this Part III . . ☐

What is the organization's primary exempt purpose? **Civic Service**

Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

28 Scholarships to Heartland Community College for 2 students - 2 semesters each.

(Grants $ 8,000) If this amount includes foreign grants, check here . . . . ▶ ☐ 28a

29 Youth Program - Friends Forever - to sponsor foreign youth to build friendships - through trip to US

(Grants $ 2,000) If this amount includes foreign grants, check here . . . . ▶ ☐ 29a

30 Project to support Boys and Girls Club -

(Grants $ 2,000) If this amount includes foreign grants, check here . . . . ▶ ☐ 30a

31 Other program services (describe in Schedule O)

(Grants $ 8,811) If this amount includes foreign grants, check here . . . . ▶ ☐ 31a

32 **Total program service expenses** (add lines 28a through 31a) . . . . . ▶ 32

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated—see the instructions for Part IV)
Check if the organization used Schedule O to respond to any question in this Part IV . . . . . ☐

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
John Pratt President	5	0	0	0
David Selzer President Elect	5	0	0	0
Carla Rudicil Secretary	5	0	0	0
Kim Larson Treasurer	5	0	0	0
Cat Woods President Elect - nominee - Director	5	0	0	0
Julie Payne Past President - Director	5	0	0	0
Jim Waldorf Sergeant at Arms - Director	5	0	0	0
Greg Cook Director	5	0	0	0
Peggy Hardy Director	5	0	0	0
Miles Bardell Director	5	0	0	0
Perry Rock Director	5	0	0	0
Doug Schwalm Director	5	0	0	0

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	33		✓
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)	34		✓
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)?	35a		✓
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*	35b		
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	35c		✓
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		✓
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a 0			
b	Did the organization file **Form 1120-POL** for this year?	37b		✓
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a		✓
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b			
39	Section 501(c)(7) organizations. Enter:			
a	Initiation fees and capital contributions included on line 9 39a			
b	Gross receipts, included on line 9, for public use of club facilities 39b			
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; 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	40b		✓
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 ▶ 0			
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) 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		✓
41	List the states with which a copy of this return is filed ▶ **Illinois**			
42a	The organization's books are in care of ▶ **Kim Larson** Telephone no. ▶ **309-664-4500**			
	Located at ▶ **56 Country Club Place, Bloomington, IL** ZIP + 4 ▶ **61701-3402**			
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).	42b		✓
c	At any time during the calendar year, did the organization maintain an office outside the United States? 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			
			Yes	No
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a		✓
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	44b		✓
c	Did the organization receive any payments for indoor tanning services during the year?	44c		✓
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*	44d		
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		✓
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)	45b		✓

			Yes	No
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	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 ☐

			Yes	No
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	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 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

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

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 11/8/17
	▶ **Kim Larson - Treasurer** Type or print name and title	

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 O (Form 990 or 990-EZ)	**Supplemental Information to Form 990 or 990-EZ**	OMB No. 1545-0047
Department of the Treasury Internal Revenue Service	**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. ▶ Go to *www.irs.gov/Form990* for the latest information.	2017 Open to Public Inspection

Name of the organization	Employer identification number
Bloomington Normal Sunrise Rotary	37-1257553

Part 1 Line 10: Grants and similar amounts Paid:

Heartland Community College Scholarhips	$8,000	Reported on Part III
Educational Ambassador - Grant to High School projects	$1,000	
Friends Forever - 2016	$2,000	Reported on Part III
Coats for Kids	$ 831	
Heartland Community College - tree and bench on quad	$1,000	
Boys and Girls club Project	$2,000	Reported on Part III
Micro-Loan - through Kiva -	$1,000	
Rotary International Youth Exchange	$1,350	
Mclean County Unit 5 Schools Literacy project	$ 600	
Western Avenue Community Center - Books after School	$ 500	
International Project - Oktoberfest Road Race proceeds	$1,500	
Rotary Youth Leadership	$ 930	
Rose Parade Contribution	$100	
TOTAL	$20,811	

Part 1 Line 16: Other Expenses:

Meal Expense - weekly breakfast	$48,290
Conferences - Rotary training, district, national , international	$ 3,465
Rotary International and Rotary District Dues	$14,668
Rotary - International and BNSR Foundations	$ 4,523
Bank Fees - tax filing fees - IT expenses	$ 2,707
Supplies, badges, banners, etc.	$3,672
TOTAL	$77,325

Name of the organization | Employer identification number

Part 1 Line 24: Other Assets

Dues Receivable	$2,265
Prepaid - Pay Pal dues	$ 88
T-shirts for sale to new members	$ 60
TOTAL	$2,413

Part 1 Line 26: Total Liabilities

Payable to Back to School Alliance	$ 447
Member's Prepaid Dues	$ 2,050
Project - Deferred contributions B+B	$ 3,941
Payable to Sunrise Foundation - happy $	$ 345
TOTAL	$6,783

Part 1 Line 8 - Other Revenue

50/50 Drawing	$5,344
Guest Breakfast payments	$1,570
Club events	$1,297
Miscellaneous	$ 500
TOTAL	$8,711

Part 1 Line 20: Other Changes in net assets or fund balances

Prior period dues receivable invoice deleted - not written off	$900
Prior period receivable for placemat advertising - invoice deleted not written off	$200
TOTAL	$1,100