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Form 990-EZ

Return of Organization Exempt From Income Tax

OMB No 1545-1150

2016

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

A For the 2016 calendar year, or tax year beginning 07-01-2016, and ending 06-30-2017

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C Name of organization

OSKALOOSA ROTARY CHAPTER OF ROTARY INTERNATIONAL

D Employer identification number

42-6081201

E Telephone number

(641) 672-2523

F Group Exemption Number

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: ▶ N/A

J Tax-exempt status (check only one) - ☐ 501(c)(3) ☒ 501(c)(4) (insert no) ☐ 4947(a)(1) or ☐ 527

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 ▶ \$ 77,938

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	1,981		
	2	Program service revenue including government fees and contracts				2	32,785		
	3	Membership dues and assessments				3	28,252		
	4	Investment income				4	15		
	5a	Gross amount from sale of assets other than inventory		5a			5c		
	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				6d			
	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	14,568	
c	Less direct expenses from gaming and fundraising events		6c	7,154					
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)				6d	7,414			
7a	Gross sales of inventory, less returns and allowances		7a			7c			
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	337			
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶				9	70,784			
Expenses	10	Grants and similar amounts paid (list in Schedule O)				10	41,584		
	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	1,385		
	14	Occupancy, rent, utilities, and maintenance				14			
	15	Printing, publications, postage, and shipping				15	145		
	16	Other expenses (describe in Schedule O)				16	18,008		
17	Total expenses. Add lines 10 through 16 ▶				17	61,122			
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)				18	9,662		
	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	35,067		
	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	44,729		

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	34,732	22	44,344
23 Land and buildings		23	
24 Other assets (describe in Schedule O)	535	24	535
25 Total assets	35,267	25	44,879
26 Total liabilities (describe in Schedule O).	200	26	150
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	35,067	27	44,729

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?
"SERVICE ABOVE SELF" - TO PROVIDE GRANTS AND SCHOLARSHIPS TO CAUSES WE BELIEVE MAY BENEFIT FROM OUR SERVICE
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

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

28 See Additional Data Table		
(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 (describe in Schedule O) (Grants \$) If this amount includes foreign grants, check here ☐	31a	
32 Total program service expenses (add lines 28a through 31a) 32		58,927

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
AMY MEYER PRESIDENT	1 00	0		
WYNDELL CAMPELL VICE PRESIDE	1 00	0		
ROBERT ELGIN SECRETARY	1 00	0		
EDWARD KINKADE TREASURER	1 00	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	No
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	No
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	No
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	No
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	No
37a Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a	37a	
b Did the organization file Form 1120-POL for this year?	37b	No
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	No
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	No
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	40e	No
41 List the states with which a copy of this return is filed ▶		
42a The organization's books are in care of ▶ ED KINKADE Telephone no ▶ (641) 672-2344 Located at ▶ 1712 PELLA AVE OSKALOOSA, IA ZIP + 4 ▶ 52577		
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	No
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)		
c At any time during the calendar year, did the organization maintain an office outside the U S ?	42c	No
If "Yes," enter the name of the foreign country ▶		
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43		
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	No
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	No
c Did the organization receive any payments for indoor tanning services during the year?	44c	No
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	No
45b 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	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

Yes

No

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

47

Yes

No

48

Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

48

Yes

No

49a

Did the organization make any transfers to an exempt non-charitable related organization?

49a

Yes

No

b

If "Yes," was the related organization a section 527 organization?

49b

Yes

No

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

EDWARD KINKADE, TREASURER
Type or print name and title

2017-10-25
Date

Paid Preparer Use Only

Print/Type preparer's name DARCEE M AYERS CPA	Preparer's signature	Date 2017-10-25	Check ☐ if self-employed	PTIN P00498801
Firm's name ▶ TD&T CPAS AND ADVISORS PC			Firm's EIN ▶ 42-1029744	
Firm's address ▶ 317 HIGH AVE E OSKALOOSA, IA 525772823			Phone no. (641) 672-2523	

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

Additional Data

Software ID:
Software Version:
EIN: 42-6081201
Name: OSKALOOSA ROTARY CHAPTER OF
ROTARY INTERNATIONAL

Form 990EZ, Part III - Statement of Program Service Accomplishments

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.		Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)
28 CHRISTMAS BASKETS OF FOOD GIVEN TO LOW INCOME FAMILIES IN THE AREA 510 BASKETS WERE DELIVERED TO FAMILIES IN DECEMBER OF 2016 (Grants \$ 24,831) If this amount includes foreign grants, check here . . . ☐		28a 24,831

Form 990EZ, Part III - Statement of Program Service Accomplishments

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.	Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)	
29 SCHOLARSHIPS GIVEN TO CHILDREN FOR SCHOOL EXPENSES (Grants \$ 1,000) If this amount includes foreign grants, check here . . . ☐	29a	1,000

Form 990EZ, Part III - Statement of Program Service Accomplishments	
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.	Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)
30 IMPROVEMENTS TO THE PIONEER CEMETARY (Grants \$) If this amount includes foreign grants, check here . . . ☐	30a

Form 990EZ, Part III - Statement of Program Service Accomplishments	
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.	Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)
WEEKLY MEETINGS TO EDUCATE MEMBERS WITH PROGRAMS ABOUT THE COMMUNITY AND ROTARY INTERNATIONAL (Grants \$ 9,904)	33,096
If this amount includes foreign grants, check here . . . ☐	

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Name of the organization
OSKALOOSA ROTARY CHAPTER OF
ROTARY INTERNATIONAL

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

2016

**Open to Public
Inspection**

Employer identification number

42-6081201

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990-EZ, PART I, LINE 8	MISC 337 TOTAL 337

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART I, LINE 10	ROTARY INTERNATIONAL 4,199 ROTARY DISTRICT 1,650

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART I, LINE 10	NONE FAMILIES AT CHRISTMA 12/23/2016 FOOD BASKETS 0 24,831 24,831 COST COST

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART I, LINE 16	EXPENSES OFFICE EXP 259 INFORMATION TECH 551 MEALS FOR MEMBERS 15,893 TRAINING 669 DUES 255 BAD DEBT WRITE OFF 381 TOTAL 18,008

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART II, LINE 24	MISCELLANEOUS 535 535 TOTAL 535 535

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART II, LINE 26	ACCOUNTS PAYABLE AND ACCRUED EXPENSES 200 150

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART III	"SERVICE ABOVE SELF" - TO PROVIDE GRANTS AND SCHOLARSHIPS TO CAUSES WE BELIEVE MAY BENEFIT FROM OUR SERVICE

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART III, LINE 31	WEEKLY MEETINGS TO EDUCATE MEMBERS WITH PROGRAMS ABOUT THE COMMUNITY AND ROTARY INTERNATIONAL