VILLAGE OF LOMBARD
LOCAL TOURISM GRANT PROGRAM APPLICATION FORM

GENERAL INFORMATION

Organization:	Lombard Historical Society		
Name of event:	Lilac Time Advertising		
Date of event:	March-May 2014	Event location:	Lilacia Park, Victorian Cottage, and Sheldon Peck Homestead
Contact person:	Alison Costanzo	Title:	Victorian Cottage Coordinator
Business address:	23 W. Maple Street	City & Zip	Lombard, 60148
Telephone:	630-629-1885	Email:	alisoncostanzo@att.net

PROJECT OVERVIEW

Total cost of the project:	$ 1250
Cost of city services requested in this application (if any):	$ 0
Total funding requested in this application:	$ 650-$937.50
Percent of total project cost being requested:	50-75%
Anticipated attendance:	500
Anticipated number of overnight hotel stays:	15

Briefly describe the project for which are funds are being requested:

We would like to advertise our Lilac Time Heritage Tours of Lilacia Park, the 175th birthday of the Sheldon Peck Homestead, and the Victorian Cottage in Horticulture Magazine's print version, its e-newsletter and e-blast. The advertisement campaign would focus on Lombard's historic treasures and how people could make Lombard a weekend destination.

ORGANIZATION

Number of years that the organization has been in existence:	43
Number of years that the project or event has been in existence:	83
Number of years the project has been supported by Village of Lombard funds:	0
How many years does the organization anticipate it will request grant funding?	1

1) Describe the organization (include brief history, mission, and ability to carry out this project):

Founded in 1970, the Lombard Historical Society is a 501(c)(3) not-for-profit organization. The mission of the Society is to collect, preserve, interpret, and promote the history or Lombard, and to advocate for our community's heritage. We operate two historic house museums and maintain an archive and artifact collection for research and interpretation. The LHS is governed by the Board of Management and operated by one full-time director, three part-time employees, and dozens of regular volunteers and docents.

2) Please describe the goals and objectives of the organization and how they are supported by this program:

As the stewards of Lombard's heritage, we will make the past meaningful in order to impact our community's present and future. Lilac Time is the celebration of why we are the Lilac Village and many come just to see the lilacs. Our focus during Lilac Time is to acknowledge the rich history of Lilacia Park by providing heritage tours which highlight the history of Col. Plum, how lilacs came to Lombard, and the horticulture of Lilacia Park.

3) What is the organization's plan to make the project self-sustaining?

This is the first time we would be advertising on such a large scale and would need to evaluate the outcome.

PROJECT DESCRIPTION

Have you requested grant funding in the past?	☐ Yes x No
Is the event open to the general public?	x Yes ☐ No
Do you intend to apply for a liquor license for this project?	☐ Yes x No
Will any revenues from this event be returned to the community?	☐ Yes x No

1) Provide the details regarding the event or project including a full description of the project and the anticipated timeline.

Horticulture Magazine has 84,000 subscribers and 70,000 electronic subscribers most of whom live in the Midwest. The advertisement is a 1/6 vertical in the March/April issue. It would focus on Lombard's historic treasures: Lilacia Park, our heritage tours, the 175th birthday of the Sheldon Peck Homestead, and the Victorian Cottage. The advertisement would include a link to direct people to a page on our web site that would highlight the tours, museums, activities, where to stay, Metra, and how people can make this a weekend excursion. As part of the advertisement campaign we would also have an advertorial in Horticulture Magazine's March e-newsletter which would be hot-linked to our web site, and in April the magazine would send out a dedicated e-blast.

2) If your application is accepted, how will the tourism grant funds be used?

The Lombard Historical Society's advertising budget for the year is very limited and the funds from this grant would allow us to advertise on a large scale with Horticulture Magazine.

3) What modifications to the event or other steps will be taken to increase event attendance over previous years (not applicable to first time events)?

During Lilac Time the Lombard Historical Society does very limited advertising in the Daily Herald and the Lombardian and in the Lombard Park District Lilac Time booklet. By advertising in a magazine that serves 154,000 we should have an increase in attendance of tours of Lilacia Park, the Sheldon Peck Homestead, the Carriage House and the Victorian Cottage.

4) **LOCATION**

Provide the location of the event or project. If a location has not been secured, list the venue(s) being proposed or considered.

Lilacia Park, Sheldon Peck Homestead, Victorian Cottage and Carriage House.

MILESTONES AND TIMETABLES

Describe the milestones that will mark the progress towards implementing the project and provide a timetable for the completion of each milestone.

January 7, 2014- Advertisement due to Horticulture Magazine. February, 2014- Lilac Time page created Lombard Historical Society web site. February 18, 2014- Horticulture Magazine in homes (84,000 subscribers). Early March- Advertorial e-newsletter sent (70,000 subscribers). Early April- Dedicated e-blast sent (70,000 subscribers).

IMPACT

1) Please describe how the event or program will promote overnight stays and/or tourism within the Village of Lombard.

In past years during Lilac Time the Lombard Historical Society has had out of town visitors book rooms and while here they have gone on Heritage Tours of Lilacia Park as well as visited our sites. By advertising on a larger scale throughout the Midwest that Lombard is a place for a weekend excursion there should be more people travelling to Lombard from out of town.

2) Please describe the economic benefit to local businesses and the Lombard community. How will your event draw more people from outside the local market (50 miles or more) or attract a new visitor audience?

Horticulture Magazine has 154,000 subscribers living throughout the entire Midwest. As the magazine is written for gardeners, some who haven't heard of Lombard and our lilacs should be interested to visit.

3) Who is the target audience for your event or project? What is your anticipated attendance?

1) Out of towners 2) Gardeners 3) Those who are interested in history 4) Families

4) Please describe any collaborative arrangements developed with other organizations to fund or otherwise implement the project (include in-kind donations).

Horticulture Magazine is giving us a reduced price to advertise in their magazine. Usual Prices: 1/6 Vertical Advertisement- $1,193 Advertorial e-newsletter-$400 Dedicated e-blast- $500 Our Total Discounted Price: $1000

5) Please describe your marketing plan. Detail the strategies your organization will use to promote the event or project (e.g., advertising, public relations, marketing, print materials, promotional pieces).

Not only will we be advertising in Horticulture Magazine, we will also be promoting our heritage tours/Lilac Time in the Lombardian, Suburban Life, DVCB, Lombard Park District Lilac Time booklet, our quarterly newsletter, Oaklees, Lombard Chamber of Commerce, Trib Local, and social media.

FINANCES

- ☐ Please include a detailed itemized budget for your entire event on the attached budget form (2 years of past actuals and estimates for upcoming event).
- ☐ Attach a copy of the most recently completed agency audit and Federal Form 990. If these documents are not available, please explain why they are not available.

CHECKLIST

- ☐ Completed Local Tourism Grant Program Application Form.
- ☐ Completed detailed budget form.
- ☐ Promotional materials from past events (not applicable to first time events).
- ☐ Post event summary from past event (not applicable to first time events).
- ☐ Copy of the most recently completed agency audit or explanation of why it is not available.
- ☐ Copy of the most recent Federal Form 990 for the agency or explanation of why it is not available.

Additional Notes, Comments or Explanations:

We are asking for more the 50% of the total cost to advertise in Horticulture Magazine because this advertisement will benefit Lombard and all Lilac Time- not just the Lombard Historical Society.

CERTIFICATION

The undersigned certifies that to the best of his or her knowledge and belief that data in this application are true and correct, the application has been duly authorized by the organization and any funds received under this grant will be used for the purposes described in this application.

Name:	Alison Costanzo		
Title or office held:		Date:	12/11/13

Signature: Alison Costanzo

LOCAL TOURISM GRANT PROGRAM
DETAILED BUDGET

Event: Lilac Time Advertising Date: 12/15/2013

Organization: Lombard Historical Society

INCOME: Include an itemized list of all actual (past 2 years) and estimated project revenues (entry fees, gate receipts, food/beverage sales, donations, sponsorships, booth rentals, souvenir sales, other revenues)

ITEMIZED REVENUES	ACTUAL 2012	ACTUAL 2013	ANTICIPATED
Lombard Tourism Grant	$0	$0	$
Heritage Tour	$289	$506	
Emporium Sales	$341	$642	
Total Income	**$**	**$1148**	**$**

EXPENSES: Include an itemized list of all actual and estimated project expenses (advertising, supplies, labor, rentals, insurance, materials, entertainment, other expenses)

ITEMIZED EXPENSES	ACTUAL 2012	ACTUAL 2013	ANTICIPATED
Ads for Lilac Time	$420	$400	$400
Horticulture Magazine Ad			$1000
Ellingsen Design			$250
Total Expenses	**$400**	**$400**	**$1650**

IN-KIND CONTRIBUTIONS: Include an itemized list of all actual and estimated in-kind contributions. In-kind contributions are non-cash donations, contributions or gifts which can be given a cash value (include Village of Lombard in-kind services, where applicable)

	ACTUAL ____	ACTUAL ____	ANTICIPATED
Estimated value of in-kind contributions (explain)	$	$	

VILLAGE OF LOMBARD
LOCAL TOURISM GRANT – POST EVENT SUMMARY

This post event summary must be completed within 90 days of the event completion. Failure to submit a post-event summary may affect the applicant's ability to receive future grant funds.

GENERAL INFORMATION

Organization:		Name of event:	
Date of event:		Event location:	
Contact person:		Title:	
Business address:		City & Zip:	
Telephone:		E-mail address:	
Estimated attendance:		Estimated hotel stays:	
Method for estimating attendance:			

1) Please summarize the advertising and marketing placed to promote the event. Please attach examples of event marketing pieces and advertisements.

Click here to enter text.

2) Provide a general assessment of the event. What were the successes of the event? Are there any concerns or recommendations of changes for future events?

Click here to enter text.

3) How did the actual outcomes of the program or event compare to your original expectations?

Click here to enter text.

Describe your organization's long term plans for funding this project or event.

SUBMISSION INSTRUCTIONS
Please submit completed form and associated application documents on or before **December 15, 2013** to Nicole Aranas, Assistant Village Manger, by e-mailing aranasn@villageoflombard.org or by using the submit button below.

Submit

*Please note that the applicant must save the completed form and have Microsoft Outlook to use the submit button above.

If you do not receive a confirmation receipt of your completed application, please contact Nicole Aranas at 630-620-3085 or aranasn@villageoflombard.org to confirm.

COPY

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, organizations that operate one or more hospital facilities and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions). All other organizations with gross receipts less than $200,000 and total assets less than $500,000 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

2012

Open to Public Inspection

A For the 2012 calendar year, or tax year beginning Jun 1, 2012, and ending Dec 31, 2012

B Check if applicable:
- [ ] Address change
- [ ] Name change
- [ ] Initial return
- [ ] Terminated
- [ ] Amended return
- [ ] Application pending

C Name of organization: Lombard Historical Society
Number and street (or P.O. box, if mail is not delivered to street address): 23 West Maple Street — Room/suite:
City or town, state or country, and ZIP + 4: Lombard IL 60148

D Employer identification number: 23-7114585
E Telephone number: (630) 629-1885
F Group Exemption Number ►

G Accounting Method: [X] Cash [ ] Accrual Other (specify) ►
H Check ► [X] if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).
I Website: ► LOMBARDHISTORY@ATT.NET
J Tax-exempt status (check only one) — [X] 501(c)(3) [ ] 501(c) ( ) ◄(insert no.) [ ] 4947(a)(1) or [ ] 527

K Check ► [ ] if the organization is not a section 509(a)(3) supporting organization or a section 527 organization and its gross receipts are normally not more than $50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions). But if the organization chooses to file a return, be sure to file a complete return.

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, line 25, column (B) below) are $500,000 or more, file Form 990 instead of Form 990-EZ ► $ 118,821.

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 [X]

REVENUE	1	Contributions, gifts, grants, and similar amounts received			1	116,039.
	2	Program service revenue including government fees and contracts			2	
	3	Membership dues and assessments			3	1,832.
	4	Investment income			4	950.
	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	118,821.
EXPENSES	10	Grants and similar amounts paid (list in Schedule O)			10	
	11	Benefits paid to or for members			11	
	12	Salaries, other compensation, and employee benefits			12	46,836.
	13	Professional fees and other payments to independent contractors			13	3,191.
	14	Occupancy, rent, utilities, and maintenance			14	9,603.
	15	Printing, publications, postage, and shipping			15	1,187.
	16	Other expenses (describe in Schedule O) See Form 990-EZ, Part I, Line 16 Other Expenses			16	30,627.
	17	**Total expenses.** Add lines 10 through 16 ►			17	91,444.
NET ASSETS	18	Excess or (deficit) for the year (Subtract line 17 from line 9)			18	27,377.
	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	159,892.
	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	187,269.

BAA For Paperwork Reduction Act Notice, see the separate instructions. Form 990-EZ (2012)

TEEA0812 03/14/13

ıctions for Part II.)

ɹle O to respond to any question in this Part II ☐

	(A) Beginning of year		(B) End of year
	159,892.	22	187,269.
	0.	23	0.
	0.	24	0.
	159,892.	25	187,269.
	0.	26	0.
lumn (B) **must** agree with line 21)	159,892.	27	187,269.

ɔmplishments (see the instrs for Part III.)

edule O to respond to any question in this Part III ☐

torical Education and Preservation

omplishments for each of its three largest program services, as manner, describe the services provided, the number of persons ıch program title.

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

		Expenses
ːe museum locations		
ʂ amount includes foreign grants, check here ► ☐	28a	91,445.
ʂ amount includes foreign grants, check here ► ☐	29a	
ʂ amount includes foreign grants, check here ► ☐	30a	
ːdule O)		
ʂ amount includes foreign grants, check here ► ☐	31a	
ʂ 28a through 31a) ►	32	91,445.

ʳustees, and Key Employees. List each one even if not compensated. (see the instructions for Part IV.)

edule O to respond to any question in this Part IV ☐

(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
3.00	0.	0.	0.
3.00	0.	0.	0.
10.00	40,806.	0.	4,000.

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

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. ► See separate instructions.

OMB No. 1545-0047

2012

Open to Public Inspection

Name of the organization	Employer identification number
Lombard Historical Society	23-7114585

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.)

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)(vi).** (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 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 that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I b ☐ Type II c ☐ Type III – Functionally integrated d ☐ Type III – Non-functionally integrated

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

			Yes	No
(i)	A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?	11g (i)		
(ii)	A family member of a person described in (i) above?	11g (ii)		
(iii)	A 35% controlled entity of a person described in (i) or (ii) above?	11g (iii)		

h 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 or IRC section (see instructions))	(iv) Is the organization in column (i) listed in your governing document? Yes	No	(v) Did you notify the organization in column (i) of your support? Yes	No	(vi) Is the organization in column (i) organized in the U.S.? Yes	No	(vii) Amount of monetary support
(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) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants.')	128,109.	137,061.	167,724.	173,197.	117,871.	723,962.
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	128,109.	137,061.	167,724.	173,197.	117,871.	723,962.
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						723,962.

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4	128,109.	137,061.	167,724.	173,197.	117,871.	723,962.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	6,050.	2,578.	1,714.	1,316.	950.	12,608.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 **Total support.** Add lines 7 through 10						736,570.

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 2012 (line 6, column (f) divided by line 11, column (f)) | 14 | 98.29 %

15 Public support percentage from 2011 Schedule A, Part II, line 14 | 15 | 97.14 %

16a **33-1/3% support test— 2012.** If the organization did not check the box on line 13, and the 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— 2011.** 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— 2012.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ► ☐

b **10%-facts-and-circumstances test— 2011.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ► ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ► ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I 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 yr beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants.')						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 **Public support** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal yr beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 **Total support.** (Add lns 9, 10c, 11, and 12.)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ► ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2011 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2011 Schedule A, Part III, line 17	18	%

19a **33-1/3% support tests– 2012.** 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– 2011.** 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 Supplemental Information. Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

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.**

OMB No. 1545-0047

2012

Open to Public Inspection

Name of the organization	Employer identification number
Lombard Historical Society	23-7114585

16 Collections and Exhibits

16 Office Expenses

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 activity not previously reported to the IRS? If 'Yes,' provide a detailed description of each activity in Schedule O	33		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)	34		X
35 a	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		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	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		X
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
37 a	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		X
38 a	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		X
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			
40 a	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) and 501(c)(4) 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		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 ►			
d	Section 501(c)(3) and 501(c)(4) 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		X

41 List the states with which a copy of this return is filed ► Illinois

42 a The organization's books are in care of ► Richard W. Gallicchio Telephone no. ► (847) 439-0250
Located at ► 100 Turner Avenue Elk Grove Village IL ZIP + 4 ► 60007

			Yes	No
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 Form TD F 90-22.1, Report of Foreign 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 a	Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44a		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	44b		X
c	Did the organization receive any payments for indoor tanning services during the year?	44c		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*	44d		
45 a	Did the organization have a controlled entity of the organization within the meaning of section 512(b)(13)?	45a		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)	45b		X

			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		X

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		X
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E	48		X
49 a	Did the organization make any transfers to an exempt non-charitable related organization?	49a		X
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 paid more than $100,000	(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 address of each independent contractor paid more than $100,000	(b) Type of service	(c) Compensation
None		

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

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts 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

► Richard W. Gallicchio — Treasurer

Type or print name and title.

COPY

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ► Self-Prepared

Firm's address ►

Firm's EIN ►

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
Form 990-EZ, Part I, Line 16 Other Expenses

Other expenses (describe in Schedule O)

Collections and Exhibits	18,912.
Office Expenses	11,715.
Total	30,627.

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INDEPENDENT AUDITOR'S REPORT

Board of Management
Lombard Historical Society, Inc.
Lombard, Illinois

We have audited the accompanying statement of assets, liabilities and net assets – modified cash basis of the **Lombard Historical Society, Inc.** (Organization) at May 31, 2012 and 2011, and the related statement of revenues, expenses and changes in net assets – modified cash basis and statement of cash flows – modified cash basis for the years then ended. These financial statements are the responsibility of the Organization's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and the significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

As described in Note 1, the Organization's policy is to prepare its financial statements on the modified cash basis of accounting, which is a comprehensive basis of accounting other than accounting principles generally accepted in the United States of America.

In our opinion, the financial statements referred to above present fairly, in all material respects, the assets, liabilities and net assets of the Lombard Historical Society, Inc. as of May 31, 2012 and 2011, and the results of its revenues, expenses and changes in net assets and cash flows for the years then ended, on the basis of accounting described in Note 1.

Selden Fox, Ltd.

February 28, 2013

Lombard Historical Society, Inc.
Statement of Assets, Liabilities and Net Assets - Modified Cash Basis
May 31,

	2012	2011
Assets		
Cash	$ 91,393	$ 77,170
Investments:		
Mutual fund, at fair value	10,565	-
Certificates of deposit	57,934	73,899
Total assets	$ 159,892	$ 151,069
Net Assets		
Net assets:		
Unrestricted	$ 141,677	$ 151,069
Temporarily restricted	18,215	-
Total net assets	$ 159,892	$ 151,069

See accompanying notes and independent auditor's report.

Lombard Historical Society, Inc.
Statement of Revenues, Expenses and Changes in Net Assets - Modified Cash Basis
For the Year Ended May 31,

	2012			2011
	Unrestricted	Temporarily Restricted	Total	Total
Revenues, gains and other support:				
Government reimbursements	$ 109,460	$ -	$ 109,460	$ 112,546
Donations and contributions	28,172	31,434	59,606	37,238
Memberships	4,130	-	4,130	3,585
Investment income	1,316	-	1,316	2,113
Net assets released from restrictions	13,219	(13,219)	-	-
Total revenues, gains and other support	156,297	18,215	174,512	155,482
Expenses:				
Reimbursed expenses	118,541	-	118,541	115,882
Historical Society	44,106	-	44,106	21,110
Peck House	3,042	-	3,042	96
Miscellaneous	-	-	-	115
Total expenses	165,689	-	165,689	137,203
Change in net assets	(9,392)	18,215	8,823	18,279
Net assets:				
Beginning of the year	151,069	-	151,069	132,790
End of the year	141,677	18,215	159,892	151,069

See accompanying notes and independent auditor's report.

Lombard Historical Society, Inc.
Statement of Cash Flows - Modified Cash Basis
For the Year Ended May 31,

	2012	2011
Cash flows from operating activities:		
Change in net assets	$ 8,823	$ 18,279
Adjustments to reconcile change in net assets to net cash from operating activities:		
Reinvested dividends	(1,101)	
Unrealized gain on mutual funds	(202)	-
Net cash from operating activities	**7,520**	18,279
Cash flows from investing activities:		
Purchase of investments	(10,000)	-
Proceeds from maturity of certificates of deposit	16,703	1,340
Net cash from investing activities	**6,703**	1,340
Net increase in cash	**14,223**	19,619
Cash, beginning of the year	77,170	57,551
Cash, end of the year	$ 91,393	$ 77,170

See accompanying notes and independent auditor's report.

1. **Summary of Significant Accounting Policies**

Organization and Purpose – Lombard Historical Society, Inc. (Organization), a not-for-profit, was formed in 1971 with a mission to educate, preserve, study, and conserve the history of Lombard, and maintain and operate historical sites and buildings located in Lombard and the surrounding vicinity.

Basis of Accounting – The accompanying financial statements are presented primarily on a cash basis, with revenues recognized upon receipt and expenses recognized upon payment of a liability. This policy is an acceptable comprehensive basis of accounting, but differs from accounting principles generally accepted in the United States of America, which require that financial statements be prepared on an accrual basis. A modification to the cash basis of accounting includes recording mutual funds at fair value.

These financial statements have been prepared to focus on the Organization as a whole, to present balances and transactions according to the existence or absence of donor imposed restrictions. This has been accomplished by classification of net assets and transactions into three classes of net assets: permanently restricted, temporarily restricted, or unrestricted.

Permanently Restricted Net Assets – Net assets subject to donor imposed stipulations that they be maintained permanently by the Organization. Generally, the donors of these assets permit the Organization to use all or part of the income earned on related investments for general or specific purposes. The Organization did not have any permanently restricted net assets for the year ended May 31, 2012 or 2011.

Temporarily Restricted Net Assets – Net assets subject to donor imposed stipulations that may or will be met by actions of the Organization or the passage of time. The Organization had temporarily restricted net assets of $18,215 in 2012 (none in 2011).

Unrestricted Net Assets – Net assets not subject to donor imposed stipulations.

Revenues are reported as increases in unrestricted net assets, unless use of the related assets is limited by donor imposed restrictions. Expenses are reported as decreases in unrestricted net assets. Gains and losses on investments and other assets or liabilities are reported as increases or decreases in unrestricted net assets, unless their use is restricted by explicit donor stipulation or by law. Expiration of temporary restrictions on net assets (i.e., the donor imposed stipulated purpose has been fulfilled or the stipulated time period has elapsed) is reported as reclassifications between the applicable classes of net assets. Contributions received with donor imposed restrictions that are met in the same year as received are reported as revenues of the temporarily restricted net asset class, and a reclassification to unrestricted net assets is made to reflect the expiration of such restrictions.

1. **Summary of Significant Accounting Policies** (cont'd)

Use of Estimates – The preparation of financial statements in conformity with the cash basis of accounting requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, and disclosure of contingent assets and liabilities, at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Certificates of Deposit – The Organization's certificates of deposit are carried at cost, which includes accrued interest.

Fair Value and Mutual Funds – The Organization's certificates of deposit are carried at cost, which includes accrued interest. The Organization's mutual funds are accounted for at fair value with unrealized gains and losses reported in the Statement of Revenue, Expenses, and Changes in Net Assets.

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Fair value measurement is broken down into a three-level valuation hierarchy based on the reliability of observable and unobservable inputs as follows:

Level 1 – Valuations are based on quoted prices in active markets for identical assets or liabilities that the Association has the ability to access at the measurement date.

Level 2 – Valuations are based on quoted prices for similar assets or liabilities in active markets; quoted prices for identical or similar assets or liabilities in markets that are not active; and model-derived valuations whose significant inputs are observable.

Level 3 – Valuations are based on unobservable inputs for the asset or liability that reflect the reporting entity's own data and assumptions that market participants would use in pricing the asset or liability.

Following is a description of the valuation methodologies used for investments measured at fair value, as well as the general classification of such investments pursuant to the valuation hierarchy.

Mutual funds are valued using quoted market prices. Accordingly, these assets are categorized in Level 1 of the fair value hierarchy.