

Return of Organization Exempt from Income Tax

OMB No 1545 0047

2003**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 black lung benefit trust or private foundation)**

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2003 calendar year, or tax year beginning 7/01, 2003, and ending 6/30, 2004**B** Check if applicable

- ☐ Address change
☐ Name change
☐ Initial return
☐ Final return
☐ Amended return
☐ Application pending

Please use
IRS label
or print
or type.
See
specific
instruc-
tions.KAPPA DELTA PI, AN INTERNATIONAL
HONOR SOCIETY IN EDUCATION
3707 WOODVIEW TRACE
INDIANAPOLIS, IN 46268**D Employer identification number**

35-1075656

E Telephone number

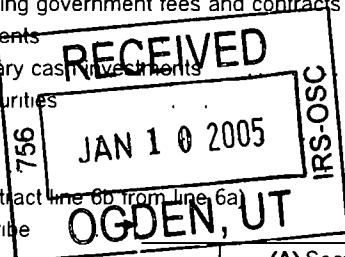
317-871-4900

F Accounting method:☐ Cash ☒ Accrual☐ Other (specify) ▶**• Section 501(c)(3) organizations and 4947(a)(1) nonexempt
charitable trusts must attach a completed Schedule A
(Form 990 or 990-EZ).****H and I are not applicable to section 527 organizations****H (a)** Is this a group return for affiliates? ☐ Yes ☒ No**H (b)** If 'Yes,' enter number of affiliates. ▶**H (c)** Are all affiliates included? ☐ Yes ☐ No

(If 'No,' attach a list. See instructions.)

H (d) Is this a separate return filed by an organization covered by a group ruling? ☐ Yes ☒ No**I Group Exemption Number** ▶**M** Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)**G Web site:** ▶ WWW.KDP.ORG**J Organization type**
(check only one)▶ ☒ 501(c) 3 (insert no) ☐ 4947(a)(1) or ☐ 527**K** Check here ☐ if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS, but if the organization received a Form 990 Package in the mail, it should file a return without financial data. **Some states require a complete return.****L** Gross receipts. Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 4,807,827.**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See instructions)

1 Contributions, gifts, grants, and similar amounts received.					
a Direct public support		1a			
b Indirect public support		1b			
c Government contributions (grants)		1c			
d Total (add lines 1a through 1c) (cash \$ noncash \$)		1d			0.
2 Program service revenue including government fees and contracts (from Part VII, line 93)					
3 Membership dues and assessments					
4 Interest on savings and temporary cash investments					
5 Dividends and interest from securities					
6a Gross rents		6a			
b Less. rental expenses		6b			
c Net rental income or (loss) (subtract line 6b from line 6a)		6c			
7 Other investment income (describe)					
8a Gross amount from sales of assets other than inventory		(A) Securities		(B) Other	
		2,205,837.	8a		
b Less. cost or other basis and sales expenses		1,999,768.	8b		
c Gain or (loss) (attach schedule)		206,069.	8c		
d Net gain or (loss) (combine line 8c, columns (A) and (B))			8d	206,069.	
9 Special events and activities (attach schedule). If any amount is from gaming, check here ☐					
a Gross revenue (not including \$ of contributions reported on line 1a)		9a			
b Less. direct expenses other than fundraising expenses		9b			
c Net income or (loss) from special events (subtract line 9b from line 9a)			9c		
10a Gross sales of inventory, less returns and allowances		10a	250,976.		
b Less. cost of goods sold		10b	112,060.		
c Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)			10c	138,916.	
11 Other revenue (from Part VII, line 103)					
12 Total revenue (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)					
13 Program services (from line 44, column (B))					
14 Management and general (from line 44, column (C))					
15 Fundraising (from line 44, column (D))					
16 Payments to affiliates (attach schedule)					
17 Total expenses (add lines 16 and 44, column (A))					
18 Excess or (deficit) for the year (subtract line 17 from line 12)					
19 Net assets or fund balances at beginning of year (from line 73, column (A))					
20 Other changes in net assets or fund balances (attach explanation)					
21 Net assets or fund balances at end of year (combine lines 18, 19, and 20)					



SCANNED JAN 12 2005

Part II Statement of Functional Expenses All organizations must complete column (A). Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others.

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22 Grants and allocations (att sch) (cash \$ _____ non-cash \$ _____)	22				
23 Specific assistance to individuals (att sch)	23				
24 Benefits paid to or for members (att sch)	24				
25 Compensation of officers, directors, etc	25				
26 Other salaries and wages	26	912,314.	469,836.	442,478.	
27 Pension plan contributions	27	79,956.	34,613.	45,343.	
28 Other employee benefits	28	50,622.	25,269.	25,353.	
29 Payroll taxes	29	73,013.	40,509.	32,504.	
30 Professional fundraising fees	30				
31 Accounting fees	31	15,347.		15,347.	
32 Legal fees	32	202.		202.	
33 Supplies	33	42,933.	33,301.	9,632.	
34 Telephone	34	31,071.	17,697.	13,374.	
35 Postage and shipping	35	246,977.	235,413.	11,564.	
36 Occupancy	36	14,538.	6,952.	7,586.	
37 Equipment rental and maintenance	37	30,841.	16,123.	14,718.	
38 Printing and publications	38	213,826.	204,294.	9,532.	
39 Travel	39	117,876.	71,167.	46,709.	
40 Conferences, conventions, and meetings	40	166,257.	166,257.		
41 Interest	41				
42 Depreciation, depletion, etc (attach schedule)	42	101,405.		101,405.	
43 Other expenses not covered above (itemize)					
a SEE STATEMENT 4	43a	534,347.	239,573.	294,774.	
b	43b				
c	43c				
d	43d				
e	43e				
44 Total functional expenses (add lines 22 - 43) Organizations completing columns (B) - (D), carry these totals to lines 13 - 15	44	2,631,525.	1,561,004.	1,070,521.	0.

Joint Costs. Check ☐ if you are following SOP 98-2.Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services? ☐ Yes ☒ No

If 'Yes,' enter (i) the aggregate amount of these joint costs \$ _____; (ii) the amount allocated to Program services \$ _____; (iii) the amount allocated to Management and general \$ _____; and (iv) the amount allocated to Fundraising \$ _____.

Part III Statement of Program Service Accomplishments

What is the organization's primary exempt purpose? ▶

All organizations must describe their exempt purpose achievements in a clear and concise manner. State the number of clients served, publications issued, etc. Discuss achievements that are not measurable. (Section 501(c)(3) & (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants & allocations to others.)

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

a 5A MEMBER HONOR SOCIETY IN EDUCATION WHICH CURRENTLY ISSUES EIGHT JOURNALS AND THREE PUBLICATIONS TO APPROXIMATELY 55,000 MEMBERS ANNUALLY

(Grants and allocations \$ _____)

1,561,004.

b _____

(Grants and allocations \$ _____)c _____

(Grants and allocations \$ _____)d _____

(Grants and allocations \$ _____)

e Other program services (Grants and allocations \$ _____)

f Total of Program Service Expenses (should equal line 44, column (B), Program services)

1,561,004.

Part IV Balance Sheets (See Instructions)**Note:** Where required, attached schedules and amounts within the description column should be for end-of-year amounts only.

		(A) Beginning of year		(B) End of year
ASSETS	45 Cash — non-interest-bearing		45	
	46 Savings and temporary cash investments	725,923.	46	365,581.
	47 a Accounts receivable	47 a 39,061.		
	b Less: allowance for doubtful accounts	47 b	34,719.	47 c 39,061.
	48 a Pledges receivable	48 a		
	b Less: allowance for doubtful accounts	48 b		48 c
	49 Grants receivable		49	
	50 Receivables from officers, directors, trustees, and key employees (attach schedule)		50	
	51 a Other notes & loans receivable (attach sch)	51 a		
	b Less: allowance for doubtful accounts	51 b		51 c
	52 Inventories for sale or use	156,898.	52	119,730.
	53 Prepaid expenses and deferred charges	17,511.	53	19,671.
	54 Investments — securities (attach schedule)	☐ Cost ☒ FMV 2,534,239.	54	3,268,817.
	55 a Investments — land, buildings, & equipment, basis	55 a		
	b Less: accumulated depreciation (attach schedule)	55 b		55 c
56 Investments — other (attach schedule)		56		
57 a Land, buildings, and equipment, basis	57 a 1,545,645.			
b Less: accumulated depreciation (attach schedule)	57 b 363,384.	1,217,631.	57 c 1,182,261.	
58 Other assets (describe ► STATEMENT 5 <u>SEE STATEMENT 6</u>)	44,653.	58	56,735.	
59 Total assets (add lines 45 through 58) (must equal line 74)	4,731,574.	59	5,051,856.	
LIABILITIES	60 Accounts payable and accrued expenses	15,198.	60	67,235.
	61 Grants payable		61	
	62 Deferred revenue	1,032,527.	62	932,566.
	63 Loans from officers, directors, trustees, and key employees (attach schedule)		63	
	64 a Tax-exempt bond liabilities (attach schedule)		64 a	
	b Mortgages and other notes payable (attach schedule)		64 b	
	65 Other liabilities (describe ► SEE STATEMENT 7)	366,852.	65	460,821.
66 Total liabilities (add lines 60 through 65)	1,414,577.	66	1,460,622.	
NET ASSETS OR FUND BALANCES	Organizations that follow SFAS 117, check here ☒ and complete lines 67 through 69 and lines 73 and 74.			
	67 Unrestricted	3,316,997.	67	3,591,234.
	68 Temporarily restricted		68	
	69 Permanently restricted		69	
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 70 through 74.			
	70 Capital stock, trust principal, or current funds		70	
	71 Paid-in or capital surplus, or land, building, and equipment fund		71	
	72 Retained earnings, endowment, accumulated income, or other funds		72	
	73 Total net assets or fund balances (add lines 67 through 69 or lines 70 through 72, column (A) must equal line 19, column (B) must equal line 21)	3,316,997.	73	3,591,234.
	74 Total liabilities and net assets/fund balances (add lines 66 and 73)	4,731,574.	74	5,051,856.

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization. How the public perceives an organization in such cases may be determined by the information presented on its return. Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

BAA

Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return (See instructions.)

a	Total revenue, gains, and other support per audited financial statements	a	3,017,822.
b	Amounts included on line a but not on line 12, Form 990.		
(1)	Net unrealized gains on investments	\$	209,763.
(2)	Donated services and use of facilities	\$	
(3)	Recoveries of prior year grants	\$	
(4)	Other (specify).		
	SEE STM 8	\$	112,060.
	Add amounts on lines (1) through (4)	b	321,823.
c	Line a minus line b	c	2,695,999.
d	Amounts included on line 12, Form 990 but not on line a:		
(1)	Investment expenses not included on line 6b, Form 990	\$	
(2)	Other (specify).		
	----- \$		
	Add amounts on lines (1) and (2)	d	
e	Total revenue per line 12, Form 990 (line c plus line d)	e	2,695,999.

Part IV-B Reconciliation of Expenses per Audited Financial Statements with Expenses per Return

a	Total expenses and losses per audited financial statements	a	2,743,585.
b	Amounts included on line a but not on line 17, Form 990.		
(1)	Donated services and use of facilities	\$	
(2)	Prior year adjustments reported on line 20, Form 990	\$	
(3)	Losses reported on line 20, Form 990	\$	
(4)	Other (specify).		
	SEE STMT 9	\$	112,060.
	Add amounts on lines (1) through (4)	b	112,060.
c	Line a minus line b	c	2,631,525.
d	Amounts included on line 17, Form 990 but not on line a:		
(1)	Investment expenses not included on line 6b, Form 990	\$	
(2)	Other (specify).		
	----- \$		
	Add amounts on lines (1) and (2)	d	
e	Total expenses per line 17, Form 990 (line c plus line d)	e	2,631,525.

Part V List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated, see instructions.)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (if not paid, enter -0-)	(D) Contributions to employee benefit plans and deferred compensation	(E) Expense account and other allowances
DR. BLOSSUM NISSMAN STRADFORD PONDS MASHPEE, MA 02649-2242	PRESIDENT NONE	0.	0.	0.
SHERRY FIELD 10405 FOXGLOVE CT. AUSTIN, TX 78739-1483	VICE PRESIDENT NONE	0.	0.	0.
KAREN NICHOLSON 3840 GREYSTONE AVE APT. 4A BRONX, NY 10463-1910	VICE PRESIDENT NONE	0.	0.	0.

75 Did any officer, director, trustee, or key employee receive aggregate compensation of more than \$100,000 from your organization and all related organizations, of which more than \$10,000 was provided by the related organizations?

☐ Yes

☒ No

If 'Yes,' attach schedule — see instructions.

Part VI Other Information (See instructions.)

	Yes	No
76 Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed description of each activity	76	X
77 Were any changes made in the organizing or governing documents but not reported to the IRS? If 'Yes,' attach a conformed copy of the changes.	77	X
78a Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	78a	X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	78b	N/A
79 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If 'Yes,' attach a statement	79	X
80a Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc., to any other exempt or nonexempt organization?	80a	X
b If 'Yes,' enter the name of the organization <u>KAPPA DELTA PI EDUCATIONAL FOUNDATION</u> and check whether it is ☒ exempt or ☐ nonexempt.		
81a Enter direct and indirect political expenditures. See line 81 instructions	81a	0.
b Did the organization file Form 1120-POL for this year?	81b	X
82a Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?	82a	X
b If 'Yes,' you may indicate the value of these items here. Do not include this amount as revenue in Part I or as an expense in Part II. (See instructions in Part III.)	82b	N/A
83a Did the organization comply with the public inspection requirements for returns and exemption applications?	83a	X
b Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	83b	X
84a Did the organization solicit any contributions or gifts that were not tax deductible?	84a	X
b If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	84b	N/A
85 501(c)(4), (5), or (6) organizations a Were substantially all dues nondeductible by members?	85a	N/A
b Did the organization make only in-house lobbying expenditures of \$2,000 or less? If 'Yes' was answered to either 85a or 85b, do not complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year.	85b	N/A
c Dues, assessments, and similar amounts from members	85c	N/A
d Section 162(e) lobbying and political expenditures	85d	N/A
e Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices	85e	N/A
f Taxable amount of lobbying and political expenditures (line 85d less 85e)	85f	N/A
g Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?	85g	N/A
h If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?	85h	N/A
86 501(c)(7) organizations. Enter: a Initiation fees and capital contributions included on line 12	86a	N/A
b Gross receipts, included on line 12, for public use of club facilities	86b	N/A
87 501(c)(12) organizations. Enter: a Gross income from members or shareholders	87a	N/A
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	87b	N/A
88 At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If 'Yes,' complete Part IX	88	X
89a 501(c)(3) organizations. Enter. Amount of tax imposed on the organization during the year under: section 4911 <u>0.</u> , section 4912 <u>0.</u> , section 4955 <u>0.</u>		
b 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 become aware of an excess benefit transaction from a prior year? If 'Yes,' attach a statement explaining each transaction	89b	X
c Enter. Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958		0.
d Enter. Amount of tax on line 89c, above, reimbursed by the organization		0.
90a List the states with which a copy of this return is filed <u>INDIANA</u>	90b	20
91 The books are in care of <u>KAPPA DELTA PI</u> Telephone number <u>317-871-4900</u> Located at <u>INDIANAPOLIS, IN</u> ZIP + 4 <u>46268</u>		
92 Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the tax year <u>92</u>		N/A

Part VII Analysis of Income-Producing Activities (See instructions.)

Note: Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f Medicare/Medicaid payments					
g Fees & contracts from government agencies					
94 Membership dues and assessments					1,797,175.
95 Interest on savings & temporary cash invmnts			14		81,313.
96 Dividends & interest from securities					
97 Net rental income or (loss) from real estate:					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from pers prop					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					206,069.
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					138,916.
103 Other revenue. a _____					
b <u>SEE STATEMENT 10</u>					472,526.
c _____					
d _____					
e _____					
104 Subtotal (add columns (B), (D), and (E))					2,695,999.
105 Total (add line 104, columns (B), (D), and (E))					2,695,999.

Note: Line 105 plus line 1d, Part I, should equal the amount on line 12, Part I.

Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes (See instructions.)

Line No.	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes).
1	SEE STATEMENT 11
2	
3	
4	

Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities (See instructions.)

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
N/A	%			
	%			
	%			
	%			

Part X Information Regarding Transfers Associated with Personal Benefit Contracts (See instructions.)

a Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes ☒ No

Note: If 'Yes' to (b), file Form 8870 and Form 4720 (see instructions).

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.

Please

Michael P. Walker

Date

12-28-04

Date

Check if

Preparer's SSN or PTIN (see

SCHEDULE A
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue Service**Organization Exempt Under**
Section 501(c)(3)(Except Private Foundation) and Section 501(e), 501(f), 501(k),
501(n), or Section 4947(a)(1) Nonexempt Charitable Trust

Supplementary Information — (See separate instructions.)

▶ **MUST be completed by the above organizations and attached to their Form 990 or 990-EZ.**

OMB No 1545-0047

2003Name of the organization **KAPPA DELTA PI, AN INTERNATIONAL
HONOR SOCIETY IN EDUCATION**Employer identification number
35-1075656**Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees**
(See instructions. List each one. If there are none, enter 'None'.)

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowances
<u>MICHAEL WOLFE</u> ----- <u>CARMEL, INDIANA</u>	EXEC DIRECTOR 50	 130,500.	 19,575.	 0.
<u>BRIAN ROTHENBERGER</u> ----- <u>INDIANAPOLIS, IN</u>	DIR OF ADMIN 50	 62,431.	 7,492.	 0.
<u>KATHIE-JO ARNOFF</u> ----- <u>INDIANAPOLIS, IN</u>	DEPT HEAD 50	 53,115.	 4,249.	 0.
----- ----- -----	 	 	 	
Total number of other employees paid over \$50,000 ▶	0			

Part II Compensation of the Five Highest Paid Independent Contractors for Professional Services
(See instructions. List each one (whether individuals or firms). If there are none, enter 'None'.)

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
<u>NONE</u> ----- ----- ----- ----- ----- ----- ----- ----- -----	 	
Total number of others receiving over \$50,000 for professional services ▶	0	

Part III Statements About Activities (See instructions.)

Yes No

- 1 During the year, has the organization attempted to influence national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum? If 'Yes,' enter the total expenses paid or incurred in connection with the lobbying activities **\$** N/A
- (Must equal amounts on line 38, Part VI-A, or line i of Part VI-B.)

1 X

Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A. Other organizations checking 'Yes,' must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities.

- 2 During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary? (If the answer to any question is 'Yes,' attach a detailed statement explaining the transactions.)

a Sale, exchange, or leasing of property?

2a X

b Lending of money or other extension of credit?

2b X

c Furnishing of goods, services, or facilities?

2c X

d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)?

2d X

e Transfer of any part of its income or assets?

2e X

- 3a Do you make grants for scholarships, fellowships, student loans, etc? (If 'Yes,' attach an explanation of how you determine that recipients qualify to receive payments.)

3a X

b Do you have a section 403(b) annuity plan for your employees?

3b X

- 4 Did you maintain any separate account for participating donors where donors have the right to provide advice on the use or distribution of funds?

4 X

Part IV Reason for Non-Private Foundation Status (See instructions.)

The organization is not a private foundation because it is. (Please check only **ONE** applicable box.)

- 5 ☐ A church, convention of churches, or association of churches. Section 170(b)(1)(A)(i).
- 6 ☐ A school. Section 170(b)(1)(A)(ii). (Also complete Part V.)
- 7 ☐ A hospital or a cooperative hospital service organization. Section 170(b)(1)(A)(iii).
- 8 ☐ A Federal, state, or local government or governmental unit. Section 170(b)(1)(A)(v).
- 9 ☐ A medical research organization operated in conjunction with a hospital. Section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state **▶** _____
- 10 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit. Section 170(b)(1)(A)(iv). (Also complete the **Support Schedule** in Part IV-A.)
- 11a ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public. Section 170(b)(1)(A)(vi). (Also complete the **Support Schedule** in Part IV-A.)
- 11b ☐ A community trust. Section 170(b)(1)(A)(vi). (Also complete the **Support Schedule** in Part IV-A.)
- 12 ☒ 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 charitable, etc., 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). (Also complete the **Support Schedule** in Part IV-A.)
- 13 ☐ An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in: (1) lines 5 through 12 above, or (2) section 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2). (See section 509(a)(3).)

Provide the following information about the supported organizations. (See instructions.)

(a) Name(s) of supported organization(s)	(b) Line number from above

- 14 ☐ An organization organized and operated to test for public safety. Section 509(a)(4). (See instructions.)

Part IV-A Support Schedule (Complete only if you checked a box on line 10, 11, or 12.) *Use cash method of accounting.***Note:** You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting

Calendar year (or fiscal year beginning in)	(a) 2002	(b) 2001	(c) 2000	(d) 1999	(e) Total
15 Gifts, grants, and contributions received. (Do not include unusual grants. See line 28.)					
16 Membership fees received	1,745,143.	1,653,035.	1,547,087.	1,525,369.	6,470,634.
17 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to the organization's charitable, etc., purpose	219,225.	238,749.	229,711.	276,508.	964,193.
18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	97,258.	82,241.	117,183.	94,405.	391,087.
19 Net income from unrelated business activities not included in line 18					
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					
21 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge					
22 Other income. Attach a schedule. Do not include gain or (loss) from sale of capital assets					
23 Total of lines 15 through 22	2,061,626.	1,974,025.	1,893,981.	1,896,282.	7,825,914.
24 Line 23 minus line 17	1,842,401.	1,735,276.	1,664,270.	1,619,774.	6,861,721.
25 Enter 1% of line 23	20,616.	19,740.	18,940.	18,963.	

26 Organizations described on lines 10 or 11: a Enter 2% of amount in column (e), line 24 **N/A**

b Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1999 through 2002 exceeded the amount shown in line 26a. Do not file this list with your return. Enter the total of all these excess amounts

c Total support for section 509(a)(1) test. Enter line 24, column (e)

d Add Amounts from column (e) for lines. 18 _____ 19 _____
22 _____ 26b _____

e Public support (line 26c minus line 26d total)

f **Public support percentage (line 26e (numerator) divided by line 26c (denominator))**

26a	
26b	
26c	
26d	
26e	
26f	%

27 Organizations described on line 12:

a For amounts included in lines 15, 16, and 17 that were received from a 'disqualified person,' prepare a list for your records to show the name of, and total amounts received in each year from, each 'disqualified person.' Do not file this list with your return. Enter the sum of such amounts for each year.

(2002) _____ 0. (2001) _____ 0. (2000) _____ 0. (1999) _____ 0.

b For any amount included in line 17 that was received from each person (other than 'disqualified persons'), prepare a list for your records to show the name of, and amount received for each year, that was more than the larger of (1) the amount on line 25 for the year or (2) \$5,000. (Include in the list organizations described in lines 5 through 11, as well as individuals.) Do not file this list with your return. After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year:

(2002) _____ 0. (2001) _____ 0. (2000) _____ 0. (1999) _____ 0.

c Add. Amounts from column (e) for lines. 15 _____ 16 6,470,634.

17 964,193. 20 _____ 21 _____

d Add. Line 27a total _____ 0. and line 27b total _____ 0.

e Public support (line 27c total minus line 27d total)

f Total support for section 509(a)(2) test. Enter amount from line 23, column (e) 27f 7,825,914.

g **Public support percentage (line 27e (numerator) divided by line 27f (denominator))**h **Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))**

27c	7,434,827.
27d	0.
27e	7,434,827.
27g	95.00 %
27h	5.00 %

28 Unusual Grants: For an organization described in line 10, 11, or 12 that received any unusual grants during 1999 through 2002, prepare a list for your records to show, for each year, the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant. Do not file this list with your return. Do not include these grants in line 15.

Part V Private School Questionnaire (See instructions.)
(To be completed ONLY by schools that checked the box on line 6 in Part IV)

		N/A	
		Yes	No
29	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?		
30	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?		
31	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If 'Yes,' please describe, if 'No,' please explain. (If you need more space, attach a separate statement.) ----- ----- -----		
32	Does the organization maintain the following.		
a	Records indicating the racial composition of the student body, faculty, and administrative staff?		
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?		
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?		
d	Copies of all material used by the organization or on its behalf to solicit contributions? If you answered 'No' to any of the above, please explain. (If you need more space, attach a separate statement.) ----- -----		
33	Does the organization discriminate by race in any way with respect to		
a	Students' rights or privileges?		
b	Admissions policies?		
c	Employment of faculty or administrative staff?		
d	Scholarships or other financial assistance?		
e	Educational policies?		
f	Use of facilities?		
g	Athletic programs?		
h	Other extracurricular activities? If you answered 'Yes' to any of the above, please explain. (If you need more space, attach a separate statement.) ----- ----- -----		
34a	Does the organization receive any financial aid or assistance from a governmental agency?		
b	Has the organization's right to such aid ever been revoked or suspended? If you answered 'Yes' to either 34a or b, please explain using an attached statement.		
35	Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev Proc 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If 'No,' attach an explanation.		

Part VI-A Lobbying Expenditures by Electing Public Charities (See instructions.)
(To be completed **ONLY** by an eligible organization that filed Form 5768)

N/A

Check ☐ **a** if the organization belongs to an affiliated group. Check ☐ **b** if you checked 'a' and 'limited control' provisions apply.**Limits on Lobbying Expenditures**

(The term 'expenditures' means amounts paid or incurred.)

		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
36 Total lobbying expenditures to influence public opinion (grassroots lobbying)	36		
37 Total lobbying expenditures to influence a legislative body (direct lobbying)	37		
38 Total lobbying expenditures (add lines 36 and 37)	38		
39 Other exempt purpose expenditures	39		
40 Total exempt purpose expenditures (add lines 38 and 39)	40		
41 Lobbying nontaxable amount. Enter the amount from the following table —			
If the amount on line 40 is —	The lobbying nontaxable amount is —		
Not over \$500,000	20% of the amount on line 40		
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000		
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	41	
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000		
Over \$17,000,000	\$1,000,000		
42 Grassroots nontaxable amount (enter 25% of line 41)	42		
43 Subtract line 42 from line 36. Enter -0- if line 42 is more than line 36	43		
44 Subtract line 41 from line 38. Enter -0- if line 41 is more than line 38	44		

Caution: If there is an amount on either line 43 or line 44, you must file Form 4720.**4 -Year Averaging Period Under Section 501(h)**(Some organizations that made a section 501(h) election do not have to complete all of the five columns below.
See the instructions for lines 45 through 50.)

Calendar year (or fiscal year beginning in) ▶	Lobbying Expenditures During 4 -Year Averaging Period				
	(a) 2003	(b) 2002	(c) 2001	(d) 2000	(e) Total
45 Lobbying nontaxable amount					
46 Lobbying ceiling amount (150% of line 45(e))					
47 Total lobbying expenditures					
48 Grassroots non-taxable amount					
49 Grassroots ceiling amount (150% of line 48(e))					
50 Grassroots lobbying expenditures					

Part VI-B Lobbying Activity by Nonelecting Public Charities

(For reporting only by organizations that did not complete Part VI-A) (See instructions.)

N/A

During the year, did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of.

	Yes	No	Amount
a Volunteers			
b Paid staff or management (Include compensation in expenses reported on lines c through h.)			
c Media advertisements			
d Mailings to members, legislators, or the public			
e Publications, or published or broadcast statements			
f Grants to other organizations for lobbying purposes			
g Direct contact with legislators, their staffs, government officials, or a legislative body			
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means			
i Total lobbying expenditures (add lines c through h.)			

If 'Yes' to any of the above, also attach a statement giving a detailed description of the lobbying activities.

STATEMENT 1
FORM 990, PART I, LINE 8
NET GAIN (LOSS) FROM NONINVENTORY SALES

PUBLICLY TRADED SECURITIES

GROSS SALES PRICE: 2,205,837.
 COST OR OTHER BASIS: 1,999,768.

TOTAL GAIN (LOSS) PUBLICLY TRADED SECURITIES \$ 206,069.

TOTAL NET GAIN (LOSS) FROM NONINVENTORY SALES \$ 206,069.

STATEMENT 2
FORM 990, PART I, LINE 10
GROSS PROFIT (LOSS) FROM SALES OF INVENTORY

ACCESSORIES	\$ 131,612.
CLOTHING AND OTHER ITEMS	66,416.
JEWELRY	52,948.

GROSS SALES	\$ 250,976.
LESS RETURNS & ALLOWANCES	0.
NET SALES	\$ 250,976.
LESS COST OF GOODS SOLD	112,060.
GROSS PROFIT FROM SALES OF INVENTORY	\$ <u>138,916.</u>

STATEMENT 3
FORM 990, PART I, LINE 20
OTHER CHANGES IN NET ASSETS OR FUND BALANCES

UNREALIZED GAIN ON INVESTMENTS	\$ 209,763.
TOTAL	\$ <u>209,763.</u>

STATEMENT 4
FORM 990, PART II, LINE 43
OTHER EXPENSES

	(A) TOTAL	(B) PROGRAM SERVICES	(C) MANAGEMENT & GENERAL	(D) FUNDRAISING
AWARDS	26,266.	20,033.	6,233.	
BANK CHARGES	79,506.		79,506.	
BOOKS	30,609.	30,609.		
CONTRACT SERVICES	201,098.	123,366.	77,732.	
CONTRIBUTIONS	100,000.		100,000.	
DUES/SUBS	11,571.	5,781.	5,790.	
INSURANCE	9,923.	1,559.	8,364.	
OTHER EXPENSES	72,544.	58,225.	14,319.	
VEHICLE EXPENSE	2,830.		2,830.	
TOTAL	\$ <u>534,347.</u>	\$ <u>239,573.</u>	\$ <u>294,774.</u>	\$ <u>0.</u>

STATEMENT 5
FORM 990, PART IV, LINE 57
LAND, BUILDINGS, AND EQUIPMENT

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE
AUTOMOBILES / TRANSPORTATION EQUIPMENT	\$ 39,392.	\$ 27,508.	\$ 11,884.
FURNITURE AND FIXTURES	213,076.	186,453.	26,623.
BUILDINGS	1,159,177.	149,423.	1,009,754.
LAND	134,000.		134,000.
TOTAL	\$ 1,545,645.	\$ 363,384.	\$ 1,182,261.

STATEMENT 6
FORM 990, PART IV, LINE 58
OTHER ASSETS

NET INTANGIBLE ASSETS			56,735.
		TOTAL	\$ 56,735.

STATEMENT 7
FORM 990, PART IV, LINE 65
OTHER LIABILITIES

CONTRIBUTIONS DUE FOUNDATION	\$ 177,768.
FUNDS DUE CHAPTERS	51,122.
FUNDS DUE SUSPENDED CHAPTERS	23,577.
OTHER LIABILITIES	208,354.
TOTAL	\$ 460,821.

STATEMENT 8
FORM 990, PART IV-A, LINE B(4)
OTHER AMOUNTS

COST OF GOODS SOLD	\$ 112,060.
TOTAL	\$ 112,060.

STATEMENT 9
FORM 990, PART IV-B, LINE B(4)
OTHER AMOUNTS

COST OF GOODS SOLD	\$ 112,060.
TOTAL	\$ 112,060.

FEDERAL STATEMENTS
KAPPA DELTA PI, AN INTERNATIONAL
HONOR SOCIETY IN EDUCATION

STATEMENT 10
FORM 990, PART VII, LINE 103
OTHER REVENUE

<u>OTHER REVENUE</u>	<u>(A)</u> <u>BUSI-</u> <u>NESS</u> <u>CODE</u>	<u>(B)</u> <u>UNRELATED</u> <u>BUSINESS</u> <u>AMOUNT</u>	<u>(C)</u> <u>EXCLU-</u> <u>SION</u> <u>CODE</u>	<u>(D)</u> <u>EXCLUDED</u> <u>AMOUNT</u>	<u>(E)</u> <u>RELATED OR</u> <u>EXEMPT</u> <u>FUNCTION</u>
CHAPTER SUPPLIES & INSTAL					\$ 27,903.
CONVOCATION/CONFERENCE					225,090.
MISCELLANEOUS					37,367.
PUBLICATIONS					174,153.
ROYALTIES					8,013.
TOTAL		\$ 0.		\$ 0.	\$ 472,526.

STATEMENT 11
FORM 990, PART VIII
RELATIONSHIP OF ACTIVITIES TO THE ACCOMPLISHMENT OF EXEMPT PURPOSES

<u>LINE #</u>	<u>EXPLANATION OF ACTIVITIES</u>
94	DUES ARE USED TO SUPPORT MEMBERS IN THE FIELD OF EDUCATION THROUGH PUBLICATION
103A	ROYALTIES ARE RECEIVED FROM PUBLICATION OF EDUCATIONAL ARTICLES AND JOURNALS
103B	PUBLICATIONS AND SUBSCRIPTIONS ARE SOLD TO LIBRARIES AND MEMBERS TO PROMOTE AND ENHANCE THE FIELD OF EDUCATION
103C	CONVOCATION/CONFERENCE REVENUE IS USED TO SUPPORT THE BIENNIAL CONVOCATION TO ELECT OFFICERS, CONDUCT WORKSHOPS, AND APPROVE THE BUDGET
103D	CHAPTER INSTALLATION FEES RECEIVED FROM INSTALLATION OF NEW CHAPTERS
103E	REFUNDS, REBATES, AND OTHER MISCELLANEOUS INCOME

**Application for Extension of Time to File an
Exempt Organization Return**

OMB No 1545 1709

▶ File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box. ☒
- If you are filing for an **Additional (not automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Note: Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**Part I Automatic 3-Month Extension of Time** — Only submit original (no copies needed)**Note: Form 990-T corporations requesting an automatic 6-month extension — check this box and complete Part I only** ☐*All other corporations (including Form 990-C filers) must use Form 7004 to request an extension of time to file income tax returns. Partnerships, REMICs and trusts must use Form 8736 to request an extension of time to file Form 1065, 1066, or 1041.*

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization		Employer identification number
	KAPPA DELTA PI, AN INTERNATIONAL HONOR SOCIETY IN EDUCATION		35-1075656
	Number, street, and room or suite number If a P O box, see instructions		
	3707 WOODVIEW TRACE		
	City, town or post office For a foreign address, see instructions		state ZIP code
	INDIANAPOLIS, IN 46268		

Check type of return to be filed (file a separate application for each return).

- | | | |
|--|--|------------------------------------|
| ☒ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (Section 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☐ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

- If the organization does **not** have an office or place of business in the United States, check this box ☐
- If this is for a **Group Return**, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the **whole group**, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6-month, for **990-T corporation**) extension of time until 2/15, 20 05, to file the exempt organization return for the organization named above. The extension is for the organization's return for

- ▶ ☐ calendar year 20 ____ or
▶ ☒ tax year beginning 7/01, 20 03, and ending 6/30, 20 04.

2 If this tax year is for less than 12 months, check reason. ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions \$ 0.

b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit \$ 0.

c **Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions \$ 0.

Signature and Verification

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, and that I am authorized to prepare this form.

Signature ▶ Lisa Freeman Title ▶ DIRECTOR CPA Date ▶ 11/10/04

BAA For Paperwork Reduction Act Notice, see instructions.

Form **8868** (12-2000)

COPY