Form **990** Department of the Treasury Internal Revenue Service

# 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)**

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

OMB No. 1545-0047 **2007** Open to Public Inspection

**A** For the 2007 calendar year, or tax year beginning APR 1, 2007 and ending MAR 31, 2008

**B** Check if applicable: [✓] Address change [ ] Name change [ ] Initial return [ ] Termination [ ] Amended return [ ] Application pending

Please use IRS label or print or type. See Specific Instructions.

**C** Name of organization: SENIOR CITIZENS OF GREATER DALLAS, INC.

Number and street (or P.O. box if mail is not delivered to street address) / Room/suite: 3910 HARRY HINES BLVD.

City or town, state or country, and ZIP + 4: DALLAS, TX 75219

**D** Employer identification number: 75-1085555

**E** Telephone number: (214) 823-5700

**F** Accounting method: [ ] Cash [X] 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 [X] No

H(b) If "Yes," enter number of affiliates ▶ N/A

H(c) Are all affiliates included? N/A [ ] Yes [ ] No (If "No," attach a list.)

H(d) Is this a separate return filed by an organization covered by a group ruling? [ ] Yes [X] No

I Group Exemption Number ▶ N/A

**G** Website: ▶WWW.THESENIORSOURCE.ORG

**J** Organization type (check only one) ▶ [X] 501(c) ( 3 ) ◀ (insert no) [ ] 4947(a)(1) or [ ] 527

**K** Check here ▶ [ ] if the organization is not a 509(a)(3) supporting organization and its gross receipts are normally **not** more than $25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.

**M** Check ▶ [ ] if the organization is **not** required to attach Sch. B (Form 990, 990-EZ, or 990-PF).

**L** Gross receipts: Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 5,639,989.

## Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances

| | | | | | | |
|---|---|---|---|---|---|---|
| Revenue | 1 | Contributions, gifts, grants, and similar amounts received: | | | | |
| | a | Contributions to donor advised funds | 1a | | | |
| | b | Direct public support (not included on line 1a) | 1b | 3,272,815. | | |
| | c | Indirect public support (not included on line 1a) | 1c | 494,046. | | |
| | d | Government contributions (grants) (not included on line 1a) | 1d | 1,542,506. | | |
| | e | **Total** (add lines 1a through 1d) (cash $ 5,248,332. noncash $ 61,035.) | | | 1e | 5,309,367. |
| | 2 | Program service revenue including government fees and contracts (from Part VII, line 93) | | | 2 | 55,117. |
| | 3 | Membership dues and assessments | | | 3 | |
| | 4 | Interest on savings and temporary cash investments | | | 4 | |
| | 5 | Dividends and interest from securities | | | 5 | 182,419. |
| | 6 a | 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 ▶ ) | | | 7 | |
| | 8 a | Gross amount from sales of assets other than inventory — (A) Securities / (B) Other | 8a | | | |
| | b | Less: cost or other basis and sales expenses | 8b | | | |
| | c | Gain or (loss) (attach schedule) | 8c | | | |
| | d | Net gain or (loss). Combine line 8c, columns (A) and (B) | | | 8d | |
| | 9 | Special events and activities (attach schedule). If any amount is from **gaming**, check here ▶ [ ] | | | | |
| | a | Gross revenue (not including $ 613,204. of contributions reported on line 1b) | 9a | 89,188. | | |
| | b | Less: direct expenses other than fundraising expenses | 9b | 93,203. | | |
| | c | Net income or (loss) from special events. Subtract line 9b from line 9a SEE STATEMENT 1 | | | 9c | <4,015.> |
| | 10 a | Gross sales of inventory, less returns and allowances | 10a | | | |
| | b | Less: cost of goods sold | 10b | | | |
| | c | Gross profit or (loss) from sales of inventory (attach schedule). Subtract line 10b from line 10a | | | 10c | |
| | 11 | Other revenue (from Part VII, line 103) | | | 11 | 3,898. |
| | 12 | **Total revenue.** Add lines 1e, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11 | | | 12 | 5,546,786. |
| Expenses | 13 | Program services (from line 44, column (B)) | | | 13 | 2,826,805. |
| | 14 | Management and general (from line 44, column (C)) | | | 14 | 142,367. |
| | 15 | Fundraising (from line 44, column (D)) | | | 15 | 351,985. |
| | 16 | Payments to affiliates (attach schedule) | | | 16 | |
| | 17 | **Total expenses.** Add lines 16 and 44, column (A) | | | 17 | 3,321,157. |
| Net Assets | 18 | Excess or (deficit) for the year. Subtract line 17 from line 12 | | | 18 | 2,225,629. |
| | 19 | Net assets or fund balances at beginning of year (from line 73, column (A)) | | | 19 | 9,480,339. |
| | 20 | Other changes in net assets or fund balances (attach explanation) SEE STATEMENT 2 | | | 20 | <13,569.> |
| | 21 | Net assets or fund balances at end of year. Combine lines 18, 19, and 20 | | | 21 | 11,692,399. |

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723001 12-27-07 LHA **For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.** Form **990** (2007)



21520123 709345 75838-ILN 2007.07050 SENIOR CITIZENS OF GREATER 75838-I2

**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 |
|---|---|---|---|---|---|
| 22a Grants paid from donor advised funds (attach schedule) (cash $ 0. noncash $ 0.) If this amount includes foreign grants, check here ▶ ☐ | 22a | | | | |
| 22b Other grants and allocations (attach schedule) (cash $ 0. noncash $ 0.) If this amount includes foreign grants, check here ▶ ☐ | 22b | | | | |
| 23 Specific assistance to individuals (attach schedule) | 23 | | | | |
| 24 Benefits paid to or for members (attach schedule) | 24 | | | | |
| 25a Compensation of current officers, directors, key employees, etc. listed in Part V-A | 25a | 463,769. | 397,738. | 11,816. | 54,215. |
| b Compensation of former officers, directors, key employees, etc. listed in Part V-B | 25b | 0. | 0. | 0. | 0. |
| c Compensation and other distributions, not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | 25c | | | | |
| 26 Salaries and wages of employees not included on lines 25a, b, and c | 26 | 1,379,433. | 1,145,597. | 32,990. | 200,846. |
| 27 Pension plan contributions not included on lines 25a, b, and c | 27 | 77,356. | 65,369. | 1,621. | 10,366. |
| 28 Employee benefits not included on lines 25a - 27 | 28 | 139,592. | 118,283. | 2,899. | 18,410. |
| 29 Payroll taxes | 29 | 136,310. | 115,142. | 3,010. | 18,158. |
| 30 Professional fundraising fees | 30 | | | | |
| 31 Accounting fees | 31 | 20,800. | 17,010. | 1,900. | 1,890. |
| 32 Legal fees | 32 | | | | |
| 33 Supplies | 33 | 113,042. | 104,045. | 7,980. | 1,017. |
| 34 Telephone | 34 | 23,502. | 17,306. | 4,784. | 1,412. |
| 35 Postage and shipping | 35 | 15,535. | 12,511. | 1,673. | 1,351. |
| 36 Occupancy | 36 | 32,639. | 23,985. | 2,668. | 5,986. |
| 37 Equipment rental and maintenance | 37 | 2,178. | 749. | 1,429. | |
| 38 Printing and publications | 38 | 21,242. | 17,019. | 1,720. | 2,503. |
| 39 Travel | 39 | | | | |
| 40 Conferences, conventions, and meetings | 40 | 36,808. | 26,289. | 6,921. | 3,598. |
| 41 Interest | 41 | | | | |
| 42 Depreciation, depletion, etc (attach schedule) | 42 | 28,644. | | 28,644. | |
| 43 Other expenses not covered above (itemize): | | | | | |
| a | 43a | | | | |
| b | 43b | | | | |
| c | 43c | | | | |
| d | 43d | | | | |
| e | 43e | | | | |
| f | 43f | | | | |
| g SEE STATEMENT 3 | 43g | 830,307. | 765,762. | 32,312. | 32,233. |
| 44 **Total functional expenses.** Add lines 22a through 43g. (Organizations completing columns (B)-(D), carry these totals to lines 13-15) | 44 | 3,321,157. | 2,826,805. | 142,367. | 351,985. |

**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 $ N/A ; **(ii)** the amount allocated to Program services $ N/A ; **(iii)** the amount allocated to Management and general $ N/A ; and **(iv)** the amount allocated to Fundraising $ N/A

## Part III Statement of Program Service Accomplishments *(See the instructions.)*

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.

| What is the organization's primary exempt purpose? ▶ SEE STATEMENT 5 | Program Service Expenses (Required for 501(c)(3) and (4) orgs., and 4947(a)(1) trusts; but optional for others.) |
|---|---|
| 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) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others.) | |
| **a** FOSTER GRANDPARENT PROGRAM (FGP) - 100 LOW-INCOME GRANDPARENTS HAD MEANINGFUL ROLES & FINANCIAL SUPPORT WHILE 1,875 CHILDREN WITH SPECIAL NEEDS - HANDICAPPED CHILDREN, BABIES AFFECTED BY DRUG ABUSE, HOMELESS AND HOSPITALIZED YOUTH, AND CHILDREN WITH AIDS - RECEIVED ONE TO ONE SUPPORT & CARE FOR 100,407 HOURS DURING THE YEAR. | |
| (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 546,458. |
| **b** SENIOR COMPANION PROGRAM (SCP) - 100 SR COMPANIONS RECD FIN'L ASSISTANCE, SOCIAL SUPPORT & AN IMPORTANT SOCIETAL ROLE WHILE PROVIDING HOME CARE (10-40 HRS/ WK) TO 114 FRAIL ELDERLY INCLUDING ALZHEIMER'S PATIENTS, STROKE VICTIMS, AND CANCER PATIENTS, THEREBY ALLOWING THEM TO STAY IN THEIR HOMES AND OUT OF INSTITUTIONS. | |
| (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 454,962. |
| **c** GUARDIANSHIP AND MONEY MANAGEMENT PROGRAM: 234 FRAIL ELDERLY INDIVIDUALS WERE SERVED BY A VOLUNTEER GUARDIAN OR MONEY MANAGEMENT VOLUNTEER. 181 VOLUNTEERS PARTICIPATED IN THE PROGRAM AND CONTRIBUTED 6,750 HOURS OF DIRECT SERVICE ARRANGING FOR HEALTHCARE, SOCIAL SERVICES, APPROPRIATE HOUSING, AND FINANCIAL MANAGEMENT. | |
| (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 394,075. |
| **d** SEE STATEMENT 4 | |
| (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 365,460. |
| **e** Other program services (attach schedule) SEE STATEMENT 6 | |
| (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 1,065,850. |
| **f Total of Program Service Expenses** (should equal line 44, column (B), Program services) ▶ | 2,826,805. |

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12-27-07

## Part IV Balance Sheets *(See the instructions.)*

**Note:** *Where required, attached schedules and amounts within the description column should be for end-of-year amounts only.*

| | Line | Description | | | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|---|---|
| Assets | 45 | Cash - non-interest-bearing | | | 5,352. | 45 | 839. |
| | 46 | Savings and temporary cash investments | | | 99,236. | 46 | 431,841. |
| | 47 a | Accounts receivable | 47a | | | | |
| | b | Less: allowance for doubtful accounts | 47b | | | 47c | |
| | 48 a | Pledges receivable | 48a | 2,280,998. | | | |
| | b | Less: allowance for doubtful accounts | 48b | 46,538. | 3,756,851. | 48c | 2,234,460. |
| | 49 | Grants receivable | | | 111,418. | 49 | 101,644. |
| | 50 a | Receivables from current and former officers, directors, trustees, and key employees | | | | 50a | |
| | b | Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | 50b | |
| | 51 a | Other notes and loans receivable | 51a | | | | |
| | b | Less: allowance for doubtful accounts | 51b | | | 51c | |
| | 52 | Inventories for sale or use | | | | 52 | |
| | 53 | Prepaid expenses and deferred charges | | | 30,549. | 53 | 8,470. |
| | 54 a | Investments - publicly-traded securities STMT 8 ▶ ☐ Cost ☒ FMV | | | 2,967,707. | 54a | 3,947,773. |
| | b | Investments - other securities ▶ ☐ Cost ☐ FMV | | | | 54b | |
| | 55 a | Investments - land, buildings, and equipment: basis STMT 7 | 55a | | | | |
| | b | Less: accumulated depreciation | 55b | | | 55c | |
| | 56 | Investments - other | | | | 56 | |
| | 57 a | Land, buildings, and equipment: basis | 57a | 1,793,842. | | | |
| | b | Less: accumulated depreciation STMT 9 | 57b | 328,540. | 1,438,475. | 57c | 1,465,302. |
| | 58 | Other assets, including program-related investments (describe ▶ SEE STATEMENT 10 ) | | | 1,139,554. | 58 | 3,734,911. |
| | 59 | **Total assets** (must equal line 74). Add lines 45 through 58 | | | 9,549,142. | 59 | 11,925,240. |
| Liabilities | 60 | Accounts payable and accrued expenses | | | 26,749. | 60 | 17,336. |
| | 61 | Grants payable | | | | 61 | |
| | 62 | Deferred revenue | | | 42,054. | 62 | 1,025. |
| | 63 | Loans from officers, directors, trustees, and key employees | | | | 63 | |
| | 64 a | Tax-exempt bond liabilities | | | | 64a | |
| | b | Mortgages and other notes payable | | | | 64b | |
| | 65 | Other liabilities (describe ▶ CONSTRUCTION RETAINAGE ) | | | 0. | 65 | 214,480. |
| | 66 | **Total liabilities.** Add lines 60 through 65 | | | 68,803. | 66 | 232,841. |
| 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 | | | 3,102,107. | 67 | 5,974,168. |
| | 68 | Temporarily restricted | | | 6,378,232. | 68 | 5,718,231. |
| | 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 and column (B) **must** equal line 21) | | | 9,480,339. | 73 | 11,692,399. |
| | 74 | **Total liabilities and net assets/fund balances.** Add lines 66 and 73 | | | 9,549,142. | 74 | 11,925,240. |

Form **990** (2007)

723031
12-27-07

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

| | | | | | |
|---|---|---|---|---|---|
| a | Total revenue, gains, and other support per audited financial statements | | | a | 5,851,038. |
| b | Amounts included on line a but not on Part I, line 12: | | | | |
| 1 | Net unrealized gains on investments | b1 | <13,569.> | | |
| 2 | Donated services and use of facilities | b2 | 224,618. | | |
| 3 | Recoveries of prior year grants | b3 | | | |
| 4 | Other (specify): EXPENSES RELATED TO SPECIAL EVENTS | b4 | 93,203. | | |
| | Add lines b1 through b4 | | | b | 304,252. |
| c | Subtract line b from line a | | | c | 5,546,786. |
| d | Amounts included on Part I, line 12, but not on line a: | | | | |
| 1 | Investment expenses not included on Part I, line 6b | d1 | | | |
| 2 | Other (specify): | d2 | | | |
| | Add lines d1 and d2 | | | d | 0. |
| e | **Total revenue** (Part I, line 12) Add lines c and d ▶ | | | e | 5,546,786. |

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

| | | | | | |
|---|---|---|---|---|---|
| a | Total expenses and losses per audited financial statements | | | a | 3,638,978. |
| b | Amounts included on line a but not on Part I, line 17: | | | | |
| 1 | Donated services and use of facilities | b1 | 224,618. | | |
| 2 | Prior year adjustments reported on Part I, line 20 | b2 | | | |
| 3 | Losses reported on Part I, line 20 | b3 | | | |
| 4 | Other (specify). EXPENSES RELATED TO SPECIAL EVENTS | b4 | 93,203. | | |
| | Add lines b1 through b4 | | | b | 317,821. |
| c | Subtract line b from line a | | | c | 3,321,157. |
| d | Amounts included on Part I, line 17, but not on line a: | | | | |
| 1 | Investment expenses not included on Part I, line 6b | d1 | | | |
| 2 | Other (specify) | d2 | | | |
| | Add lines d1 and d2 | | | d | 0. |
| e | **Total expenses** (Part I, line 17) Add lines c and d ▶ | | | e | 3,321,157. |

**Part V-A** **Current Officers, Directors, Trustees, and Key Employees** (List each person who was an officer, director, trustee, or key employee at any time during the year even if they were not compensated.) *(See the 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 & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| SEE STATEMENT 11 | | 410,936. | 51,333. | 1,500. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

**Part V-A** **Current Officers, Directors, Trustees, and Key Employees** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| 75 a | Enter the total number of officers, directors, and trustees permitted to vote on organization business at board meetings ▶ 54 | | | |
| b | Are any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, related to each other through family or business relationships? If "Yes," attach a statement that identifies the individuals and explains the relationship(s) | 75b | | X |
| c | Do any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, receive compensation from any other organizations, whether tax exempt or taxable, that are related to the organization? See the instructions for the definition of "related organization." | 75c | | X |
| | If "Yes," attach a statement that includes the information described in the instructions. | | | |
| d | Does the organization have a written conflict of interest policy? | 75d | X | |

**Part V-B** **Former Officers, Directors, Trustees, and Key Employees That Received Compensation or Other Benefits** (If any former officer, director, trustee, or key employee received compensation or other benefits (described below) during the year, list that person below and enter the amount of compensation or other benefits in the appropriate column. See the instructions.)

| (A) Name and address | (B) Loans and Advances | (C) Compensation (if not paid, enter -0-) | (D) Contributions to employee benefit plans & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| NONE | | | | |

**Part VI** **Other Information** *(See the instructions.)*

| | | | Yes | No |
|---|---|---|---|---|
| 76 | Did the organization make a change in its activities or methods of conducting activities? If "Yes," attach a detailed statement of each change | 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 | |
| 78 a | 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? N/A | 78b | | |
| 79 | Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement | 79 | | X |
| 80 a | 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 ▶ N/A and check whether it is ☐ exempt or ☐ nonexempt | | | |
| 81 a | 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 |

**Part VI Other Information** *(continued)*

| | | | | Line | Yes | No |
|---|---|---|---|---|---|---|
| 82 a | 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 | 224,618. | | | |
| 83 a | 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 | |
| 84 a | Did the organization solicit any contributions or gifts that were not tax deductible? | | N/A | 84a | | |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | | N/A | 84b | | |
| 85 a | *501(c)(4), (5), or (6).* Were substantially all dues nondeductible by members? | | N/A | 85a | | |
| b | Did the organization make only in-house lobbying expenditures of $2,000 or less? | | N/A | 85b | | |
| | 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. | | | | | |
| 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? | | N/A | 85g | | |
| 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? | | N/A | 85h | | |
| 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 a | 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 | | | 88a | | X |
| b | At any time during the year, did the organization, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Part XI ▶ | | | 88b | | X |
| 89 a | *501(c)(3) organizations.* Enter: Amount of tax imposed on the organization during the year under: section 4911 ▶ 0. ; section 4912 ▶ 0. ; section 4955 ▶ 0. | | | | | |
| 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. | | | |
| e | *All organizations.* At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? | | | 89e | | X |
| f | *All organizations.* Did the organization acquire a direct or indirect interest in any applicable insurance contract? | | | 89f | | X |
| g | *For supporting organizations and sponsoring organizations maintaining donor advised funds.* Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | | N/A | 89g | | |
| 90 a | List the states with which a copy of this return is filed ▶ NONE | | | | | |
| b | Number of employees employed in the pay period that includes March 12, 2007 | 90b | 47 | | | |
| 91 a | The books are in care of ▶ SANDRA LANDERS Telephone no. ▶ (214) 823-5700 | | | | | |
| | Located at ▶ 3910 HARRY HINES BLVD., DALLAS, TX ZIP + 4 ▶ 75219 | | | | | |
| 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 ▶ N/A<br>See the instructions for exceptions and filing requirements for **Form TD F 90-22.1**, Report of Foreign Bank and Financial Accounts. | | | 91b | | X |

**Part VI | Other Information** *(continued)*

| | | Yes | No |
|---|---|---|---|
| c At any time during the calendar year, did the organization maintain an office outside of the United States? | 91c | | X |

If "Yes," enter the name of the foreign country ▶ N/A

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 ▶ | 92 | N/A

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

| **Note:** *Enter gross amounts unless otherwise indicated.* | Unrelated business income (A) Business code | (B) Amount | Excluded by section 512, 513, or 514 (C) Exclusion code | (D) Amount | (E) Related or exempt function income |
|---|---|---|---|---|---|
| 93 Program service revenue: | | | | | |
| a FOOD/SUPPLY REIMBURSEMT | | | | | 46,285. |
| b HOLIDAY MAILING | | | | | 1,400. |
| c TRIBUTES/HONORARIUMS | | | | | 465. |
| d GUARDIANSHIP FEES | | | | | 6,967. |
| e | | | | | |
| f Medicare/Medicaid payments | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 94 Membership dues and assessments | | | | | |
| 95 Interest on savings and temporary cash investments | | | | | |
| 96 Dividends and interest from securities | | | 14 | 182,419. | |
| 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 personal property | | | | | |
| 99 Other investment income | | | | | |
| 100 Gain or (loss) from sales of assets other than inventory | | | | | |
| 101 Net income or (loss) from special events | | | 01 | <4,015.> | |
| 102 Gross profit or (loss) from sales of inventory | | | | | |
| 103 Other revenue: | | | | | |
| a MISCELLANEOUS INCOME | | | 01 | 192. | |
| b INSURANCE CLAIM | | | 01 | 3,706. | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| 104 Subtotal (add columns (B), (D), and (E)) | | 0. | | 182,302. | 55,117. |

105 **Total** (add line 104, columns (B), (D), and (E)) ▶ 237,419.

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

**Part VIII | Relationship of Activities to the Accomplishment of Exempt Purposes** *(See the 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). |
|---|---|
| 93 | EACH OF THE REPORTED ACTIVITIES CONTRIBUTED TO THE ORGANIZATION'S ABILITY TO PROVIDE INCREASED PROGRAMMING AND SUPPORT TO THE SENIOR CITIZENS OF DALLAS AND SURROUNDING AREAS, THUS HELPING TO IMPROVE THE QUALITY OF LIFE OF INCREASED NUMBERS OF OLDER ADULTS. |

**Part IX | Information Regarding Taxable Subsidiaries and Disregarded Entities** *(See the 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 the 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).*

**Part XI** **Information Regarding Transfers To and From Controlled Entities.** *Complete only if the organization is a controlling organization as defined in section 512(b)(13).* N/A

| | Yes | No |
|---|---|---|
| 106 Did the reporting organization **make** any transfers **to** a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity. | | |

| | (A) Name, address, of each controlled entity | (B) Employer Identification Number | (C) Description of transfer | (D) Amount of transfer |
|---|---|---|---|---|
| a | | | | |
| b | | | | |
| c | | | | |
| | Totals | | | |

| | Yes | No |
|---|---|---|
| 107 Did the reporting organization **receive** any transfers **from** a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity. | | |

| | (A) Name, address, of each controlled entity | (B) Employer Identification Number | (C) Description of transfer | (D) Amount of transfer |
|---|---|---|---|---|
| a | | | | |
| b | | | | |
| c | | | | |
| | Totals | | | |

| | Yes | No |
|---|---|---|
| 108 Did the organization have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and annuities described in question 107 above? | | |

**Please Sign Here**

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

▶ [signature] February 3, 2009

Signature of officer Date

▶ David B. Miller, Chairman Board of Directors

Type or print name and title

**Paid Preparer's Use Only**

| | | | | |
|---|---|---|---|---|
| Preparer's signature ▶ [signature] | Date 1/23/09 | Check if self-employed ▶ ☐ | Preparer's SSN or PTIN (See Gen Inst X) | |
| Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ WEAVER AND TIDWELL, L.L.P. 12221 MERIT DRIVE, SUITE 1400 DALLAS, TEXAS 75251 | | | EIN ▶ | Phone no. ▶ (972) 490-1970 |

**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 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

**2007**

Name of the organization: SENIOR CITIZENS OF GREATER DALLAS, INC.

Employer identification number: 75 1085555

## Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees

(See page 1 of the 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 & deferred compensation | (e) Expense account and other allowances |
|---|---|---|---|---|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total number of other employees paid over $50,000 ▶ | 0 | | | |

## Part II-A Compensation of the Five Highest Paid Independent Contractors for Professional Services

(See page 2 of the 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 |
|---|---|---|
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over $50,000 for professional services ▶ 0 | | |

## Part II-B Compensation of the Five Highest Paid Independent Contractors for Other Services

(List each contractor who performed services other than professional services, whether individuals or firms. If there are none, enter "None." See page 2 of the instructions.)

| (a) Name and address of each independent contractor paid more than $50,000 | (b) Type of service | (c) Compensation |
|---|---|---|
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| Total number of other contractors receiving over $50,000 for other services ▶ 0 | | |

**Part III** **Statements About Activities** (See page 2 of the 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 ▶ $ ______ $ ______ (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)? SEE PART V-A, FORM 990 | 2d | X | |
| e | Transfer of any part of its income or assets? | 2e | | X |
| 3 a | Did the organization make grants for scholarships, fellowships, student loans, etc.? (If "Yes," attach an explanation of how the organization determines that recipients qualify to receive payments.) | 3a | | X |
| b | Did the organization have a section 403(b) annuity plan for its employees? | 3b | X | |
| c | Did the organization receive or hold an easement for conservation purposes, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," attach a detailed statement | 3c | | X |
| d | Did the organization provide credit counseling, debt management, credit repair, or debt negotiation services? | 3d | | X |
| 4 a | Did the organization maintain any donor advised funds? If "Yes," complete lines 4b through 4g. If "No," complete lines 4f and 4g | 4a | | X |
| b | Did the organization make any taxable distributions under section 4966? N/A | 4b | | |
| c | Did the organization make a distribution to a donor, donor advisor, or related person? N/A | 4c | | |
| d | Enter the total number of donor advised funds owned at the end of the tax year ▶ | | | 0 |
| e | Enter the aggregate value of assets held in all donor advised funds owned at the end of the tax year ▶ | | | 0. |
| f | Enter the total number of separate funds or accounts owned at the end of the year (excluding donor advised funds included on line 4d) where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts ▶ | | | 0. |
| g | Enter the aggregate value of assets in all funds or accounts included on line 4f at the end of the tax year ▶ | | | 0. |

**Part IV** Reason for Non-Private Foundation Status (See pages 4 through 8 of the instructions.)

I certify that 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 otherwise meets the requirements of section 509(a)(3). Check the box that describes the type of supporting organization:

☐ Type I ☐ Type II ☐ Type III-Functionally Integrated ☐ Type III-Other

**Provide the following information about the supported organizations.** (See page 8 of the instructions.)

| (a) Name(s) of supported organization(s) | (b) Employer identification number (EIN) | (c) Type of organization (described in lines 5 through 12 above or IRC section) | (d) Is the supported organization listed in the supporting organization's governing documents? Yes | (d) No | (e) Amount of support |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| **Total** ▶ | | | | | |

14 ☐ An organization organized and operated to test for public safety. Section 509(a)(4). (See page 8 of the 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) 2006 | (b) 2005 | (c) 2004 | (d) 2003 | (e) Total |
|---|---|---|---|---|---|
| 15 Gifts, grants, and contributions received. (Do not include unusual grants. See line 28.) | 9,211,775. | 5,533,878. | 2,985,774. | 2,691,014. | 20,422,441. |
| 16 Membership fees received | | | | | |
| 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 | 130,961. | 139,465. | 133,807. | 103,867. | 508,100. |
| 18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, income from similar sources, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975 | 56,786. | 59,453. | 10,980. | 8,318. | 135,537. |
| 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 | 10,097. | 16. | SEE STATEMENT 12 1,903. | 16,420. | 28,436. |
| 23 Total of lines 15 through 22 | 9,409,619. | 5,732,812. | 3,132,464. | 2,819,619. | 21,094,514. |
| 24 Line 23 minus line 17 | 9,278,658. | 5,593,347. | 2,998,657. | 2,715,752. | 20,586,414. |
| 25 Enter 1% of line 23 | 94,096. | 57,328. | 31,325. | 28,196. | |

26 **Organizations described on lines 10 or 11:** a Enter 2% of amount in column (e), line 24 ▶ 26a 411,728.

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 2003 through 2006 exceeded the amount shown in line 26a. **Do not file this list with your return.** Enter the total of all these excess amounts ▶ 26b 931,744.

c Total support for section 509(a)(1) test: Enter line 24, column (e) ▶ 26c 20,586,414.

d Add: Amounts from column (e) for lines: 18 135,537. 19 ______ 22 28,436. 26b 931,744. ▶ 26d 1,095,717.

e Public support (line 26c minus line 26d total) ▶ 26e 19,490,697.

f **Public support percentage (line 26e (numerator) divided by line 26c (denominator))** ▶ 26f 94.6775%

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: N/A

(2006) (2005) (2004) (2003)

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 11b, 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: N/A

(2006) (2005) (2004) (2003)

c Add: Amounts from column (e) for lines: 15 ______ 16 ______ 17 ______ 20 ______ 21 ______ ▶ 27c N/A

d Add: Line 27a total ______ and line 27b total ______ ▶ 27d N/A

e Public support (line 27c total minus line 27d total) ▶ 27e N/A

f Total support for section 509(a)(2) test: Enter amount on line 23, column (e) ▶ 27f N/A

g **Public support percentage (line 27e (numerator) divided by line 27f (denominator))** ▶ 27g N/A %

h **Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))** ▶ 27h N/A %

28 **Unusual Grants:** For an organization described in line 10, 11, or 12 that received any unusual grants during 2003 through 2006, 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.

NONE

**Part V** **Private School Questionnaire** (See page 9 of the instructions.) N/A
**(To be completed ONLY by schools that checked the box on line 6 in Part IV)**

| | | | 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? | 29 | | |
| 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? | 30 | | |
| 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.) | 31 | | |
| 32 | Does the organization maintain the following: | | | |
| a | Records indicating the racial composition of the student body, faculty, and administrative staff? | 32a | | |
| b | Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? | 32b | | |
| c | Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? | 32c | | |
| 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.) | 32d | | |
| 33 | Does the organization discriminate by race in any way with respect to: | | | |
| a | Students' rights or privileges? | 33a | | |
| b | Admissions policies? | 33b | | |
| c | Employment of faculty or administrative staff? | 33c | | |
| d | Scholarships or other financial assistance? | 33d | | |
| e | Educational policies? | 33e | | |
| f | Use of facilities? | 33f | | |
| g | Athletic programs? | 33g | | |
| h | Other extracurricular activities? If you answered "Yes" to any of the above, please explain. (If you need more space, attach a separate statement.) | 33h | | |
| 34 a | Does the organization receive any financial aid or assistance from a governmental agency? | 34a | | |
| 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. | 34b | | |
| 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 | 35 | | |

**Part VI-A** **Lobbying Expenditures by Electing Public Charities** (See page 11 of the instructions.) N/A

(To be completed **ONLY** by an eligible organization that filed Form 5768)

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 |
|---|---|---|---|
| | | N/A | |
| 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 - | 41 | | |
| 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 | | |

| **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 |
| 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 |

**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 on page 13 of the instructions.)

**Lobbying Expenditures During 4-Year Averaging Period** N/A

| Calendar year (or fiscal year beginning in) ▶ | (a) 2007 | (b) 2006 | (c) 2005 | (d) 2004 | (e) Total |
|---|---|---|---|---|---|
| 45 Lobbying nontaxable amount | | | | | 0. |
| 46 Lobbying ceiling amount (150% of line 45(e)) | | | | | 0. |
| 47 Total lobbying expenditures | | | | | 0. |
| 48 Grassroots nontaxable amount | | | | | 0. |
| 49 Grassroots ceiling amount (150% of line 48(e)) | | | | | 0. |
| 50 Grassroots lobbying expenditures | | | | | 0. |

**Part VI-B** **Lobbying Activity by Nonelecting Public Charities**

(For reporting only by organizations that did not complete Part VI-A) (See page 14 of the 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.) | | | 0. |

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

## Part VII. Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations (See page 14 of the instructions.)

51 Did the reporting organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

| | | Yes | No |
|---|---|---|---|
| a Transfers from the reporting organization to a noncharitable exempt organization of: | | | |
| (i) Cash | 51a(i) | | X |
| (ii) Other assets | a(ii) | | X |
| b Other transactions: | | | |
| (i) Sales or exchanges of assets with a noncharitable exempt organization | b(i) | | X |
| (ii) Purchases of assets from a noncharitable exempt organization | b(ii) | | X |
| (iii) Rental of facilities, equipment, or other assets | b(iii) | | X |
| (iv) Reimbursement arrangements | b(iv) | | X |
| (v) Loans or loan guarantees | b(v) | | X |
| (vi) Performance of services or membership or fundraising solicitations | b(vi) | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | c | | X |

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the organization received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received: N/A

| (a) Line no. | (b) Amount involved | (c) Name of noncharitable exempt organization | (d) Description of transfers, transactions, and sharing arrangements |
|---|---|---|---|
| | | | |

52 a Is the organization directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ▶ ☐ Yes ☒ No

b If "Yes," complete the following schedule: N/A

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|---|---|---|
| | | |

FORM 990 SPECIAL EVENTS AND ACTIVITIES STATEMENT 1

| DESCRIPTION OF EVENT | GROSS RECEIPTS | CONTRIBUT. INCLUDED | GROSS REVENUE | DIRECT EXPENSES | NET INCOME OR (LOSS) |
|---|---|---|---|---|---|
| SPIRIT OF GENERATIONS LUNCHEON | 542,475. | 494,819. | 47,656. | 77,825. | <30,169.> |
| SAGE SOCIETY | 131,010. | 118,385. | 12,625. | 15,378. | <2,753.> |
| GOLF TOURNAMENT | 28,907. | | 28,907. | | 28,907. |
| TO FM 990, PART I, LINE 9 | 702,392. | 613,204. | 89,188. | 93,203. | <4,015.> |

FORM 990 OTHER CHANGES IN NET ASSETS OR FUND BALANCES STATEMENT 2

| DESCRIPTION | AMOUNT |
|---|---|
| UNREALIZED GAIN ON INVESTMENTS | <13,569.> |
| TOTAL TO FORM 990, PART I, LINE 20 | <13,569.> |

FORM 990 OTHER EXPENSES STATEMENT 3

| DESCRIPTION | (A) TOTAL | (B) PROGRAM SERVICES | (C) MANAGEMENT AND GENERAL | (D) FUNDRAISING |
|---|---|---|---|---|
| INSURANCE | 36,376. | 16,525. | 2,215. | 17,636. |
| CONTRACT SERVICES | 17,400. | 10,682. | 2,800. | 3,918. |
| CONSULTING | 118. | | | 118. |
| LEGAL ASSISTANCE | 1,304. | | | 1,304. |
| PERMITS | 500. | | | 500. |
| STIPEND | 480,763. | 480,763. | | |
| CLIENT ASSISTANCE | 92,329. | 92,329. | | |
| WEB SITE | 785. | 639. | 75. | 71. |
| JANITOR | 10,560. | 8,640. | 960. | 960. |
| GROUNDS MAINTENANCE | 840. | | | 840. |
| HOUSEHOLD SUPPLIES | 1,977. | 1,620. | 177. | 180. |
| DOCUMENT MANAGEMENT | 1,209. | 990. | 109. | 110. |
| CERTIFICATION | 516. | 516. | | |
| LOCAL TRAVEL | 23,518. | 20,944. | 2,493. | 81. |
| VEHICLE OPERATING COST | 16,923. | 16,828. | 95. | |
| DUES & SUBSCRIPTIONS | 6,553. | 4,677. | 836. | 1,040. |
| LIAB INS & FID BOND | 29,610. | 18,933. | 10,226. | 451. |
| VOLUNTEER TRAVEL | 52,666. | 52,666. | | |

| | | | | |
|---|---|---|---|---|
| BANK CHARGES | 7,421. | | 7,421. | |
| VOLUNTEER RECOGNITION | 19,372. | 16,511. | 2,477. | 384. |
| GROUNDBREAKING | 2,020. | | | 2,020. |
| RECRUITING | 2,804. | 2,256. | 548. | |
| MAINTENANCE AGREEMENTS | 12,456. | 8,712. | 1,426. | 2,318. |
| SOFTWARE | 3,631. | 2,875. | 454. | 302. |
| AGENCY DISPLAY | 288. | 288. | | |
| ADVERTISING | 8,368. | 8,368. | | |
| TOTAL TO FM 990, LN 43 | 830,307. | 765,762. | 32,312. | 32,233. |

FORM 990 STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS STATEMENT 4

DESCRIPTION OF PROGRAM SERVICE FOUR

ELDER SUPPORT PROGRAM - 4,958 OLDER ADULTS AND FAMILY MEMEBERS RECEIVED SUPPORTIVE COUNSELING IN THE AREAS OF PROBLEM RESOLUTION, DECISION MAKING, PLANNING FOR PRESENT AND FUTURE CARE NEEDS FOR OLDER ADULTS AND ASSISTANCE WITH OBTAINING LOW COST OR FREE MEDICATIONS. CAREGIVING ISSUES WERE ADDRESSED IN GROUP MEETINGS AT 15 CORPORATIONS AND COMMUNITY ORGANIZATIONS TO 622 INDIVIDUALS.

| | GRANTS | EXPENSES |
|---|---|---|
| TO FORM 990, PART III, LINE D | | 365,460. |

FORM 990 STATEMENT OF ORGANIZATION'S PRIMARY EXEMPT PURPOSE STATEMENT 5
PART III

EXPLANATION

TO PROVIDE PROGRAMS THAT IMPROVE THE QUALITY OF LIFE OF OLDER ADULTS IN THE GREATER DALLAS AREA.

FORM 990 OTHER PROGRAM SERVICES STATEMENT 6

| DESCRIPTION OF OTHER PROGRAM SERVICES | GRANTS AND ALLOCATIONS | EXPENSES |
|---|---|---|
| NURSING HOME OMBUDSMAN PROGRAM -46 VOLUNTEER OMBUDSMEN MADE 58,861 CONTACTS WITH 13,990 NURSING HOME AND ASSISTED LIVING RESIDENTS IN 61 NURSING AND 146 ASSISTED LIVING FACILITIES. OMBUDSMEN HANDLED 5,656 COMPLAINTS THAT ADDRESSSED ISSUES SUCH AS DISRESPECTFUL TREATMENT, UNSANITARY CONDITIONS, AND UNANSWERED CALL BUTTONS. PRESENTATIONS WERE MADE TO 1,555 INDIVIDUALS AND 3,079 FAMILY MEMBERS WERE ASSISTED. 759 NEW FRIENDLY VISITOR VOLUNTEERS MADE 2,226 CONTACTS WITH NURSING HOME AND ASSISTED LIVING RESIDENTS. | 0. | 361,808. |
| RETIRED & SENIOR VOLUNTEER PROGRAM (RSVP) - 2,334 VOLUNTEERS' MENTAL & PHYSICAL HEALTH WAS IMPROVED WHILE 198 NONPROFIT AGENCIES RECEIVED 362,734 HOURS OF VOLUNTEER SERVICE, IN ACTIVITIES SUCH AS TEACHING ESL CLASSES, WORKING IN FOOD PANTRIES, PROVIDING HOMELAND SECURITY, AND ENCOURAGING CHILD IMMUNIZATIONS. | 0. | 317,504. |
| SENIOR EMPLOYMENT SOURCE: 1,275 MATURE WORKERS RECEIVED JOB SEARCH ASSISTANCE AND TRAINING WITH 316 PARTICIPATING IN THE SENIOR CONNECTION SUPPORT GROUP. THE JOB LEADS DATABASE INCLUDED MORE THAN 4,100 LISTINGS. INFORMATION AND EDUCATION WERE PROVIDED TO 2,151 OLDER ADULTS LOOKING FOR EMPLOYMENT AND EMPLOYERS INTERESTED IN HIRING OLDER WORKERS. 51% OF THOSE WHO RECEIVED INDIVIDUAL COUNSELING FOUND JOBS. | 0. | 189,982. |
| ADVOCACY GROUP FOR THE ELDERLY (AGE): 2,755 INDIVIDUALS WERE REACHED IN INDIVIDUAL OR GROUP MEETINGS ADDRESSING ISSUES SUCH AS INCREASING FUNDING FOR LOCAL GUARDIANSHIP PROGRAMS; EDUCATING AND TRAINING OF MEDICARE PART D; RESTORING PERSONAL NEEDS ALLOWANCES OF SENIORS IN LONG-TERM CARE FACILITIES; AND SUPPORTING PROTECTIVE ADULT SERVICES. | 0. | 146,042. |
| OFF OUR ROCKERS PROGRAM: 103 OFF OUR ROCKERS VOLUNTEERS SERVED 634 ELEMENTARY STUDENTS, WHO NEEDED INDIVIDUALIZED ATTENTION AND ASSISTANCE IN THE LEARNING ENVIRONMENT. THIS PROVIDED A MEANINGFUL ROLE FOR THE RETIREES WHO CONTRIBUTED 2,332 VOLUNTEER HOURS WITH THE CHILDREN AT 54 SCHOOLS IN 11 SCHOOL DISTRICTS. | 0. | 50,514. |
| TOTAL TO FORM 990, PART III, LINE E | | 1,065,850. |

FORM 990 NON-GOVERNMENT SECURITIES STATEMENT 7

| SECURITY DESCRIPTION | COST/FMV | CORPORATE STOCKS | CORPORATE BONDS | OTHER PUBLICLY TRADED SECURITIES | TOTAL NON-GOV'T SECURITIES |
|---|---|---|---|---|---|
| MUTUAL FUNDS | FMV | | | 3,410,643. | 3,410,643. |
| TO FORM 990, LINE 54A, COL B | | | | 3,410,643. | 3,410,643. |

FORM 990 GOVERNMENT SECURITIES STATEMENT 8

| DESCRIPTION | COST/FMV | U.S. GOVERNMENT | STATE AND LOCAL GOV'T | TOTAL GOV'T SECURITIES |
|---|---|---|---|---|
| TREASURY NOTES & U.S. GOVT SECURITIES | FMV | 537,130. | | 537,130. |
| TOTAL TO FORM 990, LINE 54A, COL B | | 537,130. | | 537,130. |

FORM 990 DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 9

| DESCRIPTION | COST OR OTHER BASIS | ACCUMULATED DEPRECIATION | BOOK VALUE |
|---|---|---|---|
| LAND | 1,381,450. | 0. | 1,381,450. |
| FURNITURE AND FIXTURES | 256,901. | 220,869. | 36,032. |
| AUTOMOBILES | 155,491. | 107,671. | 47,820. |
| TOTAL TO FORM 990, PART IV, LN 57 | 1,793,842. | 328,540. | 1,465,302. |

FORM 990 OTHER ASSETS STATEMENT 10

| DESCRIPTION | BEGINNING OF YEAR | END OF YEAR |
|---|---|---|
| CONSTRUCTION IN PROGRESS | 814,899. | 3,423,326. |
| BENEFICIAL INTEREST IN ASSETS HELD BY OTHERS | 324,655. | 311,585. |
| TOTAL TO FORM 990, PART IV, LINE 58 | 1,139,554. | 3,734,911. |

FORM 990 PART V-A - LIST OF CURRENT OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES STATEMENT 11

| NAME AND ADDRESS | TITLE AND AVRG HRS/WK | COMPEN-SATION | EMPLOYEE BEN PLAN CONTRIB | EXPENSE ACCOUNT |
|---|---|---|---|---|
| MOLLY H. BOGEN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | EXEC DIRECTOR<br>40.00 | 159,936. | 19,305. | 1,500. |
| BONNIE C. DICKINSON<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | ASSOC. EXEC DIRECTOR<br>40.00 | 90,700. | 13,100. | 0. |
| SANDRA J. LANDERS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | FINANCE DIRECTOR<br>40.00 | 88,200. | 13,106. | 0. |
| PEGGY GLENN-SUMMITT<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR OF PROGRAMS<br>40.00 | 72,100. | 5,822. | 0. |
| JOHN D. SOLANA<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | CHAIRMAN<br>0.00 | 0. | 0. | 0. |
| SUZY GEKIERE<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | PAST CHAIRMAN<br>0.00 | 0. | 0. | 0. |
| DAVID B MILLER<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | CHAIRMAN ELECT<br>0.00 | 0. | 0. | 0. |
| DAVID M JACOBS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | TREASURER<br>0.00 | 0. | 0. | 0. |
| RAYMOND SMERGE<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | PLANNING CHAIR<br>0.00 | 0. | 0. | 0. |
| MARCIA ELLIS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | CORPORATE SECRETARY<br>0.00 | 0. | 0. | 0. |
| BECKY BRIGHT<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | AT-LARGE<br>0.00 | 0. | 0. | 0. |

| | | | | |
|---|---|---|---|---|
| DOROTHY KENNINGTON<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | AT-LARGE<br>0.00 | 0. | 0. | 0. |
| MICHAEL S ALBRIGHT<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| KEN ALLEN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| MARISSA R ANCHIA<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| DAVID S ARBUCKLE<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| JOE L ATKINS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| BOB BEST<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| CORDELIA BOONE<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| JOHN A (PETE) BRICKER, JR<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| BILL BROWN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| BILL E CARTER<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| DARLENE CASS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| SISSY CULLUM<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |

| | | | | |
|---|---|---|---|---|
| GREGORY DAVIS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| KANTILAL DESAI<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| RICK DOUGLAS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| GEORGE DUNHAM<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| SANDRA ESTESS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| DALE FULLER, MD<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| JAMES A GETTMAN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| MARGO GOODWIN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| RANDALL GREEN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| ROBERT G HALLAM<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| COREY HILL<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| AMY HINOJOSA<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| THOMAS KIERNAN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |

| | | | | |
|---|---|---|---|---|
| BOB LAW<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| FRED LIGON<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| MARTY MARKS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| ANDY MOTSENBOCKER<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| DARYL A MULLIN<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| DEBBIE OATES<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| JOAN OXFORD<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| MAX POST<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| MANNY SAN MIGUEL<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| KATY SPICER<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| REVATHI SRINATH, MS, RD<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| POLLY TRAPP<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | CORPORATE SECRETARY<br>0.00 | 0. | 0. | 0. |
| BARBARA VAN RIPER<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | AT-LARGE<br>0.00 | 0. | 0. | 0. |

| | | | | |
|---|---|---|---|---|
| CARLOS H-SALAZAR<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | AT-LARGE<br>0.00 | 0. | 0. | 0. |
| AVA WASHINGTON<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| BARBARA LORD WATKINS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| WALLACE WHITLEY<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| BERNARD WILLIAMS, JR<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| JO LYNN WILLIAMS<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| LINUS WRIGHT<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| BARBARA J YOUNT<br>3910 HARRY HINES BLVD.<br>DALLAS, TX 75219 | DIRECTOR<br>0.00 | 0. | 0. | 0. |
| TOTALS INCLUDED ON FORM 990, PART V-A | | 410,936. | 51,333. | 1,500. |

SCHEDULE A OTHER INCOME STATEMENT 12

| DESCRIPTION | 2006 AMOUNT | 2005 AMOUNT | 2004 AMOUNT | 2003 AMOUNT |
|---|---|---|---|---|
| MISCELLANEOUS REVENUE | 10,097. | 16. | 1,903. | 16,420. |
| TOTAL TO SCHEDULE A, LINE 22 | 10,097. | 16. | 1,903. | 16,420. |

THE SENIOR SOURCE

**Senior Citizens of Greater Dallas, Inc.**
**EIN 75-1085555**
**Year Ended March 31, 2008**

**Statement in Support of Part VI, line 77**

Effective February 26, 2008, Senior Citizens of Greater Dallas, Inc. amended Article III, Section 1, of its bylaws provision that governs service of its officers on its board of directors.

Attached is a copy of the amended provision. The undersigned hereby states under penalties of perjury that such copy is complete and accurate.

Marcia Ellis

Marcia Ellis,
Secretary, Senior Citizens of Greater Dallas, Inc.

A UNITED WAY PARTNER AGENCY
3910 HARRY HINES BOULEVARD · DALLAS, TEXAS 75219 · 214.823.5700 · FAX 214.826.2441
WWW.THESENIORSOURCE.ORG

# BYLAWS

# SENIOR CITIZENS OF GREATER DALLAS

**Amended December 21, 1978**
**Amended February 25, 1986**
**Amended February 24, 1987**
**Amended March 1, 1995**
**Amended August 27, 1996**
**Amended April 29, 1997**
**Amended October 19, 1999**
**Amended February 25, 2003**
**Amended February 22, 2005**
**Amended February 26, 2008**

## ARTICLE I

NAME and LOCATION

### Section 1. Name

The name of this corporation shall be Senior Citizens of Greater Dallas, Inc. (herein called the corporation).

### Section 2. Offices

The principal office of the corporation shall be located in the City of Dallas. The corporation may have in addition to its registered office, offices in such places, within the State of Texas, as the Board of Directors from time to time determine or as the activities of the corporation may require.

## ARTICLE II

PURPOSE

The purpose of the corporation shall be to improve the quality of life and to maintain the self-esteem of older persons of the Greater Dallas area by providing advocacy, education, volunteer, intergenerational, in-home, employment, elder support, and other social services.

## ARTICLE III

BOARD OF DIRECTORS

Any resident of the Greater Dallas area and someone not employed by the corporation, who is interested in the purpose of the corporation and who is qualified to further the work of the corporation shall be eligible for membership on the Board of Directors.

### Section 1. Number, Manner of Selection, and Term of Office

The Board shall consist of no fewer than twenty-one (21) members, exclusive of honorary life members. Directors shall be elected for a term of three years.

The Board of Directors, at its February meeting, shall elect directors for the following year to fill the vacancies of those directors who are retiring and to fill new positions. At this meeting, the Nominating Committee shall present a slate of names, and additional nominations may be taken from the floor.

Each director may serve two consecutive terms. After a lapse of one year, a person is eligible for re-election to the board. Regardless of the number of consecutive terms any person shall have served as a director, such person shall be eligible to be a member of the board when serving as an officer of the corporation.

### Section 2. Honorary Life Members

The Board of Directors may elect persons to honorary lifetime membership on the Board, in recognition of outstanding service to the corporation. Honorary life members shall not have voting privileges.

### Section 3. Powers and Responsibilities

The Board of Directors shall perform the following major functions or duties in discharging its responsibilities to the corporation and the community.

a. Adopt and review policies that govern the operating procedures of the Board in accordance with generally accepted privileges.

b. Make final decisions on overall policies that govern the scope and content of the corporation programs and that enable the corporation to reach its goals.

c. Approve sound personnel policies, and see that they are kept current with standard good practices.

d. Establish, approve, and control the corporation budget and financial plan.

e. See that adequate funds are provided from all possible sources.

Max Post
Linus Wright

On motion duly made and seconded, the Board approved the slate of officers and directors as presented.

**Bylaws Change**

On recommendation from Deborah Ethridge Sutton, attorney and former member of the Board, an addition to the Bylaws was proposed to add in Article III, Section 1. Number, Manner of Selection, and Term of Office, "Regardless of the number of consecutive terms any person shall have served as a director, such person shall be eligible to be a member of the board when serving as an officer of the corporation."

On motion duly made and seconded, the Board approved the Bylaws change as presented.

**Finance Committee Report**

John Solana introduced David Jacobs, Chair of the Finance Committee. Mr. Jacobs asked the Board to refer to the handout included in the packet. He noted that we are within $8,500 of raising the budgeted amount under Foundations, Corporation, Individuals. Of the five grants outstanding, we should hear about three of them before the end of the budget year. While the amount spent in the Service Specific category is greater than budgeted, it will be offset by Government Fees and Grants and Client Assistance. We currently have $60,000 more in assets than was budgeted.

Mr. Jacobs also called to the Board's attention the Honorarium cards in the packet, and encouraged them to make Honorariums to the agency.

**Capital Campaign Report**

John Solana introduced Becky Bright, Chairperson of the *Coming of Age* Capital Campaign. Mrs. Bright informed the Board that we are very close to the finish line. She thanked her co-chairs, Robert Hallam, Ray Smerge, and Linus Wright; the Community Campaign Chair, Margo Goodwin; the Chairmen of the Board, Suzy Gekiere and John Solana; the Capital Campaign Committee members; and the staff.

Ms. Bright reported on the campaign to date. The grand total is $10,940,217. Since the October 2007 Board meeting, we have received $234,100 from The Carl B. and Florence E. King Foundation, The Patrick and Beatrice Haggerty Foundation,, Bank of Texas, and Board and community members. The Community Campaign has raised $979,641.

In all, Board members gave $2,508.296, foundations gave $5,766,308, corporations gave $112,000, the community as a whole gave $2,525,345, staff gave $24,708, and agency volunteers gave $3,560.