

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

**2008****Open to Public Inspection****A** For the 2008 calendar year, or tax year beginning

, 2008, and ending

, 20

- 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 Ohio Citizen Action

Doing Business As

Number and street (or P.O. box if mail is not delivered to street address)

614 W. Superior Ave.

Room/suite

#1200

City or town, state or country, and ZIP + 4

Cleveland, OH 44113**D** Employer identification number34-1308942**E** Telephone number216-861-5300**G** Gross receipts \$ 1,474,017**F** Name and address of principal officer:Alexandra Buchanan, 614 W. Superior Ave. #1200**H(a)** Is this a group return for affiliates? ☐ Yes ☒ No**H(b)** Are all affiliates included? ☐ Yes ☐ No

If "No," attach a list. (see instructions)

**H(c)** Group exemption number ▶**I** Tax-exempt status: ☒ 501(c) (4) (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ www.ohiocitizen.org**K** Type of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: 1976**M** State of legal domicile: OHIO**Part I Summary**

**1** Briefly describe the organization's mission or most significant activities: Ohio Citizen Action is the state's largest environmental organization, with 80,000 members. The organization engages in door-to-door democracy, working with neighbors of polluting facilities to win campaigns that protect health and the environment.

**2** Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets.**3** Number of voting members of the governing body (Part VI, line 1a) . . . . .**4** Number of independent voting members of the governing body (Part VI, line 1b) . . . . .**5** Total number of employees (Part V, line 2a) . . . . .**6** Total number of volunteers (estimate if necessary) . . . . .**7a** Total gross unrelated business revenue from Part VIII, line 12, column (C) . . . . .**b** Net unrelated business taxable income from Form 990-T, line 34. . . . .

<b>3</b>	<u>11</u>
<b>4</b>	<u>11</u>
<b>5</b>	<u>488</u>
<b>6</b>	<u>10</u>
<b>7a</b>	<u>-</u>
<b>7b</b>	<u>-</u>

Revenue

**8** Contributions and grants (Part VIII, line 1h) . . . . .**9** Program service revenue (Part VIII, line 2g) . . . . .**10** Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . . .**11** Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) . . . . .**12** Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .

Prior Year	Current Year
<u>1,523,880</u>	<u>1,341,285</u>
<u>18,700</u>	<u>64,104</u>
<u>1,577</u>	<u>32</u>
<u>10,082</u>	<u>36,291</u>
<u>1,554,239</u>	<u>1,474,017</u>

Expenses

**13** Grants and similar amounts paid (Part IX, column (A), lines 1–3) . . . . .**14** Benefits paid to or for members (Part IX, column (A), line 4) . . . . .**15** Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10) . . . . .**16a** Professional fundraising fees (Part IX, column (A), line 11e) . . . . .**b** Total fundraising expenses (Part IX, column (D), line 25) ▶ 318,792**17** Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f) . . . . .**18** Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) . . . . .**19** Revenue less expenses. Subtract line 18 from line 12 . . . . .

<u>1,191,628</u>	<u>1,115,875</u>
<u>64,409</u>	<u>45,349</u>
<u>334,759</u>	<u>307,586</u>
<u>1,590,796</u>	<u>1,468,810</u>
<u>236,557</u>	<u>52,071</u>

Net Assets or Fund Balances

**20** Total assets (Part X, line 16) . . . . .**21** Total liabilities (Part X, line 26) . . . . .**22** Net assets or fund balances. Subtract line 21 from line 20 . . . . .

Beginning of Year	End of Year
<u>194,119</u>	<u>231,656</u>
<u>325,907</u>	<u>358,237</u>
<u>413,788</u>	<u>412,651</u>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Alexandra Buchanan

Signature of officer

Date

11-10-09Alexandra Buchanan, EXECUTIVE DIRECTOR

Type or print name and title

Paid Preparer's Use Only

Preparer's signature

Date

Check if self-employed ☐

Preparer's identifying number (see instructions)

Firm's name (or yours if self-employed), address, and ZIP + 4

EIN

Phone no. ( )

May the IRS discuss this return with the preparer shown above? (see instructions)

☐ Yes ☐ No

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 11282Y

Form **990** (2008)

**Part III** Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission:

Ohio Citizen Action is the state's largest environmental organization, with 80,000 members. The organization engages in door-to-door democracy, working with neighbors of polluting facilities to win campaigns that protect public health + the environment.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 924,789 including grants of \$ ) (Revenue \$ 58,104 )  
 Environmental: Public education, organizing, + lobbying on environmental, energy + public health issues, including toxic chemical exposure, air pollution, coal mining + nuclear safety.

4b (Code: ) (Expenses \$ 19,474 including grants of \$ ) (Revenue \$ 6,000 )  
 Campaign Finance: support for campaign finance reform efforts, public access to information and issues related to election procedures.

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services. (Describe in Schedule O.)  
(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses ▶ \$ 944,263 (Must equal Part IX, Line 25, column (B).)

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A		✓
<b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors?	✓	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		✓
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	N/A	
<b>5</b> <b>Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations.</b> Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III		✓
<b>6</b> Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		✓
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II		✓
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		✓
<b>9</b> Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		✓
<b>10</b> Did the organization hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V		✓
<b>11</b> Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable	✓	
<b>12</b> Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? If "Yes," complete Schedule D, Parts XI, XII, and XIII	✓	
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(iii)? If "Yes," complete Schedule E		✓
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the U.S.?		✓
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? If "Yes," complete Schedule F, Part I		✓
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Part II		✓
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Part III		✓
<b>17</b> Did the organization report more than \$15,000 on Part IX, column (A), line 11a? If "Yes," complete Schedule G, Part I	✓	
<b>18</b> Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II		✓
<b>19</b> Did the organization report more than \$15,000 on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		✓
<b>20</b> Did the organization operate one or more hospitals? If "Yes," complete Schedule H		✓
<b>21</b> Did the organization report more than \$5,000 on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II		✓
<b>22</b> Did the organization report more than \$5,000 on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III		✓
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? If "Yes," complete Schedule J		✓
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25.		✓
<b>24b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		✓
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		✓
<b>24d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		✓
<b>25a</b> <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		✓
<b>b</b> Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? If "Yes," complete Schedule L, Part I		✓
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II		✓
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? If "Yes," complete Schedule L, Part III		✓

**Part IV** Checklist of Required Schedules (continued)

	Yes	No
<b>28</b> During the tax year, did any person who is a current or former officer, director, trustee, or key employee:		
<b>a</b> Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? If "Yes," complete Schedule L, Part IV . . . . .	<b>28a</b>	✓
<b>b</b> Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV . . . . .	<b>28b</b>	✓
<b>c</b> Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? If "Yes," complete Schedule L, Part IV . . . . .	<b>28c</b>	✓
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M . . . . .	<b>29</b>	✓
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M . . . . .	<b>30</b>	✓
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I . . . . .	<b>31</b>	✓
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II . . . . .	<b>32</b>	✓
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I . . . . .	<b>33</b>	✓
<b>34</b> Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 . . . . .	<b>34</b>	✓
<b>35</b> Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 . . . . .	<b>35</b>	✓
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 . . . . .	<b>36</b>	N/A
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI . . . . .	<b>37</b>	✓

**Part IV** Statements Regarding Other IRS Filings and Tax Compliance

	Yes	No
1a Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable	1a 11	
b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b -0-	
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c ✓	
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 488	
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b ✓	
<b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)		
3a Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	3a ✓	
b If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b N/A	
4a 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)?	4a ✓	
b If "Yes," enter the name of the foreign country: ▶ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a ✓	
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b ✓	
c If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?	5c N/A	
6a Did the organization solicit any contributions that were not tax deductible?	6a ✓	
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b ✓	
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>		
a Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?	7a N/A	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b N/A	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c N/A	
d If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e N/A	
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f N/A	
g For all contributions of qualified intellectual property, did the organization file Form 8899 as required?	7g N/A	
h For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?	7h N/A	
<b>8 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8 N/A	
<b>9 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.</b>		
a Did the organization make any taxable distributions under section 4966?	9a N/A	
b Did the organization make a distribution to a donor, donor advisor, or related person?	9b N/A	
<b>10 Section 501(c)(7) organizations.</b> Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12.	10a N/A	
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b N/A	
<b>11 Section 501(c)(12) organizations.</b> Enter:		
a Gross income from members or shareholders	11a 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.)	11b N/A	
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a N/A	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	12b N/A	

**Part VII Governance, Management, and Disclosure** (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

**Section A. Governing Body and Management**

For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

	Yes	No
1a Enter the number of voting members of the governing body	11	
1b Enter the number of voting members that are independent	11	
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		✓
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		✓
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		✓
5 Did the organization become aware during the year of a material diversion of the organization's assets?		✓
6 Does the organization have members or stockholders?	✓	
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	✓	
7b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		✓
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	✓	
b Each committee with authority to act on behalf of the governing body?	✓	
9a Does the organization have local chapters, branches, or affiliates?		✓
9b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	N/A	
10 Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	✓	
11 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	✓	

**Section B. Policies**

	Yes	No
12a Does the organization have a written conflict of interest policy? If "No," go to line 13	✓	
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	✓	
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	✓	
13 Does the organization have a written whistleblower policy?	✓	
14 Does the organization have a written document retention and destruction policy?	✓	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision:		
a The organization's CEO, Executive Director, or top management official?	✓	
b Other officers or key employees of the organization?	✓	
Describe the process in Schedule O. (see instructions)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		✓
b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	N/A	

**Section C. Disclosure**

17 List the states with which a copy of this Form 990 is required to be filed Ohio, Kentucky

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☒ Own website ☒ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: Lynn Scheerhorn, Finance Director, Ohio Citizen Action  
614 W. Superior Ave, #1200, Cleve, OH 44113 216-861-5200

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**
**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

• List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

• List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

• List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

• List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if the organization did not compensate any officer, director, trustee, or key employee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
Jennifer Cooper	1	✓						-0-	-0-	-0-
Mary Johnson	1	✓						-0-	-0-	-0-
Marie Kocoshis	1	✓						-0-	-0-	-0-
Laurie Perin	1	✓						-0-	-0-	-0-
Laura Rench	1	✓						-0-	-0-	-0-
Barbara Wood	1	✓						-0-	-0-	-0-
Thomas Trimble	1	✓						-0-	-0-	-0-
Joe Korpfe	1	✓						-0-	-0-	-0-
Ellis Jacobs President	2	✓		✓				-0-	-0-	-0-
Caroline Beidler Secretary/Treasurer	2	✓		✓				-0-	-0-	-0-
Mike Jones Vice President	1.5	✓		✓				-0-	-0-	-0-
Alexandra Buchanan Executive Director	20			✓				24,850	-0-	-0-
Lynn Scheerhorn Finance Director	40			✓				52,930	-0-	-0-

## Part VII

**1b Total**

2 Total number of ind  
organization ► 0

- |   | Yes | No |
|---|-----|----|
| 3 |     | ✓  |
| 4 |     | ✓  |
| 5 |     | ✓  |

## Section B. Independent Contractors

- 1** Complete this table for your five highest compensation from the organization.

NIA

- 2 Total number of independent contractors (including compensation from the organization) ▶ 0



**Part VIII** Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns	1a	64				
	b	Membership dues	1b	1,316,418				
	c	Fundraising events	1c					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	44,803				
	g	Noncash contributions included in lines 1a-1f: \$						
	h	Total. Add lines 1a-1f		1,361,285				
Program Service Revenue	2a	contract services	Business Code 900009	62,700	62,700			
	b	publications	900009	1,404	1,404			
	c							
	d							
	e							
	f	All other program service revenue						
	g	Total. Add lines 2a-2f		64,104				
	Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		32			32
4		Income from investment of tax-exempt bond proceeds						
5		Royalties		3932			3932	
		(i) Real	(ii) Personal					
6a		Gross Rents						
b		Less: rental expenses						
c		Rental income or (loss)						
d		Net rental income or (loss)						
7a		Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
b		Less: cost or other basis and sales expenses						
c		Gain or (loss)						
d		Net gain or (loss)						
8a		Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	a	12,665				
b		Less: direct expenses	b	4292				
c		Net income or (loss) from fundraising events		8373			8373	
9a		Gross income from gaming activities. See Part IV, line 19	a					
b		Less: direct expenses	b					
c	Net income or (loss) from gaming activities							
10a	Gross sales of inventory, less returns and allowances	a						
b	Less: cost of goods sold	b						
c	Net income or (loss) from sales of inventory							
Miscellaneous Revenue	11a	Accounts Payable	Business Code 900009	36,291	36,291			
	b	write-off						
	c							
	d	All other revenue						
	e	Total. Add lines 11a-11d		36,291				
12	Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e		1,474,017	100,395		12,337		

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	77,780	18,637	52,930	6213
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	858,420	594,105	86,855	177,460
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	94,158	61,626	14,058	18,474
9 Other employee benefits	85,517	55,971	12,768	16,778
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal	6677		6677	
c Accounting				
d Lobbying	45,349			45,349
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other	19,058	14,293		4765
12 Advertising and promotion	62,719	43,799	9991	8929
13 Office expenses	25,896	18,083	1785	6028
14 Information technology				
15 Royalties	41,135	26,923	6141	8071
16 Occupancy	64,064	30,687	352	13,025
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	12,305	9482	65	2758
19 Conferences, conventions, and meetings	13,969	9143	2085	2791
20 Interest				
21 Payments to affiliates	11,556	7564	1725	2267
22 Depreciation, depletion, and amortization	7935	2272	4906	757
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a Bank Charges	26,387	17,270	3940	5177
b Membership Communication	14,408	14,408		
c Membership dues	450		450	
d Penalties	1027		1027	
e				
f All other expenses				
25 Total functional expenses. Add lines 1 through 24f	1,468,810	944,263	205,755	318,792
26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation	1,017,166	762,875	- 0 -	254,291

**Part 2****Balance Sheet**

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash—non-interest-bearing	1650	1	30,864
	2 Savings and temporary cash investments	147,537	2	147,599
	3 Pledges and grants receivable, net	4215	3	7314
	4 Accounts receivable, net		4	
	5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	6643	9	7517
	10a Land, buildings, and equipment: cost basis	228,043	10a	
	b Less: accumulated depreciation. Complete Part VI of Schedule D	197,673	10b	
	11 Investments—publicly traded securities	26,482	10c	30,370
	12 Investments—other securities. See Part IV, line 11		11	
	13 Investments—program-related. See Part IV, line 11		12	
	14 Intangible assets		13	
	15 Other assets. See Part IV, line 11	7592	14	7992
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	194,119	15	231,656	
<b>Liabilities</b>	17 Accounts payable and accrued expenses	131,403	16	106,369
	18 Grants payable		17	
	19 Deferred revenue		18	
	20 Tax-exempt bond liabilities		19	
	21 Escrow account liability. Complete Part IV of Schedule D		20	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		21	
	23 Secured mortgages and notes payable to unrelated third parties		22	
	24 Unsecured notes and loans payable	194,504	23	251,868
	25 Other liabilities. Complete Part X of Schedule D		24	
	26 <b>Total liabilities.</b> Add lines 17 through 25	325,907	25	358,237
<b>Net Assets or Fund Balances</b>	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	<131,788>	26	<126,581>
	28 Temporarily restricted net assets		27	
	29 Permanently restricted net assets		28	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		29	
	31 Paid-in or capital surplus, or land, building, or equipment fund		30	
	32 Retained earnings, endowment, accumulated income, or other funds		31	
	33 Total net assets or fund balances	<131,788>	32	<126,581>
	34 <b>Total liabilities and net assets/fund balances</b>	194,119	33	231,656

**Part 3****Financial Statements and Reporting**

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		<input checked="" type="checkbox"/>
2b	Were the organization's financial statements audited by an independent accountant?	<input checked="" type="checkbox"/>	
2c	If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	<input checked="" type="checkbox"/>	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		<input checked="" type="checkbox"/>
3b	If "Yes," did the organization undergo the required audit or audits?	<input checked="" type="checkbox"/>	

**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

► Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No. 1545-0047

**2008**

**Open to Public  
Inspection**

Name of the organization

OHIO CITIZEN ACTION

Employer identification number

341208942

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year . . . . .		
2 Aggregate contributions to (during year) . . . . .		
3 Aggregate grants from (during year) . . . . .		
4 Aggregate value at end of year . . . . .		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? . . . . . ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? . . . . . ☐ Yes ☐ No

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or pleasure)	<input type="checkbox"/> Preservation of an historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements . . . . .	2a
b Total acreage restricted by conservation easements . . . . .	2b
c Number of conservation easements on a certified historic structure included in (a) . . . . .	2c
d Number of conservation easements included in (c) acquired after 8/17/06 . . . . .	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ► . . . . .

4 Number of states where property subject to conservation easement is located ► . . . . .

5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? . . . . . ☐ Yes ☐ No

6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ► . . . . .

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ► \$ . . . . .

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? . . . . . ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 . . . . .	► \$ . . . . .
(ii) Assets included in Form 990, Part X . . . . .	► \$ . . . . .

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 . . . . .	► \$ . . . . .
b Assets included in Form 990, Part X . . . . .	► \$ . . . . .

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

**3** Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a** ☐ Public exhibition  
**b** ☐ Scholarly research  
**c** ☐ Preservation for future generations  
**d** ☐ Loan or exchange programs  
**e** ☐ Other \_\_\_\_\_

**4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

**5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Trust, Escrow and Custodial Arrangements.** Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

**1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

**b** If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
<b>1c</b> Beginning balance	
<b>1d</b> Additions during the year	
<b>1e</b> Distributions during the year	
<b>1f</b> Ending balance	

**2a** Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

**b** If "Yes," explain the arrangement in Part XIV.

**Part V Endowment Funds.** Complete if organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance					
<b>b</b> Contributions					
<b>c</b> Investment earnings or losses					
<b>d</b> Grants or scholarships					
<b>e</b> Other expenditures for facilities and programs					
<b>f</b> Administrative expenses					
<b>g</b> End of year balance					

**2** Provide the estimated percentage of the year end balance held as:

- a** Board designated or quasi-endowment ▶ \_\_\_\_\_ %  
**b** Permanent endowment ▶ \_\_\_\_\_ %  
**c** Term endowment ▶ \_\_\_\_\_ %

**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i)** unrelated organizations  
**(ii)** related organizations

**b** If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

	Yes	No
<b>3a(i)</b>		
<b>3a(ii)</b>		
<b>3b</b>		

**4** Describe in Part XIV the intended uses of the organization's endowment funds.

**Part VI Investments—Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of investment	(Investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
<b>1a</b> Land				
<b>b</b> Buildings				
<b>c</b> Leasehold improvements		15,088	15,088	~ 0 ~
<b>d</b> Equipment		157,646	142,613	15,033
<b>e</b> Other <b>AUTOMOTIVE</b>		55,309	39,972	15,377
<b>Total.</b> Add lines 1a–1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				<b>30,370</b>



**Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	1,474,017
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	1,468,810
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	5207
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	11,648
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	<11,648>
9	Total adjustments (net). Add lines 4-8	9	
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10	5207

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements	1	1,489,957
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	11,648
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	11,648
3	Subtract line 2e from line 1	3	1,478,309
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	<4292>
c	Add lines 4a and 4b	4c	<4292>
5	Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5	1,474,017

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements	1	1,484,750
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	11,648
b	Prior year adjustments	2b	
c	Losses reported on Form 990, Part IX, line 25	2c	
d	Other (Describe in Part XIV)	2d	4292
e	Add lines 2a through 2d	2e	15,940
3	Subtract line 2e from line 1	3	1,468,810
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.)	5	1,468,810

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b.

**PART XI, PART XII, PART XIII:**

A) Fundraising Expenses for EVENT = 4292, PART VIII only records the net revenue (8373); Audited statements record the gross, Revenue + gross expenses.

B) Donated services + corresponding expense are reflected in audited statements, + not on Form 990. These donated services were with a vendor that is ongoing, who normally charges for these services.

**Part IV** Supplemental Information *(continued)*



Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 990 or Form 990-EZ. Must be completed by organizations that answer "Yes" to Form 990, Part IV, lines 17, 18, or 19, and by organizations that enter more than \$15,000 on Form 990-EZ, line 6a.

2008

## Open To Public Inspection

of the organization  
OHIO CITIZEN ACTION

34 1208942

e ☒ Solicitation of non-government grants  
f ☐ Solicitation of government grants  
g ☒ Special fundraising events

OHIO, KENTUCKY, LOUISIANA, WEST VIRGINIA

**Part II Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

	(a) Event #1 movie w/speaker (event type)	(b) Event #2 (event type)	(c) Other Events (total number)	(d) Total Events (Add col. (a) through col. (c))
<b>Revenue</b>				
1 Gross receipts	12,665			12,665
2 Less: Charitable contributions				
3 Gross revenue (line 1 minus line 2)				
<b>Direct Expenses</b>				
4 Cash prizes				
5 Non-cash prizes				
6 Rent/facility costs	1944			1944
7 Other direct expenses	2348			2348
8 Direct expense summary. Add lines 4 through 7 in column (d)				( 4292 )
9 Net income summary. Combine lines 3 and 8 in column (d)				8373

**Part III Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

	(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col. (a) through col. (c))
<b>Revenue</b>				
1 Gross revenue	N/A			
<b>Direct Expenses</b>				
2 Cash prizes				
3 Non-cash prizes				
4 Rent/facility costs				
5 Other direct expenses				
6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7 Direct expense summary. Add lines 2 through 5 in column (d)				( )
8 Net gaming income summary. Combine lines 1 and 7 in column (d)				

9 Enter the state(s) in which the organization operates gaming activities: \_\_\_\_\_

a Is the organization licensed to operate gaming activities in each of these states? \_\_\_\_\_

b If "No," Explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? \_\_\_\_\_

b If "Yes," Explain: \_\_\_\_\_

11 Does the organization operate gaming activities with nonmembers? \_\_\_\_\_

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? \_\_\_\_\_

	Yes	No
9a	N/A	
10a	N/A	
11	N/A	
12	N/A	

**13** Indicate the percentage of gaming activity operated in:

- |                               | 13a | % |
|-------------------------------|-----|---|
| a The organization's facility |     |   |
| b An outside facility         | 13b | % |

**14** Provide the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶

Address ▶

**15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue?

- b** If "Yes," enter the amount of gaming revenue received by the organization ▶ \$ and the amount of gaming revenue retained by the third party ▶ \$
- c** If "Yes," enter name and address:

Name ▶

Address ▶

**16** Gaming manager information:

Name ▶

Gaming manager compensation ▶ \$

Description of services provided ▶

☐ Director/officer☐ Employee☐ Independent contractor**17** Mandatory distributions:

- a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?
- b** Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$

**SCHEDULE O  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

**2008**

**Open to Public  
Inspection**

Name of the organization

Ohio Citizen Action

Employer identification number

341208942

**PART VI, LINE 6, 7 a:**

Ohio Citizen Action is a membership organization. When people join the organization they are given written information on how to obtain proxies for voting for board members.

The board of trustees has two categories of members: those elected by the organization's members, which must constitute the majority of the board, and those elected by other board members. The board has decision-making authority for the organization.

**PART VI, LINE 10:**

**Policy for Board Distribution and Review of IRS Form 990**

**Ohio Citizen Action**

The Financial Director shall prepare the annual IRS Form 990. Upon its completion, the Financial Director shall review the Form 990 with the Executive Director.

Once reviewed and approved by the Executive Director, the Financial Director shall then distribute a copy of the IRS Form 990 to each member of the Board Audit Committee for review. The Audit Committee shall meet and document their approval or further questions by way of Committee minutes. The Audit Committee may meet in person, via telephone, or by email.

Upon approval of the Board Audit Committee, the Financial Director shall distribute to the full Board a copy of the Form 990 for their review.

The Form 990 shall not be filed with the IRS until the full Board has had an opportunity to review it.

Name of the organization

OHIO CITIZEN ACTION

Employer identification number

34-1208942

PART VI, Line 11:

**2008  
OHIO CITIZEN  
ACTION BOARD****Caroline Beidler, Secretary/Treas**

home (740) 374-0975  
cell (740) 350-2834  
122 Ingleside Ave,  
Marietta, OH 45750  
ccbeidler@gmail.com

**Jennifer Cooper**

home (330) 864-6018  
cell (513) 348-7480  
fax (330) 864-6029  
187 Lownsdale Ave.  
Akron, OH 44313  
jcooper7@aol.com

**Ellis Jacobs, President**

home (937) 767-2225  
work (937) 535-4419  
fax (937) 449-8131  
131 East Davis St,  
Yellow Springs, OH 45387  
ejacobs@ablelaw.org

**Mary Johnson**

home (937) 268-7448  
4925 Tenshaw Dr  
Dayton, OH 45418  
jermar66@earthlink.net

**Mike Jones, Vice President**

home (740) 964-2238  
cell (614) 395-6159  
312 Glenmoore Ct.,  
Pataskala, OH 43062  
mikejones@insight.rr.com

**Joe Korff**

home (330) 337-9418  
cell (330) 565-0723  
250 W. 16th Street,  
Salem, OH 44460  
fielectric@aol.com

**Marie Kocoshis**

home (513) 233-0972  
7813 Hopper Road,  
Cincinnati, OH 45255  
pskocoshis@cinci.rr.com

**Laurie Perin**

2734 Marblevista Blvd,  
Columbus, OH 43204  
Home (740) 262-2171  
laurie.perin@gmail.com

**Laura Rench**

home (937) 835-3464  
8280 W Third St,  
New Lebanon, OH 45345  
darench@aol.com

**Thomas Trimble**

home (614) 777-9888  
work (614) 224-8187  
fax (614) 224-4943  
4190 Maystar Way,  
Hilliard, OH 43026  
ttrimble@lvtbd.com

**Barbara Wood**

Home (614) 491-8281  
1428 Wayland Drive  
Columbus, OH 43207-3357  
babsfreespirit@aol.com

Name of the organization

OHIO Citizen Action

Employer identification number

341208942

PART VI, LINE 12 c:

**Process for monitoring and complying with conflict of interest policy**

Annually, board members, officers and key employees are required to review the conflict of interest policy, and to sign a document affirming that they have read and understand the policy. They must indicate if any conflict of interest exists, and fully describe such conflict of interest. They are also required to promptly bring to the Board's attention any conflict of interest that may arise in the future.

PART VI, LINE 15 a, 15 b:

**Process for Determining Compensation of Key Employees****Ohio Citizen Action**

When filling an open position of a key employee, such as the Executive Director, Financial Director, Organizing Director, or other management level positions, a review will be done using comparative data of equal positions within comparable organizations. Experience and seniority will be a factor of consideration.

Independent opinions will be sought, whenever possible, to substantiate the decision.

The current policy regarding compensation increases is to provide an annual salary increase on April 1 of each year, in an amount equal to the annual cost of living percentage increase as determined by the Department of Social Security.

Exceptions may be made to this policy based on exceptional merit, but within the comparative norm.

.....

The Board President approves the annual increase for the Executive Director.

Comparative data is obtained from interviews with other non-profits we work along with, as well as publications that gather such information.

Name of the organization

OHIO CITIZEN ACTION

Employer identification number

341208942

PART VI, LINE 19:

**Process for making certain OCA documents available to the public.**

As noted previously, the IRS Form 990 is made public upon request, on our website, and also through Guidestar, another website.

Other documents are available upon request, including audited financial statements, articles of incorporation, by-laws, and conflict of interest policy.

These additional documents are under consideration to be added to the public portion of our website.

29404-206-60282-9      A0128223      211A  
341208942      TE      3



Department of the Treasury  
Internal Revenue Service  
OGDEN UT 84201-0074

For assistance, call:  
1-877-829-5500

**Notice Number:** CP211A  
**Date:** August 24, 2009

**Taxpayer Identification Number:**  
34-1208942  
**Tax Form:** 990  
**Tax Period:** December 31, 2008

051835.636586.0160.004 1 AT 0.357 370



OHIO CITIZEN ACTION  
614 W SUPERIOR AVE STE 1200  
CLEVELAND OH 44113-1386009

051835

**APPLICATION FOR EXTENSION OF TIME TO FILE AN EXEMPT  
ORGANIZATION RETURN - APPROVED**

We have received your Form 8868, Application for Extension of Time to File an Exempt Organization Return, for the return (form) and tax period identified above.

We have approved your request and have extended the due date to file your return to November 15, 2009.

If you have any questions, please call us at the number shown above, or you may write us at the address shown at the top left of this letter.

### Reminder - You May Be Required to File Electronically

Exempt organizations may be required to file certain returns electronically. For tax years ending on or after December 31, 2006, the electronic filing requirement applies to exempt organizations with \$10 million or more in total assets if the organization files at least 250 returns in a calendar year, including income, excise, employment tax and information returns. Private foundations and charitable trusts will be required to file Forms 990-PF electronically regardless of their asset size, if they file at least 250 returns annually. For more information, go to [www.irs.gov](http://www.irs.gov). Click "Charities and Non-Profits" and look for the "e-file for Charities and Non-Profits" tab.

For tax forms, instructions and information visit [www.irs.gov](http://www.irs.gov). (Access to this site will not provide you with your specific taxpayer account information.)