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Form **990-EZ****Short Form**
Return of Organization Exempt From Income Tax

OMB No 1545-1150

2008Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

► Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$1,000,000 and total assets less than \$2,500,000 at the end of the year may use this form.

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

Open to Public Inspection**A** For the 2008 calendar year, or tax year beginning 7/01, 2008, and ending 6/30, 2009**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
Rotary Intl., Rotary Club of Lubbock
Chapter 812
1603 West Loop 289
Lubbock, TX 79416**D** Employer identification number

75-0533084

E Telephone number

806-785-3030

F Group Exemption Number

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting method ☒ Cash ☐ Accrual
Other (specify) ►**I** Website: ► www.lubbockrotary.org**H** Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)**J** Organization type (check only one) — ☒ 501(c) (4) (insert no) ☐ 4947(a)(1) or ☐ 527**K** Check ☐ if the organization is not a section 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.**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$1,000,000 or more, file Form 990 instead of Form 990-EZ. ► \$ 163,158.**Part I** **Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

REVENUE	1	Contributions, gifts, grants, and similar amounts received	1	45,302.
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	116,371.
	4	Investment income	4	1,485.
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less cost or other basis and sales expenses	5b	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (att sch)	5c	
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>		
	6a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a	
	6b	Less direct expenses other than fundraising expenses	6b	
EXPENSES	6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	
	7a	Gross sales of inventory, less returns and allowances	7a	
	7b	Less cost of goods sold	7b	
	7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
	8	Other revenue (describe in Part III)	8	
	9	Total revenue (add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8)	9	163,158.
	10	Grants and similar amounts paid (attach schedule)	10	46,958.
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	30,073.
	13	Professional fees and other payments to independent contractors	13	2,500.
ASSETS	14	Occupancy, rent, utilities, and maintenance	14	3,150.
	15	Printing, publications, postage, and shipping	15	2,447.
	16	Other expenses (describe ► See Statement 2)	16	72,807.
	17	Total expenses (add lines 10 through 16)	17	157,935.
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	5,223.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	120,813.
	20	Other changes in net assets or fund balances (attach explanation)	20	
	21	Net assets or fund balances at end of year (Combine lines 18 through 20)	21	126,036.

Part II **Balance Sheets.** If Total assets on line 25, column (B) are \$2,500,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22	120,813.	126,036.
23		
24		
25	120,813.	126,036.
26	0.	0.
27	120,813.	126,036.

BAA For Privacy Act and Paperwork Reduction Act Notice, see the instructions for Form 990.

Form 990-EZ (2008)

Expenses

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

28 Financial assistance provided to South Plains Food Bank.

28 a	30,231.
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29 a	3,000.
------	--------

30 a	400.
------	------

31 a	13,327.
------	---------

32	46,958.
----	---------

(e) Expense account and other allowances

0.

Part V Other Information (Note the statement requirement in General Instruction V.)

	Yes	No
33 Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed description of each activity		X
34 Were any changes made to the organizing or governing documents but not reported to the IRS? If 'Yes,' attach a conformed copy of the changes		X
35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T		
a Did the organization have unrelated business gross income of \$1,000 or more or 6033(e) notice, reporting, and proxy tax requirements?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		
36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If 'Yes,' complete applicable parts of Schedule N		X
37a Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a 0.		
b Did the organization file Form 1120-POL for this year?		X
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?		X
b If 'Yes,' complete Schedule L, Part II and enter the total amount involved 38b N/A		
39 501(c)(7) organizations Enter		
a Initiation fees and capital contributions included on line 9 39a N/A		
b Gross receipts, included on line 9, for public use of club facilities 39b N/A		
40a 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ <u>N/A</u> , section 4912 ▶ <u>N/A</u> , section 4955 ▶ <u>N/A</u>		
b 501(c)(3) and (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,' complete Schedule L, Part I		X
c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0.		
d Enter amount of tax on line 40c 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? If 'Yes,' complete Form 8886-T		X
41 List the states with which a copy of this return is filed ▶ <u>None</u>		

42a The books are in care of ▶ Marjan Wilkins Telephone no. ▶ 806-785-3030
 Located at ▶ 1603 West Loop 289 Lubbock TX ZIP + 4 ▶ 79416

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 ▶ _____

	Yes	No
42b		X
42c		X

See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of a Foreign Bank and Financial Accounts.**

c At any time during the calendar year, did the organization maintain an office outside of the U.S.?
 If 'Yes,' enter the name of the foreign country ▶ _____

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** — Check here ▶ ☐ N/A
 and enter the amount of tax-exempt interest received or accrued during the tax year ▶ **43** N/A

	Yes	No
44 Did the organization maintain any donor advised funds? If 'Yes,' Form 990 must be completed instead of Form 990-EZ		X
45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If 'Yes,' Form 990 must be completed instead of Form 990-EZ		X

Part VI Section 501(c)(3) organizations only. All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51.

- 46 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
- 47 Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II
- 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E
- 49a Did the organization make any transfers to an exempt non-charitable related organization?
- b If 'Yes,' was the related organization(s) a section 527 organization?

	Yes	No
46		
47		
48		
49a		
49b		

- 50 Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowances

Total number of other employees paid over \$100,000 ▶				

- 51 Complete this table for the five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation

Total number of other independent contractors receiving over \$100,000 ▶		

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

Sign Here

Signature of officer: Regina K. Johnston Date: 1-20-10

Type or print name and title: Regina K. Johnston Treasurer

Paid Preparer's Use Only

Preparer's signature: Mont Payne Date: 1-17-10 Check if self-employed: ☐ Preparer's Identifying Number (See instructions): P00021922

Firm's name (or yours if self-employed), address, and ZIP + 4: Payne & Cripps
4103 84th Street
Lubbock, TX 79423

EIN: 75-1970790 Phone no: (806) 798-1040

May the IRS discuss this return with the preparer shown above? See instructions

☒ Yes ☐ No

BAA Form 990-EZ (2008)

2008**Federal Statements**
Rotary Intl., Rotary Club of Lubbock
Chapter 812**Page 1**

Client 384001

75-0533084

1/14/10

11 39AM

Statement 1
Form 990-EZ, Part I, Line 10
Grants and Similar Amounts Paid

Donee's Name:	South Plains Food Bank		
Donee's Address:	4610 Locust Ave		
	Lubbock, TX 79404,		
Relationship of Donee:	None		
Cash Amount Given:		\$	30,231.
Donee's Name:	Camp RYLA		
Relationship of Donee:	None		
Cash Amount Given:		\$	3,000.
Donee's Name:	Boys/Girls State		
Relationship of Donee:	None		
Cash Amount Given:		\$	400.
Donee's Name:	Diabetic Childrens Camp		
Relationship of Donee:	None		
Cash Amount Given:		\$	500.
Donee's Name:	Exchange Student Sponsorship		
Relationship of Donee:	None		
Cash Amount Given:		\$	1,000.
Donee's Name:	Various high school students		
	Lubbock, TX		
Relationship of Donee:	None		
Cash Amount Given:		\$	1,500.
Donee's Name:	Rotary International Foundation		
Donee's Address:	One Rotary Center/1560 Sherman Ave		
	Evanston, IL 60201,		
Relationship of Donee:	National Affiliation		
Cash Amount Given:		\$	5,400.
Donee's Name:	Lubbock School for Young Women Leaders		
Donee's Address:	415 N Ivory		
	Lubbock, TX 79403		
Relationship of Donee:	None		
Cash Amount Given:		\$	3,482.
Donee's Name:	Boy Scouts of America		
Donee's Address:	30 Briercroft Office Park		
	Lubbock, TX 79412		
Relationship of Donee:	None		
Cash Amount Given:		\$	1,445.

Statement 2
Form 990-EZ, Part I, Line 16
Other Expenses

Committee expense	\$	1,076.
Conferences, Conventions, and Meetings		549.
Council on Legislation		170.
District dues		3,740.
District governor visit		100.

2008

Federal Statements

Page 2

Client 384001

Rotary Intl., Rotary Club of Lubbock
Chapter 812

75-0533084

1/14/10*

11 36AM

Statement 2 (continued)
Form 990-EZ, Part I, Line 16
Other Expenses

Flowers and memorials	\$	753.
Foundation expense		363.
Group study exchange		1,160.
Insurance		1,588.
Meals		47,037.
Miscellaneous		835.
Office Expenses		3,100.
Pianists		1,100.
Rotary International dues		8,117.
Speaker gifts		500.
Taxes		90.
Telephone		1,836.
Website license		693.
Total	\$	<u>72,807.</u>

Statement 3
Form 990-EZ, Part III, Line 31
Statement of Program Service Accomplishments

Description	0. Grants	Program Service Expenses
Sponsor of Diabetic Childrens Camp. Includes Foreign Grants: No	500.	500.
Financial Assistance to the Rotary International Includes Foreign Grants: No	5,400.	5,400.
Financial assistance to Jackson Elementary School, Lubbock, Texas Includes Foreign Grants: No		
Scholarships to local high school students Includes Foreign Grants: No	1,500.	1,500.
Sponsor of Youth Exchange Student Includes Foreign Grants: No	1,000.	1,000.
Lubbock School for Young Women Leaders Includes Foreign Grants: No	3,482.	3,482.
Financial Assistance to Boys Scouts of America Includes Foreign Grants: No	1,445.	1,445.
Total	<u>\$ 13,327.</u>	<u>\$ 13,327.</u>

Statement 4
Form 990-EZ, Part IV
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
Walter Huffman 1802 Hartford Lubbock, TX 79409	President 1.00	\$	0. \$	0. \$

Client 384001

Rotary Intl., Rotary Club of Lubbock
Chapter 812

75-0533084

1/14/10*

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Statement 4 (continued)
Form 990-EZ, Part IV
List of Officers, Directors, Trustees, and Key Employees

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compen- sation</u>	<u>Contri- bution to EBP & DC</u>	<u>Expense Account/ Other</u>
Tim Wooten 7820 Orlando Lubbock, TX 79423	Asst Treas 1.00	\$ 0.	\$ 0.	\$ 0.
Mike Bennett 3222 103rd Street Lubbock, TX 79423	Director 1.00	0.	0.	0.
Ann Graham 1802 Hartford Lubbock, TX 79409	Director 1.00	0.	0.	0.
Regina Johnston 3823 84th Lubbock, TX 79423	Treasurer 1.00	0.	0.	0.
Latreille Joy 1500 Broadway Ste 700 Lubbock, TX 79401	Director 1.00	0.	0.	0.
Lynn Buxkemper 1414 Peoria Slaton, TX 79364	Director 1.00	0.	0.	0.
Sheryl Santos TTU PO Box 41071 Lubbock, TX 79409	Director 1.00	0.	0.	0.
Alice White PO Box 45005 Lubbock, TX 79409	Director 1.00	0.	0.	0.
Laura Monroe 4514 16th Lubbock, TX 79416	Director 1.00	0.	0.	0.
Keith Larremore PO Box 271 Lubbock, TX 79408	Secretary 1.00	0.	0.	0.
James Pipkin PO Box 93823 Lubbock, TX 79493	Director 1.00	0.	0.	0.
Brian Yearwood Box 923 Lubbock, TX 79408	Director 1.00	0.	0.	0.
	Total	\$ 0.	\$ 0.	\$ 0.

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

OMB No 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization		Employer identification number
	Rotary Intl., Rotary Club of Lubbock Chapter 812		75-0533084
	Number, street, and room or suite number. If a P.O. box, see instructions.		
	1603 West Loop 289		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	Lubbock, TX 79416		

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

- | | | |
|---|--|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (section 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input checked="" type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

- The books are in the care of ▶ Marjan Wilkins

Telephone No ▶ 806-785-3030 FAX No ▶ _____

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 2/15, 20 10, to file the exempt organization return for the organization named above. The extension is for the organization's return for

- ▶ ☐ calendar year 20__ or
- ▶ ☒ tax year beginning 7/01, 20 08, and ending 6/30, 20 09

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 8868 (Rev. 4-2009)