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Short Form Return of Organization Exempt From Income Tax

2011

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

▶ Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions). All other organizations with gross receipts less than \$200,000 and total assets less than \$500,000 at the end of the year may use this form.

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

A For the 2011 calendar year, or tax year beginning July 1, 2011, and ending June 30, 20 12

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization Claxton Elementary School PTA Number and street (or P.O. box, if mail is not delivered to street address) Room/suite 3720 Pinetop Road City or town, state or country, and ZIP + 4 Greensboro NC 27410	D Employer identification number 58-1647045 E Telephone number 336-301-0100 F Group Exemption Number ▶ 8535
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G Accounting Method: Cash Accrual Other (specify) ▶ _____

H Check if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

I Website: ▶ www.claxtonpta.org

J Tax-exempt status (check only one) - 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527

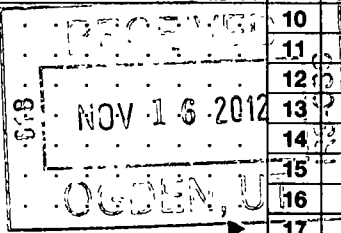
K Check if the organization is not a section 509(a)(3) supporting organization or a section 527 organization and its gross receipts are normally not more than \$50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions). But if the organization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

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, line 25, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. ▶ \$ **69,149.25**

SCANNED DEC 10 2012

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I.)
 Check if the organization used Schedule O to respond to any question in this Part I

	Description	Code	Amount
Revenue	1 Contributions, gifts, grants, and similar amounts received	1	16420.46
	2 Program service revenue including government fees and contracts	2	0.00
	3 Membership dues and assessments	3	206.00
	4 Investment income	4	6.51
	5a Gross amount from sale of assets other than inventory	5a	
	b Less: cost or other basis and sales expenses	5b	
	c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	0.00
	6 Gaming and fundraising events		
	a Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b Gross income from fundraising events (not including \$16420.46 of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	10688.61
c Less: direct expenses from gaming and fundraising events	6c	2042.73	
d Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	8645.88	
Expenses	7a Gross sales of inventory, less returns and allowances	7a	41151.22
	b Less: cost of goods sold	7b	32935.13
	c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	8216.09
	8 Other revenue (describe in Schedule O)	8	676.45
	9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	34171.39
	10 Grants and similar amounts paid (list in Schedule O)	10	0.00
	11 Benefits paid to or for members	11	0.00
Net Assets	12 Salaries, other compensation, and employee benefits	12	0.00
	13 Professional fees and other payments to independent contractors	13	0.00
	14 Occupancy, rent, utilities, and maintenance	14	0.00
	15 Printing, publications, postage, and shipping	15	2123.29
	16 Other expenses (describe in Schedule O)	16	26702.71
	17 Total expenses. Add lines 10 through 16	17	28826.00
	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	5345.39
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	18678.90	
20 Other changes in net assets or fund balances (explain in Schedule O)	20		
21 Net assets or fund balances at end of year. Combine lines 18 through 20	21	24024.29	



10 9

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

		Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O		✓
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)		✓
35a	Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?		✓
b	If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O		
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III		✓
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N		✓
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a _____		
b	Did the organization file Form 1120-POL for this year?		✓
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 outstanding at the end of the tax year covered by this return?		✓
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b _____		
39	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on line 9 39a _____		
b	Gross receipts, included on line 9, for public use of club facilities 39b _____		
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ _____ ; section 4912 ▶ _____ ; section 4955 ▶ _____		
b	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		✓
c	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ _____		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶ _____		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.		✓
40e			
41	List the states with which a copy of this return is filed. ▶ _____		
42a	The organization's books are in care of ▶ <u>Kristin Twitchell</u> Telephone no. ▶ <u>336-301-0100</u> Located at ▶ <u>1942 Haven Road Greensboro NC</u> ZIP + 4 ▶ <u>27410</u>		
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country: ▶ _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.	Yes	No
42b			✓
c	At any time during the calendar year, did the organization maintain an office outside the U.S.? If "Yes," enter the name of the foreign country: ▶ _____		✓
42c			
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 _____		<input type="checkbox"/>
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		✓
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		✓
c	Did the organization receive any payments for indoor tanning services during the year?		✓
d	If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
44d			
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		✓
45b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)		✓

	Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46	✓

Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only. All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.
 Check if the organization used Schedule O to respond to any question in this Part VI

	Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47	✓
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	✓
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a	✓
b If "Yes," was the related organization a section 527 organization?	49b	

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

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
None				

f Total number of other employees paid over \$100,000 **0**

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

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
None		

d Total number of other independent contractors each receiving over \$100,000 **0**

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A Yes No

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

Sign Here	Signature of officer: <u>Kristin Tutzell</u> Type or print name and title: <u>Kristin Tutzell - PTA Treasurer</u>	Date: <u>11/14/2012</u>
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Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶	Firm's EIN ▶		Phone no	
	Firm's address ▶				

May the IRS discuss this return with the preparer shown above? See instructions Yes No

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No 1545-0047

2011

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization

Claxton Elementary School PTA

Employer identification number

58-1647045

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
 - a Type I b Type II c Type III—Functionally integrated d Type III—Other
 - e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
 - f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
 - g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

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

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Name of the organization

Claxton Elementary School PTA

Schools

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.
▶ Attach to Form 990 or Form 990-EZ.

OMB No 1545-00-

2011

Open to Public Inspection

Employer identification number

58-1647045

Part I

	YES	NO
1 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?		✓
2 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?		✓
3 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, use Part II		✓
We are a Parent Teacher Association that supports the students and teachers through various programs and activities.		
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	4a	✓
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	4b	✓
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	4c	✓
d Copies of all material used by the organization or on its behalf to solicit contributions?	4d	✓
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
We are a Parent Teacher Association that supports the students and teachers through various programs		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?	5a	✓
b Admissions policies?	5b	✓
c Employment of faculty or administrative staff?	5c	✓
d Scholarships or other financial assistance?	5d	✓
e Educational policies?	5e	✓
f Use of facilities?	5f	✓
g Athletic programs?	5g	✓
h Other extracurricular activities?	5h	✓
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
6a Does the organization receive any financial aid or assistance from a governmental agency?	6a	✓
b Has the organization's right to such aid ever been revoked or suspended?	6b	✓
If you answered "Yes" to either line 6a or line 6b, explain on Part II.		
7 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," explain on Part II	7	✓

Claxton PTA Board 2011/2012

EXECUTIVE BOARD

President	Laura Strange	lgstrange821@yahoo.com	617-5009
VP Education	Amber Dow	addow@bellsouth.net	288-7060
VP Service	Autumn Lindley	clognchik6@yahoo.com	423-8969
VP Ways & Means	Kristie Beckner	kgbeckner@gmail.com	706-3928
Secretary	Cheryl Wyrick	chwyrick@uncg.edu	540-9505
Treasurer	Kristin Twitchell	kristin419@hotmail.com	301-0100
Principal	Anessa Burgman	burgmaa@gcsnc.com	545-2010

EDUCATION COMMITTEE CHAIRS

5th Grade Celebration	Cheryl Wyrick	ktrogdo@yahoo.com	953-6680
Character Education	Kimberly Terry	smaulanc@aol.com	282-3635
Claxton Orientation	Paula Katz	sppapier@gmail.com	285-8590
Cultural Arts	Stacey Papier	kathyhill usc@gmail.com	282-5926
CMT Representative	Kathy Hill	sppapier@gmail.com	285-8590
	Stacey Papier	kelly_proudfit@hotmail.com	282-6423
EC Advocate	Kelly Proudfit	danicakelso@triad.rr.com	446-4238
	Danica Kelso	ssjgboro@hotmail.com	545-8096
Grant Coordinator	Sarah Jones	momcmt919@triad.rr.com	545-3406
Health & Safety	Carol Townsend	ceil@triad.rr.com	286-3833
Kids Vote	Ceil Diering	lauriepelletier76@yahoo.com	510-0663
Media Center	Laurie Pelletier	addow@bellsouth.net	288-7060
Reading Incentives	Amber Dow	ktrogdo@yahoo.com	953-6680
Reflections	Kimberly Terry	ladajackson4@gmail.com	282-2852
Science Extravaganza	Diane Jackson		
Student Council Parent Rep			
Teachers' Representative			545-2010

SERVICE COMMITTEE CHAIRS

Advocacy	VACANT		
Awards	VACANT		
Beautification	Dwight & Shannon Carden	scarden2@triad.rr.com	292-7070
Bulletin Board	Nicole Frick	nicolefrick@yahoo.com	707-2810
Directory	Janet DiMaria	djcdimaria@gmail.com	294-7806
	Sheri Bergen	spbergen@gmail.com	282-6171
Field Day	Amber Dow	addow@bellsouth.net	288-7060
	Kristie Beckner	kgbeckner@gmail.com	706-3928
Good Cheer	Jodi Kolada	israelji@hotmail.com	542-3069
Newsletter	Sheri Bergen	spbergen@gmail.com	282-6171
Public Relations	VACANT		
Spring Carnival	Shannon Carden	scarden2@triad.rr.com	292-7070
	Laura Strange	lgstrange821@yahoo.com	617-5009
	Amber Dow	addow@bellsouth.net	288-7060
Staff Appreciation	Pam McCraw	pmccrawbcimage@aol.com	854-9490
Volunteers/Room Reps	Janet DiMaria	djcdimaria@gmail.com	294-7806
Web Page	VACANT		
Yearbook	Chris Pickerel	cpickerel@triad.rr.com	282-6106

WAYS AND MEANS COMMITTEE CHAIRS

Attractions	Laurie Pelletier	lauriepelletier76@yahoo.com	510-0663
	Jodi Kolada	israelji@hotmail.com	542-3069
Book Fair	Laura Strange	lgstrange821@yahoo.com	617-5009
	Suzanne Dilday	Sdilday@triad.rr.com	852-2621
	Kate King	Katek@triad.rr.com	286-6530
Boxtops	Jodi Kolada	israelji@hotmail.com	542-3069
Fundraisers	Shirley Lucky	slucky0363@triad.rr.com	708-6609
	Leigh Hamilton	jleighhamilton@hotmail.com	508-2235
	Joanne Gilbert	jsgilbert@triad.rr.com	834-8570
	Kristie Beckner	kgbeckner@gmail.com	706-3928
Membership	Ceil Diering	ceil@triad.rr.com	286-3833
	Paige Eastwood	beastwood@triad.rr.com	286-7994
Community Nights	Shannon Carden	scarden2@triad.rr.com	292-7070
	Kristie Beckner	kgbeckner@gmail.com	706-3928
Skate Night	Lisa Pointer	lpointer68@gmail.com	393-0013
	VACANT		
Spirit Sales	Elisa Liss	elisa.liss@yahoo.com	312-1198

SCHEDULE O
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No 1545-0047

2011

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

Name of the organization
Claxton Elementary School PTA

Employer identification number
58-1647045

Part I -

Revenue # 8 - Other Revenue: Sales tax refund \$676.45 (\$402.83 from 2010-12 year but received in current school year)

Expenses # 16 - Other Expenses: total \$26,702.71 (breakdown below)

Technology fund \$5,060.04 and classroom needs/supplies through the Claxton Management team requests \$5,429.95;

Bank fees \$60.98; Insurance \$400.00; Office supplies \$547.71; Website \$155.20; Beautification \$361.53; Bulletin boards \$57.00; EOG

breakfast \$561.80; Field day \$439.29; Good cheer \$147.10; Staff appreciation \$1388.11; Parents breakfast \$1080.91; Teacher

reimbursement program \$3072.66; 5th grade celebration \$484.85; Battle of the books \$529.83; Character education \$116.49;

Cultural arts \$1825; 5th grade science project \$257.46; Kindergarten Orientation/potluck \$332.52; Reading incentives celebrations \$2457

Reflections \$83.66; Scholarship \$901.11; Science Extravaganza \$253.30; Worldbook online \$699.21

Part III # 28 Student support / Education programs \$7,707.89

(Consisted of EOG breakfast, Field day, 5th grade celebration, Battle of the books, Character Education, Cultural Arts, 5th grade Science project, Reading incentives, Reflections, Science Extravaganza, Worldbook online (individual costs amounts listed above on # 16)

29 Staff/Teacher support (appreciation, supplies) \$15,097.86

(Consisted of Technology and CMT funds; along with Good Cheer, Staff appreciation lunches, and teacher reimbursement (individual cost amounts listed above on # 16)

30 Facility Support \$1262.64 (consists of beautification \$361.53 and school scholarship \$901.11)