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Form **990-EZ**Department of the Treasury
Internal Revenue Service**Short Form**
Return of Organization Exempt From Income TaxUnder 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

OMB No. 1545-1150

2011**Open to Public Inspection**

A For the 2011 calendar year, or tax year beginning July 1, 2011, and ending June 30, 2012

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

C Name of organization
Rotary International of Victoria

Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
P.O. Box 7114

City or town, state or country, and ZIP + 4
Victoria, TX 77903-7114

D Employer identification number
74 6070115

E Telephone number
361 575 4465

F Group Exemption Number ►

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: ► VICTORIAROTARY.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. \$

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 ☒

Revenue		Expenses		Net Assets	
1	Contributions, gifts, grants, and similar amounts received	1	3901	18	Excess or (deficit) for the year (Subtract line 17 from line 9)
2	Program service revenue including government fees and contracts	2		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)
3	Membership dues and assessments	3	69364	20	Other changes in net assets or fund balances (explain in Schedule O)
4	Investment income	4	11	21	Net assets or fund balances at end of year. Combine lines 18 through 20
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)	5c			
6	Gaming and fundraising events				
6a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	447		
6b	Gross income from fundraising events (not including \$ 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			
6c	Less: direct expenses from gaming and fundraising events	6c	717		
6d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	-271		
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 Schedule O)	8			
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	73005		
10	Grants and similar amounts paid (list in Schedule O)	10	8108		
11	Benefits paid to or for members	11			
12	Salaries, other compensation, and employee benefits	12			
13	Professional fees and other payments to independent contractors	13			
14	Occupancy, rent, utilities, and maintenance	14			
15	Printing, publications, postage, and shipping	15	239		
16	Other expenses (describe in Schedule O)	16	64121		
17	Total expenses. Add lines 10 through 16	17	72468		
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	537		
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	6230		
20	Other changes in net assets or fund balances (explain in Schedule O)	20	739		
21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	7506		

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No. 106421

Form **990-EZ** (2011)

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Part II Balance Sheets. (see the instructions for Part II.)Check if the organization used Schedule O to respond to any question in this Part II ☒

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	6230	22 7506
23 Land and buildings		23
24 Other assets (describe in Schedule O)	739	24
25 Total assets	6969	25 7506
26 Total liabilities (describe in Schedule O)		26
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	6969	27 7506

Part III Statement of Program Service Accomplishments (see the instructions for Part III.)Check if the organization used Schedule O to respond to any question in this Part III . . . ☐What is the organization's primary exempt purpose? To improve International Understanding

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

		Expenses (Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others)
28 Provide Funding to help improve literacy in local adult community		
(Grants \$ <u>3024</u>) If this amount includes foreign grants, check here ☐	28a	3024
29 Provide Funding to promote youth development		
(Grants \$ <u>948</u>) If this amount includes foreign grants, check here ☐	29a	948
30 Provide funding to promote youth leadership		
(Grants \$ <u>2738</u>) If this amount includes foreign grants, check here ☐	30a	2738
31 Other program services (describe in Schedule O)		
(Grants \$ <u>1398</u>) If this amount includes foreign grants, check here ☐	31a	1398
32 Total program service expenses (add lines 28a through 31a)	32	8108

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (see the instructions for Part IV.)Check if the organization used Schedule O to respond to any question in this Part IV ☐

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
Art Calvo Victoria, TX	President, 7	0	0	0
Louis Boldt Victoria, TX	President Elect, 2	0	0	0
Sara Hounshell Victoria, TX	Vice President, 2	0	0	0
Joe Truman Victoria, TX	Secretary, 4	0	0	0
Bob Bailey Victoria, TX	Treasurer, 6	0	0	0
Chris Selkop Victoria, TX	Sergeant at Arms, 2	0	0	0
Clara Prater Victoria, TX	Director, 1	0	0	0
Susan Speckels Victoria, TX	Director, 1	0	0	0
John Beck Victoria, TX	Director, 1	0	0	0
Roger Welder Victoria, TX	Director, 1	0	0	0
Bob Zawadzki Victoria, TX	Director, 1	0	0	0
Dennis Brown Victoria, TX	Director, 1	0	0	0

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	33	✓
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)	34	✓
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)?	35a	✓
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	35b	✓
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	35c	✓
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	36	✓
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?	37b	✓
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?	38a	✓
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	40b	✓
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 ► Telephone no. ►		
Located at ► ZIP + 4 ►		
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)?	42b	✓
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		
c At any time during the calendar year, did the organization maintain an office outside the U.S.?	42c	✓
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 ► ☐	43	
and enter the amount of tax-exempt interest received or accrued during the tax year ►		
44a Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a	✓
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	44b	✓
c Did the organization receive any payments for indoor tanning services during the year?	44c	✓
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)?	45a	✓
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)	45b	✓

- 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

	Yes	No
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 ☐

- 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

	Yes	No
47		✓

- 48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

48		✓
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- 49a Did the organization make any transfers to an exempt non-charitable related organization?

49a		✓
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- b If "Yes," was the related organization a section 527 organization?

49b		
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- 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

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

- 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

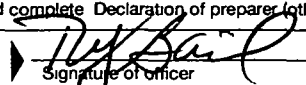
- d Total number of other independent contractors each receiving over \$100,000

- 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
Robert J. Bailey - Treasurer
Type or print name and title

10/16/2012
Date

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ 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 of Membership Dues and Assessments

Dues	9,511.33
Initiation Fees	300.00
Meals	56,645.69
Paul Harris Donations	2,907.00
	<u>69,364.02</u>

Schedule of Investment Income

IBC Bank Savings	11.43
	<u>11.43</u>

Schedule for Printing, Publications, & Postage

Postage	79.20
Printing	90.00
P.O. Box Rental	70.00
	<u>239.20</u>

Schedule of Other Expenses

District Conference	0.00
District Governor Visit	592.39
Rotary Dues	8,207.43
Meals	51,285.11
Supplies	1,152.57
Web Site Expenses	379.61
Officer Installation	348.19
Officer Training	1,313.98
Service Charges	11.42
T-Shirt Sales	36.00

Health A Rama	254.07
Outstanding Citizen Award	135.04
Early Act	405.03

64,120.84

Contributions/Gifts/Grants or Similar

893.35
446.68
446.68
717.35
-270.68
0.00
947.52
0.00
2,777.15

3,900.67

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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.

OMB No. 1545-0047

2011

**Open to Public
Inspection**

Name of the organization

Rotary International of Victoria

Employer identification number

74 6070115

Explanation of Grants detailed in attachment to schedule O

Form 990-EZ Line 20: \$739 accounts receivable outstanding not reported on 2010 return in error.

Attachment to Schedule O

Schedule for Grants and Similar Accounts

Class	Name & Address	Amt. Given
Payment to enhance youth leadership	RYLA 2010, Corpus Christi, TX	2,738.40
Payment to enhance educational opportunity	University of Houston, Victoria, TX	0.00
Payment to enhance educational opportunity	Victoria College, Victoria, TX	0.00
Payment to enhance adult literacy	Victoria Adult Literacy Council, Victoria, TX	3,023.50
Payment to promote adoption of foster childrer	South Texas Zoological Society, Victoria, TX	786.35
Payment to promote higher ethics	St. Joseph High School, Victoria, TX	612.50
Provide shelter for disaster victims	Shelter Box USA, Lakewood Ranch, FL	0.00
Payment to victims of hurricane in S. Texas	Rotary District 5930, Harlingen, TX	0.00
Provide shelter for victims of family violence	Mid Coast Family Services, Victoria, TX	0.00
Payment to promote youth development	Rotary International Foundation, Chicago, IL	947.52
		<u>8,108.27</u>