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Short Form  
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)

- 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

EXTENSION APPROVED TO 2/15/13

## A For the 2011 calendar year, or tax year beginning

07-01, 2011, and ending

06-30, 2012

B Check if applicable

- Address change
- Name change
- Initial return
- Terminated
- Amended return
- Application pending

## C Name of organization

ALBANY ROTARY CLUB

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

PO BOX 453

Room/suite

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

Albany, OR 97321-0130

## D Employer identification number

93-6032285

## E Telephone number

G Accounting Method  Cash  Accrual Other (specify) ►I Website: ► [www.rotaryofalbany.org](http://www.rotaryofalbany.org)J Tax-exempt status (check only one) -  501(c)(3)  501(c)(4) (insert no)  4947(a)(1) or  527H Check ►  if the organization is not required to attach Schedule B

(Form 990, 990-EZ, or 990-PF)

K Check ►  if the organization is not a section 509(a)(3) supporting organization or 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 ► \$ 59,855

## 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 

<b>RECEIVED</b> <b>IRSC</b> <b>OGDEN, UT</b>	1 Contributions, gifts, grants, and similar amounts received	1	800
	2 Program service revenue including government fees and contracts	2	
	3 Membership dues and assessments	3	18,242
	4 Investment income	4	143
	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	
	6 Gaming and fundraising events	6d	18,466
	a Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b Gross income from fundraising events (not including \$ from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	40,670
	c Less direct expenses from gaming and fundraising events	6c	22,204
	d Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		
	7a Gross sales of inventory, less returns and allowances	7a	
	b Less cost of goods sold	7b	
	c 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	37,651
<b>EXPENSES</b> <b>18 2013</b>	10 Grants and similar amounts paid (list in Schedule O)	10	
	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	
	16 Other expenses (describe in Schedule O)	16	9,386
	17 Total expenses. Add lines 10 through 16	17	9,386
	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	28,265
	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	22,149
	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	50,414

148

**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	22,149	22 50,414
23 Land and buildings	0	23 0
24 Other assets (describe in Schedule O)	0	24 0
25 Total assets	22,149	25 50,414
26 Total liabilities (describe in Schedule O)	0	26 0
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	22,149	27 50,414

**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? SERVICE CLUB, LOCAL, INTERNATIONAL

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 PURCHASE AND INSTALLATION OF SCHOOL PLAY GROUND EQUIPMENT A LAFAYETTE ELEMENTARY SCHOOL OF GREATER ALBANY PUBLIC SCHOOLS IN ALBANY OREGON (Grants \$ 17,000 ) If this amount includes foreign grants, check here . . . . . ► <input type="checkbox"/>	28a	0
29 CHARITABLE SUPPORT FOR LOCAL PROGRAMS, DENTAL HYGIENE, 4H PROGRAMS, CHILD ADVOCAY, JR FIRST CITIZEN ACKNOWLEDGEMENT, CHRISTMAS PROGRAM FOR NEEDY CHILDREN, DICTIONARY GIFTING (Grants \$ 13,900 ) If this amount includes foreign grants, check here . . . . . ► <input type="checkbox"/>	29a	0
30 _____ _____ (Grants \$ _____ ) If this amount includes foreign grants, check here . . . . . ► <input type="checkbox"/>	30a	
31 Other program services (describe in Schedule O) (Grants \$ _____ ) If this amount includes foreign grants, check here . . . . . ► <input type="checkbox"/>	31a	
32 Total program service expenses (add lines 28a through 31a) . . . . . ► 32		0

**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 (Form 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
HELEN NELSON 100 CALAPOOIA ST, Albany OR 97321	PRESIDENT 6	0	0	0
TRACY LILES 128 SW 3RD AVE, Albany OR 97321	PRESIDENT ELECT 0	0	0	0
CHUCK MCLARAN 3342 NW CREST LOOP, Albany OR 97321	SECRETARY 0	0	0	0
TAD DAVIES CPA 116 NE GREEN CT, Albany OR 97321	TREASURER 0	0	0	0
ED HODNEY 333 SW BROADALBIN ST, Albany OR 97321	DIRECTOR 0	0	0	0
DORIS JOHNSTON PO BOX 248, Albany OR 97321	DIRECTOR 0	0	0	0
DAN RIPPLINGER PO BOX 241, Albany OR 97321	DIRECTOR 0	0	0	0
WILL O'HEARN PO 453, Albany OR 97321-0130	DIRECTOR 0	0	0	0
BILL HELPHSTINE PO BOX 453, Albany OR 97321-0130	DIRECTOR 0	0	0	0
JENNIFER POTTER 939 SW ELM ST, Albany OR 97321	DIRECTOR 0	0	0	0
CATHY RACKMAN 1121 NW 9TH STREET, Corvallis OR 97330	DIRECTOR 0	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

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

35 a 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

37 a 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

38 a 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 39a

a Initiation fees and capital contributions included on line 9 39b

b Gross receipts, included on line 9, for public use of club facilities 39b

40 a Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ► 40b , section 4912 ► 40c , section 4955 ► 40d

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 40e

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 40f

d Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization 40g

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 40h

41 List the states with which a copy of this return is filed ► OR,

42 a The organization's books are in care of ► **TAD DAVIES, TREASURER** Telephone no ► **541-926-9356**  
Located at ► **116 NE GREEN CT Albany, OR** ZIP + 4 ► **97321-1634** 42b

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)? 42c   
If "Yes," enter the name of the foreign country ► 42d   
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 of the U S? 42e   
If "Yes," enter the name of the foreign country ► 42f

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

44 a 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

45 a Did the organization have a controlled entity within the meaning of section 512(b)(13)? 45a

b 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



**SCHEDULE G**  
(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information Regarding  
Fundraising or Gaming Activities**

OMB No 1545-0047

**2011**

Open to Public  
Inspection

Name of the organization

ALBANY ROTARY CLUB

Employer identification number

93-6032285

**Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17  
**Part I:** Form 990-EZ filers are not required to complete this part

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply

- a  Mail solicitations
- b  Internet and email solicitations
- c  Phone solicitations
- d  In-person solicitations
- e  Solicitation of non-government grants
- f  Solicitation of government grants
- g  Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?  Yes  No

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
1		Yes	No			
2						
3						
4						
5						
6						
7						
8						
9						
10						
<b>Total</b>						

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Part II** **Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events
		WINE WALK (event type)	WE PARK CARS (event type)	4 (total number)	Add col (a) through col (c)
Revenue	1 Gross receipts . . . . .	20,250	12,460	8,210	40,920
	2 Less Charitable contributions . . . . .				
	3 Gross income (line 1 minus line 2) . . . . .	20,250	12,460	8,210	40,920
Direct Expenses	4 Cash prizes. . . . .				
	5 Noncash prizes . . . . .				
	6 Rent/facility costs. . . . .				
	7 Food and beverages . . . . .				
	8 Entertainment. . . . .				
	9 Other direct expenses . . . . .	12,250	6,230	3,974	22,454
	10 Direct expense summary Add lines 4 through 9 in column (d) . . . . .				► ( 22,454 )
	11 Net income summary Combine line 3, column (d), and line 10 . . . . .				► 18,466

**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))
Revenue	1 Gross revenue . . . . .				
Direct Expenses	2 Cash prizes. . . . .				
	3 Noncash 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 line 1, column d, and line 7 . . . . .				► ( )

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? . . . . .  Yes  No  
b If "No," explain \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? . . . . .  Yes  No  
b If "Yes," explain \_\_\_\_\_

**SCHEDULE O**  
(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

Name of the organization

ALBANY ROTARY CLUB

**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**

Employer identification number

93-6032285

**01. Description of other expenses (Part I, line 16)**

Description	Amount
ROTARY INTERNATIONAL DUES	3,983
ROTARY DISTRICT DUES	2,132
PETS TRAINING - INCOMING PRESIDENT	760
DISTRICT CONFERENCE	176
SPECIAL DISCRETIONARY EXPENSES	446
CLUB OPERATING EXPENSES	833
SPEAKER AND GUEST MEALS	475
DISTRCT GOVERNOR VISIT	331
CHAMBER DUES	250