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Form **990-EZ**Department of the Treasury  
Internal Revenue Service**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 and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$100,000 and total assets less than \$250,000 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

**2007****Open to Public Inspection****A** For the 2007 calendar year, or tax year beginning **November 1**, 2007, and ending **October 31**, 20 **08****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**Oregon Association of Municipal Recorders, INC.**

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

**P O Box 345**

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

**Yachats, OR 97498****D** Employer identification number**93 : 0856787****E** Telephone number**( 541 ) 547-3565****F** Group Exemption Number

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.oamr.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) ( **6** ) ◀ (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 \$100,000 or more, file Form 990 instead of Form 990-EZ. ► \$ **82814.46**

**Part I** Revenue, Expenses, and Changes in Net Assets or Fund Balances (See page 55 of the instructions.)

Revenue	<b>1</b>	Contributions, gifts, grants, and similar amounts received	<b>1</b>	<b>1230.00</b>
	<b>2</b>	Program service revenue including government fees and contracts	<b>2</b>	<b>56520.00</b>
	<b>3</b>	Membership dues and assessments	<b>3</b>	<b>10465.00</b>
	<b>4</b>	Investment income	<b>4</b>	<b>1705.96</b>
	<b>5a</b>	Gross amount from sale of assets other than inventory	<b>5a</b>	
	<b>5b</b>	Less: cost or other basis and sales expenses	<b>5b</b>	
	<b>5c</b>	Gain or (loss) from sale of assets other than inventory. Subtract line 5b from line 5a (attach schedule)	<b>5c</b>	
	<b>6</b>	Special events and activities (attach schedule). If any amount is from gaming, check here <input type="checkbox"/>		
	<b>a</b>	Gross revenue (not including \$ _____ of contributions reported on line 1)	<b>6a</b>	<b>9196.00</b>
<b>b</b>	Less: direct expenses other than fundraising expenses	<b>6b</b>	<b>2218.24</b>	
<b>c</b>	Net income or (loss) from special events and activities. Subtract line 6b from line 6a	<b>6c</b>	<b>6977.76</b>	
<b>7a</b>	Gross sales of inventory, less returns and allowances	<b>7a</b>	<b>2587.00</b>	
<b>b</b>	Less: cost of goods sold	<b>7b</b>	<b>2006.56</b>	
<b>c</b>	Gross profit or (loss) from sales of inventory. Subtract line 7b from line 7a	<b>7c</b>	<b>580.44</b>	
<b>8</b>	Other revenue (describe ► <b>misc. and advertising in the association newsletter</b> )	<b>8</b>	<b>1110.50</b>	
<b>9</b>	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8. ►	<b>9</b>	<b>78589.66</b>	
Expenses	<b>10</b>	Grants and similar amounts paid (attach schedule)	<b>10</b>	<b>20100.00</b>
	<b>11</b>	Benefits paid to or for members	<b>11</b>	
	<b>12</b>	Salaries, other compensation, and employee benefits	<b>12</b>	
	<b>13</b>	Professional fees and other payments to independent contractors	<b>13</b>	
	<b>14</b>	Occupancy, rent, utilities, and maintenance	<b>14</b>	
	<b>15</b>	Printing, publications, postage, and shipping	<b>15</b>	<b>4450.00</b>
	<b>16</b>	Other expenses (describe ► <b>conference and training session expenses/other events</b> )	<b>16</b>	<b>50083.91</b>
	<b>17</b>	<b>Total expenses.</b> Add lines 10 through 16. ►	<b>17</b>	<b>74633.91</b>
Net Assets	<b>18</b>	Excess or (deficit) for the year. Subtract line 17 from line 9	<b>18</b>	<b>3955.75</b>
	<b>19</b>	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)	<b>19</b>	<b>53261.83</b>
	<b>20</b>	Other changes in net assets or fund balances (attach explanation)	<b>20</b>	
	<b>21</b>	Net assets or fund balances at end of year. Combine lines 18 through 20. ►	<b>21</b>	<b>57217.58</b>

**Part II** Balance Sheets—If Total assets on line 25, column (B) are \$250,000 or more, file Form 990 instead of Form 990-EZ.

(See page 60 of the instructions.)

	(A) Beginning of year	(B) End of year
<b>22</b> Cash, savings, and investments	<b>53261.83</b>	<b>57217.58</b>
<b>23</b> Land and buildings	<b>0</b>	<b>0</b>
<b>24</b> Other assets (describe ► _____)	<b>0</b>	<b>0</b>
<b>25</b> <b>Total assets</b>	<b>53261.83</b>	<b>57217.58</b>
<b>26</b> <b>Total liabilities</b> (describe ► _____)	<b>0</b>	<b>0</b>
<b>27</b> <b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	<b>53261.83</b>	<b>57217.58</b>

**Part III Statement of Program Service Accomplishments** (See page 60 of the instructions.)**Expenses**

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

What is the organization's primary exempt purpose? Provide educational opportunities/promote profession

Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each program title.

**28** 54 scholarships were given to members to attend training and academy sessions and conferences, including the International Institute of Municipal Clerks conference.(Grants \$ ) If this amount includes foreign grants, check here ☐ **28a****29** Association organized and put on an annual conference, 2 academy sessions and many regional training sessions providing educational opportunities for members and other professionals in local government(Grants \$ ) If this amount includes foreign grants, check here ☐ **29a****30** Association members networked with other state associations, the League of Oregon Cities and other associations for professionals in local government such as the Mayors Association and the Oregon Municipal Finance Officers Association.(Grants \$ ) If this amount includes foreign grants, check here ☐ **30a****31** Other program services (attach schedule)(Grants \$ ) If this amount includes foreign grants, check here ☐ **31a****32** Total program service expenses. Add lines 28a through 31a **32****Part IV List of Officers, Directors, Trustees, and Key Employees** (List each one even if not compensated. See page 61 of the instructions.)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
Mary Feldman 777 Peal Street, Eugene, OR 97401	President 10 hrs	0	0	0
Kathy Louie P O Box 1083, Corvallis, OR 97333	1st Vice President 10 hrs	0	0	0
Stacie Cook P O Box 256, Mill City, OR 97360	Secretary 10 hrs	0	0	0
Karin Johnson P O Box 7, Independence, OR 97351	Treasurer (07/08) 10 hrs	0	0	0

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

Yes No

**33** Did the organization make a change in its activities or methods of conducting activities? If "Yes," attach a detailed statement of each change **33** ☒**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 **34** ☒**35** If the organization had income from business activities, such as those reported on lines 2, 6, and 7 (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? **35a** ☒**b** If "Yes," has it filed a tax return on Form 990-T for this year? **35b** ☒**36** Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement. **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 unpaid at the start of the period covered by this return? **38a** ☒**b** If "Yes," attach the schedule specified in the line 38 instructions and enter the amount involved **38b****39** 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**

**Part V Other Information** (Note the statement requirement in General Instruction V ) (Continued)**40a** 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under:

section 4911 ▶ \_\_\_\_\_ ; section 4912 ▶ \_\_\_\_\_ ; section 4955 ▶ \_\_\_\_\_

**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," attach an explanation . . .

	Yes	No
<b>40b</b>		
<b>40c</b>		
<b>40e</b>		✓

**c** Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 . . . ▶ \_\_\_\_\_**d** 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? . . .**41** List the states with which a copy of this return is filed. ▶ \_\_\_\_\_**42a** The books are in care of ▶ Nancy Batchelder, Treasurer 08/09Telephone no. ▶ ( 541 ) 547-3565Located at ▶ 441 hwy 101 north, Yachats, OR 97498ZIP + 4 ▶ 97498**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**.**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 . . . ▶ ☐and enter the amount of tax-exempt interest received or accrued during the tax year . . . ▶ 43**Please  
Sign  
Here**

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.

▶ Nancy Batchelder

Signature of officer

Date

1-3-4-2009▶ Nancy Batchelder, Treasurer 08/09

Type or print name and title

**Paid  
Preparer's  
Use Only**Preparer's  
signature ▶

Date

Check if  
self-  
employed ▶ ☐

Preparer's SSN or PTIN (See Gen. Inst. X)

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

EIN ▶

Phone no ▶ ( )



Schedule for  
line 10  
(scholarships)

**Memorandum**

To: Mary Feldman, CMC, OAMR President

From: Amber Ames, CMC, Chair  
OAMR 2007/08 Scholarship Committee

Date: August 18, 2008

Re: OAMR Scholarship Committee – Year End Report

\* \* \* \* \*

Thank you to the Scholarship Committee for their continued work on this committee!

Robyn Christie, Lake Oswego; Debbie Jermann, Gresham; Shirley Kappas, Klamath Falls, Sandy King, Wilsonville; Kathy Louie, Corvallis; Vicki Luther, Sutherlin; Amber Mathiesen, Cornelius; Kelly Morse, Redmond; Anna Ruggles, Forest Grove; Carolyn Shields, Myrtle Creek; and Carol Weir, Rogue River

**RECAP OF WORK DONE IN 2006/07:**

In the fall of 2007, the Scholarship Committee reviewed the ranking, criteria and applications for the Professional Development classes, Mid-Year Academy, Annual Academy and the Annual Conference. The Board approved the revision to add two points for members that have served in their positions for less than one year for the annual conference registration scholarship. In April, the board approved a revised scholarship committee description.

The main purpose of the ranking system is to assist the committee in making recommendations to the OAMR Board when we receive more applications than budgeted scholarship funds. This year we had enough funds to approval all applications, but we want to ensure that we continue to support the attendance of members who are new to the profession or organization and those in pursuant of their certification.

**MID YEAR ACADEMY SCHOLARSHIPS:**

The adopted 2007/08 OAMR Budget included \$1,250 for Mid-Year Academy Scholarships. The committee received 10 applications and all were determined to meet the criteria for approval. The recipients of the scholarships were:

Name	Amount
Boyce, Laurie Aurora	125.00
Cook, Stacie Mill City	125.00
Eldridge, Michelle Harrisburg	125.00
Hamilton, Debbie	125.00

Sutherlin	
Lucas, April Ashland	125.00
Mathiesen, Amber Cornelius	125.00
Manning, Debra Dundee	125.00
Nelson, Catherine Waterloo	125.00
Roth, Debby Cornelius	125.00
Weir, Carol Rogue River	125.00
<b>Total</b>	<b>1250.00</b>

#### **PROFESSIONAL DEVELOPMENT SCHOLARSHIPS:**

The adopted 2007/08 OAMR Budget included \$8,855 for Professional Development I, II, III and IV Scholarships. The committee received 24 applications (7 for PD 1, 4 for PD 2, 3 for PD 3 and 10 for PD 4), totaling \$11,680 in scholarships. The difference of \$2,825 would be taken from the Scholarships – General line item, leaving a balance of \$4,175 to add to the budgeted funds of \$5,625.00 for the Annual Conference and Academy Session scholarships.

All of the applicants were determined to meet the criteria for approval. After the scholarship awards were made, three scholarship recipients canceled registration for personal reasons. We received \$11,680 in scholarships. *Note: Ultimately, three members canceled their registrations due to personal reasons.*

The recipients of the scholarships were:

<b>Name</b>	<b>PD I</b>	<b>PD II</b>	<b>PD III</b>	<b>PD IV</b>	<b>Amount</b>
Clingman, Diane Prairie City	X				495.00
Cramer, Sadie Mololla	X				495.00
Mathiesen, Amber Cornelius	X				495.00
Nation, Theresa Damascas	X				495.00
Smith, Maureen	X				495.00

Tualatin					
Strader, Vicki Myrtle Point	Withdrew application				
Turley, Cecille Gresham	X				495.00
York, Melissa Canby	X				495.00
					<b>3,465.00 Rev</b>
Boyce, Laurie Aurora		X			495.00
Kaser, Linda Lebanon		X			495.00
Manning, Debra Dundee		X			495.00
Werner, Debbie Hillsboro		X			495.00
					<b>1,980.00</b>
Lucas, April Ashland			X		495.00
Pentecost, Susan Scappoose			X		495.00
Roth, Debbie Cornelius			X		495.00
					<b>1,485.00</b>
Alley, Norma Newberg				X	475.00
Barnett, Tori Ontario				X	475.00
Cook, Stacie Mill City				X	475.00
Johnson, Karin Independence				X	475.00
Kappas, Shirley Klamath Falls				X	475.00
Lockhart, Debbie Keizer				X	475.00

Louie, Kathy Corvallis				X	475.00
Post, Ruth Philomath				X	475.00
Spoons, Karen Medford				X	475.00
Vodrup, Kitty Junction City				X	475.00
					<b>4,750.00</b>

### **ANNUAL CONFERENCE AND ACADEMY SESSION**

The adopted 2007/08 OAMR budget included \$5,625 for Annual Academy and Annual Conference Scholarships. The Board approved a one week extension of the deadline to allow for additional members to apply for the scholarships. The committee received 32 applications (14 for Annual Academy and 18 for Annual Conference). The total amount for both scholarships was \$6,300; \$5,625 was budgeted and \$4,950 of carry over funds from the 2008 PD scholarship process was used to cover the balance.

All of the applicants were determined to meet the criteria for approval. The committee recommended and the OAMR Board approved that all 32 of the conference registration scholarships and Annual Academy Scholarships be awarded. The recipients of the scholarships were:

Name	Academy	Conference Registration	Total Awarded
	<b>\$150.00</b>	<b>\$250.00</b>	
Boyce, Laurie Aurora	X	X	400.00
Cook, Stacie Mill City	X	X	400.00
Collins, Rene Coquille	X	X	400.00
Cramer, Sadie Molalla	X	X	400.00
Gibson, Lisa North Plains		X	250.00
Hadley, Jean Mosier		X	250.00
Heinze, Pat		X	250.00



Florence			
Kappas, Shirley Klamath Falls	X	X	400.00
Lockhart, Debbie Keizer	X	X	400.00
Manning, Debra Dundee	X	X	400.00
Mathiesen, Amber Cornelius	X	X	250.00
Nelson, Catherine Waterloo	X	X	400.00
Raymond, Megan Mt. Angel	X	X	400.00
Roth, Debby Cornelius	X	X	250.00
Ruggles, Anna City of Forest Grove	X	X	400.00
Sowa, Amy Springfield		X	250.00
Spoons, Karen Medford	X	X	400.00
Weir, Carol Rogue River	X	X	400.00
	\$2,100.00	\$4,500.00	\$6,600.00

Peggy Hawker - Newport 1000.00  
Debbie Jermann Gresham 1000.00

#### **IIMC CONFERENCE SCHOLARSHIPS:**

The deadline to file for an IIMC Conference Scholarship was August 15. There are budgeted funds to award two scholarships of \$1,000 each.

#### **RECOMMENDATIONS:**

The committee would recommend the 2008/09 OAMR Scholarship Committee consider forwarding a recommendation for the OAMR Board to set up a temporary scholarship fund to aid OAMR members in housing and registration costs for the 2012 IIMC Conference in Portland. This may allow members to experience an international conference when not otherwise financially able.