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Form **990**

Department of the Treasury
Internal Revenue Service

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)

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

OMB No 1545-0047

2008

Open to Public Inspection

A For the 2008 calendar year, or tax year beginning 09-01-2008 and ending 08-31-2009

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 Name of organization
OHIO EDUCATION ASSOCIATION

Doing Business As

Number and street (or P O box if mail is not delivered to street address) | Room/suite
225 EAST BROAD STREET

City or town, state or country, and ZIP + 4
COLUMBUS, OH 43215

D Employer identification number
31-4269414

E Telephone number
(614) 228-4526

G Gross receipts $ 62,929,547

F Name and address of Principal Officer
JAMES TIMLIN
225 EAST BROAD STREET
COLUMBUS,OH 43215

H(a) Is this a group return for affiliates? ☐ Yes ☑ No

H(b) Are all affiliates included? ☐ Yes ☐ No
(If "No," attach a list See instructions)

H(c) Group Exemption Number ▶

I Tax-exempt status ☑ 501(c) (6) ◀(insert no) ☐ 4947(a)(1) or ☐ 527

J Web site: ▶ WWW OHEA ORG

K Type of organization ☑ Corporation ☐ trust ☐ association ☐ other ▶

L Year of Formation 1859 **M** State of legal domicile OH

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
CONTINUOUS IMPROVEMENT OF PUBLIC EDUCATION WHILE ADVOCATING FOR MEMBERS & THEIR LEARNERS

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets

3	Number of voting members of the governing body (Part VI, line 1a)	3	47
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	47
5	Total number of employees (Part V, line 2a)	5	242
6	Total number of volunteers (estimate if necessary)	6	44
7a	Total gross unrelated business revenue from Part VIII, line 12, column (C)	7a	-177
b	Net unrelated business taxable income from Form 990-T, line 34	7b	-41,217

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)		575,000
	9	Program service revenue (Part VIII, line 2g)	57,802,970	58,529,321
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	902,797	183,368
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-71,868	-35,378
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	58,633,899	59,252,311
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1,779,987	1,920,943
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	26,691,381	26,642,028
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0
	b	(Total fundraising expenses, Part IX, column (D), line 25 0)		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	17,008,737	16,974,316
	18	Total expenses—add lines 13–17 (must equal Part IX, line 25, column (A))	45,480,105	45,537,287
	19	Revenue less expenses Subtract line 18 from line 12	13,153,794	13,715,024

			Beginning of Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	43,440,763	47,364,715
	21	Total liabilities (Part X, line 26)	12,486,767	44,150,014
	22	Net assets or fund balances Subtract line 21 from line 20	30,953,996	3,214,701

Part II Signature Block

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

Please Sign Here

▶ ****** | 2010-07-08
Signature of officer | Date

▶ JAMES TIMLIN TREASURER
Type or print name and title

Paid Preparer's Use Only

Preparer's signature ▶ Jane E Pfeifer	Date 2010-07-08	Check if self-empolyed ▶ ☐	Preparer's PTIN (See Gen Inst)
Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ CLARK SCHAEFER HACKETT & CO 150 E CAMPUS VIEW BLVD SUITE 100 COLUMBUS, OH 43235			EIN ▶ Phone no ▶ (614) 885-2208

May the IRS discuss this return with the preparer shown above? (See instructions) ☑ Yes ☐ No

Part III Statement of Program Service Accomplishments (See the instructions.)

1 Briefly describe the organization's mission

THE OEA WILL LEAD THE WAY FOR CONTINUOUS IMPROVEMENT OF PUBLIC EDUCATION WHILE ADVOCATING FOR MEMBERS AND THE LEARNERS THEY SERVE

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . ☐ Yes ☑ No

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting or make significant changes in how it conducts any program services? . . . . ☐ Yes ☑ No

If "Yes," describe these changes on Schedule O

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses Section 501(c)(3) and (4) organizations and 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses $ including grants of $) (Revenue $)

OVER 120,000 members were served in 2008 MEMBER SERVICES PROGRAM DELIVERYThis division is responsible for delivering and coordinating OEA/NEA programs and services directly to local members and affiliated organizations through twenty-five field offices housing approximately 140 professional and associate staff The OEA Headquarters houses the Assistant Executive Director-Member Services, an Executive Assistant and two associate staff There are five regional directors with offices located in their respective areas of the state In the field, labor relations consultants, with support from the OEA program divisions, provide vital programmatic assistance to affiliates and members Responsibilities of the division also include the funding, coordination and administration of the organization's pre-entry intern program, organizing plan, promoting membership expansion and retention, research and legal services UniServ Delivery ProgramsCollective Bargaining The service team assists all local affiliates in securing bargaining rights Bargaining strategies and data dissemination are provided through on-site counsel, with direct assistance available from either team members and/or chief negotiators to better enable locals to improve their member benefit and protection capabilities Support services included providing clerical assistance at all stages in the bargaining process, including contract proposal and package preparation, and maintaining proper relationships with the State Employment Relations Board (SERB) by serving as designated representatives of local affiliates Crisis Assistance This program provides funding of staff support for on-site assistance, prior to and during sanctioned job action activities Upon the request of local affiliates, through their consultant, all personnel, materials and financial resources are available through coordinated strike operations which may include additional OEA personnel Additional crisis assistance is also available in the form of interest-paid member loans, guarantee of basic medical insurance continuations, and the membership crisis assistance fund grants Contract Administration and Member Protection This provides staff funding to assist affiliates in improving contract enforcement with on-site training of local members in grievance identification and processing Grievance analysis and preparation is provided, along with subsequent processing, through all stages of the procedure including formal arbitration Pre-hearing and post-hearing briefs are prepared where appropriate, with consultants acting as official representatives of the local affiliates to agencies such as the American Arbitration Association and Federal Mediation and Conciliation Services Additionally this area includes the processing of member and affiliate applications to secure their legal rights through the Legal Services Plan, as well as being assisted by consultants in other appropriate administrative agency review processes Membership Promotion & Organizing Assistance This area provides staff funding for ongoing recruitment of members through day-to-day consultant/affiliate contacts, as well as financial resources to fund membership recruitment activities Funds are provided for grants to assist locals in special projects, programs and problem-solving activities Organizational Development Staff resources are provided to advise leaders in local operations and assist in association program development Such advice and counsel includes the development of effective internal and external public relations, building action teams and networking through liaison with other OEA divisions, and building strong locals Consultants provide assistance in local, state and national issue campaigns and member-to-member political action programs Other areas include continuing professional development, in-service education to members, awareness of critical issues facing public education and the promotion of the public image of teachers and education Also included is the cost of planning, advertising and conducting the annual Leadership Academy and expanding the application of learning organization theory Pre-Entry Intern This program includes the cost of providing intern training, financial assistance, travel expense, recruitment cost, selection and pre-employment testing costs UniServ This includes personnel costs related to the UniServ pool including travel expenses for out-of-state job applicants, internal posting and external advertisement of vacant positions Organizing ProgramsMembership Expansion This provides for planned membership increases via the creation, affiliation and/or certification of new units Such expansion is achieved through the coordination of the assessment/targeting process, administration of the Organizing Affiliates Policy, development of membership promotion programs aimed at potential member This includes a special focus on recruiting school support personnel and providing assistance in development of organizing publications and promotional literature and materials Staff support is provided for on-site organizing activities and funding for assessment of organizing potential Membership Maintenance Staff provides assistance to local affiliates in overcoming challenges to their representation rights, as well as planning and implementing programs aimed at building effective locals The ultimate goal is to secure recognition where a competing organization is the recognized representative Leadership Development This includes planning and conduction training for local leaders, associates, UniServ Councils and district associations aimed at support and effective implementation of the Statewide Organizing Program Staff Support This function provides staff with timely information on organizing issues and trends and OEA organizing progress via SERB Docket, election reports and SERB decisions as well as providing technical organizing assistance in creating and affiliating locals and assisting locals in achieving recognition status ResearchThe research function of Program Delivery includes maintenance and enhancement of the Association's statewide research and data information systems, providing data along with interpretation and strategic recommendations to other divisions, governance and members, assistance in the legislative process as it impacts on school funding, and local and state taxation and other appropriate issues and liaison functions Offensive Research Analysis/Program Development This supports new computer program development and program documentation, publication and distribution of statewide reports, computer training/software application training for staff, maintenance of computer programs and database maintenance in support of collective bargaining Computer ServicesThe Computer Services Division is responsible for developing and maintaining computerized information on various OEA programs for use by other divisions of the organization In recent years this division has overseen conversion from mainframe to windows and internet based technology Initiatives in the past year have included upgrading the OEA website and development of a comprehensive contract database There is a continuing commitment to the updating of hardware, software and server capabilities Major programmatic computer support responsibilities include software development, member enrollment processing and various member reporting systems that integrate with NEA systems, accounting systems, legal services, and program delivery services

4b (Code) (Expenses $ including grants of $) (Revenue $)

LEGAL SERVICESThere are several association programs administered by Legal Services to provide legal assistance, liability coverage, and insurance protection to our members and local associations Four of these programs are operated jointly by the OEA and the NEA Legal services to members and local associations are rendered by various attorneys throughout the state Additionally, the legal services department provides support and training to field staff, other divisions and governance groups on a routine and "as-needed" basis Kate Frank/DuShane Unified Legal Services Program This is a membership benefit that protects the employment rights of individual members and local associations in accordance with negotiated collective bargaining agreements under the law Local associations are reimbursed for arbitration and impasse costs under this program This program is administered jointly with the NEA Educators Employment Liability Program This is a membership benefit that provides protection from financial liability to association members in connection with their education employment activities when they are sued by parents and/or students as a result of job-related occurrences The program is a membership benefit administered by the State association, and backed by the NEA It is fully insured The OEA solely administers and funds the program for non-unified OEA life members, certain OEA-Retired members and organizing affiliate members Additional coverage for certain allied health care members is also funded by the OEA Attorney Referral Program This administers the OEA/NEA attorney referral program, which provides legal services at reduced rates in connection with personal matters such as wills and estates, real property, domestic relations, certain traffic offenses, and consumer protection This includes facilitating communications with local associations and referral attorneys to improve customer service and use of the program Association Professional Liability This is the administration of the OEA/NEA association professional liability program It provides liability coverage for association staff, governance, local leaders, the OEA and local affiliates in connection with lawsuits that stem from association activities Legal Assistance This Initiative provides legal assistance to corporation, officers, staff and OEA affiliates It provides funding for approved legal services and/or actions to defend or protect the Association, its affiliates and members which would otherwise be excluded from coverage under the guidelines of the Legal Services Program Certain OEA amicus curiae briefs are funded under this program Also provided are opinion letters, summaries, brochures and other memoranda on general legal topics Bargaining Assistance and Language Development This includes the publication of the Bargainer's Handbook as well as the purchase and dissemination of the Collective Bargaining Law and SERB rules as resources for local bargainers Publication of the SERB docket and the Strike Manual is also included We also publish and distribute the Contract Language Development Guide manual and the Topical Index Guide Contracted services are obtained for microfilming of arbitration awards and related documents HUMAN RESOURCESPersonnel The personnel function includes the facilitation of the screening and selection of all staff, encouraging the employment of minorities at all levels of the association and serving as liaison to the OEA Affirmative Action Advisory Council The personnel function also includes administration, background checks on job applicants, postage, interview guides, employment applications, etc Labor Relations This division is responsible for supervising employee relations, benefits administration and negotiating and monitoring staff contracts It administers the Association's corporate insurance, maintains the Association's health services and purchasing operation and coordinates arrangements for the OEA Representative Assembly meetings

4c (Code) (Expenses $ including grants of $) (Revenue $)

ADVOCACY PROGRAMSRecently integrated with Program Delivery to better coordinate the various aspects of Member Services, the Advocacy function is responsible for the promotion and administration of the OEA legislative agenda and political action program This area is also responsible for the development and coordination of a comprehensive internal and external communications program CommunicationsThe program objectives include informing the membership and general public of OEA's goals and accomplishments, providing public relations programs and maximizing member involvement The division is also responsible for the development of membership promotion materials Internal Communications Produce and distribute OHIO SCHOOLS magazine, the Association's all-member publication Prepare pre-printed public relations materials for locals including brochures, "Success Cards", and other materials that enhance the image of the Association and its members Assist locals, through LRCs, in developing and producing PR projects and programs to improve local PR, increase community ties, expand external communications, and create a positive image for the Association Provide strategic consultation and creative development as well as design assistance for art, production and typesetting operations for OEA Design and produce OEA's membership promotional materials such as pocket calendars, brochures, flyers, folders, pens and clip art Design and maintain the OEA Home Page External Communications Develop and distribute the OEA Media Kit, prepare news releases, monitor Association news coverage and distribute news clippings to Board of Directors and staff Coordinate and promote joint OEA/NEA ad campaign Assist district associations in any related cooperative advertising program Local Assistance This provides consultation and training to field staff who deliver communications training and assistance to locals Member Benefits This area promotes, publicizes and administers NEA-sponsored Member Benefits Programs designed to enhance the economic well-being of members through groups purchasing, insurance and investment programs Governmental ServicesThe Governmental Services division of Advocacy has two major functions promoting the OEA legislative agenda and administering the OEA political action program The purpose of the political action program is to secure the election of pro-education candidates to political office In pursuing the first function, the OEA lobbyists maintain continuous contact with members of the Ohio General Assembly and with statewide office holders This function includes advocating for OEA's legislative priorities, offering testimony and lobbying support for OEA's position on education-related legislation and keeping members informed of the status of all bills being monitored Also included is research assistance in the legislative process as it impacts on school funding, local and state taxation and other appropriate issues The division also trains members on the techniques of lobbying at the local level and encourages member involvement in the lobbying effort at the statehouse In conjunction with NEA staff, the division administers and coordinates the Congressional Contact Teams for Ohio In pursuing the second function, the division coordinates the operation of OEA-FCPE and LCF-PAC, OEA's political action arm, conducts member fundraising activities, maintains liaison with the Democratic and Republican parties, other political organizations, labor unions and government officials The division also develops and implements training programs for members and staff on all phases of campaign and electoral politics from a member-to-member campaign perspective LegislativeLegislative Lobbying Lobbies members of the General Assembly on OEA's Legislative priorities and goals, opposes legislation detrimental to education and education employees, maintains continuous contact with members of the General Assembly, provides assistance to NEA in lobbying its legislative agenda, encourages formation of coalitions to promote or oppose legislation Member Participation Brings OEA members to the Statehouse to lobby their legislators, encourages local meetings with elected officials to lobby OEA positions, provides training in lobbying techniques, and provides funding for the grassroots lobbying program Information This provides for the publication of legislative, political and school funding analysis information to members via a variety of communication methods, including but not limited to official publications, home page and member to member grassroots meetings Retirement Monitors activities of three retirement systems (STRS, SERS and PERS), analyzes and lobbies legislation affecting retirement benefits Political ActionGovernance This includes funding for expenses of the meetings of the FCPE State Council when performing authorized duties, provides financial assistance to House and Senate district committees for operating expenses, covers expenses of the FCPE State Convention and travel expense of delegates Organization This area funds activities at the state and local levels for developing an understanding of the OEA-FCPE organization and its purposes, covers OEA-FCPE operational expenses, provides funds for use in training OEA-FCPE and other association committees in running a political or issue campaign Campaigns This funds member-to-member activities of OEA endorsed candidates, funds authorized committee activities in promotion of issues Fundraising This covers expenses of producing the materials needed for securing member contributions to OEA-FCPE, provides funds for promotion of OEA-FCPE fundraising

4d Other program services (Describe in Schedule O)
(Expenses $ including grants of $) (Revenue $)

4e Total program service expenses $ *Must equal Part IX, Line 25, column (B).*

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1		No
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2	Yes	
3	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*	3	Yes	
4	Section 501(c)(3) organizations Did the organization engage in lobbying activities? *If "Yes," complete Schedule C, Part II*	4		
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? *If "Yes," complete Schedule C, Part III*	5	Yes	
6	Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		No
10	Did the organization hold assets in term, permanent,or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10		No
11	Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? *If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable*	11	Yes	
12	Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? *If "Yes," complete Schedule D, Parts XI, XII, and XIII*	12	Yes	
13	Is the organization a school as described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the U S ?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, and program service activities outside the U S ? *If "Yes," complete Schedule F, Part I*	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or assistance to any organization or entity located outside the United States? *If "Yes," complete Schedule F, Part II*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or assistance to individuals located outside the United States? *If "Yes," complete Schedule F, Part III*	16		No
17	Did the organization report more than $15,000 on Part IX, column (A), line 11e? *If "Yes," complete Schedule G, Part I*	17		No
18	Did the organization report more than $15,000 total on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		No
19	Did the organization report more than $15,000 on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20	Did the organization operate one or more hospitals? *If "Yes," complete Schedule H*	20		No
21	Did the organization report more than $5,000 on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21	Yes	
22	Did the organization report more than $5,000 on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22		No
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? *If "Yes," complete Schedule J*	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer questions 24b–24d and complete Schedule K. If "No," go to question 25*	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3) and 501(c)(4) organizations Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		
b	Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? *If "Yes," complete Schedule L, Part I*	25b		
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? *If "Yes," complete Schedule L, Part II*	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? *If "Yes," complete Schedule L, Part III*	27		No

Part IV Checklist of Required Schedules *(Continued)*

			Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee			
a	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? *If "Yes," complete Schedule L, Part IV*	**28a**		No
b	Have a family member who had a direct or indirect business relationship with the organization? *If "Yes," complete Schedule L, Part IV*	**28b**		No
c	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? *If "Yes," complete Schedule L, Part IV*	**28c**		No
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	**29**		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	**30**		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	**31**		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	**32**		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations section 301 7701-2 and 301 7701-3? *If "Yes," complete Schedule R, Part I*	**33**		No
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1*	**34**	Yes	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	**35**		No
36	501(c)(3) organizations Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	**36**		
37	Did the organization conduct more than 5 percent of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	**37**		No

Part V Statements Regarding Other IRS Filings and Tax Compliance

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096, *Annual Summary and Transmittal of U.S. Information Returns. Enter -0-* if not applicable	1a	163			
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c	Yes	
2a	Enter the number of employees reported on Form W-3, *Transmittal of Wage and Tax Statements* filed for the calendar year ending with or within the year covered by this return	2a	242			
b	If at least one is reported in 2a, did the organization file all required federal employment tax returns? **Note:** *If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return.*			2b	Yes	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return?			3a	Yes	
b	If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O*			3b	Yes	
4a	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)?			4a		No
b	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.*					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			5a		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			5b		No
c	If "Yes," to 5a or 5b, did the organization file Form 8886-T, *Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?*			5c		
6a	Did the organization solicit any contributions that were not tax deductible?			6a		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			6b		
7	*Organizations that may receive deductible contributions under section 170(c).*					
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of $75 or more?			7a		
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c		
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d				
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			7e		
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			7f		
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?			7g		
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?			7h		
8	*Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.* Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?			8		
9	*Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.*					
a	Did the organization make any taxable distributions under section 4966?			9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?			9b		
10	*Section 501(c)(7) organizations.* Enter					
a	Initiation fees and capital contributions included on Part VIII, line 12	10a				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b				
11	Section 501(c)(12) organizations Enter					
a	Gross income from members or shareholders	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	11b				
12a	*Section 4947(a)(1) non-exempt charitable trusts.* Is the organization filing Form 990 in lieu of Form 1041?			12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b				

Part VI **Governance, Management, and Disclosure** *(Sections A, B, and C request information about policies not required by the Internal Revenue Code.)*

Section A. Governing Body and Management

			Yes	No
	For each "Yes" response to lines 2-7 below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.			
1a	Enter the number of voting members of the governing body . . **1a** 47			
b	Enter the number of voting members that are independent . . **1b** 47			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	**2**		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	**3**		No
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	**4**		No
5	Did the organization become aware during the year of a material diversion of the organization's assets?	**5**		No
6	Does the organization have members or stockholders?	**6**	Yes	
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	**7a**	Yes	
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	**7b**	Yes	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following			
a	the governing body?	**8a**	Yes	
b	each committee with authority to act on behalf of the governing body?	**8b**	Yes	
9a	Does the organization have local chapters, branches, or affiliates?	**9a**	Yes	
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	**9b**	Yes	
10	Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	**10**		No
11	Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	**11**		No

Section B. Policies

			Yes	No
12a	Does the organization have a written conflict of interest policy? *If "No", go to line 13*	**12a**	Yes	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	**12b**	Yes	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	**12c**	Yes	
13	Does the organization have a written whistleblower policy?	**13**	Yes	
14	Does the organization have a written document retention and destruction policy?	**14**		No
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision			
a	The organization's CEO, Executive Director, or top management official?	**15a**	Yes	
b	Other officers or key employees of the organization?	**15b**	Yes	
	Describe the process in Schedule O			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	**16a**		No
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable Federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	**16b**		

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed

18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection Indicate how you make these available Check all that apply

☐ own website ☐ another's website ☑ upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public See Additional Data Table

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization

JAMES E MARTIN
225 E BROAD ST PO BOX2550
COLUMBUS, OH 43216
(614) 227-3023

Part VII Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Section A Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Use Schedule J-2 if additional space is needed

* List all of the organization's **current** officers, directors, trustees (whether individuals or organizations) and key employees regardless of amount of compensation, and current key employees Enter -0- in columns (D), (E), and (F) if no compensation was paid

* List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations

* List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations

* List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

☐ Check this box if the organization did not compensate any officer, director, trustee or key employee

(A) Name and Title	**(B)** Average hours per week	**(C)** Position (check all that apply) Individual Trustee or Director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	**(D)** Reportable compensation from the organization (W-2/1099MISC)	**(E)** Reportable compensation from related organizations (W- 2/1099-MISC)	**(F)** Estimated amount of other compensation from the organization and related organizations

Part VII **Continued**

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply): Individual Trustee or Director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
1b Total								2,232,946	0	427,128

2 Total number of individuals (including those in 1a) who received more than $100,000 in reportable compensation from the organization ▶107

		Yes	No
3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	**3**	Yes	
4 For any individual listed online 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	**4**	Yes	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? *If "Yes," complete Schedule J for such person*	**5**		No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization

(A) Name and business address	(B) Description of services	(C) Compensation
CLOPPERT LATANICK & ET AL 225 E BROAD ST COLUMBUS, OH 43215	LEGAL	1,328,290
BAASTEN MCKINLEY & CO LPA 4150 BELDEN VILLAGE ST CANTON, OH 44718	LEGAL	646,068
GREEN HAINES SGAMBATI LPA PO BOX 849 YOUNGSTOWN, OH 44501	LEGAL	403,339
KALNIZ IORIA & FELDSTEIN PO BOX 352170 TOLEDO, OH 43635	LEGAL	380,447
BAKER & HOSTETLER 225 ONTARIO ST CLEVELAND, OH 44115	LEGAL	328,882

2 Total number of independent contractors (including those in 1) who received more than $100,000 in compensation from the organization ▶ 5

Part VIII Statement of Revenue

				(A) Total Revenue	(B) Related or Exempt Function Revenue	(C) Unrelated Business Revenue	(D) Revenue Excluded from Tax under IRC 512, 513, or 514
Contributions, gifts, grants and other similar amounts							
	1a	Federated campaigns . . . 1a					
	b	Membership dues 1b					
	c	Fundraising events 1c					
	d	Related organizations . . . 1d					
	e	Government grants (contributions) 1e					
	f	All other contributions, gifts, grants, and similar amounts not included above 1f	575,000				
	g	Noncash contributions included in lines 1a-1f $					
	h	**Total (Add lines 1a-1f)** . . . . ▶		575,000			
Program Service Revenue			Business Code				
	2a	MEMBERSHIP DUES	900,099	56,664,971	56,664,971		
	b	LEGAL SERVICES PLAN	541,100	1,391,219	1,391,219		
	c	SUBSIDIES MEMBERSHIP	900,099	330,402	330,402		
	d	MISCELLANEOUS	900,099	101,478	101,478		
	e	TPD CONFERENCES	611,710	41,251	41,251		
	f	All other program service revenue					
	g	**Total. Add lines 2a-2f** . . . . ▶ $ 58,529,321					
Other Revenue							
	3	Investment income (including dividends, interest other similar amounts) . . . . ▶		783,997			783,997
	4	Income from investment of tax-exempt bond proceeds . . ▶					
	5	Royalties					
			(i) Real / (ii) Personal				
	6a	Gross Rents	125,968 /				
	b	Less rental expenses	189,795 /				
	c	Rental income or (loss)	-63,827 /				
	d	Net rental income or (loss) . . . . ▶		-63,827	-35,201	-28,626	
			(i) Securities / (ii) Other				
	7a	Gross amount from sales of assets other than inventory	2,886,812 /				
	b	Less cost or other basis and sales expenses	3,487,441 /				
	c	Gain or (loss)	-600,629 /				
	d	Net gain or (loss) . . . . ▶		-600,629	-600,629		
	8a	Gross income from fundraising events (not including $ ______ of contributions reported on line 1c) See Part IV, line 18 *Attach Schedule G if total exceeds $15,000* . . . . a					
	b	Less direct expenses . . . b					
	c	Net income or (loss) from fundraising events . . ▶					
	9a	Gross income from gaming activities See part IV, line 19 *Complete Schedule G if total exceeds $15,000* a					
	b	Less direct expenses . . . b					
	c	Net income or (loss) from gaming activities . . . ▶					
	10a	Gross sales of inventory, less returns and allowances . a					
	b	Less cost of goods sold . . b					
	c	Net income or (loss) from sales of inventory . . ▶					
		Miscellaneous Revenue	Business Code				
	11a	advertising - ohio sch	511,120	28,449		28,449	
	b						
	c						
	d	All other revenue					
	e	**Total. Add lines 11a-11d** . . . . $ 28,449					
	12	**Total Revenue.** Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e . . . . . . ▶		59,252,311	57,893,491	-177	783,997

Part IX **Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.
All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

	Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	1,918,443			
2	Grants and other assistance to individuals in the U S See Part IV, line 22	2,500			
3	Grants and other assistance to governments, organizations and individuals outside the U S See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	2,232,946			
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	17,258,514			
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	1,097,402			
9	Other employee benefits	3,027,511			
10	Payroll taxes	3,025,655			
11	Fees for services (non-employees)				
a	Management	176,712			
b	Legal	3,681,575			
c	Accounting	154,799			
d	Lobbying	332,339			
e	Professional fundraising *See Part IV, line 17*				
f	Investment management fees	71,208			
g	Other	39,574			
12	Advertising and promotion	424,550			
13	Office expenses	2,608,579			
14	Information technology	443,832			
15	Royalties				
16	Occupancy	1,966,893			
17	Travel	1,760,788			
18	Payments of travel or entertainment expenses for any Federal, state or local public officials				
19	Conferences, conventions and meetings	1,260,169			
20	Interest	335,910			
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	1,303,102			
23	Insurance	158,765			
24	Other expenses—Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a	coalitions & member to	955,392			
b	MEMBERSHIP PROMOTION	551,752			
c	staff training and deve	421,943			
d	research and organizati	282,315			
e	miscellaneous	44,119			
f	All other expenses				
25	**Total functional expenses.** Add lines 1 through 24f	45,537,287			
26	**Joint Costs.** Check ☐ if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

			(A) Beginning of year		(B) End of year
Assets					
1	Cash—non-interest-bearing		9,051,095	1	8,531,542
2	Savings and temporary cash investments			2	
3	Pledges and grants receivable, net			3	
4	Accounts receivable, net		4,604,752	4	4,820,020
5	Receivables from current and former officers, directors, trustees, key employees or other related parties *Complete Part II of Schedule L*			5	
6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) *Complete Part II of Schedule L*			6	
7	Notes and loans receivable, net			7	
8	Inventories for sale or use			8	
9	Prepaid expenses and deferred charges		3,295,326	9	
10a	Land, buildings, and equipment cost basis	10a 24,373,405			
b	Less accumulated depreciation *Complete Part VI of Schedule D*	10b 15,541,112	8,982,126	10c	8,832,293
11	Investments—publicly traded securities		14,818,188	11	25,113,940
12	Investments—other securities See Part IV, line 11 *Complete Part VII of Schedule D*			12	
13	Investments—program-related See Part IV, line 11 *Complete Part VIII of Schedule D*			13	
14	Intangible assets			14	
15	Other assets See Part IV, line 11 *Complete Part IX of Schedule D*		2,689,276	15	66,920
16	**Total assets.** *Add lines 1 through 15 (must equal line 34)*		43,440,763	16	47,364,715
Liabilities					
17	Accounts payable and accrued expenses		924,171	17	900,994
18	Grants payable			18	
19	Deferred revenue			19	
20	Tax-exempt bond liabilities			20	
21	Escrow account liability *Complete Part IV of Schedule D*			21	
22	Payable to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons *Complete Part II of Schedule L*			22	
23	Secured mortgages and notes payable to unrelated third parties		2,808,191	23	2,549,108
24	Unsecured notes and loans payable			24	
25	Other liabilities *Complete Part X of Schedule D*		8,754,405	25	40,699,912
26	**Total liabilities.** *Add lines 17 through 25*		12,486,767	26	44,150,014
Net Assets or Fund Balances					
	Organizations that follow SFAS 117, check here ▶ ☑ and complete lines 27 through 29, and lines 33 and 34.				
27	Unrestricted net assets		30,916,911	27	3,056,778
28	Temporarily restricted net assets		37,085	28	157,923
29	Permanently restricted net assets			29	
	Organizations that do not follow SFAS 117, check here ▶ ☐ and complete lines 30 through 34.				
30	Capital stock or trust principal, or current funds			30	
31	Paid-in or capital surplus, or land, building or equipment fund			31	
32	Retained earnings, endowment, accumulated income, or other funds			32	
33	Total net assets or fund balances		30,953,996	33	3,214,701
34	Total liabilities and net assets/fund balances		43,440,763	34	47,364,715

Part XI Financial Statements and Reporting

			Yes	No
1	Accounting method used to prepare the Form 990 ☐ cash ☑ accrual ☐ other			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
c	If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		No
b	If "Yes," did the organization undergo the required audit or audits?	3b		

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

To be completed by organizations described below. Attach to Form 990 or Form 990-EZ

OMB No 1545-0047

2008

Open to Public Inspection

If the organization answered "Yes," to Form 990, Part IV, Line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities)
- Section 501(c)(3) organizations complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations complete Part I-A only

If the organization answered "Yes," to Form 990, Part IV, Line 4, or Form 990EZ, Part VI, line 47 (Lobbying Activities)
- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered "Yes," to Form 990, Part IV, Line 5 (Proxy Tax)
- Section 501(c)(4), (5), or (6) organizations complete Part III

Name of the organization	Employer identification number
OHIO EDUCATION ASSOCIATION	31-4269414

Part I-A **To be completed by all organizations exempt under section 501(c) and section 527 organizations.** (See the instructions for Schedule C for details.)

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV

2 Political expenditures $ ______

3 Volunteer hours ______

Part I-B **To be completed by all organizations exempt under section 501(c)(3).** (See the instructions for Schedule C for details.)

1 Enter the amount of any excise tax incurred by the organization under section 4955 $ ______

2 Enter the amount of any excise tax incurred by organization managers under section 4955 $ ______

3 If the organization incurred in a section 4955 tax, did it file Form 4720 for this year? ☐ **Yes** ☐ **No**

4a Was a correction made? ☐ **Yes** ☐ **No**

b If "Yes," describe in Part IV

Part I-C **To be completed by all organizations exempt under section 501(c), except section 501(c)(3).** (See the instructions for Schedule C for details.)

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities $ ______

2 Enter the amount of the filing organization's internal funds contributed to other organizations for section 527 exempt funtion activities $ ______

3 Total of direct and indirect exempt function expenditures Add lines 1 and 2 and enter here and on Form 1120-POL, line 17b $ ______

4 Did the filing organization file **Form 1120-POL** for this year? ☐ **Yes** ☐ **No**

5 State the names, addresses and Employer Identification Number (EIN) of all section 527 political organizations to which payments were made Enter the amount paid and indicate if the amount was paid from the filing organization's own internal funds or were political contributions received and promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV

(a) Name	**(b)** Address	**(c)** EIN	**(d)** Amount paid from filing organization's internal funds If none, enter -0-	**(e)** Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-
OEA POLITICAL CONTRIBUTING ENTITY	225 E BROAD ST COLUMBUS,OH 43215	91-2066690	397,161	

Part II-A **To be completed by organizations exempt under section 501(c)(3) that filed Form 5768 (election under section 501(h)).** (See the instructions for Schedule C for details.)

A Check ☐ if the filing organization belongs to an affiliated group
B Check ☐ if the filing organization checked box A and "limited control" provisions apply

Limits on Lobbying Expenditures— **(The term "expenditures" means amounts paid or incurred.)**	**(a)** Filing Organization's Totals	**(b)** Affiliated Group Totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)		
b Total lobbying expenditures to influence a legislative body (direct lobbying)		
c Total lobbying expenditures (add lines 1a and 1b)		
d Other exempt purpose expenditures		
e Total exempt purpose expenditures (add lines 1c and 1d)		
f Lobbying nontaxable amount Enter the amount from the following table in both columns—		

If the amount on line 1e, column (a) or (b) is:	**The lobbying nontaxable amount is:**
Not over $500,000	20% of the amount on line 1e
Over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000
Over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000
Over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000
Over $17,000,000	$1,000,000

	(a)	(b)
g Grassroots nontaxable amount (enter 25% of line 1f)		
h Subtract line 1g from line 1a Enter -0- if line g is more than line a		
i Subtract line 1f from line 1c Enter -0- if line f is more than line c		

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ **Yes** ☐ **No**

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 1a through 1f of the instructions.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	**(a)** 2005	**(b)** 2006	**(c)** 2007	**(d)** 2008	**(e)** Total
2a Lobbying non-taxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots non-taxable amount					
e Grassroots ceiling amount (150% of line d, column (e))					
f Grassroots lobbying expenditures					

Part II-B To be completed by organizations exempt under section 501(c)(3) that have NOT filed Form 5768 (election under section 501(h)). (See the instructions for Schedule C for details.)

		(a) Yes	(a) No	(b) Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
a	Volunteers?			
b	Paid staff or management (include compensation in expenses reported on lines c through i)?			
c	Media advertisements?			
d	Mailings to members, legislators, or the public?			
e	Publications, or published or broadcast statements?			
f	Grants to other organizations for lobbying purposes?			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?			
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means?			
i	Other activities If "Yes," describe in Part IV			
j	Total lines 1c through 1i			
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b	If "Yes" enter the amount of any tax incurred under section 4912			
c	If "Yes" enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6). (See the instructions for Schedule C for details.)

			Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1		No
2	Did the organization make only in-house lobbying expenditures of $2,000 or less?	2		No
3	Did the organization agree to carryover lobbying and political expenditures from the prior year?	3		No

Part III-B To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered "No" OR if Part III-A, question 3 is answered "Yes." (See the instructions for Schedule C for details.)

1	Dues, assessments and similar amounts from members	1 $	56,664,971
2	Section 162(e) non-deductible lobbying and political expenditures ***(do not include amounts of political expenses for which the section 527(f) tax was paid).***		
a	Current Year	2a $	3,435,087
b	Carryover from last year	2b $	
c	Total	2c $	3,435,087
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3 $	3,505,734
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4 $	
5	Taxable amount of lobbying and political expenditures (line 2c total minus 3 and 4)	5 $	-70,647

Part IV Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i Also, complete this part for any additional information

Identifier	Return Reference	Explanation
Part I-A, Line 1	Organizations Direct and Indirect Political Campaign Activities	THE OEA CONDUCTS CANDIDATE SCREENING SESSIONS BY INVITATION TO CANDIDATES FROM BOTH PARTIES THE OEA CONDUCTS MEMBER COMMUNICATIONS WITH RECOMMENDATIONS FOR CANDIDATES FAVORABLE TO EDUCATION POLICY

Part IV Supplemental Information

Identifier	Return Reference	Explanation

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493193008010

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OHIO EDUCATION ASSOCIATION

Employer identification number
31-4269414

Part I **Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate Contributions to (during year)		
3	Aggregate Grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? ☐ Yes ☐ No

Part II **Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)
- ☐ Preservation of land for public use (e g , recreation or pleasure)
- ☐ Preservation of an historically importantly land area
- ☐ Protection of natural habitat
- ☐ Preservation of certified historic structure
- ☐ Preservation of open space

2 Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

			Held at the End of the Year
a	Total number of conservation easements	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 8/17/06	2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff or volunteer hours devoted to monitoring, inspecting and enforcing easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ $

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III **Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 ▶ $

(ii) Assets included in Form 990, Part X ▶ $

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a Revenues included in Form 990, Part VIII, line 1 ▶ $

b Assets included in Form 990, Part X ▶ $

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange programs
e ☐ Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ **Yes** ☐ **No**

Part IV Trust, Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ **Yes** ☐ **No**

b If "Yes," explain why in Part XIV and complete the following table

			Amount
c	Beginning balance	1c	
d	Additions during the year	1d	
e	Distributions during the year	1e	
f	Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ **Yes** ☐ **No**

b If "Yes," explain the arrangement in Part XIV

Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

		(a) Current Year	(b) Prior Year	(c) Two Years Back	(d) Three Years Back	(e) Four Years Back
1a	Beginning of year balance					
b	Contributions					
c	Investment earnings or losses					
d	Grants or scholarships					
e	Other expenditures for facilities and programs					
f	Administrative expenses					
g	End of year balance					

2 Provide the estimated percentage of the year end balance held as

a Board designated or quasi-endowment ►

b Permanent endowment ►

c Term endowment ►

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

			Yes	No
	(i) unrelated organizations	3a(i)		
	(ii) related organizations	3a(ii)		
b	If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b		

4 Describe in Part XIV the intended uses of the organization's endowment funds

Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land	682,172			682,172
b Buildings	12,840,007		6,876,803	5,963,204
c Leasehold improvements	160,028		104,646	55,382
d Equipment	10,081,077		8,559,663	1,521,414
e Other	610,121			610,121
Total. Add lines 1a-1e *(Column (d) should equal Form 990, Part X, column (B), line 10(c).)* ►				8,832,293

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(a) Description of security or cateory (including name of security)	**(b)**Book value	**(c)** Method of valuation Cost or end-of-year market value
Financial derivatives and other financial products		
Closely-held equity interests		
Other		
Total. *(Column (b) should equal Form 990, Part X, col (B) line 12)* ▶		

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	**(b)** Book value	**(c)** Method of valuation Cost or end-of-year market value
Total. *(Column (b) should equal Form 990, Part X, col (B) line 13)* ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	**(b)** Book value
Total. *(Column (b) should equal Form 990, Part X, col.(B) line 15.)* . . . . ▶	

Part X Other Liabilities. See Form 990, Part X, line 25.

(a) Description of Liability	**(b)** Amount
Federal Income Taxes	
NEA AND DISTRICT DUES PAYABLE	2,923,793
ACCRUED VACATION AND SEVERANCE	4,849,340
ACCRUED PENSION	206,846
OTHER ACCRUED EXPENSES	1,483,062
POSTRETIREMENT HEALTHCARE BENEFITS	3,307,584
DEFINED BENEFIT PENSION	27,929,287
Total. *(Column (b) should equal Form 990, Part X, col (B) line 25)* ▶	40,699,912

In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	59,252,311
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	45,537,287
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	13,715,024
4	Net unrealized gains (losses) on investments	4	323,728
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	-41,778,048
9	Total adjustments (net) Add lines 4 - 8	9	-41,454,320
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	-27,739,296

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements			1	59,765,834
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains on investments	2a	323,728		
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIV)	2d			
e	Add lines **2a** through **2d**			2e	323,728
3	Subtract line **2e** from line **1**			3	59,442,106
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**				
a	Investment expenses not included on Form 990, Part VIII, line 7b .	4a			
b	Other (Describe in Part XIV)	4b	-189,795		
c	Add lines **4a** and **4b**			4c	-189,795
5	Total Revenue Add lines **3** and **4c.** (This should equal Form 990, Part I, line 12)			5	59,252,311

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements			1	45,727,082
2	Amounts included on line 1 but not on Form 990, Part IX, line 25				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Losses reported on Form 990, Part IX, line 25	2c			
d	Other (Describe in Part XIV)	2d	189,795		
e	Add lines **2a** through **2d**			2e	189,795
3	Subtract line **2e** from line **1**			3	45,537,287
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b . .	4a			
b	Other (Describe in Part XIV)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total expenses Add lines **3** and **4c.** (This should equal Form 990, Part I, line 18)			5	45,537,287

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part XIV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b

Identifier	Return Reference	Explanation
Part XI, Line 8 - Other Adjustments		PENSION-RELATED CHANGES OTHER THAN NET PERIODIC BENEFIT COST -41778048
Part XII, Line 4b - Other Adjustments		RENTAL EXPENSES -189795
Part XIII, Line 2d - Other Adjustments		RENTAL EXPENSES 189795

Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

Grants and Other Assistance to Organizations, Governments and Individuals in the U.S.

Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22. Attach to Form 990.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OHIO EDUCATION ASSOCIATION

Employer identification number
31-4269414

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . ☑ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Governments and Organizations in the United States.

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 for any recipient that received more than $5,000. Check this box if no one recipient received more than $5,000. Use Part IV and Schedule I-1 if additional space is needed . . . ▶ ☐

1(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							

2 Enter total number of section 501(c)(3) and government organizations . . . ▶

3 Enter total number of other organizations . . . ▶

Part III **Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Use Schedule I-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	**(b)** Number of recipients	**(c)** Amount of cash grant	**(d)** Amount of non-cash assistance	**(e)** Method of valuation (book, FMV, appraisal, other)	**(f)** Description of non-cash assistance

Part IV **Supplemental Information.** Complete this part to provide the information required in Part I, line 2, and any other additional information.

See Additional Data Table

Identifier	**Return Reference**	**Explanation**
Procedure for Monitoring Grants in the U S	Part I, Line 2	Schedule I, Part I, Line 2 GRANTS ARE AVAILABLE TO LOCAL ASSOCIATIONS OF THE OEA UPON APPROVAL OF APPLICATION GRANTS ARE MONITORED BY THE ASSISTANT EXECUTIVE DIRECTOR, MEMBER SERVICES GRANTS MUST BE FOR A PURPOSE RELATED TO OEA INITIATIVES, SUCH AS INTERNAL ORGANIZING, LEADERSHIP DEVELOPMENT, IMPROVE TEACHER QUALITY, ETC

Schedule J
(Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OHIO EDUCATION ASSOCIATION

Employer identification number
31-4269414

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items ☐ First class or charter travel ☐ Travel for companions ☐ Tax idemnification and gross-up payments ☐ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☑ Health or social club dues or initiation fees ☐ Personal services (e g , maid, chauffeur, chef)			
b	If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain	**1b**	Yes	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	**2**	Yes	
3	Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply ☑ Compensation committee ☐ Independent compensation consultant ☐ Form 990 of other organizations ☑ Written employment contract ☐ Compensation survey or study ☑ Approval by the board or compensation committee			
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a			
a	Receive a severance payment or change of control payment?	**4a**	Yes	
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III	**4c**		No
	501(c)(3) and 501(c)(4) organizations only must complete lines 5-8.			
5	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of			
a	The organization?	**5a**		
b	Any related organization? If "Yes," to line 5a or 5b, describe in Part III	**5b**		
6	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of			
a	The organization?	**6a**		
b	Any related organization? If "Yes," to line 6a or 6b, describe in Part III	**6b**		
7	For persons listed in form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		
8	Were any amounts reported in Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III	**8**		

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other compensation				
patriCIA FROST-BROOKS	(i)	174,229			18,795	9,845	202,869	
	(ii)							
WILLIAM LEIBENSBERGER	(i)	164,054			15,989	22,618	202,661	
	(ii)							
JAMES TIMLIN	(i)	161,851			15,222	9,432	186,505	
	(ii)							
DENNIS REARDON	(i)	198,107			8,748	6,488	213,343	
	(ii)							
SUSAN BABCOCK	(i)	151,590			12,841	25,321	189,752	
	(ii)							
JAMES MARTIN	(i)	160,415			13,609	25,321	199,345	
	(ii)							
KEVIN FLANAGAN	(i)	151,813			12,355	25,321	189,489	
	(ii)							
NORMAN YOUNG	(i)	152,782			23,567	9,432	185,781	
	(ii)							
WILLIAM PEARSOL	(i)	148,254			23,567	9,432	181,253	
	(ii)							
SHEILA SAAD	(i)	148,056			23,567	25,321	196,944	
	(ii)							
MARY SUCHY	(i)	147,999			12,168	25,321	185,488	
	(ii)							
FRITZ FEKETE	(i)	147,895			11,948	25,321	185,164	
	(ii)							
DANIEL RIVERA	(i)	134,991			2,580		137,571	
	(ii)							
DENNIS PELTOLA	(i)	153,453			2,295		155,748	
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8 Also complete this part for any additional information

Identifier	Return Reference	Explanation

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SCHEDULE O (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OHIO EDUCATION ASSOCIATION

Employer identification number
31-4269414

Identifier	Return Reference	Explanation
Form 990, Part III, line 4d	Other Program Services	BUSINESS SERVICES, GOVERNANCE, EXECUTIVE OFFICES, AND EDUCATION IMPROVEMENT AND INNOVATION BUSINESS SERVICES This division is responsible for carrying out the fiscal operations of the Association, including Accounting and Membership Services In addition, this division provides internal services related to Printing and Mailing and Building management Specific Accounting responsibilities include the receipt and disbursement of funds, maintenance of accounting records, preparation of periodic financial reports and applicable tax returns, banking and investment activities, administration of the annual audit, preparation of annual budget, fair share fee processing and FCPE processing and record maintenance Specific Membership responsibilities include the processing and maintenance of all membership records and related billing files This division prepares and updates annually the Treasurer's operational handbook w hich is distributed to local presidents and treasurers and provides training for local association treasurers on a statew ide basis Building management provides for the upkeep of physical facilities and payment of property taxes, utilities, maintenance and repair expense The debt retirement fund provides for the payment of mortgage obligations Printing and mailing provides for the sending, receipt and distribution of mail, and internal print jobs as w ell as the routing of specialized print jobs to outside contractors GOVERNANCE Through their elected representatives-the officers, the Board of Directors and the Representative Assembly-individual members have a continuing voice in the operation of the Association The governance structure provides the framew ork through w hich the policies and procedures w hich govern program activities are developed and implemented Acting as advisory committees to the governing bodies, the committees and commissions are a resource for elected leaders and the Representative Assembly in the formulation of policy The Appeals Board is vested w ith pow ers that are described in the Constitution and Bylaw s Representative Assemblies The OEA Representative Assembly includes bi-annual meetings for the purpose of voting, proposing new initiatives, election of officers, approval of budgets and other areas of interest to the membership In addition the association provides funding to send state delegates to the NEA National Assembly, provides handbooks, caucus expenses, Steering Committee expenses and funds other delegate activities Board of Directors The Association provides financial support for Board of Directors meetings, including printing and mailing charges, meeting room charges, group meals and refreshments The Association also provides financial support for Board of Directors members to attend meetings in their unit of representation or districts, to represent OEA at meetings of related groups such us NEA, the Education Coalition and the Department of Education Subcommittees, Ad Hoc Committees and Coalitions In addition to the Board of Directors, the Association provides funding for meeting of various special committees and coalitions, including travel, meeting room, meals, lodging, printing and mailing and other communications expense Examples include the STRS/SERS Screening Committee, Steering Committees for the OEA RA, BEST, various Coalitions and local coalition building The 7 member Appeals Board meets tw ice a year Officers The association provides financial support for the authorized salaries for the President, Vice President and Secretary-Treasurer Other covered expenses include payroll taxes, insurance, telephone, supplies and travel Other Governance The association supports the meeting of various other member groups as needed, providing for the costs of transportation, meals, meeting rooms and communications Examples include, but are not limited to, the Commission on Organizational Development, Human and Civil Rights Commission, Commission of Teacher Education and Professional Standards, Peace and International Relations Committee, Division of Higher Education, Ohio Student Education Association, OEA-Retired, Women's Concerns Committee, Minority Affairs Committee and the National Council of State Education Association EXECUTIVE OFFICES This division is responsible for the overall supervision and execution of all Association programs It provides staff support for the Officers, Board of Directors, Subcommittees, District Leaders and arranges for OEA and NEA RA meetings and the OEA/NEA Relations Committee This division oversees and monitors the election of delegates to OEA and NEA Representative Assemblies and assures compliance w ith Constitutional Requirements for same Additionally, the division acts as a liaison to represent OEA and w orks w ith state education agencies, the NEA , legislators and political agencies and various staff associations EDUCATION IMPROVEMENT AND INNOVATION (EI&I) A subdivision of Member Services, the EI&I function includes planning and executing professional development activities for members and staff, assisting members and others in the organization to understand and respond to critical educational reform issues The division prepares for innovations in teaching and learning and communicates w ith staff and members EI&I plans, advertises and conducts the Education Issues Conference and the Midsummer Leadership Conference as w ell as other local or statew ide seminars as may arise in the areas above EI&I manages the OEA resources center, providing resources as w ell as obtaining information through print and multimedia sources on educational issues, acquires computer access to external information systems (such as the ODE bulletin board) and cabling, satellite hookups and necessary services to facilitate view ing and sending educational programs This group has taken the lead in helping members complete the steps necessary for National Board Certification, as w ell as increasing the number of "highly qualified" teachers under the NCLB act

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 6		THE ORGANIZATION IS MADE UP OF MEMBERS MEMBERS ARE ALSO MEMBERS OF THE NATIONAL EDUCATION ASSOCIATION (NEA)

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7a		THE OFFICERS AND BOARD OF DIRECOTRS ARE ELECTED BY MEMBERS AT STATEWIDE AND LOCAL REPRESENTATIVE ASSEMBLIES

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7b		AMENDMENTS TO THE ORGANIZATION'S CONSTITUTION & BYLAWS ARE VOTED ON BY MEMBERS AT REPRESENTATIVE ASSEMBLY BUDGET AND VARIOUS INITIATIVES ARE ALSO APPROVED AT REPRESENTATIVE ASSEMBLY

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 10		THE 990 IS REVIEWED BY the assistant executive director of BUSINESS SERVICES, THE ORGANIZATION'S TREASURER, AND AN INDEPENDENT AUDIT FIRM

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 12c		THERE IS A CONFLICT OF INTEREST POLICY FOR EMPLOYEES WHICH IS MONITORED BY the assistant executive director of BUSINESS SERVICES, JIM MARTIN A SEPARATE CONFLICT OF INTEREST POLICY EXISTS FOR OFFICERS OF GOVERNANCE AND IS MONITORED BY THE SECRETARY-TREASURER THE BOARD OF DIRECTORS ALSO FILL OUT A CONFLICT OF INTEREST QUESTIONNAIRE

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 15		SALARIES ARE REVIEWED AND APPROVED BY THE BOARD OF DIRECTORS THEY ARE BASED ON COMPARABILITY DATA, AVERAGE TEACHER'S SALARY AND/OR BARGAINED CONTRACT THE COMPARABILITY DATA FOR MANAGEMENT SALARIES INCLUDES COMPARISON TO THE OTHER STATES ASSOCIATED WITH THE NEA, BASED ON THE ANNUAL NEA MARKET STUDY, AS WELL AS MODELS DEVELOPED BY MERCER, A LEADING H/R FIRM

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 19		THE ORGANIZATION DOES NOT MAKE ITS GOVERNING DOCUMENTS AVAIABLE TO THE PUBLIC

SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Attach to Form 990. To be completed by organizations that answerd "Yes" to Form 990, Part IV, lines 33, 34, 35, 36, or 37.
▶ See separate instructions.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OHIO EDUCATION ASSOCIATION

Employer identification number
31-4269414

Part I Identification of Disregarded Entities

(A) Name, address, and EIN of disregarded entity	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Total income	(E) End-of-year assets	(F) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity
OHIO EDUCATION ASSOCIATION FUND FOR CHILDREN & PUBLIC EDUCATION 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 91-2066313	PAC	OH	527		
OHIO EDUCATION ASSOCIATION POLITICAL CONTRIBUTING ENTITY 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 91-2066690	PAC	OH	527		
OEA EDUCATIONAL FOUNDATION 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 04-3618101	FOUNDATION	OH	501(C)(3)		
LEGISLATIVE CRISIS FUND PAC 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 31-1444495	PAC	OH	527		
OHIO RETIRED TEACHERS FOUNDATION 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 31-6050636	FOUNDATION	OH	501(C)(3)		
OHIOANS FOR GREAT PUBLIC SCHOOLS PAC 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216	PAC	OH	527		
FUND FOR STRONG PUBLIC SCHOOLS 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216	PAC	OH	527		

Part III Identification of Related Organizations Taxable as a Partnership

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Predominant income(related, investment, unrelated)	(F) Share of total income	(G) Share of end-of-year assets	(H) Disproprtionate allocations?		(I) Code V—UBI amount on Box 20 of K-1	(J) General or managing partner?	
							Yes	No		Yes	No

Part IV Identification of Related Organizations Taxable as a Corporation or Trust

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Type of entity (C corp, S corp, or trust)	(F) Share of total income	(G) Share of end-of-year assets	(H) Percentage ownership

Part V Transactions with Related Organizations

		Yes	No
Note. Complete line 1 if any entity is listed in Parts II, III or IV			
1 During the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a Receipt of **(i)** interest **(ii)** annuities **(iii)** royalties **(iv)** rent from a controlled entity	**1a**		**No**
b Gift, grant, or capital contribution to other organization(s)	**1b**	**Yes**	
c Gift, grant, or capital contribution from other organization(s)	**1c**		**No**
d Loans or loan guarantees to or for other organization(s)	**1d**		**No**
e Loans or loan guarantees by other organization(s)	**1e**		**No**
f Sale of assets to other organization(s)	**1f**		**No**
g Purchase of assets from other organization(s)	**1g**		**No**
h Exchange of assets	**1h**		**No**
i Lease of facilities, equipment, or other assets to other organization(s)	**1i**		**No**
j Lease of facilities, equipment, or other assets from other organization(s)	**1j**		**No**
k Performance of services or membership or fundraising solicitations for other organization(s)	**1k**		**No**
l Performance of services or membership or fundraising solicitations by other organization(s)	**1l**		**No**
m Sharing of facilities, equipment, mailing lists, or other assets	**1m**	**Yes**	
n Sharing of paid employees	**1n**	**Yes**	
o Reimbursement paid to other organization for expenses	**1o**		**No**
p Reimbursement paid by other organization for expenses	**1p**		**No**
q Other transfer of cash or property to other organization(s)	**1q**		**No**
r Other transfer of cash or property from other organization(s)	**1r**		**No**

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

	(A) Name of other organization(s)	**(B)** Transaction type(a-r)	**(C)** Amount Involved
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			

Part VI Unrelated Organizations Taxable as a Partnership

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization See instructions regarding exclusion for certain investment partnerships

(A) Name, address, and EIN of entity	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Are all partners section 501(c)(3) organizations?		(E) Share of end-of-year assets	(F) Disproprtionate allocations?		(G) Code V—UBI amount on Box 20 of K-1	(H) General or managing partner?	
			Yes	No		Yes	No		Yes	No

Additional Data

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Form 990, Schedule R, Part II - Identification of Related Tax-Exempt Organizations

(A) Name, address, and EIN of related organization	(B) Primary Activity	(C) Legal Domicile (State or Foreign Country)	(D) Exempt Code section	(E) Public charity status (if 501(c)(3))	(F) Direct Controlling Entity
OHIO EDUCATION ASSOCIATION FUND FOR CHILDREN & PUBLIC EDUCATION 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 91-2066313	PAC	OH	527		
OHIO EDUCATION ASSOCIATION POLITICAL CONTRIBUTING ENTITY 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 91-2066690	PAC	OH	527		
OEA EDUCATIONAL FOUNDATION 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 04-3618101	FOUNDATION	OH	501(C)(3)		
LEGISLATIVE CRISIS FUND PAC 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 31-1444495	PAC	OH	527		
OHIO RETIRED TEACHERS FOUNDATION 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216 31-6050636	FOUNDATION	OH	501(C)(3)		
OHIOANS FOR GREAT PUBLIC SCHOOLS PAC 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216	PAC	OH	527		
FUND FOR STRONG PUBLIC SCHOOLS 225 EAST BROAD STREET PO BOX 2550 COLUMBUS, OH43216	PAC	OH	527		

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Form 990, Part VII - Section Aaa

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply): Individual Trustee or Director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
barb armour , DIRECTOR	3 00	X						0	0	0
DAVID AUGUSTA , DIRECTOR	3 00	X						0	0	0
DIANA BALL , DIRECTOR	3 00	X						0	0	0
MARY Becker , DIRECTOR	3 00	X						0	0	0
BARBARA CATALANO , DIRECTOR	3 00	X						0	0	0
BEV CLARK , DIRECTOR	3 00	X						0	0	0
PATRICIA COHEN , DIRECTOR	3 00	X						0	0	0
STEVE COLAHAN , DIRECTOR	3 00	X						0	0	0
JUANITA COLLEIN , DIRECTOR	3 00	X						0	0	0
ARNETTE GP COLLINS , DIRECTOR	3 00	X						0	0	0
MATHEW CONRAD , DIRECTOR	3 00	X						0	0	0
CHRIS DOMHOFF , DIRECTOR	3 00	X						0	0	0
CHAD DOTSON , DIRECTOR	3 00	X						0	0	0
SANDRA DUCKWORTH , DIRECTOR	3 00	X						0	0	0
LAURA HERROON , DIRECTOR	3 00	X						0	0	0
WARRENN HERSHBERGER , DIRECTOR	3 00	X						0	0	0
DELORES ROME HUDSON , DIRECTOR	3 00	X						0	0	0
ROBIN JEFFRIES , DIRECTOR	3 00	X						0	0	0
PHIL LONG , DIRECTOR	3 00	X						0	0	0
JAMES MCGEEVY , DIRECTOR	3 00	X						0	0	0
MARTHA MILLER , DIRECTOR	3 00	X						0	0	0
TIM MYERS , DIRECTOR	3 00	X						0	0	0
ROBERTA NEFF , DIRECTOR	3 00	X						0	0	0
EMILY OSTERLING , DIRECTOR	3 00	X						0	0	0
JEFF PEGG , DIRECTOR	3 00	X						0	0	0
HAVEN REARDON , DIRECTOR	3 00	X						0	0	0
DAVID SAYWELL , DIRECTOR	3 00	X						0	0	0
SALLY SCHULER , DIRECTOR	3 00	X						0	0	0
JENNIFER SHELTON , DIRECTOR	3 00	X						0	0	0
TIM SKAMFER , DIRECTOR	3 00	X						0	0	0

Form 990, Part VII - Section Aaa

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply) Individual Trustee or Director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
PAM SMITH , DIRECTOR	3 00	X						0	0	0
SALLY SMITH , DIRECTOR	3 00	X						0	0	0
PATRICK SNEE , DIRECTOR	3 00	X						0	0	0
BRADLEY STRONG , DIRECTOR	3 00	X						0	0	0
SUSAN STUCKEY , DIRECTOR	3 00	X						0	0	0
JANIFER TROWLES , DIRECTOR	3 00	X						0	0	0
RITA WALTERS , DIRECTOR	3 00	X						0	0	0
GRETCHEN WASHINGTON , DIRECTOR	3 00	X						0	0	0
REBECCA WHITED , DIRECTOR	3 00	X						0	0	0
DAVID YOUNG , DIRECTOR	3 00	X						0	0	0
mary binegar , dIRECTOR	3 00	X						0	0	0
carol correthers , dIRECTOR	3 00	X						0	0	0
RHONDA JOHNSON , DIRECTOR	3 00	X						0	0	0
KIM RICHARDS , DIRECTOR	3 00	X						0	0	0
patriCIA FROST-BROOKS , PRESIDENT	50 00			X				174,229	0	28,640
WILLIAM LEIBENSBERGER , VICE PRESIDENT	50 00			X				164,054	0	38,607
JAMES TIMLIN , SECRETARY-TREASURER	50 00			X				161,851	0	24,656
DENNIS REARDON , EXECUTIVE DIRECTOR	60 00			X				198,107	0	15,236
LARRY WICKS , EXECUTIVE DIRECTOR	60 00			X				37,457	0	10,702
SUSAN BABCOCK , AED STRATEGIC & WORKFORC	50 00				X			151,590	0	38,162
JAMES MARTIN , AED BUSINESS SERVICES	50 00				X			160,415	0	38,930
KEVIN FLANAGAN , AED MEMBER SERVICES	50 00				X			151,813	0	37,676
NORMAN YOUNG , LABOR RELATIONS CONSULTA	50 00					X		152,782	0	32,999
WILLIAM PEARSOL , LABOR RELATIONS CONSULTA	50 00					X		148,254	0	32,999
SHEILA SAAD , LABOR RELATIONS CONSULTA	50 00					X		148,056	0	48,888
MARY SUCHY , DIRECTOR MEMBERSHIP PROC	50 00					X		147,999	0	37,489
FRITZ FEKETE , DIRECTOR RESEARCH AND I/	50 00					X		147,895	0	37,269
DANIEL RIVERA , AED MEMBER SERVICES	50 00						X	134,991	0	2,580
DENNIS PELTOLA , LABOR RELATIONS CONSULTA	40 00						X	153,453	0	2,295

Form 990, Part VIII - Statement of Revenue - 2a - 2g Program Service Revenue -

		Business Code	(A) Total Revenue	(B) Related or Exempt Function Revenue	(C) Unrelated Business Revenue	(D) Revenue Excluded from Tax under IRC 512, 513, or 514
a	MEMBERSHIP DUES	900,099	56,664,971	56,664,971		
b	LEGAL SERVICES PLAN	541,100	1,391,219	1,391,219		
c	SUBSIDIES MEMBERSHIP	900,099	330,402	330,402		
d	MISCELLANEOUS	900,099	101,478	101,478		
e	TPD CONFERENCES	611,710	41,251	41,251		

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Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
CANTON EA			189,006				LOCAL OPTION
FIRELANDS LOCAL EA			299,478				LOCAL OPTION
BIG WALNUT EA			16,006				EFFECTIVE LOCAL GRANT
BRUNSWICK EA			11,500				EFFECTIVE LOCAL GRANT
DAYTON EA			19,814				EFFECTIVE LOCAL GRANT
DAYTON EA			31,831				OFFICER RELEASE TIME
GAHANNA JEFFERSON EA			6,500				EFFECTIVE LOCAL GRANT
GROVEPORT MADISON			10,211				NEA LPRT GRANT
HAMILTON CLASSROOM TEACHERS ASSOC			20,000				EFFECTIVE LOCAL GRANT
HILLIARD EA			37,111				EFFECTIVE LOCAL GRANT

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LAKEWOOD TA			7,113				EFFECTIVE LOCAL GRANT
LANCASTER EA			2,400				EFFECTIVE LOCAL GRANT
LIMA EA			2,400				EFFECTIVE LOCAL GRANT
MENTOR CLASSIFIED EMPLOYEES ASSN			5,842				EFFECTIVE LOCAL GRANT
MENTOR TEA			33,774				EFFECTIVE LOCAL GRANT
NEWARK EA			14,666				EFFECTIVE LOCAL GRANT
SOUTHWESTERN EA			53,901				EFFECTIVE LOCAL GRANT
PICKERINGTON EA			6,981				EFFECTIVE LOCAL GRANT
TRI-COUNTY EA			652				EFFECTIVE LOCAL GRANT
YOUNGSTOWN EA			41,363				EFFECTIVE LOCAL GRANT

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UPPER ARLINGTON EA			12,815				EFFECTIVE LOCAL GRANT
WORTHINGTON EA			48,550				EFFECTIVE LOCAL GRANT
XENIA CLASSIFIED EMPLOYEES			1,759				EFFECTIVE LOCAL GRANT
DAYTON EA			32,739				OPERATING GRANT
YOUNGSTOWN EA			37,785				OPERAINT GRANT
YOUNGSTOWN EA			41,363				EFFECTIVE LOCAL GRANT
COLUMBUS EA			978,914				OPERATING GRANT
YSU STUDENT EA			2,190				SOAR GRANT

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Form 990, Schedule J, Part II - Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name		(B)(i) Base Compensation	(B)(ii) Bonus & incentive compensation	(B)(iii) Other compensation	(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
patriCIA FROST-BROOKS	(i) (ii)	174,229			18,795	9,845	202,869	
WILLIAM LEIBENSBERGER	(i) (ii)	164,054			15,989	22,618	202,661	
JAMES TIMLIN	(i) (ii)	161,851			15,222	9,432	186,505	
DENNIS REARDON	(i) (ii)	198,107			8,748	6,488	213,343	
SUSAN BABCOCK	(i) (ii)	151,590			12,841	25,321	189,752	
JAMES MARTIN	(i) (ii)	160,415			13,609	25,321	199,345	
KEVIN FLANAGAN	(i) (ii)	151,813			12,355	25,321	189,489	
NORMAN YOUNG	(i) (ii)	152,782			23,567	9,432	185,781	
WILLIAM PEARSOL	(i) (ii)	148,254			23,567	9,432	181,253	
SHEILA SAAD	(i) (ii)	148,056			23,567	25,321	196,944	
MARY SUCHY	(i) (ii)	147,999			12,168	25,321	185,488	
FRITZ FEKETE	(i) (ii)	147,895			11,948	25,321	185,164	
DANIEL RIVERA	(i) (ii)	134,991			2,580		137,571	
DENNIS PELTOLA	(i) (ii)	153,453			2,295		155,748	