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Form **990-EZ**

Short Form
Return of Organization Exempt From Income Tax

OMB No 1545-1150

2009

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)
▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.
▶ The organization may have to use a copy of this return to satisfy state reporting requirements

A For the 2009 calendar year, or tax year beginning , 2009, and ending , 20

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Terminated ☐ Amended return ☐ Application pending	C Name of organization Medford Education Association Number and street (or P O box, if mail is not delivered to street address) Room/suite 2445 S. Pacific Hwy City or town, state or country, and ZIP + 4 Medford OR 97501	D Employer identification number 930635913 E Telephone number 541-773-6431 F Group Exemption Number ▶
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• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting Method: ☐ Cash ☐ Accrual
Other (specify) ▶

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

I Website: ▶

J Tax-exempt status (check only one) — ☒ 501(c) (5) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

K Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$500,000 or more, file Form 990 instead of Form 990-EZ ▶ \$

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	4875.49
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	91,865.03
	4	Investment income	4	1305.36
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less: cost or other basis and sales expenses	5b	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	0
	6	Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ☐		
	a	Gross revenue (not including \$ of contributions reported on line 1)	6a	
b	Less: direct expenses other than fundraising expenses	6b		
c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	0	
7a	Gross sales of inventory, less returns and allowances	7a		
b	Less: cost of goods sold	7b		
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	0	
8	Other revenue (describe ▶)	8	0	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	98,045.88	
Expenses	10	Grants and similar amounts paid (attach schedule)	10	11,854.12
	11	Benefits paid to or for members	11	0
	12	Salaries, other compensation, and employee benefits	12	76,548.57
	13	Professional fees and other payments to independent contractors	13	0
	14	Occupancy, rent, utilities, and maintenance	14	1656.12
	15	Printing, publications, postage, and shipping	15	983.052
	16	Other expenses (describe ▶ see attached - District Relations, Part B, membership)	16	04790.85
	17	Total expenses. Add lines 10 through 16	17	95833.6918
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	2212.70
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	39501.96
	20	Other changes in net assets or fund balances (attach explanation)	20	0
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	46,214.66

Part II Balance Sheets. If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	39,501.96	41,714.66
23 Land and buildings		0
24 Other assets (describe ▶)		0
25 Total assets	39,501.96	41,714.66
26 Total liabilities (describe ▶)		0
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	39,501.96	41,714.66

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 106421

Form **990-EZ** (2009)

SCANNED APR 12 2011

Expenses

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

[illegible]

28

Figure 1. The relationship between the number of children and the number of mothers. The figure shows a scatter plot with a positive linear regression line. The x-axis is labeled 'Number of children' and ranges from 0 to 10. The y-axis is labeled 'Number of mothers' and ranges from 0 to 10. The data points are represented by black dots, and a solid black line represents the linear regression. The line starts at approximately (0, 0.5) and ends at approximately (10, 10.5).

(Grants \$) If this amount includes foreign grants, check here ☐

28a

29

(Grants \$) If this amount includes foreign grants, check here ☐

29a

30

(Grants \$) If this amount includes foreign grants, check here ☐

30a

31 Other program services (attach schedule)

(Grants \$) If this amount includes foreign grants, check here ☐

31a

32 Total program service expenses (add lines 28a through 31a)

32

	(b) Title and average	(c) Compensation	(d) Contributions to	(e) Expense
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[illegible]

Part V Other Information (Note the statement requirements in the instructions for Part V.)

		Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33	
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	34	
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T.		
a	Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?	35a	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	35b	
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36	
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ► 37a		
b	Did the organization file Form 1120-POL for this year?	37b	
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return?	38a	
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b		
39	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on line 9 39a		
b	Gross receipts, included on line 9, for public use of club facilities 39b		
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ► ; section 4912 ► ; section 4955 ►		
b	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b	
c	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ►		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization ►		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.	40e	
41	List the states with which a copy of this return is filed. ►		
42a	The organization's books are in care of ► Telephone no. ► Located at ► ZIP + 4 ►		
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	
	If "Yes," enter the name of the foreign country: ► See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts .		
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c	
	If "Yes," enter the name of the foreign country: ►		
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here ► ☐ and enter the amount of tax-exempt interest received or accrued during the tax year 43		
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45	

Part VI

Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only. All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

46	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	46	Yes	No
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	47		
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48		
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a		
b	If "Yes," was the related organization a section 527 organization?	49b		
50	Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."			

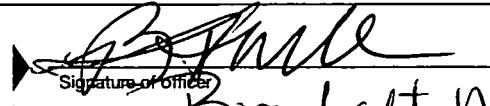
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances

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

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

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 . . . ▶ _____

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.			
	 Signature of officer		Date <u>7/31/10</u>	
Paid Preparer's Use Only	Type or print name and title <u>Bridget McMillen MET Treasurer</u>			
	Preparer's signature ▶	Date	Check if self-employed ▶ ☐	Preparer's identifying number (See instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4 ▶	EIN ▶ _____ Phone no. ▶ _____		
May the IRS discuss this return with the preparer shown above? See instructions ▶ ☐ Yes ☐ No				

08/19/10

Medford Education Association
Profit & Loss
July 2009 through June 2010

	Jul '09 - Jun 10
Ordinary Income/Expense	
Income	
Income	
Endowment Fund	4,875.49
Investment Income	
Dividend	12.60
Reserve Fund	1,292.76
Total Investment Income	1,305.36
Membership Dues	
Fairshare Dues	4,051.79
Member Dues	87,813.24
Total Membership Dues	91,865.03
Total Income	98,045.88
Total Income	98,045.88
Expense	
Expenses	
District Relations	
Training	264.50
Total District Relations	264.50
Membership	
Member Activities	765.82
Retirement Awards	194.57
Retirement Dinner	1,457.50
Total Membership	2,417.89
Office Expenses	
Accounting Software Updates	349.00
Miscellaneous	
Reconciliation Discrepancies	0.49
Miscellaneous - Other	218.19
Total Miscellaneous	218.68
Office Supplies and Equipment	415.84
Total Office Expenses	983.52
Outreach and Advocacy (Grants)	
Endowment Scholarships	4,500.00
LOPAC Transfer	4,509.12
SOUC Dues	2,845.00
Total Outreach and Advocacy (Grants)	11,854.12
Payroll Expenses	
Administrative Assistants	
Emp. Insurance	24,235.80
Emp. Pension	2,568.00
Gross Wages	27,090.81
Administrative Assistants - Other	865.46
Total Administrative Assistants	54,760.07
Leader Stipends	
Grievance Chair	867.00
Political Action Chair	500.00
President-Elect Trainer	540.00
Total Leader Stipends	1,907.00
Officer Stipends	
President	3,793.33
Treasurer	3,881.00
Vice President	3,080.00
Total Officer Stipends	10,754.33

08/19/10

Medford Education Association
Profit & Loss
July 2009 through June 2010

	Jul '09 - Jun 10
Taxes	
Company Payroll Taxes	8,335 85
SAIF Policy	395 59
Total Taxes	8,731 44
Payroll Expenses - Other	395 73
Total Payroll Expenses	76,548 57
Professional Development	
Rep Assembly	
RA Food	530 00
RA Hotel	1,530.00
RA Travel	48 46
Total Rep Assembly	2,108.46
Total Professional Development	2,108 46
Utilities	
Cell Phone Expense	960 00
Office Phone Expense	696 12
Total Utilities	1,656 12
Total Expenses	95,833 18
Total Expense	95,833.18
Net Ordinary Income	2,212 70
Net Income	2,212.70

08/19/10

Medford Education Association
Transaction Detail By Account
July 2009 through June 2010

Type	Date	Numb	Name	Memo	Clr	Split	Original Amount	Paid Amount	Balance
Expenses									
Outreach and Advocacy (Grants)									
Endowment Scholarships									
Check	6/30/2010	2	SMHS Scholarship ...			Savings Endo...	2,250.00	2,250.00	2,250.00
Check	6/30/2010		NMHS Scholarship ..			Savings Endo...	2,250.00	2,250.00	4,500.00
Total Endowment Scholarships									
LOPAC Transfer									
Check	1/19/2010		Share-to-share	Internet Tran...		Checking Acc...	1,503.04	1,503.04	1,503.04
Check	2/19/2010		Share-to-share	Internet Tran...		Checking Acc...	1,503.04	1,503.04	3,006.08
Check	3/19/2010		Share to Share fro..	Internet Tran...		Checking Acc...	1,503.04	1,503.04	4,509.12
Total LOPAC Transfer									
							4,509.12	4,509.12	4,509.12
SOU C Dues									
Check	11/18/2009	2836	Southern Oregon U...			Checking Acc...	2,845.00	2,845.00	2,845.00
Total SOU C Dues									
							2,845.00	2,845.00	2,845.00
Total Outreach and Advocacy (Grants)									
							11,854.12	11,854.12	11,854.12
Total Expenses									
							11,854.12	11,854.12	11,854.12
TOTAL									
							11,854.12	11,854.12	11,854.12

08/19/10

Medford Education Association
Transaction Detail By Account
July 2009 through June 2010

Type	Date	Num	Name	Memo	Clr	Split	Original Amount	Paid Amount	Balance
Expenses									
District Relations									
Training									
Check	10/7/2009	2822	OEA	SHARE DRA...		Checking Acc...	149.50	149.50	149.50
Check	11/10/2009	2832	chef cj	SHARE DRA .		Checking Acc...	115.00	115.00	264.50
Total Training							264.50	264.50	264.50
Total District Relations							264.50	264.50	264.50
Total Expenses							264.50	264.50	264.50
TOTAL							264.50	264.50	264.50

08/19/10

Medford Education Association
Transaction Detail By Account
July 2009 through June 2010

Type	Date	Num	Name	Memo	Clr	Split	Original Amount	Paid Amount	Balance
Expenses									
Membership									
Member Activities									
Check	10/26/2009	2826	Barnes and Noble	SHARE DRA...		Checking Acc..	50.00	50.00	50.00
Check	11/20/2009	2837	Charlotte Frederick	SHARE DRA...		Checking Acc..	364.61	364.61	414.61
Check	3/2/2010	2863	Medford School Dis..	SHARE DRA..		Checking Acc..	83.34	83.34	497.95
Check	4/5/2010	2865	Charlotte Frederick ..			Checking Acc	267.87	267.87	765.82
Total Member Activities									
								765.82	765.82
Retirement Awards									
Check	11/18/2009	2835	Oregon Education ...	SHARE DRA ..		Checking Acc...	40.00	40.00	40.00
Check	4/23/2010	2872	Lashley, Cheryl	SHARE DRA...		Checking Acc...	154.57	154.57	194.57
Check	5/23/2010		Voided Check			Checking Acc..	0.00	0.00	194.57
Total Retirement Awards									
								194.57	194.57
Retirement Dinner									
Check	4/23/2010	2871	Low, Barbara	SHARE DRA...		Checking Acc...	58.00	58.00	58.00
Check	5/22/2010	2870	Tim Church	SHARE DRA..		Checking Acc...	100.00	100.00	158.00
Check	5/22/2010	2869	Fredericks, Charlotte	SHARE DRA...		Checking Acc..	100.00	100.00	258.00
Check	5/23/2010	2873	PLATON	SHARE DRA...		Checking Acc..	30.00	30.00	288.00
Check	5/23/2010	2874	Always Bloomin'	SHARE DRA...		Checking Acc..	60.00	60.00	348.00
Check	5/23/2010	2877	Ella Barnett	SHARE DRA...		Checking Acc..	40.00	40.00	388.00
Check	5/23/2010	2878	Jacksonville Inn	SHARE DRA..		Checking Acc...	1,069.50	1,039.50	1,457.50
Total Retirement Dinner									
								1,457.50	1,457.50
Total Membership									
								2,417.89	2,417.89
Total Expenses									
								2,417.89	2,417.89
TOTAL									
								2,417.89	2,417.89

Medford Education Association
Transaction Detail By Account
July 2009 through June 2010

Expenses	Type	Date	Num	Name	Memo	Clr	Split	Original Amount	Paid Amount	Balance
Professional Development										
Rep Assembly										
RA Food	Check	4/21/2010	2866	Lashley, Cheryl	SHARE DRA		Checking Acc.	530.00	530.00	530.00
Total RA Food									530.00	530.00
RA Hotel	Check	3/2/2010	2861	Red Lion Hotel Jant	SHARE DRA		Checking Acc.	1,530.00	1,530.00	1,530.00
Total RA Hotel									1,530.00	1,530.00
RA Travel	Check	4/26/2010	2867	Lashley, Cheryl	SHARE DRA		Checking Acc.	48.46	48.46	48.46
Total RA Travel									48.46	48.46
Total Rep Assembly									2,108.46	2,108.46
Total Professional Development									2,108.46	2,108.46
Total Expenses									2,108.46	2,108.46
TOTAL									2,108.46	2,108.46