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Short Form
Return of Organization Exempt From Income TaxUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)► Sponsoring organizations of donor advised funds 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.

OMB No. 1545-1150

2009

Open to Public
Inspection

A For the 2009 calendar year, or tax year beginning September 1, 2009, and ending August 31, 2010

B Check if applicable	C Name of organization Lake Oswego Education Association	D Employer identification number 93 1000835
<input checked="" type="checkbox"/> Address change	Number and street (or P O box, if mail is not delivered to street address) 2501 Country Club Road	E Telephone number 503-703-0891
<input type="checkbox"/> Name change	Room/suite	
<input type="checkbox"/> Initial return	City or town, state or county, and ZIP + 4 Lake Oswego, OR, 97034	F Group Exemption Number ►
<input type="checkbox"/> Terminated		
<input type="checkbox"/> Amended return		
<input type="checkbox"/> Application pending		

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

G Accounting Method: Cash Accrual
Other (specify) ►I Website: ► <http://sites.google.com/site/lakeoswegoeducationassociation/>H Check ► if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).J Tax-exempt status (check only one) — 501(c) () ▲ (insert no.) 4947(a)(1) or 527K 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	
1	Contributions, gifts, grants, and similar amounts received	1	
2	Program service revenue including government fees and contracts	2	
3	Membership dues and assessments	3	47229
4	Investment income	4	609
5a	Gross amount from sale of assets other than inventory	5a	
b	Less: cost or other basis and sales expenses	5b	
c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here ► <input type="checkbox"/>		
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	
7a	Gross sales of inventory, less returns and allowances	7a	
b	Less: cost of goods sold	7b	
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
8	Other revenue (describe ►)	8	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ► OGDEN, UT	9	47838
Expenses		10	3200
10	Grants and similar amounts paid (attach schedule)	10	
11	Benefits paid to or for members	11	
12	Salaries, other compensation, and employee benefits	12	34380
13	Professional fees and other payments to independent contractors	13	
14	Occupancy, rent, utilities, and maintenance	14	
15	Printing, publications, postage, and shipping	15	
16	Other expenses (describe ► See statement 2)	16	4819
17	Total expenses. Add lines 10 through 16 ► IRS OSC	17	42399
Net Assets		18	5439
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	
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	42225
20	Other changes in net assets or fund balances (attach explanation)	20	
21	Net assets or fund balances at end of year. Combine lines 18 through 20 ► 47664	21	

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	42225	22	47664
23	Land and buildings		23	
24	Other assets (describe ►)		24	
25	Total assets.	42225	25	47664
26	Total liabilities (describe ►)		26	
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	42225	27	47664

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

What is the organization's primary exempt purpose?

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

Expenses

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

28

(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

(Grants \$) If this amount includes foreign grants, check here . . . ► 31a
Total program service expenses (add lines 28a through 31a) ► 32

32

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions on page 1.)

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.)

(a) Name and address

(b) Title and average hours per week devoted to position

(c) Compensation
(If not paid,
enter -0-.)

Contributions to Employee benefit plans & Retired compensation

(e) Expense account and other allowances

See Statement #3

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	35a	✓
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?	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	37b	✓
b Did the organization file Form 1120-POL for this year?	38a	✓
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?	38b	✓
b If "Yes," complete Schedule L, Part II and enter the total amount involved	39a	✓
39 Section 501(c)(7) organizations. Enter:	39b	✓
a Initiation fees and capital contributions included on line 9	40a	✓
b Gross receipts, included on line 9, for public use of club facilities	40b	✓
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ► _____ ; section 4912 ► _____ , section 4955 ► _____	40c	✓
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	40d	✓
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	40e	✓
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.		
41 List the states with which a copy of this return is filed. ► None		
42a The organization's books are in care of ► Casey Dunn	Telephone no. ► 503-703-0891	
Located at ► 1926 W Burnside Street Unit 913, Portland OR	ZIP + 4 ► 97209	
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: ► _____	42c	✓
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.?		
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	Yes	No
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	46	
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	47	
49a	Did the organization make any transfers to an exempt non-charitable related organization?	48	
b	If "Yes," was the related organization a section 527 organization?	49a	
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."	49b	

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."

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

Sign Here	<p>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.</p> <p>Casey Dunn</p> <p>Casey Dunn, Treasurer</p> <p>Type or print name and title</p> <p>1/12/2011</p> <p>Date</p>	
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Paid Preparer's Use Only	Preparer's signature	Date	Check if self- employed ► <input type="checkbox"/>	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

Form 990-EZ (2009)



Statement 1
Form: 990-EZ
Page: 1
Part: I
Question: 10

Lake Oswego Education Association
93-1000835

Grants and Allocations

Classification: Scholarship

Kyle Haggart

Date: 6/15/2010

Address:

Lake Oswego, OR 97034

Type: Cash

Grant amount: \$1,000

Relationship: Student in district

Classification: Scholarship

Grant Sherer

Date: 6/15/2010

Address:

Lake Oswego, OR 97034

Type: Cash

Grant amount: \$1,000

Relationship: Student in district

Classification: Donation

Lake Oswego School Foundation

Date: 5/18/2010

Address:

Type: Cash

2501 Country Club Rd.

Lake Oswego, OR 97034

Grant amount: \$1000

Relationship: Business

Classification: Donation

Lake Oswego Library

Date: 10/15/2009

Address:

Type: Cash

706 4th Street

Lake Oswego, OR 97034

Grant amount: \$200

Relationship: Business

Total Grants: \$3,200.00

Statement 2
Form: 990-EZ
Page: 1
Part: I
Question: 16

Lake Oswego Education Association
93-1000835

Other Expenses for Part 1 line 16

Uniserv Dues	1230.00
Teacher and Student Rec	917.70
Conventions and Workshops	1391.41
Meals and Travel	400.01
Supplies and Meeting Exp	280.04
Misc.	600.00

Total Other	\$4,819.16
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Statement 3
Form: 990-EZ
Page: 1
Part: IV
Question:

Lake Oswego Education Association
93-1000835

Key Officers

Name and Address	(B) Title and Wkly Hrs	(C) Compensation	(D) N/A	(E) N/A
Andy Porter 18 Preakness Ct Lake Oswego OR 97224	President 25	\$31,480	0	0
Casey Dunn 1926 W Burnside St Unit 913 Portland OR 97209	Treasurer 2	\$400	0	0
Joel Glick 10347 SW 14 th Dr Portland OR 97219	Negotiations 3	\$400	0	0
Janell Sowers Cinquini 7503 SW 51 st Ave Portland OR 97219	Insurance 2	\$300	0	0
Karen Zurcher 908 SW Gaines St. #12 PDX, 97239	Secretary 2	\$300	0	0
Terry Shlaes 2000 NW 28th Place Portland, OR 97210	Contract Mnt 2	\$300	0	0
Kelly Nalty 4448 SE Nehalem St. Portland, OR 97206	Vice Pres 3	\$600	0	0
Kristin O'Conner Lake Oswego 97035	Communications 2	\$300	0	0
Jan Pearce 4951 Oakridge Rd Lake Oswego OR 97035	Past President 3	\$300	0	0