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Form **990-EZ****Short Form**
Return of Organization Exempt From Income Tax

OMB No 1545-1150

2010**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, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions). All other organizations with gross receipts less than \$200,000 and total assets less than \$500,000 at the end of the year may use this form.

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

A For the 2010 calendar year, or tax year beginning September 1, 2010, and ending August 31, 20 11

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

C Name of organization
Lake Oswego Education Association

Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
2501 Country Club Road

City or town, state or country, and ZIP + 4
Lake Oswego, OR, 97034

D Employer identification number
93-1000835

E Telephone number
503-703-0891

F Group Exemption Number ►

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)(3) ☒ 501(c) () ◀ (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 \$50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions). But if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, line 25, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. \$ **46,275**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I.)Check if the organization used Schedule O to respond to any question in this Part I. ☐

| | | | | | |
|-------------------|-----------|--|-----------|---------------------|--------------|
| Revenue | 1 | Contributions, gifts, grants, and similar amounts received | | 1 | 1203 |
| | 2 | Program service revenue including government fees and contracts | | 2 | |
| | 3 | Membership dues and assessments | | 3 | 44583 |
| | 4 | Investment income | | 4 | 489 |
| | 5a | Gross amount from sale of assets other than inventory | 5a | | |
| | b | Less: cost or other basis and sales expenses | 5b | | |
| | c | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) | 5c | | |
| | 6 | Gaming and fundraising events | | | |
| | a | Gross income from gaming (attach Schedule G if greater than \$15,000) | 6a | | |
| | b | Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000) | 6b | | |
| | c | Less: direct expenses from gaming and fundraising events | 6c | | |
| | d | Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c) | 6d | | |
| Expenses | 7a | Gross sales of inventory, less returns and allowances | 7a | | |
| | b | Less: cost of goods sold | 7b | | |
| | c | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) | 7c | | |
| | 8 | Other revenue (describe in Schedule O) | 8 | | |
| | 9 | Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 | 9 | 46275 | |
| | 10 | Grants and similar amounts paid (list in Schedule O) | 10 | 3290 | |
| | 11 | Benefits paid to or for members | 11 | | |
| Net Assets | 12 | Salaries, other compensation, and employee benefits | 12 | 39951 | |
| | 13 | Professional fees and other payments to independent contractors | 13 | 3103 | |
| | 14 | Occupancy, rent, utilities, and maintenance | 14 | | |
| | 15 | Printing, publications, postage, and shipping | 15 | | |
| | 16 | Other expenses (describe in Schedule O) | 16 | 5848 | |
| | 17 | Total expenses. Add lines 10 through 16 | 17 | 52192 | |
| | 18 | Excess or (deficit) for the year (Subtract line 17 from line 9) | 18 | <5917> | |
| | 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 | 47664 | |
| | 20 | Other changes in net assets or fund balances (explain in Schedule O) | 20 | | |
| | 21 | Net assets or fund balances at end of year. Combine lines 18 through 20 | 21 | 41747 | |

For Paperwork Reduction Act Notice, see the separate instructions.

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Form **990-EZ** (2010)

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Part II Balance Sheets. (see the instructions for Part II.)Check if the organization used Schedule O to respond to any question in this Part II ☐

| | (A) Beginning of year | (B) End of year |
|--|-----------------------|-----------------|
| 22 Cash, savings, and investments | 47664 | 22 41747 |
| 23 Land and buildings | | 23 |
| 24 Other assets (describe in Schedule O) | | 24 |
| 25 Total assets | 47664 | 25 41747 |
| 26 Total liabilities (describe in Schedule O) | | 26 |
| 27 Net assets or fund balances (line 27 of column (B) must agree with line 21) | 47664 | 27 41747 |

Part III Statement of Program Service Accomplishments (see the instructions for Part III.)Check if the organization used Schedule O to respond to any question in this Part III ☐What is the organization's primary exempt purpose? **Representation of members (licensed teaching staff)**

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.

| | | |
|--|------------|--|
| 28 | | |
| (Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/> | 28a | |
| 29 | | |
| (Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/> | 29a | |
| 30 | | |
| (Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/> | 30a | |
| 31 Other program services (describe in Schedule O) | | |
| (Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/> | 31a | |
| 32 Total program service expenses (add lines 28a through 31a) | 32 | |

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (see the instructions for Part IV.)Check if the organization used Schedule O to respond to any question in this Part IV ☐

| (a) Name and address | (b) Title and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-.) | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
|--|--|--|---|--|
| Andy Porter 18 Preakness Ct Lake Oswego OR | President 25 | 33651 | | |
| Casey Dunn 928 SW Evans St Portland OR | Treasurer 3 | 800 | | |
| Kelly Nalty 4448 SW Nehalem St Portland OR | Vice President 3 | 600 | | |
| Rhonda Broadfoot Lake Oswego OR | Secretary 1 | 300 | | |
| Terry Shlaes 2000 NW 28th Place Portland OR | Contract Maintenance 2 | 450 | | |
| Gail Anderson Lake Oswego OR | Communications | 300 | | |
| Joel Glick 10347 SW 14th Dr Portland OR | Bargaining Chair 4 | 1250 | | |
| Jan Pearce 4951 Oakridge Rd, Lake Oswego OR | Past President 1 | 300 | | |
| Joe Godfrey Lake Oswego OR | Bargaining Team 2 | 600 | | |
| Kathy Lundeen Lake Oswego OR | Bargaining Team 2 | 600 | | |
| Gerrit Koepping Portland OR | Bargaining Team 2 | 600 | | |
| | | | | |
| | | | | |
| | | | | |

Part V Other Information (Note the statement requirements in the instructions for Part V.)Check if the organization used Schedule O to respond to any question in this Part V. ☐

Yes No

| | | | | |
|------------|---|------------|--|---|
| 33 | Did the organization engage in any activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O | 33 | | ✓ |
| 34 | Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions) | 34 | | ✓ |
| 35 | 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, explain in Schedule O 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 a section 501(c)(4), 501(c)(5), or 501(c)(6) organization 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 (see instructions)? | 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 tax year covered by this return? | 38a | | ✓ |
| b | If "Yes," complete Schedule L, Part II and enter the total amount involved | 38b | | |
| 39 | Section 501(c)(7) organizations Enter: | | | |
| 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 did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I | 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 ▶ None | | | |
| 42a | The organization's books are in care of ▶ Casey Dunn Telephone no ▶ 503-703-0891 Located at ▶ 928 SW Evans St. Portland OR ZIP + 4 ▶ 97219 | | | |
| 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 | | | |

Yes No

| | | | | |
|------------|---|------------|--|---|
| 44a | Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ | 44a | | ✓ |
| b | Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ | 44b | | ✓ |
| c | Did the organization receive any payments for indoor tanning services during the year? | 44c | | ✓ |
| d | If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O | 44d | | |

| | Yes | No |
|---|------------|-------------------------------------|
| 45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? | 45 | <input checked="" type="checkbox"/> |
| a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions) | 45a | <input checked="" type="checkbox"/> |
| 46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | 46 | <input checked="" type="checkbox"/> |

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 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI ☐

| | Yes | No |
|--|------------|-------------------------------------|
| 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II | 47 | <input checked="" type="checkbox"/> |
| 48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 48 | <input checked="" type="checkbox"/> |
| 49a Did the organization make any transfers to an exempt non-charitable related organization? | 49a | <input checked="" type="checkbox"/> |
| b If "Yes," was the related organization a section 527 organization? | 49b | <input checked="" type="checkbox"/> |

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 |
|--|--|------------------|---|--|
| None | | | | |
| | | | | |
| | | | | |
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| | | | | |

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 |
|--|---------------------|------------------|
| None | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A ☐ Yes ☒ No

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.

| | | | | | |
|---|--|----------------------|------------------------|---|--|
| Sign Here | Signature of officer <i>Casey Dunn</i> | | Date <i>12/20/2011</i> | | |
| | Type or print name and title Casey Dunn Treasurer | | | | |
| Paid Preparer Use Only | Print/Type preparer's name | Preparer's signature | Date | Check <input type="checkbox"/> if self-employed | |
| | Firm's name | Firm's EIN | | | |
| | Firm's address | Phone no | | | |
| May the IRS discuss this return with the preparer shown above? See instructions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | | | | |

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

► Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2010

**Open to Public
Inspection**

Name of the organization

Lake Oswego Education Association

Employer identification number

93-1000835

Line 10 Grants and similar

| Classification | Recipient | relationship | Address | type | date | amount |
|----------------|-------------------------------|---------------------|-------------------------------|------|-----------|--------|
| Scholarship | Anna Williams | Student in district | Lake Oswego OR 97034 | Cash | 6/5/2011 | \$1000 |
| Scholarship | Mackenzie Dean | Student in district | Lake Oswego OR 97034 | Cash | 6/5/2011 | \$1000 |
| Donation | Lake Oswego School Foundation | business | Lake Oswego OR 97034 | Cash | 1/18/2011 | \$1000 |
| Donation | Jobs with Justice | business | 6025 E Burnside, Portland, OR | Cash | 9/30/2010 | \$225 |
| Donation | NAMI of Mult County | business | 600 NE 8th Ave, Gresham OR | Cash | 9/30/2010 | \$65 |

Line 16 Other Expenses Detail

| | |
|---------------------------|------------|
| Uniserv Dues | \$1146 00 |
| Negotiations Expense | 125.77 |
| Teacher and Student Rec | 2099 72 |
| Conventions and Workshops | 830 38 |
| Supplies and Meeting Exp | 1189 79 |
| Political Action | 216.74 |
| Misc. | 240 00 |
| Total Other | \$5,848 40 |