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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
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Doing Business As

Number and street (or P O box if mail is not delivered to street address) | Room/suite
400 NORTH THIRD STREET

City or town, state or country, and ZIP + 4
HARRISBURG, PA 17101

D Employer identification number
23-0961125

E Telephone number
(717) 255-7000

G Gross receipts $ 66,970,812

F Name and address of Principal Officer
W Gerard Oleksiak Treasurer
400 North Third Street
Harrisburg, PA 17101

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 PSEA ORG

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

L Year of Formation 1852

M State of legal domicile PA

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
TO ADVOCATE FOR QUALITY PUBLIC EDUCATION AND OUR MEMBERS THROUGH COLLECTIVE ACTION

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	46
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	42
5	Total number of employees (Part V, line 2a)	5	295
6	Total number of volunteers (estimate if necessary)	6	2,700
7a	Total gross unrelated business revenue from Part VIII, line 12, column (C)	7a	126,315
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)		0
	9	Program service revenue (Part VIII, line 2g)	58,978,181	61,362,221
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	2,981,122	2,880,442
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	571,958	484,429
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	62,531,261	64,727,092
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	450,784	352,605
	14	Benefits paid to or for members (Part IX, column (A), line 4)		37,030
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	34,642,383	36,075,940
	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)	17,589,875	16,438,940
	18	Total expenses—add lines 13–17 (must equal Part IX, line 25, column (A))	52,683,042	52,904,515
	19	Revenue less expenses Subtract line 18 from line 12	9,848,219	11,822,577

			Beginning of Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	72,356,233	71,797,034
	21	Total liabilities (Part X, line 26)	43,205,490	70,546,442
	22	Net assets or fund balances Subtract line 21 from line 20	29,150,743	1,250,592

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

▶ ****** | 2010-04-08
Signature of officer | Date

▶ W GERARD OLEKSIAK TREASURER
Type or print name and title

Paid Preparer's Use Only

Preparer's signature ▶	Date	Check if self-empolyed ▶ ☐	Preparer's PTIN (See Gen Inst)
Firm's name (or yours if self-employed), address, and ZIP + 4 ▶	WTAS LLC 335 Commerce Drive - Suite 201 Fort Washington, PA 19034		EIN ▶ Phone no ▶ (215) 654-1600

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

TO ADVOCATE FOR QUALITY PUBLIC EDUCATION AND OUR MEMBERS THROUGH COLLECTIVE ACTION

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 $)

Field Services Field Operations is composed of a headquarters division and thirteen field office sites staffed by approximately 108 UniServ, UniServ Specialists, and Management professional staff, and 40 associates It provides services to approximately 191,000 members Field headquarters supports and administers member and organizational programs and events which include, but are not limited to external organizing, Educational Support Professional (ESP) Region, PSEA Retired member program, PSEA House of Delegates, ESP Region House of Delegates and Leadership Workshop, Collective Bargaining/Local Association Presidents Conference, Minority Affairs/Womens Leadership Conference and Training, and Coordination of National Events held in Pennsylvania Field services, through the UniServ and UniServ Specialist program, provides direct support and service to local associations, their leaders and members in areas which include, but are not limited to member advocacy, consultation and referral on professional and labor issues, local association advocacy through collective bargaining and contract enforcement, development and/or implementation of programs designed to maintain and increase active membership in local associations, legislative support, community/public relations, member rights and professional development, to improve and maintain the organizational health of local affiliates through leadership training and development, internal communications, business management, and conflict resolutions, to organize new local associations and affiliates, and to coordinate and advocate for NEA and PSEA programs and priorities

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

Legal Services The PSEA Legal Division is responsible for providing legal services as needed to PSEAs 191,000 members and to over 1,000 PSEA local affiliates PSEA attorneys, who are either on staff or are retained, represent locals with respect to bargaining and contract issues and represent members in all employment-related matters Each year, the attorneys collectively handle over a thousand cases In addition, the Legal Division provides counsel and advice to staff within PSEA including field staff, lobbyists, educational specialists, and financial management staff The Legal Division also provides advice and legal opinions in PSEA governance matters and is responsible for all representation of PSEA as a legal entity The Legal Division is responsible for meeting all requirements of the NEA Unified Legal Services Program, which partially reimburses PSEA for its attorneys fees in certain cases The Legal Division coordinates a number of programs for PSEA including the Educators Employment Liability program and the Associations Liability Insurance policy

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

Communications Services The Communications Division supports and promotes all Association activities, projects and programs through internal and external communications activities The division provides core services, including print and electronic publications, strategic message management, news media relations, advertising, membership materials, and leadership communications Communications writes and produces the following publications Voice, the all-member magazine, distributed to all members, 6 times a year, Connected, the all-member e-newsletter, distributed to about 119,000 members, monthly, and President To President, an e-newsletter from the PSEA President to local presidents, distributed to about 1,000 local leaders, monthly Communications also publishes other membership materials, and is responsible for arts and graphics materials for the entire organization Staff provides sophisticated, researched, data-driven internal and external programs Communications helps build and strengthen relationships with PSEA members, the public, and other members of the education and labor communities

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		No
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		No
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	Yes	
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	Yes	
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**	Yes	
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** 232			
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** 295			
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**	Yes	
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		**6b**	Yes	
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

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.

			Yes	No
1a	Enter the number of voting members of the governing body	1a 46		
b	Enter the number of voting members that are independent	1b 42		
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		No
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	Yes	
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	Yes	
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

W GERARD OLEKSIAK TREASURER
400 NORTH 3RD STREET
HARRISBURG, PA 17101
(717) 255-7000

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 . . . . ►								2,517,469	0	528,315

2 Total number of individuals (including those in 1a) who received more than $100,000 in reportable compensation from the organization ►12

			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
Killian Gephart 218 Pine Street HARRISBURG, PA 17101	LEGAL SERVICES	252,081
William K Eckel Esq 132 Gazebo Park JOHNSTOWN, PA 15901	Legal services	112,379
Spencer Gleason Hebe Rague PC 17 Central Avenue WELLSBORO, PA 16901	Legal services	188,402
STAR TOPLIN 1301 VIRGINIA DRIVE SUITE 310 FORT WASHINGTON, PA 19034	ADVERTISING	967,230
WILLIGEROD MACAVOY 2223 NORTH SECOND STREET HARRISBURG, PA 17110	ARCHITECTURAL	110,842

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					
	g	Noncash contributions included in lines 1a-1f $					
	h	**Total (Add lines 1a-1f)** . . . . ▶					
Program Service Revenue			Business Code				
	2a	MEMBERSHIP DUES & ASSESSMENT		54,856,881	54,856,881		
	b	CONFERENCES		546,000	546,000		
	c	NAT'L EDUCATION ASSOC REIMBURSEMENT		5,823,457	5,823,457		
	d	AMERICAN FED TEACHERS REIMBURSEMENT		9,568	9,568		
	e	ADVERTISING	511,190	126,315		126,315	
	f	All other program service revenue					
	g	**Total. Add lines 2a-2f** . . . . ▶ $ 61,362,221					
Other Revenue	3	Investment income (including dividends, interest other similar amounts) . . . . ▶		3,003,230			3,003,230
	4	Income from investment of tax-exempt bond proceeds . . ▶		0			
	5	Royalties		335,657			335,657
			(i) Real	(ii) Personal			
	6a	Gross Rents	32,035				
	b	Less rental expenses	50,932				
	c	Rental income or (loss)	-18,897				
	d	Net rental income or (loss) . . . . ▶		-18,897			-18,897
			(i) Securities	(ii) Other			
	7a	Gross amount from sales of assets other than inventory	2,070,000				
	b	Less cost or other basis and sales expenses	2,192,788				
	c	Gain or (loss)	-122,788				
	d	Net gain or (loss) . . . . ▶		-122,788			-122,788
	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 . . ▶		0			
	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 . . . ▶		0			
	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 . . ▶		0			
		Miscellaneous Revenue	Business Code				
	11a	LEGAL FEE RECOVERIES		109,823	109,823		
	b	STRIKE LOAN RECOVERIES		19,522	19,522		
	c	MISCELLANEOUS		38,324	38,324		
	d	All other revenue					
	e	**Total. Add lines 11a-11d** . . . . $ 167,669					
	12	**Total Revenue.** Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e . . . . . . ▶		64,727,092	61,403,575	126,315	3,197,202

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	279,867			
2	Grants and other assistance to individuals in the U S See Part IV, line 22	72,738			
3	Grants and other assistance to governments, organizations and individuals outside the U S See Part IV, lines 15 and 16	0			
4	Benefits paid to or for members	37,030			
5	Compensation of current officers, directors, trustees, and key employees	2,261,529			
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0			
7	Other salaries and wages	23,187,641			
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	2,280,357			
9	Other employee benefits	6,485,426			
10	Payroll taxes	1,860,987			
11	Fees for services (non-employees)				
a	Management	0			
b	Legal	1,172,037			
c	Accounting	151,238			
d	Lobbying	17,335			
e	Professional fundraising *See Part IV, line 17* . .	0			
f	Investment management fees	36,897			
g	Other	785,564			
12	Advertising and promotion	1,409,735			
13	Office expenses	3,061,273			
14	Information technology	516,533			
15	Royalties . .	0			
16	Occupancy	1,568,458			
17	Travel	2,440,326			
18	Payments of travel or entertainment expenses for any Federal, state or local public officials	12,973			
19	Conferences, conventions and meetings	2,604,291			
20	Interest	27,788			
21	Payments to affiliates	0			
22	Depreciation, depletion, and amortization	964,429			
23	Insurance	91,664			
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	LOCAL AFFILIATE DUES REBATES	726,027			
b	MEMBER TRAINING	300,989			
c	TEMPORARY HELP	234,498			
d	REFERENCE MATERIALS	103,933			
e	BANK FEES	68,287			
f	All other expenses	144,665			
25	**Total functional expenses.** Add lines 1 through 24f	52,904,515			
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	276,234	1	106,650
	2	Savings and temporary cash investments	21,221,536	2	20,578,825
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	1,292,260	4	1,021,084
	5	Receivables from current and former officers, directors, trustees, key employees or other related parties *Complete Part II of Schedule L*		5	142,849
	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	474,706	9	1,443,542
	10a	Land, buildings, and equipment cost basis — 10a 23,038,281			
	b	Less accumulated depreciation *Complete Part VI of Schedule D* — 10b 14,727,972	8,935,533	10c	8,310,309
	11	Investments—publicly traded securities	38,643,367	11	39,811,553
	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*	1,512,597	15	382,222
	16	**Total assets.** *Add lines 1 through 15 (must equal line 34)*	72,356,233	16	71,797,034
Liabilities	17	Accounts payable and accrued expenses	36,927,594	17	63,999,365
	18	Grants payable		18	
	19	Deferred revenue	2,039,617	19	2,160,822
	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		23	
	24	Unsecured notes and loans payable		24	
	25	Other liabilities *Complete Part X of Schedule D*	4,238,279	25	4,386,255
	26	**Total liabilities.** *Add lines 17 through 25*	43,205,490	26	70,546,442
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	29,150,743	27	1,250,592
	28	Temporarily restricted net assets		28	
	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	29,150,743	33	1,250,592
	34	Total liabilities and net assets/fund balances	72,356,233	34	71,797,034

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		

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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
PENNSYLVANIA STATE EDUCATION ASSOCIATION	23-0961125

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-

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) Filing Organization's Totals	**(b)** Affiliated Group Totals
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 $	54,856,881
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 $	2,896,252
b	Carryover from last year	2b $	
c	Total	2c $	2,896,252
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3 $	3,291,413
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 $	0

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
SUPPLEMENTAL INFORMATION		PSEA established the PSEA-PACE for State Elections political action committee (PACE) for the purpose of contributing to the campaigns of candidates for state and local offices and making independent expenditures to support candidates for state and local offices in order to elect public officials who are committed to the welfare of children, public education, and PSEA members, and to quality health care for Pennsylvania's citizens PACE is a section 527(f)(3) separate segregated fund that is subject to its own filing requirements and therefore files a separate 990 return PACE is funded by voluntary contributions from members and employees Requests for contributions include an express statement that such contributions are not tax deductible as charitable contributions for federal and state income tax purposes PSEA pays expenses related to issues based lobbying on behalf of its members, communicating with its members in support or opposition of a candidate, and PACE fundraising and administrative expenses These expenses are reported in Part III-B of Schedule C In addition, PSEA provides administrative support to PACE which is documented through an administrative services agreement

Part IV Supplemental Information

Identifier	Return Reference	Explanation

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
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

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		1,257,308		1,257,308
b Buildings		13,199,583	8,865,253	4,334,330
c Leasehold improvements		1,921,300	370,023	1,551,277
d Equipment		6,482,996	5,398,244	1,084,752
e Other		177,094	94,452	82,642
Total. Add lines 1a-1e *(Column (d) should equal Form 990, Part X, column (B), line 10(c).)* ▶				8,310,309

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
OTHER RECEIVABLES	382,222
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	
UNREMITTED NEA DUES	3,367,041
DEFERRED COMPENSATION	1,008,300
OTHER CURRENT LIABILITIES	10,914
Total. *(Column (b) should equal Form 990, Part X, col (B) line 25)* ▶	4,386,255

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	64,727,092
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	52,904,515
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	11,822,577
4	Net unrealized gains (losses) on investments	4	-1,541,958
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	-38,180,770
9	Total adjustments (net) Add lines 4 - 8	9	-39,722,728
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	-27,900,151

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	63,236,066
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains on investments	2a	-1,541,958		
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	-1,541,958
3	Subtract line **2e** from line **1**			3	64,778,024
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	-50,932		
c	Add lines **4a** and **4b**			4c	-50,932
5	Total Revenue Add lines **3** and **4c.** (This should equal Form 990, Part I, line 12)			5	64,727,092

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

1	Total expenses and losses per audited financial statements			1	52,955,447
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	50,932		
e	Add lines **2a** through **2d**			2e	50,932
3	Subtract line **2e** from line **1**			3	52,904,515
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	
5	Total expenses Add lines **3** and **4c.** (This should equal Form 990, Part I, line 18)			5	52,904,515

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
SCHEDULE D		SCHEDULE D, PART XI, LINE 8 EFFECT OF PENSION ($36,229,618) AND POST RETIREMENT ($1,951,152) RELATED CHANGES OTHER THAN NET PERIODIC COST, TOTAL = $(38,180,770) SCHEDULE D, PART XII, LINE 4B EXPENSES PAID OR INCURRED IN CONNECTION WITH THE RENTAL PROPERTY (RECLASS) $50,932 SCHEDULE D, PART XIII, LINE 2D EXPENSES PAID OR INCURRED IN CONNECTION WITH THE RENTAL PROPERTY (RECLASS) $50,932

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
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

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
Springfield Education Association49 West Leamy Avenue Springfield, PA 19064	23-2109311	501(c)(5)	6,954				Local Assistance Grant
Keystone Research Center Inc412 North Third Street Harrisburg, PA 17101	25-1776998	501(c)(3)	33,700				GENERAL SUPPORT
Open Stage of Harrisburg 223 Walnut Street Harrisburg, PA 17101	23-2290559	501(C)(3)	5,500				GENERAL SUPPORT
Education Policy and Leadership Center800 North Third Street Harrisburg, PA 17102	25-1817936	501(C)(3)	6,000				PA School Funding Campaign
Economics Pennsylvania123 North Market Street Selinsgrove, PA 17870	23-2063626	501(C)(3)	20,000				Education Program

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
Retirement & Welfare Grants	22	30,000			
Member Assistance Grants	14	28,000			
Political action committee fundraising prizes	47	11,428			
Student art contest prizes	20	1,310			
Innovative Teaching Grants	2	2,000			

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**
SCHEDULE I, PART I, LINE 2		The Association provides grants and other forms of assistance to various charities, labor organizations, and members These grant programs include, but are not limited to the following local involvement, internal organizing, crisis communications, local assistance, member assistance, retirement & welfare, and innovative teaching grants Each grant program has specific eligibility requirements that must be met prior to the awarding of the grant In addition, certain grants require supporting documentation with regard to the use of the grant funds such as providing receipts and an evaluation of the program Other forms of assistance consist of donations, contributions, and sponsorships to other non-profit entities for general support or in support of efforts committed to public education

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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
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

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 ☑ Housing allowance or residence for personal use ☑ Travel for companions ☐ Payments for business use of personal residence ☐ Tax idemnification and gross-up payments ☐ Health or social club dues or initiation fees ☐ Discretionary spending account ☐ 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 ☑ Written employment contract ☐ Independent compensation consultant ☑ Compensation survey or study ☐ Form 990 of other organizations ☑ 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**		No
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				
James Testerman	(i)	89,925	0	30,694	28,107	11,826	160,552	19,006
	(ii)	0	0	0	0	0	0	0
John Springer	(i)	154,401	0	24,444	23,002	27,517	229,364	18,218
	(ii)	0	0	0	0	0	0	0
Carolyn Dumaresq	(i)	155,383	0	23,836	4,673	20,789	204,681	20,432
	(ii)	0	0	0	0	0	0	0
George Hughes	(i)	143,073	0	19,956	20,351	20,818	204,198	0
	(ii)	0	0	0	0	0	0	0
David Wazeter	(i)	141,196	0	9,623	51,774	18,856	221,449	0
	(ii)	0	0	0	0	0	0	0
Gerard Brandon	(i)	143,073	0	23,751	20,351	19,778	206,953	0
	(ii)	0	0	0	0	0	0	0
Lynne Wilson	(i)	153,113	0	16,568	21,779	20,930	212,390	0
	(ii)	0	0	0	0	0	0	0
John Audi	(i)	101,041	0	140,291	12,624	3,892	257,848	0
	(ii)	0	0	0	0	0	0	0
Gary Smith	(i)	123,690	0	56,499	15,590	18,147	213,926	0
	(ii)	0	0	0	0	0	0	0
Eric Elliott	(i)	125,120	0	47,740	14,563	18,109	205,532	0
	(ii)	0	0	0	0	0	0	0
Wendy Rulapaugh	(i)	118,833	0	43,920	14,451	18,039	195,243	0
	(ii)	0	0	0	0	0	0	0
Carlin Wenger	(i)	140,562	0	18,452	19,994	18,840	197,848	0
	(ii)	0	0	0	0	0	0	0
	(i)							
	(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
SCHEDULE J, PART I	Compensation	Regarding travel for companions, PSEA Fiscal Policy states that "the Executive Officers (President, Vice President, and Treasurer) shall have the payment of expenses for spouse or guest attending two state Houses of Delegates and one national Representative Assembly borne by the Association An amount equal to the expenses paid for the attending spouse or guest shall be included in the Officer's taxable income " Regarding residence for personal use, PSEA Fiscal Policy states that "the Executive Officers shall each be provided the opportunity annually to elect to occupy one of the apartments owned by PSEA during the term of their office An amount equal to the annual fair market rental value of the apartment shall be included in the Officer's taxable income, if he or she elects to occupy the apartment " Two of the Executive Officers, Michael Crossey and W Gerard Oleksiak, had amounts included in their 2008 taxable income for PSEA provided apartments

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Schedule L
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

▶ Attach to Form 990 or Form 990-EZ.
▶ To be completed by organizations that answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V lines 38b or 40b.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

Part I Excess Benefit Transactions (section 501(c)(3) and section 501 (c)(4) organizations only).
To be completed by organizations that answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1 (a) Name of disqualified person	(b) Description of transaction	(c) Corrected? Yes	No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 . . . ▶ $

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . ▶ $

Part II Loans to and/or From Interested Persons
To be completed by organizations that answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a

(a) Name of interested person and purpose	(b) Loan to or from the organization? To	From	(c) Original principal amount	(d) Balance due	(e) In default? Yes	No	(f) Approved by board or committee? Yes	No	(g) Written agreement? Yes	No
W Gerard Oleksiak PERSONAL COMPUTER		X	561	550		No	Yes		Yes	
George Hughes PERSONAL COMPUTER		X	1,700	1,667		No	Yes		Yes	
Total . . . ▶ $				2,217						

Part III Grants or Assistance Benefitting Interested Persons
To be completed by organizations that answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of grant or type of assistance

Part IV Business Transactions Involving Interested Persons
To be completed by organizations that answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues? Yes	No

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
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 1a	Voting rights	Under the PSEA Constitution and Bylaws, the voting members of the Board of Directors are as follows the Executive Officers, the Region and PSEA-Retired representatives and the state representatives on the National Education Association (NEA) board of directors The non-voting members of the Board of Directors are as follows the presidents of the departments, the chairperson of the Council on Instruction and Professional Development, the president of Student PSEA, and an ethnic minority representative

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 6	Organization Members	Membership, as provided in the Constitution and bylaws, shall be available to persons actively engaged in the profession of teaching or in other educational work in Pennsylvania, to students preparing for the profession of teaching, to persons retired from educational work, and to persons interested in advancing the cause of public education

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 7a	Governing Body Election Process	PSEA is governed by its constitution and bylaws, standing rules, and such other actions as the House of Delegates and the board of directors, the two governing bodies, may take which are consistent with those governing documents The governance structure of PSEA also includes regions and local associations Local association officers and delegates to Region Houses of Delegates and the PSEA House of Delegates are elected through open nominations, by secret ballot, by majority vote, and in conformity with the one person one vote principle Each region is entitled to one representative on the board of directors for every 4,500 active members within the region, provided however that each region will have at least 2 representatives and no more than 5 representatives Each region representative on the board of directors shall be elected at an annual Region House of Delegates or by direct vote of the region membership through open nomination, by majority vote, and by secret ballot Region representatives who are elected as local delegates or by direct vote of the region membership are entitled to full delegate status at the PSEA House of Delegates, otherwise, they may vote at the House, but not with respect to dues or the election of the PSEA Executive Officers or the NEA board of directors

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 10	Form 990 Review Process	The audit committee of the Board of Directors reviews a draft of the Form 990 with management After the audit committee reviews the form 990 and prior to its filing with the taxing authority, it will be distributed electronically to all voting and non-voting members of the board of directors

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 12c	Conflict of Interest Policy Monitoring	The Association has a conflict of interest policy that covers the following individuals executive officers, officers, board members, elected or appointed individuals to an Association committee, commission, board, or task force, and employees The Association's conflict of interest policy requires executive officers, officers, board members, and employees that are members of management to review the policy and disclose any possible personal, familial, and/or business relationships that could give rise to a conflict of interest On an annual basis, these individuals will either disclose such relationships or indicate that no such relationships exist on a statement of disclosure The statements of disclosure are reviewed by members of management and selected employees If a conflict is perceived to exist, the matter involving an executive officer, officer, board member, or elected or appointed individual to an Association committee, commission, board, or task force is turned over to the chairperson of the professional rights and responsibilities commission ("commission") The commission shall select three PSEA association members to serve as an investigation committee The investigation committee will investigate the charge and incorporate its findings and conclusions into a written report which will be submitted to the commission The commission will have the final decision as to whether a conflict does in fact exist Although Association employees other than employees that are members of management do not complete an annual statement of disclosure, the executive director of the Association has the responsibility to implement and enforce the conflict of interest policy for matters involving any employees The executive director's responsibility includes determining whether a conflict exists and resolving any questions that may arise regarding the interpretation or application of any provision of the policy The executive director may also take corrective action to deal with any violations of the policy When a conflict is determined to exist, the executive director or the commission will submit a report to the individual involved stating one of the following (1) that such individual is prohibited from participating in any discussion or deliberation and decision regarding the transaction or (2) that the executive director/commission is recommending a method for eliminating the conflict The individual will have a reasonable period of time to comply with the recommendation for eliminating the conflict If the individual does not comply, then he or she may be removed or impeached from their position as provided for in the PSEA constitution and bylaws

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 15	Executive Compensation Review	Compensation for officers and key employees is set by the personnel committee and then approved by the board of directors Compensation for officers, the executive director, and program managers is documented in written employment contracts The salaries for officers and senior management team members are based on a differential from the highest bargaining unit salary The process for determining officers and key employees compensation includes a review of comparability data Comparison data from other NEA state affiliates is collected and summarized by an external consulting firm This data is then made available to the personnel committee for their consideration The deliberation process and outcome is documented in the personnel committee meeting files

Identifier	Return Reference	Explanation
Form 990, Part VI, LINE 19	DOCUMENT AVAILABILITY TO THE PUBLIC	The Association's governing documents, conflict of interest policy and financial statements are available to the public upon request

Identifier	Return Reference	Explanation
Form 990, Part VII	Compensation	PSEA's Executive Officers (President, Vice President, and Treasurer) and two region officers are on leave of absence from their school district positions while they serve as full-time officers of PSEA Part of these individuals' compensation (salaries and benefits) is paid directly by the school district and then reimbursed by PSEA and part of their compensation is paid directly by PSEA The part of their total compensation that is paid directly by the school district is not reported on Form 990, Part VII since it is not included in the Form W-2 issued by PSEA INFORMATION REGARDING "FORMER" PRESIDENT'S COMPENSATION JAMES WEAVER IS THE FORMER PSEA PRESIDENT AS WELL AS A CURRENT DIRECTOR SERVING ON THE PSEA BOARD HIS COMPENSATION IN THE CAPACITY OF FORMER PSEA PRESIDENT CONSISTS OF ACCRUED VACATION LEAVE IN THE AMOUNT OF $63,549 His compensation IN THE CAPACITY OF CURRENT DIRECTOR is $7,280

Identifier	Return Reference	Explanation
Schedule L, Part II	Loans to and/or from Interested Persons	Loans to employees for the purchase of personal computers are awarded in accordance with the PSEA Employee Computer Purchase Policy that was previously approved by the PSEA Board of Directors The maximum amount of a loan permissible under the policy is $2,000

Identifier	Return Reference	Explanation
Schedule R, Part V	Transactions with Related Organizations	Performance of services or membership or fundraising solicitations for other organizations - PSEA provides services to related organizations such as administrative and technical support, accounting and financial reporting services, information technology support and management consulting In addition, PSEA does engage in fundraising and solicitation activities for PSEA-PACE for State Elections and for the Lucy A Valero Memorial Scholarship Trust PSEA provides these services free of charge These services are documented through a management services agreement between PSEA and the related organization The management services agreements were approved by the Board of Directors and are documented in accordance with fiscal policy Sharing of facilities and equipment - PSEA shares its office space and equipment with the PSEA Health & Welfare Fund PSEA does not charge a fee for this usage Sharing of paid employees - PSEA employees spent time on activities for the PSEA Health & Welfare Fund PSEA Health & Welfare Fund reimburses PSEA for the salary and benefits of those employees who work on the PSEA Health & Welfare Fund

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
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

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
PSEA Health & Welfare Fund 400 North Third Street Harrisburg, PA17101 23-2121745	Benefits	PA	501(C)(9)	N/A	NA
PSEA-PACE for State Elections 400 North Third Street Harrisburg, PA17101 23-2116856	PAC	PA	527	N/A	NA
PSEA Retiree Benefit Trust 400 North Third Street Harrisburg, PA17101 25-6862258	Benefits	PA	501(C)(9)	N/A	NA
Lucy A Valero Memorial Scholarship Trust c/o Mellon Bank NA PO Box 185 Pittsburgh, PA152300185 23-2225710	Scholarships	PA	501(C)(3)	PF	NA
PSEA Education Foundation 400 North Third Street Harrisburg, PA17101 31-1649860	Education	PA	501(C)(3)	509(A)(2)	NA

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

Note. Complete line 1 if any entity is listed in Parts II, III or IV

			Yes	No
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		No
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	Yes	
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	Yes	
p	Reimbursement paid by other organization for expenses	1p	Yes	
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)	PSEA Health & Welfare Fund	1N	494,564
(2)	PSEA Health & Welfare Fund	1P	14,714
(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

Software ID:
Software Version:
EIN: 23-0961125
Name: PENNSYLVANIA STATE EDUCATION ASSOCIATION

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
James Testerman , President	60 0	X		X				120,619	0	39,933
Michael Crossey , Vice President	60 0	X		X				63,791	0	27,182
W Gerard Oleksiak , Treasurer	60 0	X		X				45,771	0	36,333
Bradley Siegfried , DIRECTOR	7 0	X						7,280	0	0
James Weaver , DIRECTOR/FORMER PRESIDENT	7 0	X						70,829	0	0
Dina McGee , DIRECTOR	7 0	X						7,280	0	0
Trina Smith , DIRECTOR	7 0	X						7,280	0	0
Richard Milne , DIRECTOR	7 0	X						7,280	0	0
Barbara Sipler , DIRECTOR	7 0	X						7,280	0	0
Wendy Kushner , DIRECTOR	7 0	X						5,480	0	0
Dawn Bandle , DIRECTOR	7 0	X						13,814	0	0
Norbert Paunovich , DIRECTOR	7 0	X						7,280	0	0
Lorraine Ricciuti , DIRECTOR	7 0	X						7,280	0	0
Dolores McCracken , DIRECTOR	7 0	X						7,280	0	0
Marc Howshall , DIRECTOR	7 0	X						7,280	0	0
Linda Weaver , DIRECTOR	7 0	X						7,280	0	0
James Sando , DIRECTOR	7 0	X						7,280	0	0
Donna Milner , DIRECTOR	7 0	X						7,280	0	0
Terri Majors , DIRECTOR	7 0	X						7,280	0	0
Anthony Stagno , DIRECTOR	7 0	X						7,280	0	0
Boyd Weiss , DIRECTOR	7 0	X						7,280	0	0
Glen Galante , DIRECTOR	7 0	X						7,280	0	0
Fran Gerchman , DIRECTOR	7 0	X						7,280	0	0
Mary Lou DeLuca , DIRECTOR	7 0	X						7,280	0	0
Kevin Kantz , DIRECTOR	7 0	X						2,480	0	0
Linda Cook , DIRECTOR	7 0	X						7,280	0	0
Nancy Kennedy , DIRECTOR	7 0	X						7,280	0	0
Thomas Beccone , DIRECTOR	7 0	X						7,280	0	0
Mary Wills , DIRECTOR	7 0	X						7,280	0	0
Tamzen M Butler , DIRECTOR	7 0	X						7,280	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
Susan Grimm McCoy , DIRECTOR	7 0	X						7,280	0	0
Geoffrey Taylor , DIRECTOR	7 0	X						7,280	0	0
Frederick Berestecky , DIRECTOR	7 0	X						7,280	0	0
Donald Grenaldo , DIRECTOR	7 0	X						7,280	0	0
Marylou Stefanko , DIRECTOR	7 0	X						7,280	0	0
Debra Turici , DIRECTOR	7 0	X						7,280	0	0
Regis Laughlin , Director	7 0	X						7,280	0	0
Susan Jones , Director	7 0	X						3,080	0	0
Richard Bioteau , Director	7 0	X						2,480	0	0
Richard Eberlin , Director	7 0	X						7,280	0	0
Linda White , Director	7 0	X						7,280	0	0
Susan Dillon , Director	7 0	X						7,280	0	0
Richard Askey , Director	7 0	X						7,280	0	0
Grace Bekaert , Director	7 0	X						2,480	0	0
Timothy Graham , Director	7 0	X						7,280	0	0
Valerie Brown , Director	7 0	X						7,280	0	0
John Springer , Executive Director	60 0				X			178,845	0	50,519
George Hughes , AED for Field Operations	65 0				X			163,029	0	41,169
David Wazeter , AED for Program Services	60 0				X			150,819	0	70,630
Gerard Brandon , AED for Human Resources	55 0				X			166,824	0	40,129
Lynne Wilson , General Counsel	60 0				X			169,681	0	42,709
John Audi , Staff Attorney	55 0					X		241,332	0	16,516
Gary Smith , Region Field Director	50 0					X		180,189	0	33,737
Eric Elliott , Asst Director of Research	50 0					X		172,860	0	32,672
Wendy Rulapaugh , Asst Dir of Fin Mgmt	55 0					X		162,753	0	32,490
Carlin Wenger , Field Manager	60 0					X		159,014	0	38,834
Carolyn Dumaresq , Former Executive Director							X	179,219	0	25,462

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 & ASSESSMENT		54,856,881	54,856,881		
b	CONFERENCES		546,000	546,000		
c	NAT'L EDUCATION ASSOC REIMBURSEMENT		5,823,457	5,823,457		
d	AMERICAN FED TEACHERS REIMBURSEMENT		9,568	9,568		
e	ADVERTISING	511,190	126,315		126,315	

Additional Data

Return to Form

Software ID:
Software Version:
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Name: PENNSYLVANIA STATE EDUCATION ASSOCIATION

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

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation (i) Base Compensation	(ii) Bonus & incentive compensation	(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
James Testerman	(i)	89,925	0	30,694	28,107	11,826	160,552	19,006
	(ii)	0	0	0	0	0	0	0
John Springer	(i)	154,401	0	24,444	23,002	27,517	229,364	18,218
	(ii)	0	0	0	0	0	0	0
Carolyn Dumaresq	(i)	155,383	0	23,836	4,673	20,789	204,681	20,432
	(ii)	0	0	0	0	0	0	0
George Hughes	(i)	143,073	0	19,956	20,351	20,818	204,198	0
	(ii)	0	0	0	0	0	0	0
David Wazeter	(i)	141,196	0	9,623	51,774	18,856	221,449	0
	(ii)	0	0	0	0	0	0	0
Gerard Brandon	(i)	143,073	0	23,751	20,351	19,778	206,953	0
	(ii)	0	0	0	0	0	0	0
Lynne Wilson	(i)	153,113	0	16,568	21,779	20,930	212,390	0
	(ii)	0	0	0	0	0	0	0
John Audi	(i)	101,041	0	140,291	12,624	3,892	257,848	0
	(ii)	0	0	0	0	0	0	0
Gary Smith	(i)	123,690	0	56,499	15,590	18,147	213,926	0
	(ii)	0	0	0	0	0	0	0
Eric Elliott	(i)	125,120	0	47,740	14,563	18,109	205,532	0
	(ii)	0	0	0	0	0	0	0
Wendy Rulapaugh	(i)	118,833	0	43,920	14,451	18,039	195,243	0
	(ii)	0	0	0	0	0	0	0
Carlin Wenger	(i)	140,562	0	18,452	19,994	18,840	197,848	0
	(ii)	0	0	0	0	0	0	0