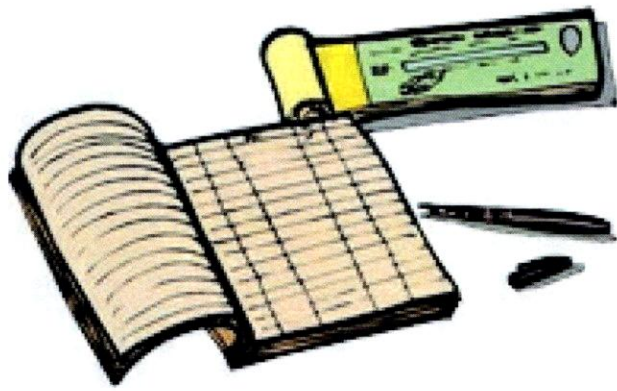


Washington State School Retirees' Association



Membership Chairs and Treasurer's Handbook
2024-2025

TABLE OF CONTENTS

Letter from the State Membership Committee Chair	3
Who Can Become a Member and Materials available from the WSSRA office	4
Membership Forms and Instructions	5
State Membership Chair and Committee Responsibilities	6
Unit Membership Chair Responsibilities	7
A Treasurer's Responsibilities	8
Monthly Deposits	9
State Committee Voucher (White Voucher)	10 - 11
Coordinating Council Voucher (Green Voucher)	12 - 13
Convention Voucher (Blue Voucher)	14 - 15
Membership Incentive Voucher	16
Materials and Supplies Invoice	17
Important Tax Information for Local Units	18
Unit Scholarship and Non-Profit Tax Codes	19
Monthly Membership Compilation	20 - 21
Membership Incentive Programs	22
Deceased Members and Non-Members – How to Report Obituary Notices	23
What Do You Get from WSSRA for \$7 a month?	24
What Do the Codes Mean?	25
Bullet Points	26
Enrolling Actives	27
Sample Speech for Enrolling Actives	28
Member Participation	29
Membership Retention	30
2024-2025 School Districts with Payroll Deduction	31
Record Retention Schedule	32

Michele Hunter
360-413-5496 Ext 1
michele@wssra.org

Available by request:

Non-Member list
Labels, by alpha or zip, all, or those without email
Datafiles sent to your newsletter mailer.
Brochures, Membership Forms, Previous Journals

To: Local Membership Chairs

From: State Membership Committee Chair

Congratulations and thank you for stepping forward to assume the responsibilities as your Unit Membership Chair. You and your committee are an important team. Did you realize that your team includes ALL members of your local Unit? Get them involved. It takes all of us working together to increase membership. If each of our members enrolled ONE member, we would have a membership of 34,000 – WOW!

The membership year starts July 1 and ends June 30. Members can join at any time during the year. Our PRIME PURPOSE is to increase membership by sharing the benefits available to ALL retired and current school employees and their spouses. Remember our organization welcomes retired and active CLASSIFIED as well as CERTIFICATED school employees and their spouses.

If you need any of the following materials, please contact the state office.

1. Membership forms.
2. Brochures and past Journals.
3. Non-Member mailing lists.
4. Mailing labels or datafiles sent electronically to your newsletter mailer.

If you need help, please contact me.

1. Have you been having trouble enrolling members, retired or active?
2. How many new members have you enrolled? Contact Michele Hunter for actual numbers of new members from Unit enrollment.
3. Are you aware of the WSSRA New Member Incentive Program and Unit Incentive Program, \$20 incentive plans per new member enrolled? (See page 22)
4. Did you know that your Unit will receive a one-time \$100 bonus for enrolling 25 (or more) new members between July 1, 2024, and June 30, 2025?
5. Are you aware that you can be reimbursed mileage for school visits (white voucher)?
6. If you have any questions about enrolling new members, please contact Michele Hunter or me (see contact information below).

This handbook is just one tool you can use to help your Unit increase membership. The other tools needed are an active committee with a plan, enthusiastic local leaders armed with membership forms so that new members can be signed up on a moment's notice, and materials from the state office. If you and your Unit work together to communicate the goals of WSSRA to retired and active school employees, folks will join!

You may contact Michele at 1-360-413-5496 ext. 1, michele@wssra.org, or Alan at alan@wssra.org.

Washington State School Retiree's Association
Dedicated to preserving, protecting, and improving
the benefits of retirees and active school personnel.

Alan Burke, Membership Chair

Who Can Become a Member?

Occasionally a member paying \$14 per month via pension deduction (dues for self and spouse) passes away. The spouse wishes to continue membership. The spouse has a choice.

1. The spouse can pay by check \$84 annually.
2. Credit/Debit card payments of \$84 annually are available on the website wssra.org.
3. If the spouse is receiving survivor benefits from DRS, he/she can sign a new membership form. The social security number of the pension account holder and the spouse need to be written on the new membership form.

We've had a couple of inquiries asking if substitute teachers can join. Any school employee or retiree can pay cash membership dues.



Materials Available from the WSSRA Office

- | | |
|---|-------------|
| 1. Membership Forms | no cost |
| 2. WSSRA Lapel Pins | \$1.50 each |
| 3. #10 Envelopes | .09 each |
| 4. Return Address Envelopes | .07 each |
| 5. Mailing Labels with Printed Addresses | .04 each |
| 6. Membership Lists (retiree, active, member, non-member, cash, or pension deduction by alphabet or by zip code) | no cost |
| 7. Coordinating Council, State Committee, Membership Incentive Vouchers (also available at wssra.org) | no cost |

We will deduct the postage from your monthly Unit deposit.

Please recommend that potential members check out our website wssra.org. Membership information and forms are available there.

Membership Forms and Instructions

RETIREEES:

We need all new pension deduction forms and/or any changes, in the WSSRA office NO LATER THAN THE 10TH OF EACH MONTH. DRS has a monthly deadline date. Any forms received after the 10th of the month may not be submitted until the following month.

Please check closely when you are sending it to the WSSRA office to be sure that ALL information is filled out.

1. Complete name with middle initial
2. Address, city, and zip code
3. Home email address
4. Social Security number (need full number)
5. Member signature and date
6. Local Unit number
7. Retirement plan (this one is missed most often)

The spouse of and the retiree may have their dues deducted from the retiree's pension with the retiree's permission. We need written authorization to deduct \$14 from one member's account to pay for both memberships. Without the above information we cannot submit the deduction to DRS. Please indicate which retiree will have the \$14 deduction.

It's easy for a member on pension deduction to change from one Unit to another. We need written documentation from the member, either by mail or email. Please have them send us their complete name, address, and which Unit they wish to change to.

ACTIVES:

"Active" members pay their dues by payroll deduction from their school district paychecks. They can also pay annually with a check or by debit/credit card on our website wssra.org.

Look at the form closely when you are sending it to the WSSRA office to be sure that ALL information is filled out. Mail ALL parts of the form to the WSSRA office. Michele Hunter will share the form with the school district.

Social Security numbers are our identification at the Department of Retirement Systems. We cannot submit a new member without it. Please assure any prospective member that we are very careful with their personal information. We shred all documents. The new member may want to call their SSN into the Lacey office instead of handing it out to others. Please have them call Michele Hunter at 360-413-5496 ext. 1. Unit Treasurers should shred forms after they are no longer needed. All membership lists and changes reports are available by email.

State Membership Chair Responsibilities

1. Communicate with committee members and local chairs.
2. Develop agendas and handouts for fall membership meeting, state committee meeting and leadership session.
3. Appoint a secretary for each meeting, proof minutes to be sent to committee, local chairs, and office coordinator for placement in upcoming Executive Board packets.
4. Submit an article for each issue of WSSRA Journal.
5. Prepare a membership report for each WSSRA Board Meeting.
6. Develop budget for membership each year.
7. Write membership report for Delegate Assembly Handbook.
8. Prepare presentation for Awards Banquet at Annual Convention.
9. Communicate with WSSRA staff and Membership Coordinator.
10. Work with committee members during the year to choose a member for a future chair.

State Membership Committee Responsibilities

1. Attend state Membership Committee meeting in the fall; state committee meeting in April; and leadership session at convention. Most meetings are available by zoom.
2. Know the Membership chairs in your district and contact information such as name, address, phone number, e-mail, Unit name and number. The WSSRA office can provide this information.
3. Maintain contact with each local Unit Membership chair through the year. If possible and practical, visit the local Units.
4. Present a membership report at each of your local Coordinating Council meetings.
5. Review the monthly membership compilation report that is sent to Unit Presidents, Unit Treasurers and Unit Membership chairs for current membership numbers for your area.

Responsibilities of Unit Membership Chairs

You as a Unit Membership chair have a great responsibility. You are the member who will help increase your local Unit Membership and consequently add money to your Unit treasury.

You are being asked to:

1. Establish a committee or work group.
2. Set clear goals for the year's membership growth.
3. Develop methods for contacting prospective members (former and non-member lists are available from the state office by request).
4. Updated addresses of former and non-members are on the membership changes report distributed monthly to Unit Membership Chairs and Treasurers.
5. Use enrollment materials – brochures, membership forms, etc. **(It is suggested that chairs fill out general information on enrollment forms.)*
6. Compile a persuasive list of reasons to join WSSRA (see page 24) and use it to convince prospective members. Legislative goals and informed brochures are available from the state office.
7. Follow through – thank you notes, phone calls, etc.
8. Attend Coordinating Council meetings. Stay connected with your District's State Membership Committee representative.
9. Be enthusiastic, informed, and pro-active.
10. ASK for help if you need it, OFFER help when you can.
11. Evaluate your program, adjust accordingly.
12. Ask the Unit Treasurer to include membership expenses in the annual budget.
13. Keep membership lists **confidential**. Remember to shred old lists.

Discuss the following ideas with your committee, your Unit, and your local board.

How do we develop methods for contacting prospective members?

1. Identify new retirees and enroll them. School board meeting minutes list those who are retiring.
2. Develop a recruiting team and go into schools. Mini grant award presentations provide access to faculty meetings.
 - a. While there, emphasize the importance of saving for retirement and protecting your pension.
 - b. Inform active employees of WSSRA's legislative agenda (particularly the Plan 2/3 portion) and advocacy commitment.
 - c. Collaborate with the superintendent to get payroll deduction in place before enrolling new actives at a school district that isn't currently set up with us for deductions (see last page of handbook).
 - d. If appropriate, invite the WSSRA Executive Director or Membership Chair to attend a faculty meeting and make a short "why join" presentation.
 - a. Recognize active members – goodie bags, classroom grants, etc.
3. Promote attendance at WSSRA-sponsored zoom pre-retirement webinars.
4. Use your monthly Membership Changes Report to send a welcome note, membership info, etc.
5. Support and maintain present members.
6. Attract new members with good programs, and a welcoming atmosphere.

A Treasurer's Responsibility

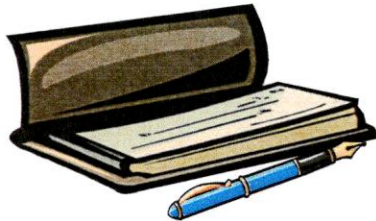
Monthly you should be:

Balancing the checkbook with deposit slips and bank statements. Show your work!



Annually you should be:

Having a three-member committee (not the Treasurer) review the checkbook, deposit slips and bank statements for the year for accuracy and certify so.



Change of Treasurer:

Prior to a new Treasurer taking over the responsibility, have a three-member committee review the books for accuracy and certify so.



MONTHLY DEPOSITS

1. **PENSION DEDUCTION FOR RETIREES:** The Department of Retirement Systems sends us a monthly deposit for all the members on pension deduction. Your Unit receives \$2 per month per member.
2. **ACTIVE SCHOOL EMPLOYEES:** School Districts send WSSRA a check each month. Units receive \$2 per member per month. Teachers on a leave of absence – we do not collect dues from them.
3. **UNIT REFUNDS:** This usually indicated dues that have been overpaid by Unit members.
4. **CASH DUES:** Dues sent directly to the WSSRA office – \$24 per member is paid to the Units – the entire year's membership.
5. **WSSRA ADDITION:** Miscellaneous transactions.
6. **MEMBERSHIP INCENTIVE:** If your Unit chooses to participate in the WSSRA Incentive program, \$20 per new member that was not a member the previous year. (\$10 per new member will be deposited for those Units that have enrolled a new member during the year and a bonus of \$100 if the Unit added 25 or more new members).
7. **CONVENTION REIMBURSEMENT:** Reimbursement for Convention expenses.
8. **COORDINATING COUNCIL MILEAGE REIMBURSEMENT:** Reimbursement for Coordinating Council Meetings to be distributed to each driver listed.
9. **WSSRA DEDUCTION FOR INVOICE:** If your Unit has ordered supplies from the office, your deduction for those supplies will be listed here. A detailed invoice will also be included with your Treasurer's packet. Can also be for a member refund of cancelled membership dues.
10. **DATE DEPOSITED:** This is the date on which our bank has been notified to direct deposit money into your account. This process can take 3 – 5 business days to complete.
11. **AMOUNT OWED TO UNIT:** Should match the amount deposited into your account.

FOR THE MONTH OF	FEB	2024				UNIT 00
DUES DEDUCTION FOR RETIREES						\$0.00
DUES ACTIVE SCHOOL EMPLOYEES						\$0.00
UNIT REFUNDS FOR OVERPAYMENTS						\$0.00
CASH DUES SENT IN WITH STATE DUES						\$0.00
TOTAL OF UNIT DUES						\$0.00
WSSRA ADDITION FOR				ADD		\$0.00
MEMBERSHIP INCENTIVE				ADD		\$0.00
CONVENTION REIMBURSEMENT				ADD		\$0.00
COORDINATING COUNCIL MILEAGE REIMBURSEMENT				ADD		\$0.00
TOTAL OF MISC ADDITIONS						\$0.00
WSSRA DEDUCTION FOR INVOICE				MINUS		\$0.00
Estimated date of deposit ?/?/2024	Amount owed to Unit					\$0.00

WASHINGTON STATE SCHOOL RETIREES' ASSOCIATION

Mailing address: PO Box 5127 Lacey WA 98509 Physical address: 4726 Pacific Avenue Lacey WA 98503
1-360-413-5496

(Instructions on reverse)

Please use the green voucher for Coordinating Council and the blue voucher for Convention.

First Name (print) _____ Last Name _____
Address _____ City _____ St. _____ Zip _____
() _____ - _____
Phone # _____ Unit # _____ Unit Name _____

Member of the:

- ☐ Executive Board
☐ District Rep. # _____
☐ Other _____
☐ State Committee (Specify) _____

☐ CHECK HERE IF CHANGE OF ADDRESS

Meeting Date _____		Reason for attending meeting _____					
Meeting attended _____		State budget (s) responsible for expense _____					
Travel Detail:	Miles	Miles x rate	Bkfst	Lunch	Dinner	Hotel	TOTAL
From:	#						
To:	#						

Meeting Date _____		Reason for attending meeting _____					
Meeting attended _____		State budget (s) responsible for expense _____					
Travel Detail:	Miles	Miles x rate	Bkfst	Lunch	Dinner	Hotel	TOTAL
From:	#						
To:	#						

Meeting Date _____		Reason for attending meeting _____					
Meeting attended _____		State budget (s) responsible for expense _____					
Travel Detail:	Miles	Miles x rate	Bkfst	Lunch	Dinner	Hotel	TOTAL
From:	#						
To:	#						

Totals							
---------------	--	--	--	--	--	--	--

Miscellaneous Expenses:

Description	Phone	Printing	Postage	Misc.	TOTAL
Totals					

TOTAL TO BE REIMBURSED

\$

LIST ADDITIONAL PARTICIPANTS FOR TRAVEL OR MEALS:

1. _____ Date _____ Committee _____
2. _____ Date _____ Committee _____
3. _____ Date _____ Committee _____
4. _____ Date _____ Committee _____

I certify that this statement, the amounts claimed, and attached receipts represent necessary expenses incurred by me while engaged in the Association's business.

Submitted By _____ Date _____

Approved By _____ Date _____

PLEASE KEEP YELLOW COPY FOR YOUR RECORDS AND SEND ONLY WHITE COPY TO WSSRA

Committee	Office use only	
Mileage		
Food		
Hotel		
Phone		
Printing		
Postage		
Misc.		
Total	\$ _____	\$ _____

WSSRA will reimburse you fully for all reasonable expenses incurred in the ordinary course of business. You will be reimbursed for actual Association business expenses only. Check with the office first if you're not sure an expenditure qualifies for reimbursement.

The requirements below reflect sound business practices and Internal Revenue regulations.

* **Submit a completed Expense Voucher to your Committee Chair for approval.**

* **Attach all receipts to back of voucher.**

* Vouchers should be submitted within thirty (30) days of the expense or sooner.

* List expenditures by date and amount in the appropriate columns. If necessary, continue on a second form.

* Expenditures for business meals and entertainment must document all of the following:

- a. Purpose
- b. Nature of event.
- c. Name and location where expense was incurred.
- d. Names of all participants.

* Identify telephone & incidental expenses in the MISCELLANEOUS column.

* Check the box that pertains to the meeting or function you attended. (Indicating which budget this expense comes out of.)

It's your obligation to ride-share whenever possible. If members who live in the same vicinity need to drive alone, please indicate why.

FOR ADDITIONAL INFORMATION REFER TO "TRAVEL REIMBURSEMENT PROCEDURAL INFORMATION" IN THE WSSRA HANDBOOK.

PLEASE KEEP YELLOW COPY FOR YOUR RECORDS AND SEND ONLY WHITE COPY TO WSSRA

WASHINGTON STATE SCHOOL RETIREES' ASSOCIATIONMailing address: PO Box 5127 Lacey WA 98509 Physical address: 4726 Pacific Avenue Lacey WA 98503
1-360-413-5496**COORDINATING COUNCIL (Area _____)**

UNIT # _____ UNIT NAME _____ Meeting Date _____

The driver and all passengers must be listed for each car to be eligible for reimbursement!

CAR #1	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #2	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #3	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #4	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #5	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

TOTAL TO BE REIMBURSED

\$

OF PARTICIPANTS _____ CARS ALLOWED _____

I, the President of our local Unit certify that this statement represents expenses incurred by Unit members engaged in the Association's business. I am also aware that the check will be mailed to the Unit Treasurer.

Office use only

CC 303-_____ \$ _____

Approved by: _____
CC Chair/Unit President/District Representative Date

(Instructions on reverse)

Submit all copies to WSSRA. The pink will be returned with your reimbursement check.

INSTRUCTIONS

COORDINATING COUNCILS:

Round trip mileage from each local Unit to attend up to three meetings of the Coordinating councils per year. Checks will be sent to the local Unit for distribution among whomever and however many drivers were locally authorized to provide the transportation.

Vouchers must be approved by CC Chair, Unit President or by the District Representative.

Chairs please use white voucher to submit claims for postage, office supplies, meeting room rent (where complimentary meeting room is not available), meals for Coordinating Council Officers (not covered by other budgets).

NOTE: Local Units often cover the meal expenses of their respective participants. Some meetings do not incur meal expenses.

REIMBURSEMENT FOR CARS/PARTICIPANTS:

As a co-sharing of travel costs, reimbursement for round trip mileage is authorized for reimbursement at two or more to a car.

WASHINGTON STATE SCHOOL RETIREES' ASSOCIATION
Mailing address: PO Box 5127 Lacey WA 98509 Physical address: 4726 Pacific Avenue Lacey WA 98503
1-360-413-5496

CONVENTION VOUCHER

UNIT # _____ UNIT NAME _____ Convention Dates _____

Instructions on reverse) The driver and all passengers must be listed for each car.

CAR #1	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #2	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #3	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #4	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

CAR #5	Travel Detail:	# Miles	Miles x rate = \$	Parking	Ferry	Amount due
From:						
To:						
DRIVER:		3.			5.	
2.		4.			6.	

OF PARTICIPANTS _____ CARS ALLOWED _____

BREAK-OUT SESSION ONLY

Hotel for registered convention attendees that can only attend the last day of Convention for the break-out sessions. may be reimbursed for one night of lodging. based on double occupancy. for those persons traveling more than 150 miles each way. Both names must be listed with receipt for reimbursement.

Room #1 Name _____ Name _____
Room #2 Name _____ Name _____

TOTAL TO BE REIMBURSED\$ _____

I, the President/Treasurer of our local unit certify that this statement represents expenses incurred by unit members engaged in the Association's business. I am also aware that the check will be sent to the Unit Treasurer.

Unit President/Treasurer

(submitted by)

Unit #

Date

WSSRA CONVENTION REIMBURSEMENT DIRECTIONS

**The ABSOLUTE deadline for Convention vouchers is June 21.
WSSRA must have all vouchers from this fiscal year paid by June 30.**

The Unit President or Treasurer is responsible for submitting the blue voucher for reimbursement. All drivers and riders must be listed in the spaces provided.

As a co-sharing of travel costs, reimbursement for round trip mileage is authorized for reimbursement at two or more to a car.

Vouchers must be submitted by Unit Presidents/Treasurer with the claimant being the local Unit. Checks will be sent to the Unit Treasurer. (Local Units may distribute these reimbursements among drivers which were authorized by Local Units to provide the needed transportation.)

These members should not be listed on this voucher unless they are listed as carpool drivers or riders and are not submitting any other voucher for carpool reimbursement.

Expenses for the following are paid by WSSRA:

State Officers
District Representatives
WSSRA Historian
State (not Unit) Committee Chairs
Working Committee members (Awards, Nominating & Review, Rules & Resolutions)
WSSRA staff members

Each WSSRA Past-president will have registration and meals paid by WSSRA if s/he chooses to vote as a WSSRA Past-president.

BREAK-OUT SESSION ONLY

Hotel accommodations for registered convention attendees that can only attend the last day of Convention for the break-out sessions, may be reimbursed for one night of lodging, based on double occupancy, for those persons who travel more than 150 miles each way.

Submit all copies to WSSRA. The pink copy will be returned with your reimbursement.

Membership Cash Event Reimbursement Voucher

Not having this voucher sent in with the completed membership forms may result in a delay of reimbursement.

Event Information

Date of visit	School or Event	Number of New Members

Names of New Members Only (Number of names must match reimbursement requested)

NEW MEMBER NAME	\$20 GIFT CARD	\$20 CASH AMOUNT

Name of unit or individual to be reimbursed _____

Phone () _____

Address _____ City _____ WA Zip Code _____

Submitted by _____ Date _____

Office Approval by _____ Date _____ Amount \$ _____

Washington State School Retirees' Association
PO Box 5127
Lacey, WA 98509

INVOICE

TO: Unit Treasurer
UNIT: _____
DATE: _____
REQUESTED BY: _____

Item		Price		Quantity	Cost
Envelopes	Regular with State Logo	.09	each	0	\$ -
	#9 Return with Address	.07	each	0	\$ -
	6 x 9 Brown Kraft	.11	each	0	\$ -
	9 x 12 Brown Kraft	.22	each	0	\$ -
	10 x 13 Brown Kraft	.42	each	0	\$ -
	#94 envelope for posters	.50	each	0	\$ -
	Boxes for posters	1.02	each	0	\$ -

Labels	Labels with Printed Address	.04	each	0	\$ -
	Water bottle labels	.04	each	0	\$ -

Copies	copies	.07	each	0	\$ -
	Letterhead	.05	each	0	\$ -

Miscellaneous	Pocket Folders	.98	each	0	\$ -
	Name Tents	.23	each	0	\$ -
	Membership Pins	1.50	each	0	\$ -

Postage	Metered Postage	Meter Total			
---------	-----------------	-------------	--	--	--

Auto deduct	THIS INVOICE HAS BEEN DEDUCTED	YES	NO
	FROM YOUR MONTHLY DEPOSIT	x	

Other Charges					
Description					

Total Due Upon Receipt **\$ -**

IMPORTANT TAX INFORMATION FOR LOCAL UNIT

ANNUAL FILINGS:

1. **STATE--**SECRETARY OF STATE ANNUAL FILING- (filed by Unit Treasurer annually) - New Treasurers need to log in to the website to make sure your Unit is up to date and so you know what month you need to file.
<https://www.sos.wa.gov/assets/corps/2.2022---24.03a-annual-report-form---np.pdf> you will need your UBI#. Annual filing fee \$20.00
2. **FEDERAL--**(The WSSRA currently files the 990 e-postcard for most of the Units.)
 - A. **IRS E-POSTCARD--**annual IRS 990 E-postcard before November 15th. If your Unit's annual gross receipts are \$25,000 or more, you will need to file a 990 tax complete tax form (Units under the \$25,000 file 990 E- postcard). Failure to comply will result in the loss of non-profit status.
There is no paper form you will need to file electronically. If you choose to file your Units E-postcard you must first register in order to receive a password.
 - ▶ Employer identification number (EIN) also known as the Taxpayer Identification Number (TIN)
 - ▶ Tax year
 - ▶ Legal name and mailing address
 - ▶ Any other names the organization uses
 - ▶ Name and address of Treasurer
 - ▶ Website address if the organization has one
 - ▶ Confirmation that the organization's annual gross receipts are normally \$25,000 or less
 - ▶ If applicable, a statement that the organization has terminated or is terminating (going out of business)
 - B. **1099-NEC AND 1098 FORMS:** For stipends or monthly payments for any paid position.
ORDER THE 1099-NEC AND 1098 FORMS FROM THE IRS WEBSITE-- Order a couple of months before the January deadline. <https://apps.irs.gov/app/taxmat/information-employer-returns/>
A nonprofit organization is required to issue 1099-NEC to anyone that you pay \$600 or more during the year to non-employees for services. You are not required to file for services provided by a corporation such as Office Depot, only individuals and small companies. If you hire a small business to create your newsletter then you will need to provide them with a 1099-NEC. To get the filing information from the employee or contracted company print this W-9 form for them to fill out. <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
Or If you have PAYROLL W-2 forms: Due Jan 31st. (Payroll is always a calendar year reporting)
W-2 If you have an employee, you need to file a W-2 (or a 1099-NEC if you are not paying the payroll taxes). For stipends or monthly payments for any paid position.

NAME CHANGE- State and Federal

Secretary of State-- <https://www.sos.wa.gov/corporations-charities/business-entities/download-forms-online-filing-instructions> When you log into the website to file your annual report, you can update your name. You will then need to update your Articles of Incorporation.

IRS--Internal Revenue Service name change link - <https://www.irs.gov/charities-non-profits/charitable-organizations/change-of-name-exempt-organizations>

1. The letter or fax reporting the change of name must include your organization's:
 - full name (both the prior name and the new name)
 - Employer Identification Number and
 - authorized signature (an officer or trustee) The individual signing the letter must state the capacity in which he or she is signing (for example, "John Smith, President").
2. A copy of the amendment to the Articles of Incorporation submitted to Secretary of State.

Please contact Debbie Burgess at
Debbie@wssra.org at WSSRA with
questions about IRS tax requirements or
State/Federal annual filings.

IMPORTANT NOTES:

Non-profit status with the IRS-- 501(c)(4) or 501(c)(3)

The main difference between the two types of non-profits is the deductibility of the donations by the donors.

A 501(c)(3) is a public charity and the donations to such an organization are tax deductible to the donors. Donations to a 501(c)(4) are not tax deductible to the donor so there may be more incentive for donors to contribute to an organization that is a 501(c)(3).

501(c)(4) an educational, social and a fraternal organization:

Most units are 501(c)(4) due to the fact that state and local Unit dues are not tax deductible, and they have limited legislative activity. Units can give scholarships and grants--IRS does have more scrutiny with scholarships. Please lookup the IRS guidelines for scholarships on the IRS website. The IRS watches to make sure you have a set of rules and guidelines for a fair process to award the scholarships. If a 501(c)(4) organization receives donations for a scholarship from members this would not be considered unrelated income. **However, the money cannot be co-mingled with dues money.** The money can only be used for the intent indicated on the donation.

If a 501(c)(4) receives unrelated income (if the money was not within the purpose in your Constitution and Bylaws.) You are required to file the IRS form 990T and pay taxes on it. An example of unrelated income would be income from advertisement in your newsletter.

501(c)(3) a public charity: 501(c)(3) are commonly referred to as charitable organizations

The donations to such an organization are tax deductible to the donors. WSSRA Dues are not tax deductible. If your Unit collects additional income for scholarships that you want donors to secure a tax deduction you would need to complete the 501(c)(3) organization application. Some Units do apply for both. If the Units are planning on requesting donations for scholarships or if a person gives a donation or bequest, then the money needs to be tracked and the intent of the donation(s) must be followed.

Make sure you apply as a public foundation and not a private foundation. Private foundations are also required to pay excise tax on any investment income earned.

Unit scholarship questions--501(c)(4) or 501(c)(3) Inquiry about whether being organized as a 501(c)(4) versus a 501(c)(3) has any consequence to a non-profit organization when it comes to distributing scholarships and grants to current or future educators.

Facts: The WSSRA has several local Units that it oversees, some of which are 501(c)(3) and others are 501(c)(4). These local Units receive funds in the form of grants and donations with the purpose of redistributing those funds as scholarships and grants to current and future educators.

Issue: Does being organized as one form of non-profit over the other have either a positive or negative affect on the ability of the organization to carry out its mission? Are there any limits on how much either of these types of organizations can choose to award as either a scholarship or grant?

Conclusion:

So long as the local Units are operating within **the boundaries of their mission and the IRS regulations**, as well as respecting any limitations imposed by the donors of the funds they receive, it would not matter if they were organized as a 501(c)(3) or 501(c)(4) for the purpose of distributing grants or scholarships. In any case, **Units that receive scholarship donations must follow sound accounting principles by maintaining separate records for funds that are given specifically for scholarships from those that come from dues.** Scholarship monies should be earmarked specifically for the intended purpose and not co-mingled with general operating funds.

MEMBERSHIP COMPILATION

05/01/2024

Unit	Cash	ADD	Lifetime Honorary	Actives	Total	Last Month	Last Year	Retirees pending	Actives pending	Actives on Leave	Free 6 months	Deceased last month	Need SSN to continue	Request off last month	Current Emails at State Level
01 CLARKSTON/ASOTIN/POMEROY	12	169		149	330	332	335			1		2			159
02 CHELAN DOUGLAS	41	415	1	362	819	822	801			5		3			405
03 CLALLAM CO	33	171		17	221	223	231					1			174
04 COLUMBIA BASIN	32	239		190	461	464	465		25			2		1	263
05 GH / PACIFIC	25	147	1	52	225	223	205					1			97
06 SOUTHWEST KING	30	484	1	142	657	660	683	2		8		1			145
07 JEFFERSON CO	12	87			99	99	97								53
08 KITSAP CO	51	292		2	345	345	337	1				1			180
09 KITTITAS CO	14	182		44	240	238	248								63
10 COLUMBIA GORGE	16	38		2	56	60	52								41
11 LEWIS CO	23	301	2	77	403	404	380		1	1		2			132
12 LOWER COLUMBIA	25	301		42	368	370	377					1			110
14 MASON CO	18	106	1	47	172	170	172			1		1			80
15 OKANOGAN CO	21	213	2	101	337	336	325		1			1			136
16 EAST KING	57	344	1	3	405	406	414	1	1			3		1	201
18 PEND OREILLE CO	4	34		9	47	47	49								25
19 SOUTHEAST KING	60	296	2	3	361	363	363					1			198
20 SEATTLE	80	738	2	39	859	860	875			2	2	2		3	279
21 SKAGIT-ISLAND-SJ	56	456	3	67	582	582	586					1			271
22 SNO-ISLE	109	741	2	135	987	984	996					1			539
23 SNO-KING	98	948	4	320	1370	1366	1386			7		5			1013
25 SPOKANE AREA	127	771	3	53	954	959	993					3			381
27 PIERCE CO	161	795	3	202	1161	1159	1158	1	4	6		7			619
28 THURSTON CO	100	536	7	336	979	974	988		38	3	26				636
29 BENTON/FRANKLIN	103	604	5	135	847	842	854	1	11	5		2		1	488
30 SW WASHINGTON	70	367	2	76	515	499	493		1	2		2			219
31 WALLA WALLA/COL	36	381		169	586	587	598	1	5	1	9				323
32 WHATCOM CO	41	575	2	111	729	735	766	2		1		2			229
33 WHITMAN CO	11	113	1	18	143	143	142								69
34 YAKIMA	55	944		491	1490	1493	1514		10	3		5			492
36 MEMBERS AT LARGE	6	192	1		199	203	224					4			20
TOTAL	1527	11980	46	3394	16947	16948	17107	9	97	46	37	54	0	6	8040

POTENTIAL RETIREE MEMBERSHIP 56,113 (PERS 1, 2, 3, TRS 1, 2, 3, SERS 2, 3)

Pending = New members signed up who have not yet made first pension or payroll payment

MEMBERSHIP REPORT
MICHELE HUNTER, MEMBERSHIP COORDINATOR

MAY 1, 2024

MEMBERSHIP COMPARISON MONTH TO MONTH

MAY 1, 2024		APRIL 1, 2024	
CASH MEMBERS	1527	CASH MEMBERS	1517
ACTIVES	3394	ACTIVES	3363
ADD MEMBERS	11980	ADD MEMBERS	12022
HON/LIFE MEMBERS	-46	HON/LIFE MEMBERS	-46
	16947		16948

Members lost in one month = -1

MEMBERSHIP COMPARISON YEAR TO YEAR

MAY 1, 2024		MAY 1, 2023	
CASH MEMBERS	1527	CASH MEMBERS	1459
ACTIVES	3394	ACTIVES	3522
ADD MEMBERS	11980	ADD MEMBERS	12078
HON/LIFE MEMBERS	-46	HON/LIFE MEMBERS	-48
	16947		17107

Members lost in one year = -160

ESTIMATED POTENTIAL RETIREE MEMBERSHIP = 56113

(PERS 1, 2, TRS 1, 2, 3, SERS 2, 3)

Honorary Members are shown as a negative number. They count in the Unit and Association total of members, but no dues are received from these individuals.

WSSRA Membership Incentive Program 2024-2025

WSSRA and Unit membership building incentive programs beginning July 1, 2024, to June 30, 2025

WSSRA and local Units have developed the following membership incentive programs:

1. WSSRA New Member Incentive Program:

Units may choose between a \$20 Starbucks gift card or a cash incentive of \$20 for new members.

- Starbuck cards may be obtained from WSSRA.
- Units must front the \$20 cash.
- The cost of the Starbucks card will be deducted from the monthly deposit.
- Reimbursement will be made upon verification of the new membership form and reimbursement voucher.

2. Unit Incentive Program:

- \$10 rebate to each Unit for a new member (with at least a one-year lapse) and reimbursement will be made at the end of the current year.
- \$100 bonus for each Unit that obtains 25 or more new members.
- This is the same WSSRA sponsored program that has been available for several years.



OBITUARY NOTICES

It is very helpful to have one person in each Unit who sends obits and death notices to the WSSRA Membership Coordinator. This can be the Treasurer, Membership Chair, the "sunshine person" – anyone who has the time and interest. It may be a good way to involve a member who is homebound and looking for a way to participate.

PLEASE SEND THE FOLLOWING INFORMATION, IF POSSIBLE, TO THIS OFFICE:

1. Complete name, including middle initial
2. Last known city where they lived and taught

**BE AS COMPLETE
AS POSSIBLE**

The individual may not have been a member of your Unit, but he/she may be in another Unit or may have been a member at one time. We need to remove all deceased from our database to prevent mailings to deceased persons.

It is going to be hard to get all the names of our deceased retirees, but if all Units and Committee members would be alert, we can honor those at our annual necrology program at Convention.

Will appreciate your assistance.

Deceased lists are sent out
via email or US mail in the
first week of each month.



What do you get from WSSRA for \$7 a month?

Year-around efforts to protect and enhance pensions for all school employees by:

- **An Executive Director** who lobbies on the Hill, attends monthly pension meetings, and acts as a spokesperson for WSSRA
- **A Legislative Director** who knows our pensions inside and out and writes legislative news for members
- **Two contract lobbyists** who work on WSSRA's issues
- **The WSSRA Legislative Committee** who frequently meet with legislators in the House and the Senate to present WSSRA's viewpoints on pension and related issues
- **A state-wide legislative communication plan** to notify members to contact legislators
- **A magazine, The JOURNAL, and e-mail Legislative Updates**, which are also available online at www.wssra.org

Additional benefits include:

- **State Scholarships** for high school seniors pursuing a career in education
- **Student Teacher/Intern Scholarship** for college seniors participating in student teaching
- **Unit Scholarships** for college-age students
- **Mini-Grants** to enhance school programs
- **Local newsletters**
- **CommUnity service projects**
- **Retirement Seminars for all school employees**
- **Membership benefits through AMBA** including insurance (vision, dental, cancer, long term care, life, emergency evacuation), and reductions on travel.

Washington State School Retirees' Association's goal is to maintain and improve pension benefits for all school retirees. No one else cares! It is the responsibility of all school employees and retirees to speak up. Join **WSSRA** today. Have a voice in the future. The cost of \$7 monthly – is a wise investment.

Join WSSRA today! It is worth \$7 a month.

WASHINGTON STATE SCHOOL RETIREES' ASSOCIATION

Mailing address: PO Box 5127, Lacey, WA 98509
Physical address: 4726 Pacific Ave SE, Lacey, WA 98503
(360) 413-5496 – www.wssra.org

WHAT DO THE CODES MEAN?

Membership Status Codes ~ (usually listed in red on reports)

UU	Has never been a member of WSSRA
00	Former members now unpaid
D	Pending DRS retirees awaiting first payment
DD	Now on DRS
DU	Former DRS now unpaid
T	Pending active awaiting first payment
TE	Now active member on school district reports
TEL	Active member now on leave from school district
TU	Former active now unpaid
A##	Former cash member for ## last two-digit year (A24 = 2024)
C##	Current cash member
AR##	Auto-renewal member that paid by credit card on the website
HM	Honorary member

Membership Change Codes ~

ACT	Active member (payroll deduction)
ADD	New address (can be a member or non-member)
BTW	Was on leave of absence now back to work
CASH	Cash member (new)
DELQ	Delinquent cash member
DRS	Now on DRS (pension deduction)
FORM	Needs a new form filled out to continue membership, letter has been sent
LOA	On leave of absence
NC	Name change
NR	New retiree not a member
PEND	New Member submitted to DRS or school district awaiting payment
RES	Resigned/left district
RET	Active member that retired from school district and submitted to DRS
RNEW	Cash Renewal
RQ	Requested off/Cancelled membership
SSN	Need full social security number to submit to DRS, letter has been sent
SUPT	Superintendent
WA	Wrong address

When an individual joins please pass the name along to your membership chair, newsletter editor, sunshine person, calling committee . . . whomever so that the new member can be welcomed. Please do not leave a new member hanging thinking that all we are interested in is his/her dues.

CAUTION – NON-MEMBER ADDRESSES MAY BE INCORRECT. Check www.zabasearch.com for correct listings.

Bullet Points

Use these ideas when talking to prospective members.

*WSSRA is 77 years old, the largest organization in the state working for the improvement of pensions for all school employees – over 17,000 members.

*We have an Executive Director, a legislative director, paid lobbyists, a well-informed volunteer Legislative Committee, and an excellent staff. WSSRA is the support for retired school employee benefit issues.

*WSSRA cooperates with retiree political coalitions. There should be no competition, just cooperation as we work toward common goals.

*Our office is in Lacey, close to the capitol campus so that our staff members and volunteers can be there every day the Legislature is in session. We are organized, professional, visible, and tireless in our efforts.

*Anytime information is needed, call the WSSRA office at 1-360-413-5496 or check the website, www.wssra.org.

*Historically, WSSRA has made gains over the years due to persistence, a professional approach, hard work, active, informed volunteers. No one simply hands you benefits.

1. \$1000 minimum monthly pension benefit expanded and improved to over \$2000.
2. Representation at the committee which oversees our pensions – Select Committee on Pension Policy.
3. Subsidy to the Medicare-eligible retirees which reduces PEBB premium rates. The current subsidy is \$183 per month. WSSRA is fighting to preserve and expand this non-contractual benefit.
4. Secure retirement for current Plan 2 & 3 that are age 62 with 30 years of service, with a goal to reduce the full retirement age to 60.
5. WSSRA is working to further enhance early retirement benefits.
6. In 2018, 2020, 2022, 2023, and 2024 secured a COLA for Plan 1 retirees.
7. In 2023 WSSRA worked with legislators to secure a \$250 million dollar pay down of TRS 1 unfunded liability.

WSSRA also offers many benefits to its members.

1. Classroom grants for active teachers and paraprofessionals.
2. Scholarships for those going into education and for student teachers.
3. Retirement workshops.
4. Professionally prepared magazine, The Journal, loaded with information and published five times per year.
5. Member Only Benefits from Association Member Benefits Advisors (AMBA) -Dental and Vision Plans, Medicare Solutions, Tax-Deferred Asset Protection, Long-Term Care, Cancer, Heart, Stroke, and Accident Insurance, Whole Life, Hospital Indemnity, Start Hearing, Inc., Connect America Medical Alert Service, and many more discounts.

Enrolling Actives

Here is a Plan. Use it, adjust, adapt, just do!

1. Choose a place to start. Select a school district with which you have some comfort, has payroll deduction in place and hopefully one where your Unit is known because you give grants.
2. Contact the Superintendent for permission to go into school. You can do this by phone and then by mail if necessary. Sometimes you can be asked to attend the principal's meeting and meet everyone at once. Alternatively team with the Unit's mini grant chair to join her or him when grants are presented at faculty meetings.
3. Make a list of the schools you want to contact, the principal's name, the secretary's name, school phone number. Keep it with you and at odd times when you have a moment, make a call. Keep track of your calls, messages, etc.
4. Call or email 3 or 4 schools, get those scheduled, and then continue down your list. Ask to be first on the agenda, if possible, 10 min max for speaking.
5. Prepare materials for your presentation – brochure, membership forms, and a thank you note for the principal. Practice your speech.
6. Consider inviting the WSSRA Executive Director or state Membership Chair to join you in the faculty solicitation.
7. Find a helper to accompany you – hopefully, a friendly face at that school. Take a treat – cookies, bottled water, candy, pens, post-it notes, your choice. Your “helper” circulates with these as you talk.
8. If it has been a while since scheduling, call the school a day or so ahead to make sure that you are still on the agenda. Plans change!
9. Arrive a little early, professional looking and acting, upbeat. Keep your presentation short. Time is precious. Compliment them about the job they are doing. Ask if you can stay until the end of the meeting and then collect all your materials so that no mess is left.
10. At home, make a list of all those who enrolled. Send them a thank you note. Keep track of that list and work with your Unit Treasurer and the WSSRA office to make sure that all those that you enrolled clear the process.
- 11. Mail all membership forms to Michele Hunter at the Lacey office. Do not take your forms to the school office.**
12. When finished, send the superintendent a thank you and a membership form if he/she is not a member.

Procedure for Enrolling Actives

1. Participate in an all-district function such as a Benefits Fair.
2. Meet and get to know the Superintendent IN THAT SETTING and enroll him/her there and then if not already enrolled. See the superintendent list for your area (from Lacey office).
3. After establishing a good rapport, ask to present WSSRA at an upcoming principal's meeting.
4. Principals will hopefully see the sense of joining us without delay.
5. Ask principals for permission to call later to schedule a WSSRA presentation to their staff.
6. Do this also with Classified leaders and staff.

Sample Speech for Enrolling Actives

Greetings:

My name is _____, and my friend is _____. We are from the Washington State School Retirees' Association, usually referred to as WSSRA. Thank you for allowing us the chance to visit with you today and thanks to your principal _____ for putting time on the agenda.

We know the importance of your time and its value. We will not take more than 10 minutes to share with you.

Our purpose is to tell you about WSSRA and to invite you to join by payroll authorization or cash. Membership forms are on your tables.

WSSRA is the largest organization in the state working for all school employees, active or retired, and has over 17,000 members. Our Vision is to provide leadership and promote action relevant to all retired and active school personnel, both classified and certificated. Our mission is to represent all present and future Washington State School Retirees, both educationally and professionally.

You ask why I should join. "I'm working." True you are working, and we wish you joy, pleasure, excitement, and love in your chosen profession. Please consider the following information.

- ✗ WSSRA members are proactive individuals and affect the lives of present and future school personnel.
- ✗ WSSRA has staff members and a well-organized, volunteer legislative committee, respected by legislators, working to improve benefits.
- ✗ WSSRA's concerns about retirees' and actives' retirement income and benefits include purchasing power, COLAs, earlier retirement age for Plan 2 and 3 members, health care issues, representation on the Select Commission for Pension Policy and other issues.
- ✗ Many local Units give monetary grants to use with students; scholarships for students interested in working in the educational setting, and student teacher scholarships.
- ✗ Local Units sponsor retirement seminars, and the Lacey office sponsors statewide virtual retirement webinars.
- ✗ Some of you on Plans 2 or 3 might choose to stop working before retirement age and if you elect to receive your pension, you will shoulder the burden of a reduced pension. Do you have a tax-shelter and/or a ROTH IRA or SOMETHING for your future? Start now. It is never too early, and most certainly can be TOO LATE.
- ✗ Why join? To be proactive, have your voice heard in Olympia, affect results on relevant issues that affect you as an employee and later as a retiree, to be informed about issues of WSSRA through our publication, The Journal, to have ownership of actions and association with colleagues committed to service that affects the future.
- ✗ WSSRA membership is \$84 a year, \$7 a month, .23 cents a day by payroll deduction or cash. That is a wise investment in your future.

Thank you for your time. We will be in the back of the room after the meeting to gather membership forms and visit if you wish.

MEMBER PARTICIPATION

All members have certain expectations or needs when they join your local Unit. Special attention should be given to these needs as the Unit plans their activities. If a member feels welcome and feels their needs are being met, they will want to continue their active membership. They will, in turn, help with the enrollment of new members because of their enjoyable experience. Within your local Unit, use the ideas below for discussions on building and strengthening your membership.

INCREASING MEMBER PARTICIPATION

Working hard to involve all members requires Unit leaders to willingly share their fun and enjoyment they get from being involved. All members are important and should be valued.

- Mail or email reminders to members about upcoming meetings and other Unit events.
- Personally ask each member to participate in one Unit meeting/activity or serve on a Unit committee each year; sharing talents, leading the pledges.
- Provide a Unit newsletter for your membership.
- Provide greeters for meetings, use name tags, and print or display meeting agendas.

RECOGNIZING MEMBERS

All members will help at some time with local Unit activities, programs, invocations, pledges, snacks, greeters, committee activities, etc. Make sure these contributions are recognized and appreciated.

- Honor contributing members with appropriate Unit awards, introductions, etc.
- Recognize significant contributions of individuals (Officers, Committee Chairs, Leaders of Special Events/Service Project planners) with special certificates.
- Send thank you notes to those who have spent their time and energy making the local Unit a successful Unit. Include a few examples of how their efforts benefited the Unit.
- Make your entire membership feel special.

Dos of Membership

1. Do look for members everywhere – next door, at church, other group events.
2. Do keep brochures and membership forms handy in your purse, glove box.
3. Do remember that people often join for social reasons.
4. Do use the TNT approach – Telephone and Transportation – plus e-mail.
5. Do seek quality members as well as quantity.
6. Do be aware that time is precious – make programs count.
7. Do make a new member feel as though you really want THEM.
8. Do be attentive to new members – name tags, introductions, interest in their hobbies.
9. Do educate new members about WSSRA.
10. Do get the new person involved quickly.
11. Do communicate – send a welcome letter or welcome packet.
12. Do think about someone who is absent – ill, busy, neglected – find out, and contact them.
13. Do publicize your activities in a newsletter, the paper, or website.

MEMBERSHIP RETENTION

Too often, groups focus on group enrollment without taking the time to work with new members and getting them acclimated into the group. The following are some suggestions to help increase membership retention efforts.

- ✚ LEARN THE NAMES OF THE MEMBERS AND USE THEM!
(Not only in meetings, but make friends outside meetings)
- ✚ GET TO KNOW EACH OTHER
(The more you get to know each other, the more likely the group will work better together.)
- ✚ BE POSITIVE AND SMILE!
- ✚ TAKE THE TIME TO MEET WITH EVERY MEMBER ON A REGULAR BASIS
(Let them know you value them and ask how they think the group is operating.)
- ✚ SPEND EXTRA TIME WITH NEW MEMBERS
(Let them know how they can get involved in the club. A little attention now will pay off big later!)
- ✚ ASSIGN TASKS TO EVERYONE – ESPECIALLY DURING PLANNING STAGES
(People are more likely to support what they help create.)
- ✚ ASK FOR MEMBERS' OPINIONS
- ✚ PRAISE YOUR MEMBERS
- ✚ ORGANIZE A FUN GET TOGETHER!
- ✚ LEARN MEMBERS' TALENTS AND PUT THEM TO USE
- ✚ BE OPEN AND HONEST
- ✚ SURPRISE MEMBERS WITH A SPECIAL THANK YOU GIFT
- ✚ PLAN AND COORDINATE EFFECTIVE MEETINGS
- ✚ SAY THANK YOU

2024-2025 CURRENT SCHOOL DISTRICTS WITH PAYROLL AUTHORIZATION

01-110	POMEROY	11-014	NAPAVINE	22-004	LAKE STEVENS	29-001	PASCO
01-250	CLARKSTON	11-206	MOSSYROCK	22-006	MUKILTEO	29-017	KENNEWICK
01-420	ASOTIN-ANATONE	11-214	MORTON	22-016	ARLINGTON	29-052	KIONA-BENTON
02-013	ORONDO	11-226	ADNA	22-025	MARYSVILLE	29-053	FINLEY
02-019	MANSON	11-232	WINLOCK	22-02B	EVERETT	29-116	PROSSER
02-075	BRIDGEPORT	11-237	TOLEDO	22-063	INDEX	29-123	ESD-123
02-127	ENTIAT	11-300	ONALASKA	22-103	MONROE	29-400	RICHLAND
02-129	LAKE CHELAN	11-301	PE ELL	22-201	SNOHOMISH	30-037	VANCOUVER
02-171	NCESD 171	11-302	CHEHALIS	22-206	SOUTH WHIDBEY	30-098	HOCKINSON
02-206	EASTMONT	11-401	CENTRALIA	22-306	LAKEWOOD	30-101	LA CENTER
02-209	WATERVILLE	12-122	LONGVIEW	22-311	SULTAN	30-114	EVERGREEN
02-222	CASHMERE	12-155	NASELLE	22-330	DARRINGTON	30-119	BATTLEGROUND
02-228	CASCADE	12-200	WAHIAKUM	22-332	GRANITE FALLS	30-122	RIDGEFIELD
02-246	WENATCHEE	12-401	CASTLE ROCK	22-401	STANWOOD-CAMANO	31-002	DAYTON
03-121	PORT ANGELES	12-402	KALAMA	23-015	EDMONDS	31-101	DIXIE
03-313	CRESCENT	12-404	WOODLAND	23-412	SHORELINE	31-140	WALLA WALLA
03-323	SEQUIM	12-458	KELSO	23-417	NORTHSHORE	31-250	COLLEGE PLACE
03-401	CAPE FLATTERY	14-042	SOUTHSIDE	25-030	ONION CREEK	31-300	TOUCHET
03-402	QUILLAYUTE	04-054	GRAPEVIEW	25-036	CHEWELAH	31-400	COLUMBIA
04-073	WAHLUKE	14-309	SHELTON	25-049	WELLPINIT	31-401	WAITSBURG
04-144	QUINCY	14-311	MARY M KNIGHT	25-070	INCHELIUM	31-402	PRESCOTT
04-147	OTHELLO	14-403	NORTH MASON	25-101	ESD 101	32-501	BELLINGHAM
04-156	SOAP LAKE	15-014	NESPELEM	25-115	COLVILLE	32-502	FERNDAL
04-160	ROYAL CITY	15-019	OMAK	25-200	WILBUR	32-503	BLAINE
04-161	MOSES LAKE	15-105	OKANOGAN	25-206	COLUMBIA	32-504	LYNDEN
04-165	EPHRATA	15-111	BREWSTER	25-207	MARY WALKER	32-505	MERIDIAN
04-167	WILSON CREEK	15-122	PATEROS	25-207	DAVENPORT	32-506	NOOKSACK
05-005	ABERDEEN	15-301	GRAND COULEE	25-325	NINE MILE FALLS	32-507	MT. BAKER
05-028	HOQUIAM	15-350	METHOW VALLEY	25-356	CENTRAL VALLEY	33-035	STARBUCK
05-064	NORTH BEACH	15-404	TONASKET	25-360	CHENEY	33-267	PULLMAN
05-066	MONTESANO	15-410	OROVILLE	25-361	EAST VALLEY	33-300	COLFAX
05-068	ELMA	16-400	MERCER ISLAND	25-362	LIBERTY	33-301	PALOUSE
05-116	RAYMOND	16-407	RIVERVIEW	25-363	WEST VALLEY	33-302	GARFIELD
05-118	SOUTH BEND	16-410	SNOQUALMIE VLY	25-414	DEER PARK	33-320	ROSALIA
05-160	WILLAPA VALLEY	16-411	ISSAQUAH	27-003	PUYALLUP	33-322	ST. JOHN
05-172	OCOSTA	18-056	NEWPORT	27-010	TACOMA	33-324	OAKESDALE
06-210	FEDERAL WAY	19-121	PS ESD 121	27-019	CARBONADO	34-002	UNION GAP
06-401	HIGHLINE	19-403	RENTON	27-400	CLOVER PARK	34-003	NACHES VALLEY
06-402	VASHON	19-409	TAHOMA	27-404	PENINSULA	34-007	YAKIMA
07-048	QUILCENE	20-001	SEATTLE	27-402	FRANKLIN PIERCE	34-090	EAST VALLEY
07-049	CHIMACUM	21-011	CONCRETE	27-403	BETHEL	34-105	ESD 105
08-303	BAINBRIDGE	21-100	BURLINGTON	27-404	EATONVILLE	34-119	SELAH
08-401	CENTRAL KITSAP	21-101	SEDRO WOOLLEY	27-417	FIFE	34-120	MABTON
09-028	EASTON	21-103	ANACORTES	28-002	YELM	34-200	GRANDVIEW
09-400	THORP	21-144	LOPEZ ISLAND	28-003	NORTH THURSTON	34-201	SUNNYSIDE
09-401	ELLENSBURG	21-189	ESD 189	28-033	TUMWATER	34-202	TOPPENISH
09-403	KITTITAS	21-311	LA CONNER	28-111	OLYMPIA	34-203	HIGHLAND
09-404	CLE ELUM/ROSLYN	21-320	MOUNT VERNON	28-113	ESD 113	34-204	GRANGER
10-303	STEVENSON/CARSON			28-307	RAINIER	34-205	ZILLAH
10-404	GOLDENDALE			28-324	GRIFFIN	34-207	WAPATO
				28-401	ROCHESTER	34-208	WEST VALLEY
				28-402	TENINO	34-209	MT. ADAMS

**Record-Retention Schedule
WSSRA Recommendations**

1 Year	Deceased List
2 Years	Correspondence (routine) with customers or vendors Membership Changes Report
3 Years	Accounts Payable Ledgers and Schedules Accounts Receivable Ledgers and Schedules Employment applications (not hired) Inventories of products, materials, and supplies
3-7 Years	Copy of all scholarship and grant applications Copy of all score and guidelines used for scholarship/grant recipients
6 Years	Authorization for payroll deductions Bank deposits and statements Contracts and Leases Employee personnel records (after termination +6 years) Fixed Assets Insurance Policy Contract Vouchers for payments to vendors, employees, and so forth (includes allowances and reimbursement of employees, officers, and so forth for travel and entertainment expenses)
10 Years	Litigation/Legal Case Files
Permanently	Audit Reports Deeds, mortgages, and bills of sale Depreciation schedules Financial statements (end-of-year, other months optional) Insurance Policy Legal Opinions Minutes of all meetings Payroll records and summaries including payments to pensioners. All tax records- including Secretary of State annual filing and Federal 990 or e-postcard.