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DLN: 93493105003499

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 private foundations)

Do not enter social security numbers on this form as it may be made public

Information about Form 990 and its instructions is at [www.irs.gov/form990](#)

OMB No 1545-0047

2017

Open to Public Inspection

A For the 2017 calendar year, or tax year beginning 09-01-2017 , and ending 08-31-2018

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C Name of organization

Pennsylvania State Education Association

% JEFFREY D NEY TREASURER

Doing business as

Number and street (or P O box if mail is not delivered to street address)

400 North Third Street

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

Harrisburg, PA 17101

F Name and address of principal officer

JEFFREY D NEY Treasurer

400 North Third Street

Harrisburg, PA 17101

H(a) Is this a group return for subordinates?

☐ Yes ☒ No

H(b) Are all subordinates included?

☐ Yes ☐ No

If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status

☐ 501(c)(3) ☒ 501(c) (6) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ www.psea.org

K Form 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 net assets

3 Number of voting members of the governing body (Part VI, line 1a)

46

4 Number of independent voting members of the governing body (Part VI, line 1b)

43

5 Total number of individuals employed in calendar year 2017 (Part V, line 2a)

271

6 Total number of volunteers (estimate if necessary)

2,700

7a Total unrelated business revenue from Part VIII, column (C), line 12

96,965

7b Net unrelated business taxable income from Form 990-T, line 34

63,855

Revenue

8 Contributions and grants (Part VIII, line 1h)

9 Program service revenue (Part VIII, line 2g)

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)

Expenses

13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)

14 Benefits paid to or for members (Part IX, column (A), line 4)

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

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–24e)

16,970,399

18 Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)

66,490,949

19 Revenue less expenses Subtract line 18 from line 12

4,525,771

Net Assets or Fund Balances

20 Total assets (Part X, line 16)

115,876,015

21 Total liabilities (Part X, line 26)

62,797,804

22 Net assets or fund balances Subtract line 21 from line 20

53,078,211

Prior Year

0

69,889,992

407,059

719,669

71,016,720

463,402

29,108

49,028,040

0

16,970,399

66,490,949

4,525,771

Beginning of Current Year

115,876,015

62,797,804

53,078,211

Current Year

0

71,216,217

2,751,843

761,855

74,729,915

453,076

29,251

47,285,970

0

17,718,640

65,486,937

9,242,978

End of Year

126,885,279

38,166,832

88,718,447

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including attachments and all information furnished and required to be furnished, and I declare that this return, including attachments and all information furnished and required to be furnished, is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Sign Here

Signature of officer

JEFFREY D NEY Treasurer

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name

FRANK GIARDINI

Preparer's signature

FRANK GIARDINI

Firm's name ▶ GRANT THORNTON LLP

Firm's address ▶ 2001 MARKET STREET SUITE 700

PHILADELPHIA, PA 19103

May the IRS discuss this return with the preparer shown above? (see instructions)

☐ Yes ☒ No

For Paperwork Reduction Act Notice, see the separate instructions.

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒**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 organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations 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 \$)
See Additional Data**4b** (Code) (Expenses \$ including grants of \$) (Revenue \$)
See Additional Data**4c** (Code) (Expenses \$ including grants of \$) (Revenue \$)
See Additional Data**4d** Other program services (Describe in Schedule O)
(Expenses \$ including grants of \$) (Revenue \$)**4e** Total program service expenses ►

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 (see instructions)?	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	Yes
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4	
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5	Yes
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which 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 for escrow or custodial account liability, 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, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	10	No
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI	11a	Yes
b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b	No
c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c	No
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	11d	No
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	Yes
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f	Yes
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	12a	No
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b	Yes
13 Is the organization a school 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 United States?	14a	No
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b	No
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15	No
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16	No
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	17	No
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions 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 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No

Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		No
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	Yes	
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	Yes	
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		No
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
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?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i>		No
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>		No
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		No
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		No
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>		No
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		No
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		No
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		No
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		No
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		No
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>	Yes	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	Yes	
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	Yes	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		No
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	Yes	

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable	1a	242
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	271
b	If at least one is reported on line 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 (see instructions)	2b	Yes
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	Yes
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, 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 instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)		
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 line 5a or 5b, did the organization file Form 8886-T?	5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	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 receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	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 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	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b	Did the sponsoring 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	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	No
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b	

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.Check if Schedule O contains a response or note to any line in this Part VI. ☒**Section A. Governing Body and Management**

		Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	1a 46		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.			
b Enter the number of voting members included in line 1a, above, who are independent	1b 43		
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 governing documents since the prior Form 990 was filed?	4		No
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		No
6 Did the organization have members or stockholders?	6	Yes	
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	Yes	
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	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	
9 Is there any officer, director, 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.	9		No

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a	Yes	
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	Yes	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b Describe in Schedule O the process, if any, used by the organization to review this Form 990.			
12a Did the organization have a written conflict of interest policy? If "No," go to line 13.	12a	Yes	
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done.	12c	Yes	
13 Did the organization have a written whistleblower policy?	13	Yes	
14 Did 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	
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
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," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take 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 made these available. Check all that apply. ☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)	
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.	
20 State the name, address, and telephone number of the person who possesses the organization's books and records. ▶JEFFREY D NEY TREASURER 400 NORTH 3RD STREET Harrisburg, PA 17101 (717) 255-7000	

Check if Schedule O contains a response or note to any line in this Part VII ☒

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

Form **990** (2017)

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
See Additional Data Table										
1b Sub-Total										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								3,278,977	0	1,362,110

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **▶ 154**

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		No
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	Yes	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		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. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
Killian Gephart, 218 Pine Street HARRISBURG, PA 17101	Legal Services	488,252
Intelliprint Solutions Inc, 3930 Chambers Hill Road HARRISBURG, PA 17111	Printing	385,123
Berlinrosen Ltd, 15 Maiden Ln Suite 1600 NEW YORK, NY 10038	Digital Comm/Adver	362,340
DDC Works Inc, 718 Arch Street Suite 200NW PHILADELPHIA, PA 19106	Digital Comm/Adver	315,143
Ed Early Printing Co Inc, 908 Windsor Road BALTIMORE, MD 21208	Printing	263,916

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **▶ 12**

Part VIII **Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII ☐

Contributions, Gifts, Grants
and Other Similar Amounts

	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
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	0			

Program Service Revenue

	Business Code				
2a MEMBERSHIP DUES & ASSESSMENT	900099	64,505,576	64,505,576		
b CONFERENCES	900099	455,307	455,307		
c NAT'L EDUCATION ASSOC REIMBURSEMENT	900099	6,157,463	6,157,463		
d AMERICAN FED TEACHERS REIMBURSEMENT	900099	906	906		
e ADVERTISING	511190	96,965		96,965	
f All other program service revenue					
g Total. Add lines 2a-2f	71,216,217				

Other Revenue

3 Investment income (including dividends, interest, and other similar amounts)		1,981,139			1,981,139
4 Income from investment of tax-exempt bond proceeds		0			
5 Royalties		112,949			112,949
6a Gross rents	(i) Real	(ii) Personal			
	32,553				
b Less rental expenses	24,422				
c Rental income or (loss)	8,131	0			
d Net rental income or (loss)		8,131			8,131
7a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
	1,622,159	4,230			
b Less cost or other basis and sales expenses	851,476	4,209			
c Gain or (loss)	770,683	21			
d Net gain or (loss)		770,704			770,704
8a Gross income from fundraising events (not including \$ of contributions reported on line 1c) See Part IV, line 18	a	0			
b Less direct expenses	b	0			
c Net income or (loss) from fundraising events		0			
9a Gross income from gaming activities See Part IV, line 19	a	0			
b Less direct expenses	b	0			
c Net income or (loss) from gaming activities		0			
10a Gross sales of inventory, less returns and allowances	a	0			
b Less cost of goods sold	b	0			
c Net income or (loss) from sales of inventory		0			
Miscellaneous Revenue	Business Code				
11a MEMBERSHIP SERVICES REVENUE	900099	229,244	229,244		
b LEGAL FEE RECOVERIES	900099	282,417	282,417		
c STRIKE LOAN RECOVERIES	900099	22,820	22,820		
d All other revenue		106,294	106,294		
e Total. Add lines 11a-11d		640,775			
12 Total revenue. See Instructions		74,729,915	71,760,027	96,965	2,872,923

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).

Check if Schedule O contains a response or note to any line in this Part IX ☐

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.				
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.	418,570			
2 Grants and other assistance to domestic individuals. See Part IV, line 22.	34,506			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, line 15 and 16.	0			
4 Benefits paid to or for members.	29,251			
5 Compensation of current officers, directors, trustees, and key employees.	3,744,694			
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.	25,542,997			
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions).	7,278,529			
9 Other employee benefits.	8,588,521			
10 Payroll taxes.	2,131,229			
11 Fees for services (non-employees):				
a Management.	0			
b Legal.	1,602,094			
c Accounting.	116,440			
d Lobbying.	166,145			
e Professional fundraising services. See Part IV, line 17.	0			
f Investment management fees.	41,269			
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).	743,623			
12 Advertising and promotion.	1,290,628			
13 Office expenses.	2,427,839			
14 Information technology.	1,436,039			
15 Royalties.	0			
16 Occupancy.	1,953,531			
17 Travel.	2,264,846			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.	4,850			
19 Conferences, conventions, and meetings.	2,993,266			
20 Interest.	11,858			
21 Payments to affiliates.	0			
22 Depreciation, depletion, and amortization.	685,782			
23 Insurance.	105,652			
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O):				
a LOCAL AFFILIATE REBATES	833,525			
b TEMPORARY HELP	277,285			
c TRANSFER TO SSF	266,605			
d BANK FEES	173,228			
e All other expenses	324,135			
25 Total functional expenses. Add lines 1 through 24e.	65,486,937			
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part IX ☐

				(A) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing		95,594	1	505,732
	2	Savings and temporary cash investments		57,160,254	2	59,001,155
	3	Pledges and grants receivable, net		0	3	0
	4	Accounts receivable, net		807,395	4	1,107,323
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		417	5	0
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L		0	6	0
	7	Notes and loans receivable, net		0	7	0
	8	Inventories for sale or use		0	8	0
	9	Prepaid expenses and deferred charges		2,403,477	9	2,509,953
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.	10a	23,297,397		
	b	Less: accumulated depreciation	10b	18,818,775		
				4,644,109	10c	4,478,622
	11	Investments—publicly traded securities		50,389,340	11	58,989,703
	12	Investments—other securities. See Part IV, line 11		0	12	0
	13	Investments—program-related. See Part IV, line 11		0	13	0
	14	Intangible assets		0	14	0
15	Other assets. See Part IV, line 11		375,429	15	292,791	
16	Total assets. Add lines 1 through 15 (must equal line 34)		115,876,015	16	126,885,279	
Liabilities	17	Accounts payable and accrued expenses		57,110,503	17	32,179,764
	18	Grants payable		0	18	0
	19	Deferred revenue		3,243,368	19	3,335,010
	20	Tax-exempt bond liabilities		0	20	0
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		0	21	0
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		0	22	0
	23	Secured mortgages and notes payable to unrelated third parties		0	23	0
	24	Unsecured notes and loans payable to unrelated third parties		0	24	0
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		2,443,933	25	2,652,058
	26	Total liabilities. Add lines 17 through 25		62,797,804	26	38,166,832
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here ☒ and complete lines 27 through 29, and lines 33 and 34.					
	27	Unrestricted net assets		53,078,211	27	88,718,447
	28	Temporarily restricted net assets		0	28	0
	29	Permanently restricted net assets		0	29	0
	Organizations that do not follow SFAS 117 (ASC 958), 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		53,078,211	33	88,718,447	
34	Total liabilities and net assets/fund balances		115,876,015	34	126,885,279	

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	74,729,915
2	Total expenses (must equal Part IX, column (A), line 25)	2	65,486,937
3	Revenue less expenses Subtract line 2 from line 1	3	9,242,978
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	53,078,211
5	Net unrealized gains (losses) on investments	5	495,447
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	25,901,811
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	88,718,447

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
1 Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		No
b Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both ☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis	Yes	
c If "Yes," to line 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? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	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?		No
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Additional Data

Software ID:
Software Version:
EIN: 23-0961125
Name: Pennsylvania State Education Association

Form 990 (2017)

Form 990, Part III, Line 4a:

Field Services The field services division provides direct support and service to local labor union associations, their leaders and approximately 181,000 members in areas such as internal organizing and member engagement, consultation and referral on professional and labor issues, local association advocacy through collective bargaining and contract enforcement, legislative support, community/public relations, member rights and leadership training and development. Field services also supports and administers efforts to organize new local associations.

Form 990, Part III, Line 4b:

Legal Services The legal division is responsible for providing legal services to PSEAs 181,000 members and to over 1,000 local affiliates PSEA represents locals with respect to bargaining and contract issues and represents members in all employment-related matters in arbitration or before state agencies Each year, the attorneys collectively open and work on over 1,000 cases In addition, the legal division advises and represents PSEA as an organization, undertakes litigation as needed on behalf of PSEA, its locals, and members on matters of statewide importance involving constitutional or statutory rights, and coordinates a number of programs including the Educators Employment Liability program and the associations liability insurance policy

Form 990, Part III, Line 4c:

Communication Services The communications division produces many publications focused on issues relevant to members including a magazine, several print newsletters, and several electronic newsletters Other professional publications are available containing research, best practices, and useful tips and suggestions for members Communications writes and produces the following print publications Voice, the all-member magazine, distributed to all members, 6 times a year, Statement, a newsletter for PSEA-Retired members, distributed to 27,000 PSEA-Retired members four times a year, Dispatch, a newsletter for PSEAs ESP members, distributed to 32,000 ESP members four times a year, and Pulse, a newsletter for PSEAs HealthCare members In addition, Communications writes, produces, and deploys several electronic newsletters, including 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, is responsible for arts and graphics materials for the entire organization, shoots, edits, and deploys videos, and designs and maintains a sophisticated website with both public and members-only elements

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Dolores M McCracken President (beg 9/2/17)	55 0 2 0	X		X				158,687	0	116,773
W Gerard Oleksiak President (end 9/1/17)	55 0 2 0	X		X				164,669	0	53,671
Richard W Askey Vice President	55 0 4 0	X		X				87,093	0	77,072
Jeffrey D Ney Treasurer	55 0 3 0	X		X				32,076	0	51,152
Holli Jo Weber Director (end 7/31/18)	7 0 0 0	X						8,400	0	0
Charles D Fuller Director (beg 8/1/18)	7 0 0 0	X						0	0	0
Melody Hassinger Director	7 0 0 0	X						2,800	0	0
Dina K McGee Director	7 0 0 0	X						8,400	0	0
Maria N Heinrich Director	7 0 0 0	X						8,400	0	0
Bryan T Sanguinito Director	7 0 0 0	X						8,400	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Lori A Sherman Director	7 0 0 0	X						8,400	0	0
Timothy R Kearney Director	7 0 0 0	X						8,400	0	0
Dawn L Bandle Director	7 0 0 0	X						14,539	0	0
Marc A Howshall Director	7 0 0 0	X						8,400	0	0
Mindy Anderson Director	7 0 0 0	X						8,400	0	0
Holly P Harrington Director	7 0 0 0	X						8,400	0	0
Margaret A Rockwell Director	7 0 0 0	X						8,400	0	0
Alan M Malachowski Director	7 0 0 0	X						8,400	0	0
Bill Senavaitis Director	7 0 0 0	X						2,800	0	0
William D McGill Director	7 0 0 0	X						8,400	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Brian Reiser Director	7 0 0 0	X						8,400	0	0
Rosetta A Dufalla Director	7 0 0 0	X						8,400	0	0
Aaron F Chapin Director	7 0 0 0	X						8,400	0	0
Mary Yohe Director	7 0 0 0	X						8,400	0	0
Gretchen Ragazzo Director	7 0 0 0	X						8,400	0	0
Tracey L Hart Director	7 0 0 0	X						8,400	0	0
Joseph M Mifsud Director	7 0 0 0	X						8,400	0	0
Korri J Brown Director	7 0 0 0	X						8,400	0	0
Pamela R Brown Director	7 0 0 0	X						8,400	0	0
Gary D Gittis Director	7 0 0 0	X						8,400	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Jimbo G Lamb Director	7 0 0 0	X						8,400	0	0
Scott L Penner Director	7 0 0 0	X						8,400	0	0
Summer L Hill Director	7 0 0 0	X						8,400	0	0
Kevin T Downs Director	7 0 0 0	X						8,400	0	0
Eric V Pringle Director	7 0 1 0	X						8,400	0	0
Melissa M Brant Director	7 0 0 0	X						2,800	0	0
Marylou Stefanko Director	7 0 0 0	X						8,400	0	0
David W Taylor Director	7 0 1 0	X						8,400	0	0
Mary Moran Director	7 0 0 0	X						8,400	0	0
Patsy Tallarico Director	7 0 0 0	X						8,400	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Margaret C Beall Director	7 0 0 0	X						8,400	0	0
Jolene Hough Director	7 0 0 0	X						8,400	0	0
Kizzy L Nicholas Director	7 0 0 0	X						8,400	0	0
Debra Lee Director	7 0 0 0	X						8,400	0	0
Rudolph Burruss Director	7 0 0 0	X						8,400	0	0
Cheryl S Mattern Director	7 0 0 0	X						8,400	0	0
Sam R Talarico Director	7 0 0 0	X						8,400	0	0
Kevin T Deely Director	7 0 0 0	X						2,800	0	0
James G Vaughan Executive Director	55 0 2 0				X			208,097	0	89,371
Lynne L Wilson General Counsel	55 0 1 0				X			193,338	0	85,370

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Todd C Park AED for Human Resources	55 0 0 0				X			177,167	0	81,760
David L Wazeter AED for Program Services	55 0 0 0				X			177,922	0	81,760
Cindy J Hake AED for IT (end 8/5/18)	55 0 0 0				X			187,733	0	79,990
Joseph F Howlett AED for Administrative Service	55 0 2 0				X			179,866	0	95,872
Lisa K Buettner AED for Field Operations	55 0 0 0				X			179,949	0	80,888
Daniel M Wiedemer AED for Gov't Relations	55 0 1 0				X			174,603	0	102,755
Wendy M Leary UniServ Representative	55 0 0 0					X		220,211	0	73,016
Nathan J Greenawalt Director of Special Field Prog	55 0 0 0					X		213,774	0	72,165
William A Lydick UniServ Representative	55 0 0 0					X		202,041	0	71,154
Christine A Cortazzo UniServ Representative	55 0 0 0					X		201,806	0	70,473

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Richard E Burridge Asst General Counsel	55 0 0 0					X		175,006	0	78,868

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

▶Complete if the organization is described below. ▶Attach to Form 990 or Form 990-EZ.
▶Information about Schedule C (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2017

Open to Public Inspection

If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- 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" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- 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" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of the organization Pennsylvania State Education Association	Employer identification number 23-0961125
--	--

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1	Provide a description of the organization's direct and indirect political campaign activities in Part IV (see instructions for definition of "political campaign activities")	
2	Political campaign activity expenditures (see instructions)	▶ \$ 266,605
3	Volunteer hours for political campaign activities (see instructions)	0

Part I-B Complete if the organization is exempt under section 501(c)(3).

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 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 Complete if the organization is exempt under section 501(c), except section 501(c)(3).

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 funds contributed to other organizations for section 527 exempt function activities	▶ \$
3	Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b	▶ \$
4	Did the filing organization file Form 1120-POL for this year?	☐ Yes ☒ No
5	Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were 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 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-
(1) Fund for Student Success	400 North Third Street Harrisburg, PA 17101	83-1322288		266,605
2				
3				
4				
5				
6				

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

A Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)

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

g Grassroots nontaxable amount (enter 25% of line 1f)**h** Subtract line 1g from line 1a If zero or less, enter -0-**i** Subtract line 1f from line 1c If zero or less, enter -0-**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 separate instructions for lines 2a through 2f.)****Lobbying Expenditures During 4-Year Averaging Period**

Calendar year (or fiscal year beginning in)	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity

		(a)		(b)
		Yes	No	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 1c through 1i)?			
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 similar means?			
i	Other activities?			
j	Total. Add 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 Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

	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 carry over lobbying and political expenditures from the prior year?	3	No

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

1 Dues, assessments and similar amounts from members	1	64,505,576
2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	4,207,541
b Carryover from last year	2b	
c Total	2c	4,207,541
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	6,450,558
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 (see instructions)	5	-2,243,017

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, Part II-A (affiliated group list), Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
Schedule C, Part I-A, Line 1	Direct and Indirect Political Campaign Activities PSEA established the Fund for Student Success ("the Fund") to work with like-minded organizations to educate the public about the need to elect pro-public education officials. Activities of the Fund include working with like-minded organizations to communicate with the public about Pennsylvania's public schools, students, communities, and education professionals to drive the message to the public that Pennsylvania's children deserve better and elected officials should make public education a priority. The Fund is a Section 527(F)(3) Separate Segregated Fund that is subject to its own filing requirements and therefore files a separate 990 return. A transfer in the amount of \$266,605 was made by PSEA to the Fund in the fiscal year ending 8/31/2018. This transfer amount is included in Part 1-A, Line 2 and in Part III-B, Line 2A. Additional 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.

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93493105003499											
SCHEDULE D (Form 990)		Supplemental Financial Statements			OMB No 1545-0047										
Department of the Treasury Internal Revenue Service		► Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. ► Attach to Form 990. Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.			2017										
Name of the organization Pennsylvania State Education Association		Employer identification number 23-0961125			Open to Public Inspection										
Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.															
		(a) Donor advised funds		(b) Funds and other accounts											
1 Total number at end of year															
2 Aggregate value of contributions to (during year)															
3 Aggregate value of 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 can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?				☐ Yes ☐ No											
Part II Conservation Easements. Complete if the organization answered "Yes" on 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 education) ☐ Preservation of an historically important land area															
☐ Protection of natural habitat ☐ Preservation of a certified historic structure															
☐ Preservation of open space															
2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year															
<table><tr><td colspan="2">Held at the End of the Year</td></tr><tr><td>2a</td><td></td></tr><tr><td>2b</td><td></td></tr><tr><td>2c</td><td></td></tr><tr><td>2d</td><td></td></tr></table>						Held at the End of the Year		2a		2b		2c		2d	
Held at the End of the Year															
2a															
2b															
2c															
2d															
a Total number of conservation easements															
b Total acreage restricted by conservation easements															
c Number of conservation easements on a certified historic structure included in (a)															
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register															
3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax 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, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No															
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ►															
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation 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 section 170(h)(4)(B)(ii)? ☐ Yes ☐ No															
9 In Part XIII, 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" on Form 990, Part IV, line 8.															
1a If the organization elected, as permitted under SFAS 116 (ASC 958), 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 XIII, the text of the footnote to its financial statements that describes these items															
b If the organization elected, as permitted under SFAS 116 (ASC 958), 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) Revenue included on 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 (ASC 958) relating to these items															
a Revenue included on Form 990, Part VIII, line 1 ► \$															
b Assets included in Form 990, Part X ► \$															
For Paperwork Reduction Act Notice, see the Instructions for Form 990.															
Cat No 52283D		Schedule D (Form 990) 2017													

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, 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 XIII

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 Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on 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 the arrangement in Part XIII and complete the following table

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on 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 Net investment earnings, gains, and 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 current year end balance (line 1g, column (a)) held as

a Board designated or quasi-endowment ▶

b Permanent endowment ▶

c Temporarily restricted endowment ▶

The percentages on lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i) unrelated organizations

(ii) related organizations

b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?

	Yes	No
3a(i)		
3a(ii)		
3b		

4 Describe in Part XIII the intended uses of the organization's endowment funds

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		1,257,308		1,257,308
b Buildings		15,351,417	12,898,736	2,452,681
c Leasehold improvements				
d Equipment		6,511,577	5,772,458	739,119
e Other		177,095	147,581	29,514
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c)) . . . ▶				4,478,622

Part VII

Investments—Other Securities. Complete if the organization answered "Yes" on Form 990, Part IV, line 11b.
See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 12) ▶		

Part VIII

Investments—Program Related.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 13) ▶		

Part IX

Other Assets. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col (B) line 15) ▶	

Part X

Other Liabilities. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f.
See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
1. (1) Federal income taxes	0
UNREMITTED NEA DUES	767,807
DEFERRED COMPENSATION	1,884,251
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col (B) line 25) ▶	2,652,058

2. Liability for uncertain tax positions In Part XIII, 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 (ASC 740) Check here if the text of the footnote has been provided in Part XIII

☒

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	75,258,082
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains (losses) on investments	2a	495,447
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII)	2d	
e	Add lines 2a through 2d	2e	495,447
3	Subtract line 2e from line 1	3	74,762,635
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 XIII)	4b	-32,720
c	Add lines 4a and 4b	4c	-32,720
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12)	5	74,729,915

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	65,518,363
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	Other losses	2c	
d	Other (Describe in Part XIII)	2d	31,426
e	Add lines 2a through 2d	2e	31,426
3	Subtract line 2e from line 1	3	65,486,937
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 XIII)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18)	5	65,486,937

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
See Additional Data Table	

Part XIII **Supplemental Information** *(continued)*

Return Reference	Explanation

Additional Data

Software ID:
Software Version:
EIN: 23-0961125
Name: Pennsylvania State Education Association

Supplemental Information

Return Reference	Explanation
Liability for Uncertain Tax Position (ASC 740)	Schedule D, Part X, Line 2 THE ASSOCIATION QUALIFIES UNDER THE PROVISIONS OF SECTION 501(c)(6) OF THE INTERNAL REVENUE CODE AS AN ORGANIZATION EXEMPT FROM FEDERAL INCOME TAX EXCEPT FOR ACTIVITIES CONSIDERED TO BE UNRELATED TO ITS EXEMPT PURPOSE NO PROVISION FOR INCOME TAXES WAS REQUIRED FOR 2018 OR 2017 MANAGEMENT HAS ANALYZED THE TAX POSITIONS TAKEN BY THE ASSOCIATION AND HAS CONCLUDED THAT, AS OF AUGUST 31, 2018 AND 2017, THERE ARE NO UNCERTAIN POSITIONS TAKEN OR EXPECTED TO BE TAKEN THAT WOULD REQUIRE RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS

Supplemental Information	
Return Reference	Explanation
SCHEDULE D, PART XI, LINE 4B	EXPENSES PAID OR INCURRED IN CONNECTION WITH THE RENTAL PROPERTY (RECLASS) (\$24,422) HEALTHCARE-PSEA ARBITRATION/INTEREST REVENUE (\$8,298) ----- TOTAL (\$32,720)

Supplemental Information	
Return Reference	Explanation
Schedule D, Part XII, Line 2D	EXPENSES PAID OR INCURRED IN CONNECTION WITH THE RENTAL PROPERTY (RECLASS) \$24,422 Healthc are-PSEA arbitration expense \$7,104 Fund for Student Success - Expense \$266,505 Fund for S tudent Success - Revenue (\$266,605) ----- Total \$31,426

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Grants and Other Assistance to Organizations,
Governments and Individuals in the United States

Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990.

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2017

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 Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed

(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 noncash assistance	(h) Purpose of grant or assistance
(1) See Additional Data							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2

Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

4

3

Enter total number of other organizations listed in the line 1 table

3

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22

Part III can be duplicated if additional space is needed

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) MEMBER ASSISTANCE GRANTS	5	11,000			
(2) Student Convention/advisor prizes/membership	94	3,087			
(3) region art contest prizes	20	2,250			
(4) Political Action Committee Fundraising Prizes	6		781	Cost	MISC Wares
(5) Political Action Committee Fundraising Prizes	45	11,668			
(6) Member Benefit vendor prizes	58	4,220			
(7) My Teacher is an Olympian contest prizes	22	1,500			
(7)					

Part IV **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
Procedure for Monitoring Use of Grant Funds Inside U S	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, fair share, strength & vitality, local assistance, member assistance, 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 or governmental entities for general support or in support of efforts committed to public education.

Additional Data

Software ID:
Software Version:
EIN: 23-0961125
Name: Pennsylvania State Education Association

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(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
Keystone Research Center Inc 412 North Third Street Harrisburg, PA 17101	25-1776998	501(c)(3)	35,575				General Support
PSEA Education Foundation 400 N Third Street Harrisburg, PA 17101	31-1649860	501(c)(3)	41,500				Welfare Grant Prgrm

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(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
National Educ Assoc of the United States 1201 16th StNW Washington, DC 20036	53-0115260	501(c)(5)	10,000				nea ra giveaways
York City School District 31 N Pershing Ave York, PA 17401	23-6004284	Government	73,000				Gen Supp/Prof Devt

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(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
Shelly Lyons 219 State Street Harrisburg, PA 17101	41-2240921	N/A	50,000				Clear Coalition Fund Support
NEA Foundation for the Improvement of Education 1201 16th st NW Washington, DC 20036	23-7035089	501(C)(3)	6,000				Hurricane Relief/General Support

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(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
Pennsylvania Spotlight 7124 SYCAMORE AVENUE Takoma Park, MD 20912	32-0495654	501(c)(4)	40,000				General Support

Form 990, Schedule I, Part III, Grants and Other Assistance to Domestic Individuals.

(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
MEMBER ASSISTANCE GRANTS	5	11,000			
Student Convention/advisor prizes/membership	94	3,087			
region art contest prizes	20	2,250			
Political Action Committee Fundraising Prizes	6		781	Cost	MISC Wares
Political Action Committee Fundraising Prizes	45	11,668			

Form 990, Schedule I, Part III, Grants and Other Assistance to Domestic Individuals.					
(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
Member Benefit vendor prizes	58	4,220			
My Teacher is an Olympian contest prizes	22	1,500			

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
▶ Attach to Form 990.
▶ Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

Employer identification number

23-0961125

Name of the organization
Pennsylvania State Education Association

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on 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 indemnification and gross-up payments | ☐ Health or social club dues or initiation fees |
| ☐ Discretionary spending account | ☐ Personal services (e.g., maid, chauffeur, chef) |

b If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?

3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|--|---|
| ☒ 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 on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

a Receive a severance payment or change-of-control payment?

b Participate in, or receive payment from, a supplemental nonqualified retirement plan?

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.

Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

a The organization?

b Any related organization?

If "Yes," on line 5a or 5b, describe in Part III.

6 For persons listed on 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?

b Any related organization?

If "Yes," on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III.

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

1b Yes

2 Yes

4a No

4b No

4c No

5a

5b

6a

6b

7

8

9

For each individual whose compensation must be reported on 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) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

See Additional Data Table

[illegible]

Part III **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Return Reference	Explanation
Schedule J, Part I, Line 1a	Travel for companions. Regarding travel for companions, PSEA Fiscal Policy states that "the Executive Officers (President, Vice President, and Treasurer) shall have the payment of expenses for a spouse or guest attending two state Houses of Delegates events, one national Representative Assembly, and the Pennsylvania Society annual meeting, 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." Housing Allowance or Residence for Personal USE. 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." Three of the executive officers had amounts included in their 2017 taxable income for PSEA provided apartments.

Additional Data

Software ID:
Software Version:
EIN: 23-0961125
Name: Pennsylvania State Education Association

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1Dolores M McCracken President (beg 9/2/17)	(i)	146,440		12,247	90,363	26,410	275,460	
	(ii)							
1W Gerard Oleksiak President (end 9/1/17)	(i)	61,332		103,337	49,211	4,460	218,340	93,461
	(ii)							
2Richard W Askey Vice President	(i)	80,638		6,455	50,743	26,329	164,165	
	(ii)							
3James G Vaughan Executive Director	(i)	196,499		11,598	62,789	26,582	297,468	
	(ii)							
4Lynne L Wilson General Counsel	(i)	186,053		7,285	58,852	26,518	278,708	
	(ii)							
5Todd C Park AED for Human Resources	(i)	173,097		4,070	52,766	28,994	258,927	
	(ii)							
6David L Wazeter AED for Program Services	(i)	173,852		4,070	52,766	28,994	259,682	
	(ii)							
7Cindy J Hake AED for IT (end 8/5/18)	(i)	173,852		13,881	52,766	27,224	267,723	
	(ii)							
8Joseph F Howlett AED for Administrative Service	(i)	173,852		6,014	68,518	27,354	275,738	
	(ii)							
9Lisa K Buettner AED for Field Operations	(i)	173,852		6,097	54,444	26,444	260,837	
	(ii)							
10Daniel M Wiedemer AED for Gov't Relations	(i)	170,047		4,556	75,938	26,817	277,358	
	(ii)							
11Wendy M Leary UniServ Representative	(i)	144,353		75,858	46,197	26,819	293,227	
	(ii)							
12Nathan J Greenawalt Director of Special Field Prog	(i)	151,992		61,782	46,131	26,034	285,939	
	(ii)							
13William A Lydick UniServ Representative	(i)	144,352		57,689	45,166	25,988	273,195	
	(ii)							
14Christine A Cortazzo UniServ Representative	(i)	144,352		57,454	44,470	26,003	272,279	
	(ii)							
15Richard E Burndge Asst General Counsel	(i)	166,227		8,779	52,492	26,376	253,874	
	(ii)							

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
~~Internal Revenue Service~~

Name of the organization
Pennsylvania State Education Association

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at
www.irs.gov/form990.

OMB No 1545-0047

2017

**Open to Public
Inspection**

Employer identification number

23-0961125

990 Schedule O, Supplemental Information

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

990 Schedule O, Supplemental Information

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

990 Schedule O, Supplemental Information

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.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Line 11b	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.

990 Schedule O, Supplemental Information

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.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Line 15a/15b	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 NE A state affiliates is collected, summarized, and made available to the personnel committee for their consideration The deliberation process and outcome is documented in the personnel committee meeting files

990 Schedule O, Supplemental Information

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

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VII	Compensation The PSEA 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.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part XI, Line 9	Reconciliation of Net Assets EFFECT OF PENSION RELATED CHANGES OTHER THAN NET PERIODIC PEN SION COST \$24,669,435 EFFECT OF POST RETIREMENT CHANGES OTHER THAN NET PERIODIC Postretire ment COST \$ 1,232,376 ----- \$25,901,811

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

► Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
► Attach to Form 990.
► Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2017

Open to Public Inspection

Name of the organization
Pennsylvania State Education Association

Employer identification number
23-0961125

Part I Identification of Disregarded Entities

Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) 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

Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(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	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1)PSEA Health & Welfare Fund 400 North Third Street Harrisburg, PA 17101 23-2121745	Benefits	PA	501(c)(9)	N/A	PSEA	Yes	
(2)PSEA-Pace for State Elections 400 North Third Street Harrisburg, PA 17101 23-2116856	PAC	PA	527	N/A	NA		No
(3)PSEA Retiree Benefit Trust 400 North Third Street Harrisburg, PA 17101 25-6862258	Benefits	PA	501(c)(9)	N/A	NA		No
(4)PSEA Scholarship Trust c/o Mellon Bank NA PO Box 185 Pittsburgh, PA 15230 23-2225710	Scholarships	PA	501(c)(3)	PF	NA		No
(5)PSEA Education Foundation 400 North Third Street Harrisburg, PA 17101 31-1649860	Educational	PA	501(c)(3)	PF	NA		No
(6)Healthcare - PSEA 400 North Third Street Harrisburg, PA 17101 27-0648795	Member Svcs	PA	501(c)(6)	N/A	PSEA	Yes	
(7)Fund for Student Success 400 North Third street Harrisburg, PA 17101 83-1322288	SSF	PA	527	N/A	PSEA	Yes	

Part III Identification of Related Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

(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, unrelated, excluded from tax under sections 512- 514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV Identification of Related Organizations Taxable as a Corporation or Trust Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(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	(i) Section 512(b) (13) controlled entity?	
								Yes	No

Part V Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	1a	No
b Gift, grant, or capital contribution to related organization(s)	1b	No
c Gift, grant, or capital contribution from related organization(s)	1c	No
d Loans or loan guarantees to or for related organization(s)	1d	No
e Loans or loan guarantees by related organization(s)	1e	No
f Dividends from related organization(s)	1f	No
g Sale of assets to related organization(s)	1g	No
h Purchase of assets from related organization(s)	1h	No
i Exchange of assets with related organization(s)	1i	No
j Lease of facilities, equipment, or other assets to related organization(s)	1j	No
k Lease of facilities, equipment, or other assets from related organization(s)	1k	No
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	Yes
m Performance of services or membership or fundraising solicitations by related organization(s)	1m	No
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	Yes
o Sharing of paid employees with related organization(s)	1o	Yes
p Reimbursement paid to related organization(s) for expenses	1p	Yes
q Reimbursement paid by related organization(s) for expenses	1q	Yes
r Other transfer of cash or property to related organization(s)	1r	Yes
s Other transfer of cash or property from related organization(s)	1s	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 related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) PSEA HEALTH & WELFARE FUND	o	764,941	FMV
(2) HEALTHCARE - PSEA	l	229,244	FMV
(3) Fund for Student Success	r	266,605	FMV

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.

[illegible]

Part VII **Supplemental Information**

Provide additional information for responses to questions on Schedule R (see instructions)

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, the PSEA Scholarship Trust, and the PSEA Education Foundation. 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. PSEA has entered into an affiliation agreement with HealthCare-PSEA whereby PSEA provides services to HealthCare-PSEA in exchange for an amount equivalent to the annual PSEA dues rate for each HealthCare-PSEA member. In exchange for this fee, PSEA provides to HealthCare-PSEA members all benefits that are provided to members of PSEA including but not limited to legal services, membership processing, maintenance of accounting procedures, research, government relations, communications assistance, organizing, and field staff services. PSEA also provides administrative services necessary for the maintenance and operation of HealthCare-PSEA. 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, as set forth in the management services agreement. Sharing of paid employees - The PSEA Health & Welfare Fund has no employees. The Fund contracts with PSEA to provide administrative services. Certain PSEA employees dedicate all or a portion of their time to the activities of the Fund. PSEA is reimbursed by the Fund for the salary and benefits of those PSEA employees who are assigned to the PSEA Health and Welfare Fund. Other Transfer of cash or property to related organization - PSEA made a transfer to the Fund for Student Success, a section 527(f)(3) separate segregated fund.



Additional Data

Software ID:
Software Version:
EIN: 23-0961125
Name: Pennsylvania State Education Association

Form 990, Schedule R, 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	(g) Section 512 (b)(13) controlled entity?	
						Yes	No
400 North Third Street Harrisburg, PA 17101 23-2121745	Benefits	PA	501(c)(9)	N/A	PSEA	Yes	
400 North Third Street Harrisburg, PA 17101 23-2116856	PAC	PA	527	N/A	NA		No
400 North Third Street Harrisburg, PA 17101 25-6862258	Benefits	PA	501(c)(9)	N/A	NA		No
c/o Mellon Bank NA PO Box 185 Pittsburgh, PA 15230 23-2225710	Scholarships	PA	501(c)(3)	PF	NA		No
400 North Third Street Harrisburg, PA 17101 31-1649860	Educational	PA	501(c)(3)	PF	NA		No
400 North Third Street Harrisburg, PA 17101 27-0648795	Member Svcs	PA	501(c)(6)	N/A	PSEA	Yes	
400 North Third street Harrisburg, PA 17101 83-1322288	SSF	PA	527	N/A	PSEA	Yes	