

990

Return of Organization Exempt From Income Tax

OMB No. 1545-

0047 2023

Open to Public Inspection

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.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury Internal Revenue Service

A For the 2023 calendar year, or tax year beginning 09-01-2023, and ending 08-31-2024

- 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. Doing business as. Number and street (or P.O. box if mail is not delivered to street address) Room/suite: 400 NORTH THIRD STREET. City or town, state or province, country, and ZIP or foreign postal code: HARRISBURG, PA 17101

D Employer identification number: 23-0961125. E Telephone number: (717) 255-7000. G Gross receipts \$ 93,018,289

F Name and address of principal officer: RACHAEL M WEST TREASURER, 400 NORTH THIRD STREET, HARRISBURG, PA 17101

H(a) Is this a group return for subordinates? No. H(b) Are all subordinates included? No. H(c) Group exemption number

I Tax-exempt status: 501(c)(3) 501(c)(6) 4947(a)(1) 527

J Website: WWW.PSEA.ORG

K Form of organization: Corporation Association Other

L Year of formation: 1852 M State of legal domicile: PA

Part I Summary

Activities & Governance

Table with 2 columns: Description and Amount. Rows include mission statement, discontinued operations, and various revenue and expense items.

Revenue

Table with 3 columns: Description, Prior Year, Current Year. Rows include contributions, program service revenue, investment income, and other revenue.

Expenses

Table with 3 columns: Description, Prior Year, Current Year. Rows include grants paid, benefits, salaries, fundraising fees, and other expenses.

Net Assets or Fund Balances

Table with 3 columns: Description, Beginning of Current Year, End of Year. Rows include total assets, total liabilities, and net assets.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Sign Here: Signature of officer RACHAEL M WEST TREASURER, Date 2025-04-03

Paid Preparer Use Only

Print/Type preparer's name, Preparer's signature, Date, Firm's name, Firm's EIN, Firm's address, Phone no.

May the IRS discuss this return with the preparer shown above? See Instructions. Yes No

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

WE SUPPORT, EMPOWER, AND ADVOCATE FOR MEMBERS, STUDENTS, AND PUBLIC EDUCATION.

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 \$)
FIELD SERVICES: THE FIELD SERVICES DIVISION PROVIDES DIRECT SUPPORT AND SERVICE TO LOCAL LABOR UNION ASSOCIATIONS, THEIR LEADERS AND APPROXIMATELY 176,000 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.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)
LEGAL SERVICES: THE LEGAL DIVISION IS RESPONSIBLE FOR PROVIDING LEGAL SERVICES TO PSEA'S APPROXIMATELY 176,000 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. IN THE 2023-2024 FISCAL YEAR, THE DIVISION COLLECTIVELY OPENED AND WORKED ON OVER 800 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 ASSOCIATION'S LIABILITY INSURANCE POLICY.

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)
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, 5 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 PSEA'S ESP MEMBERS, DISTRIBUTED TO 32,000 ESP MEMBERS FOUR TIMES A YEAR; AND PULSE, A NEWSLETTER FOR PSEA'S HEALTHCARE MEMBERS. IN ADDITION, COMMUNICATIONS WRITES, PRODUCES, AND DEPLOYS SIX ELECTRONIC NEWSLETTERS, INCLUDING KEEPING CONNECTED, THE ALL-MEMBER E-NEWSLETTER, DISTRIBUTED TO ABOUT 141,000 MEMBERS, WEEKLY; 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, COORDINATES THE ASSOCIATION'S SOCIAL AND DIGITAL MEDIA PROGRAMS, AND DESIGNS AND MAINTAINS A SOPHISTICATED WEBSITE WITH BOTH PUBLIC AND MEMBERS-ONLY ELEMENTS. FINALLY, COMMUNICATIONS LEADS THE ASSOCIATION'S MEDIA RELATIONS PROGRAM, PROVIDING INFORMATION TO REPORTERS, DEPLOYING PRESS RELEASES, AND OP-EDS, AND PREPARING OFFICERS AND STAFF FOR MEDIA INTERVIEWS.

4d Other program services (Describe in Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses

Part IV Checklist of Required Schedules

Table with 3 columns: Question number, Question text, and Yes/No response columns. Rows include questions 1 through 21 regarding organizational requirements and reporting.

Part IV Checklist of Required Schedules (continued)

		Yes	No	
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>	22	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>	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3), 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>	25a		
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>	25b		
26	Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons?	26		No
27	Did the organization report a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>	27	Yes	
28	Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>	28a		No
b	A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>	28b	Yes	
c	A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions?	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31		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>	32		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?	33		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>	34	Yes	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	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>	35b	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>	36		
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>	37		No
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O.	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance
 Check 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		217
b	Enter the number of Forms W-2G included on 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	

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Form 990 (2023) Part V Statements Regarding Other IRS Filings and Tax Compliance (continued). Includes sections 2a through 17, covering employee reporting, federal employment tax returns, unrelated business gross income, foreign accounts, prohibited tax shelter transactions, deductible contributions, and various organizational requirements.

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

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year... 1b Enter the number of voting members included in line 1a, above, who are independent... 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? 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? 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? 5 Did the organization become aware during the year of a significant diversion of the organization's assets? 6 Did the organization have members or stockholders? 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? 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 8a The governing body? 8b Each committee with authority to act on behalf of the governing body? 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.

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

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates? 10b 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? 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? 11b Describe on 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 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done 13 Did the organization have a written whistleblower policy? 14 Did the organization have a written document retention and destruction policy? 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? 15a The organization's CEO, Executive Director, or top management official 15b Other officers or key employees of the organization If "Yes" to line 15a or 15b, describe the process on 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? 16b 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?

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 (1024 or 1024-A, if applicable), 990, and 990-T (section 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:
RACHAEL M WEST TREASURER 400 NORTH 3RD STREET HARRISBURG, PA 17101 (717) 255-7000

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

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

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

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

(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/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee;	Officer	Key employee	Highest compensated employee			
(1) AARON F CHAPIN PRESIDENT	55.00 2.00	X		X			120,445	0	84,863
(2) JEFFREY D NEY VICE PRESIDENT	55.00 4.00	X		X			111,044	0	69,071
(3) RACHAEL M WEST TREASURER	55.00 3.00	X		X			53,607	0	68,766
(4) RUDOLPH BURRUSS DIRECTOR	7.00 0.00	X					15,600	0	0
(5) NANCY M WEAVER-BEHE DIRECTOR	7.00 0.00	X					8,400	0	0
(6) CASEY L VANWHY DIRECTOR	7.00 0.00	X					8,400	0	0
(7) MELISSA M BRANT DIRECTOR	7.00 0.00	X					8,400	0	0
(8) CHARLES D FULLER DIRECTOR	7.00 0.00	X					8,400	0	0
(9) KEVIN T DEELY DIRECTOR	7.00 0.00	X					8,400	0	0
(10) JOLYNN ANN YOUNG DIRECTOR	7.00 0.00	X					8,400	0	0
(11) RICHARD W WASHABAUGH DIRECTOR	7.00 0.00	X					8,400	0	0
(12) JENA BRODHEAD DIRECTOR	7.00 0.00	X					8,400	0	0
(13) AMY D HICKS DIRECTOR	7.00 0.00	X					8,400	0	0
(14) MARC A HOWSHALL DIRECTOR	7.00 0.00	X					8,400	0	0
(15) MARGARET A ROCKWELL DIRECTOR	7.00 0.00	X					8,400	0	0
(16) BILL SENAVATTIS DIRECTOR	7.00 0.00	X					8,400	0	0
(17) DEBRA LEE DIRECTOR	7.00 0.00	X					8,400	0	0

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/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(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			
(18) BRIAN REISER DIRECTOR	7.00 0.00	X					8,400	0	0	
(19) ROSETTA A DUFALLA DIRECTOR	7.00 0.00	X					8,400	0	0	
(20) JENNIFER J AGOLINO DIRECTOR	7.00 0.00	X					8,400	0	0	
(21) ELLEN E RAGUCKAS DIRECTOR	7.00 0.00	X					8,400	0	0	
(22) TRACEY L HART DIRECTOR	7.00 0.00	X					8,400	0	0	
(23) JANICE E PEARSON DIRECTOR	7.00 0.00	X					8,400	0	0	
(24) PAMELA R BROWN DIRECTOR	7.00 0.00	X					8,400	0	0	
(25) GARY D GITTIS DIRECTOR	7.00 0.00	X					8,400	0	0	
(26) MICHAEL D DEHAUT DIRECTOR	7.00 0.00	X					8,400	0	0	
(27) JIMBO G LAMB DIRECTOR	7.00 0.00	X					8,400	0	0	
(28) BENJAMIN C RUGG DIRECTOR	7.00 0.00	X					8,400	0	0	
(29) CHERYL S MATTERN DIRECTOR	7.00 0.00	X					8,400	0	0	
(30) JOSEPH B STEEVES DIRECTOR	7.00 0.00	X					8,400	0	0	
(31) DAVID W TAYLOR DIRECTOR	7.00 1.00	X					8,400	0	0	
(32) RAYMOND L MILLIGAN II DIRECTOR	7.00 0.00	X					8,400	0	0	
(33) PATSY J TALLARICO DIRECTOR	7.00 0.00	X					8,400	0	0	
(34) DAWN M BLAUS DIRECTOR	7.00 0.00	X					8,400	0	0	
(35) MELISSA M COSTANTINO-PORUBEN DIRECTOR	7.00 0.00	X					8,400	0	0	
(36) MARIA M BENNETT DIRECTOR	7.00 0.00	X					8,400	0	0	
(37) COLLEEN BRODBECK DIRECTOR	7.00 0.00	X					8,400	0	0	
(38) AMY LAWRENCE DIRECTOR	7.00 0.00	X					8,400	0	0	
(39) CARL A RIEFFANAUGH DIRECTOR	7.00 0.00	X					8,400	0	0	
(40) MICHAEL G BOWERS DIRECTOR (AS OF 9/12/23)	7.00 0.00	X					2,520	0	0	
(41) ADAM LANZA DIRECTOR	7.00 0.00	X					5,200	0	0	
(42) DENEEN DRY DIRECTOR	7.00 0.00	X					5,200	0	0	
(43) WILLIAM D MCGILL DIRECTOR	7.00 0.00	X					2,800	0	0	
(44) CAROL YANITY DIRECTOR	7.00 0.00	X					2,800	0	0	
(45) JAMES G VAUGHAN EXECUTIVE DIRECTOR	55.00 2.00				X		280,787	0	59,624	
(46) LYNNE L WILSON GENERAL COUNSEL	55.00 0.00				X		226,404	0	37,615	
(47) WALTER W WOJCIK AED FOR HUMAN RESOURCES	55.00 0.00				X		212,829	0	53,452	
(48) DAVID L WAZETER AED FOR PROGRAM SERVICES	55.00 0.00				X		212,519	0	61,958	
(49) JAMES PENDLETON AED FOR IT	55.00 0.00				X		215,698	0	57,121	
(50) LISA K BUETTNER AED FOR FIELD OPERATIONS	55.00 0.00				X		212,914	0	56,409	
(51) DANIEL M WIEDEMER AED FOR GOV'T RELATIONS	55.00 1.00				X		216,865	0	80,166	
(52) PHYLLIS HEVERLY FLESHER AED FOR ADMINISTRATIVE SERVICES	55.00 2.00				X		202,060	0	68,707	
(53) CHARLES L HERRING STAFF ATTORNEY	55.00 0.00					X	215,533	0	58,771	
(54) LAURA M PIRO DIRECTOR OF ADMINISTRATIVE SVCS	55.00 0.00					X	235,009	0	52,113	
(55) CORINNE E FECHO YANES UNISERV REPRESENTATIVE	55.00 0.00					X	244,300	0	46,615	
(56) LORI A STRIPAY UNISERV REPRESENTATIVE	55.00 0.00					X	237,398	0	26,290	
(57) BERNADETTE M MCHUGH UNISERV REPRESENTATIVE	55.00 0.00					X	236,555	0	22,528	
(58) RICHARD W ASKEY FORMER PRESIDENT	0.00 0.00						X	250,037	0	43,478
(59) JOSEPH F HOWLETT FORMER AED FOR ADMINISTRATIVE SVCS	0.00 0.00						X	208,488	0	26,508

1b Sub-Total			
1c Total from continuation sheets to Part VII, Section A			
1d Total (add lines 1b and 1c)	4,020,612	0	974,055

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 **175**

	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>	Yes	
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
SOFTCRYLIC LLC 718 WASHINGTON AVE N SUITE 214 MINNEAPOLIS, MN 55401	IT PROFESSIONAL SERVICES	1,567,734
KILLIAN & GEPHART 218 PINE STREET HARRISBURG, PA 17101	LEGAL SERVICES	519,437
INTELLIPRINT SOLUTIONS INC 3930 CHAMBERS HILL ROAD HARRISBURG, PA 17111	PRINTING	340,489
CLEAR POINT COMMUNICATIONS 219 STATE STREET HARRISBURG, PA 17101	ADVERTISING	338,856
ED EARLY PRINTING CO INC 908 WINDSOR RD BALTIMORE, MD 21208	PRINTING	286,277

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 **11**

Part VIII Statement of Revenue

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

	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants, and Other				
Amt Similar Amounts				
1a Federated campaigns		1a		
b Membership dues		1b		
c Fundraising events		1c		
d Related organizations		1d		
e Government grants (contributions)		1e		
f All other contributions, gifts, grants, and similar amounts not included above		1f		
g Noncash contributions included in lines 1a - 1f:\$		1g		
h Total. Add lines 1a-1f				

Program Service Revenue		Business Code				
			(A)	(B)	(C)	(D)
2a MEMBERSHIP DUES & ASSESSMENT		900099	68,780,407	68,780,407		
b NAT'L EDUCATION ASSOC REIMB		900099	6,057,325	6,057,325		
c CONFERENCES		900099	290,439	290,439		
d PUBLICATION ADVERTISING		513120	76,080		76,080	
e AMERICAN FED TEACHERS REIMB		900099	746	746		
f All other program service revenue.						
g Total. Add lines 2a-2f.			75,204,997			

Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		6,291,204			6,291,204	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties		123,677			123,677	
	6a Gross rents	(i) Real					
		(ii) Personal					
		6a	29,605				
		b Less: rental expenses	6b	28,861			
	c Rental income or (loss)	6c	744				
	d Net rental income or (loss)			744			744
	7a Gross amount from sales of assets other than inventory	(i) Securities					
		(ii) Other					
		7a	11,082,100				
		b Less: cost or other basis and sales expenses	7b	9,096,607			
	c Gain or (loss)	7c	1,985,493				
	d Net gain or (loss)			1,985,493			1,985,493
8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	8a						
b Less: direct expenses	8b						
c Net income or (loss) from fundraising events							
9a Gross income from gaming activities. See Part IV, line 19	9a						
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							

Other Revenue Misc Amt		Business Code				
			(A)	(B)	(C)	(D)
11a MEMBERSHIP SERVICES REVENUE		900099	122,394	122,394		
b LEGAL FEE RECOVERIES		900099	100,240	100,240		
c MISCELLANEOUS REVENUE		900099	64,072	64,072		
d All other revenue						
e Total. Add lines 11a-11d			286,706			
12 Total revenue. See instructions			83,892,821	75,415,623	76,080	8,401,118

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	482,232			
2 Grants and other assistance to domestic individuals. See Part IV, line 22	102,284			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members	18,900			
5 Compensation of current officers, directors, trustees, and key employees	3,877,972			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	32,226,620			
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,183,801			
9 Other employee benefits	11,212,960			
10 Payroll taxes	2,686,151			
11 Fees for services (non-employees):				
a Management				
b Legal	939,729			
c Accounting	220,513			
d Lobbying	10,625			
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	45,665			
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	1,352,686			
12 Advertising and promotion	1,623,580			
13 Office expenses	2,144,875			
14 Information technology	3,192,559			
15 Royalties				
16 Occupancy	2,967,458			
17 Travel	2,300,921			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	3,545			
19 Conferences, conventions, and meetings	3,888,046			
20 Interest	7,241			
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	1,075,825			
23 Insurance	130,266			
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 TRANSFER TO SSF	900,000			
b LOCAL AFFILIATE REBATES	867,484			
c BANK/CREDIT CARD PROCES	838,622			
d REFERENCE MATERIALS	140,474			
e All other expenses	251,813			
25 Total functional expenses. Add lines 1 through 24e	74,692,847			
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 <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

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

		(A)		(B)
		Beginning of year		End of year
Assets	1 Cash-non-interest-bearing	188,563	1	169,534
	2 Savings and temporary cash investments	65,886,045	2	66,386,053
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	469,016	4	671,329
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	27,904,133	9	42,175,302
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 36,137,554		
	b Less: accumulated depreciation	10b 23,108,087	10,650,288	10c 13,029,467
	11 Investments—publicly traded securities	97,225,821	11	108,000,865
	12 Investments—other securities. See Part IV, line 11		12	
	13 Investments—program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	4,029,564	15	5,312,799
16 Total assets: Add lines 1 through 15 (must equal line 33)	206,353,430	16	235,745,349	
Liabilities	17 Accounts payable and accrued expenses	26,143,907	17	26,709,716
	18 Grants payable		18	
	19 Deferred revenue	2,669,530	19	2,736,509
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	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	4,435,536	25	5,573,285
	26 Total liabilities. Add lines 17 through 25	33,248,973	26	35,019,510
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	173,104,457	27	200,725,839
	28 Net assets with donor restrictions		28	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	173,104,457	32	200,725,839
33 Total liabilities and net assets/fund balances	206,353,430	33	235,745,349	

Part XI Reconciliation of Net Assets

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

Table with 10 rows for reconciliation of net assets. Columns include line number, description, and amount. Total revenue is 83,892,821 and total expenses are 74,692,847.

Part XII Financial Statements and Reporting

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

Table for financial statements and reporting. Includes questions about accounting methods (Accrual checked), compilation by independent accountant, and audit status. Includes Yes/No columns for responses.

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

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.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

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
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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 ▶ \$ 900,000

3 Volunteer hours for political campaign activities. See instructions

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		900,000
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.														
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:35%;">If the amount on line 1e, column (a) or (b) is:</th> <th style="width:65%;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	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.		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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) 2019	(b) 2020	(c) 2021	(d) 2022	(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?		No
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?		No
3 Did the organization agree to carry over lobbying and political expenditures from the prior year?		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	68,780,407
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	6,115,692
b	Carryover from last year	2b	
c	Total	2c	6,115,692
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues .	3	6,878,041
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	-762,349

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
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. PSEA COLLECTED AND TRANSFERRED DUES EARMARKED FOR THE FUND IN THE AMOUNT OF \$900,000 DURING THE FISCAL YEAR ENDED 8/31/2024. THIS TRANSFER AMOUNT IS INCLUDED IN PART I-A, LINE 2; PART I-C, LINE 5E; AND PART III-B, LINE 2A. ADDITIONAL INFORMATION FOR SCHEDULE C: 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 AS OPPOSED TO ANY EARMARKED DUES. 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, LINE 2A OF SCHEDULE C. IN ADDITION, PSEA PROVIDES ADMINISTRATIVE SUPPORT TO PACE WHICH IS DOCUMENTED THROUGH AN ADMINISTRATIVE SERVICES AGREEMENT.

Additional Data

Return to Form

Software ID:

Software Version:

Supplemental Financial Statements

2022

Open to Public Inspection

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.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury Internal Revenue Service

Name of the organization PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number

23-0961125

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two yes/no questions about donor informed.

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Form for Part II Conservation Easements. Includes checkboxes for various purposes, a table for 'Held at the End of the Year' (2a-2d), and several text-based questions (3-9) regarding monitoring and reporting.

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.

Form for Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Includes questions 1a-1b and 2 regarding reporting requirements and amounts.

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:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, 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** Term 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		22,220,066	15,315,479	6,904,587
c Leasehold improvements				
d Equipment		12,261,566	7,565,195	4,696,371
e Other		398,614	227,413	171,201
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				13,029,467

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.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
DEFERRED COMPENSATION	2,658,665
OTHER LIABILITIES	2,167,631
UNREMITTED NEA DUES	746,989
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.)	5,573,285

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	89,689,132
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	5,755,926	
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	40,385	
e	Add lines 2a through 2d	2e		5,796,311
3	Subtract line 2e from line 1	3		83,892,821
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		
c	Add lines 4a and 4b	4c		0
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5		83,892,821

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	74,446,708
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	-246,139	
e	Add lines 2a through 2d	2e		-246,139
3	Subtract line 2e from line 1	3		74,692,847
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		0
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5		74,692,847

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
PART X, LINE 2:	LIABILITY FOR UNCERTAIN TAX POSITION (ASC 740) 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 2024 OR 2023. MANAGEMENT HAS ANALYZED THE TAX POSITIONS TAKEN BY THE ASSOCIATION AND ITS CONTROLLED AFFILIATES AND HAS CONCLUDED THAT, AS OF AUGUST 31, 2024 AND 2023, THERE ARE NO UNCERTAIN POSITIONS TAKEN OR EXPECTED TO BE TAKEN THAT WOULD REQUIRE RECOGNITION OR DISCLOSURE IN THE CONSOLIDATED FINANCIAL STATEMENTS.
PART XI, LINE 2D - OTHER ADJUSTMENTS:	EXPENSES PAID OR INCURRED IN CONNECTION WITH THE RENTAL PROPERTY (RECLASS) 28,861. HEALTHCARE-PSEA ARBITRATION/INTEREST REVENUE 11,524.
PART XII, LINE 2D - OTHER ADJUSTMENTS:	EXPENSES PAID OR INCURRED IN CONNECTION WITH THE RENTAL PROPERTY (RECLASS) 28,861. FUND FOR STUDENT SUCCESS - EXPENSE 625,000. FUND FOR STUDENT SUCCESS - REVENUE -900,000.

Additional Data

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**Schedule I
(Form 990)**

**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.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Department of the
Treasury
Internal Revenue Service

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) KEYSTONE RESEARCH CENTER INC 412 NORTH THIRD STREET HARRISBURG, PA 17101	25-1776998	501(C)(3)	33,000	0			GENERAL SUPPORT
(2) PSEA EDUCATION FOUNDATION 400 N THIRD STREET HARRISBURG, PA 17101	31-1649860	501(C)(3)	56,000	0			WELFARE GRANT/TRAINING PROGRAMS
(3) CLEAR POINT COMMUNICATIONS 219 STATE STREET HARRISBURG, PA 17101	41-2240921	N/A	50,000	0			CLEAR COALITION FUND SUPPORT
(4) CENTRAL PENNSYLVANIA FOOD BANK 3908 COREY ROAD HARRISBURG, PA 17109	23-2202250	501(C)(3)	7,700	0			GENERAL SUPPORT
(5) AARON'S ACRES 1861 CHARTER LANE SUITE 114 LANCASTER, PA 17601	11-3820295	501(C)(3)	12,000	0			GENERAL SUPPORT
(6) PSEA SCHOLARSHIP TRUST 400 N THIRD STREET HARRISBURG, PA 17101	23-2225710	501(C)(3)	14,397	0			SCHOLARSHIP PROGRAMS
(7) PA ALLIANCE ACTION 121 S BROAD STREET SUITE 400 PHILADELPHIA, PA 19107	82-3537729	501(C)(4)	25,000	0			GENERAL SUPPORT
(8) PDK INTERNATIONAL PO BOX 13090 ARLINGTON, PA 22219	35-0975844	501(C)(3)	105,000	0			EDUCATORS RISING PROGRAM
(9) SCIENCE EXPLORERS 110 W WYOMISSING AVE MOHNTON, PA 19540	23-3023113	N/A	8,750	0			SCIENCE ASSEMBLIES
(10) CAMP DISCOVERY INC 896 CATHE LANE WARMINSTER, PA 18974	23-2729907	N/A	20,000	0			KIDS CAMP
(11) PENNSYLVANIA HERITAGE FOUNDATION AMERICA250PA 400 NORTH STREET HARRISBURG, PA 17120	22-2456059	501(C)(3)	10,000	0			PA CELEBRATION

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 7
- 3** Enter total number of other organizations listed in the line 1 table 4

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	18	30,750			
(2) POLITICAL ACTION COMMITTEE FUNDRAISING PRIZES	66	24,299	1,277	COST	SMALL ELECTRONICS
(3) MEMBER BENEFIT VENDOR PRIZES	11	2,875			
(4) STUDENT CONVENTION/ADVISOR PRIZES/MEMBERSHIP	3	150			
(5) REGION SCHOLARSHIP GRANTS	5	5,000			
(6) FABRIC OF UNIONISM ART CONTEST PRIZES	6	3,750			
(7) NEA REPRESENTATIVE ASSEMBLY VOLUNTEER GRANTS	109	27,048			
(8) REGION ART CONTEST/SPELLING BEE PRIZES	31	7,135			

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
PART I, LINE 2:	PROCEDURE FOR MONITORING USE OF GRANT FUNDS INSIDE U.S. 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, AGENCY FEE, 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

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Schedule J
(Form 990)

Compensation Information

OMB No. 1545-0047

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.**
- ▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

2023

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number
23-0961125

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.

- | | |
|---|---|
| <input type="checkbox"/> First-class or charter travel | <input checked="" type="checkbox"/> Housing allowance or residence for personal use |
| <input checked="" type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax idemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

b If any of the boxes on 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 on 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.

- | | |
|--|---|
| <input checked="" type="checkbox"/> Compensation committee | <input type="checkbox"/> Written employment contract |
| <input type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study |
| <input type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> 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		

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

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.

(A) Name and Title		(B) Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC			(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				
1 JAMES G VAUGHAN EXECUTIVE DIRECTOR	(i)	247,479	10,000	23,308	19,456	40,168	340,411	9,616
	(ii)	0	0	0	0	0	0	0
2 DANIEL M WIEDEMER AED FOR GOV'T RELATIONS	(i)	200,114	0	16,751	39,961	40,205	297,031	5,330
	(ii)	0	0	0	0	0	0	0
3 RICHARD W ASKEY FORMER PRESIDENT	(i)	195,901	0	54,136	7,494	35,984	293,515	39,180
	(ii)	0	0	0	0	0	0	0
4 CORINNE E FECHO YANES UNISERV REPRESENTATIVE	(i)	166,519	4,000	73,781	7,153	39,462	290,915	0
	(ii)	0	0	0	0	0	0	0
5 LAURA M PIRO DIRECTOR OF ADMINISTRATIVE SVCS	(i)	170,066	4,000	60,943	7,103	45,010	287,122	0
	(ii)	0	0	0	0	0	0	0
6 DAVID L WAZETER AED FOR PROGRAM SERVICES	(i)	200,114	0	12,405	20,583	41,375	274,477	0
	(ii)	0	0	0	0	0	0	0
7 CHARLES L HERRING STAFF ATTORNEY	(i)	183,118	0	32,415	20,853	37,918	274,304	0
	(ii)	0	0	0	0	0	0	0
8 JAMES PENDLETON AED FOR IT	(i)	200,114	0	15,584	15,226	41,895	272,819	4,949
	(ii)	0	0	0	0	0	0	0
9 PHYLLIS HEVERLY FLESHER AED FOR ADMINISTRATIVE SERVICES	(i)	193,859	0	8,201	29,822	38,885	270,767	0
	(ii)	0	0	0	0	0	0	0
10 LISA K BUETTNER AED FOR FIELD OPERATIONS	(i)	200,114	0	12,800	15,554	40,855	269,323	0
	(ii)	0	0	0	0	0	0	0
11 WALTER W WOJCIK AED FOR HUMAN RESOURCES	(i)	200,114	0	12,715	15,438	38,014	266,281	0
	(ii)	0	0	0	0	0	0	0
12 LYNNE L WILSON GENERAL COUNSEL	(i)	213,712	0	12,692	14,758	22,857	264,019	0
	(ii)	0	0	0	0	0	0	0
13 LORI A STRIPAY UNISERV REPRESENTATIVE	(i)	161,519	4,000	71,879	6,913	19,377	263,688	0
	(ii)	0	0	0	0	0	0	0
14 BERNADETTE M MCHUGH UNISERV REPRESENTATIVE	(i)	161,519	4,000	71,036	7,210	15,318	259,083	0
	(ii)	0	0	0	0	0	0	0
15 JOSEPH F HOWLETT FORMER AED FOR ADMINISTRATIVE SVCS	(i)	28,171	0	180,317	3,954	22,554	234,996	169,785
	(ii)	0	0	0	0	0	0	0
16 AARON F CHAPIN PRESIDENT	(i)	103,858	0	16,587	45,450	39,413	205,308	0
	(ii)	0	0	0	0	0	0	0
17 JEFFREY D NEY VICE PRESIDENT	(i)	93,791	0	17,253	31,594	37,477	180,115	0
	(ii)	0	0	0	0	0	0	0

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
PART I, LINE 1A	<p>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 2023 TAXABLE INCOME FOR PSEA PROVIDED APARTMENTS.</p>

Additional Data

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Schedule L
(Form 990)

Transactions with Interested Persons

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

2023

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number

23-0961125

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and section 501(c)(29) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected?	
				Yes	No

- 2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958. _____
- 3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization \$ _____

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No
Total												

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance
(1) JANICE PEARSON	BOARD MEMBER	1,000	PRIZE	ART CONTEST PRIZE - FABRIC OF UNIONISM

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
(1) GEORGE LEADER	SEE PART V EMPLOYEE IS SON- IN-LAW OF FORMER KEY EMPLOYEE	124,265	SEE PART VEMPLOYEE COMPENSATION AND BENEFITS		No

Part V Supplemental Information

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

Return Reference	Explanation
SCHEDULE L, PART IV	EMPLOYEE COMPENSATION AND BENEFITS REPORTED IN COLUMN C ABOVE INCLUDES ALL FORMS OF CASH AND NONCASH COMPENSATION AND BENEFITS INCLUDING SALARIES, DEFERRED COMPENSATION SUCH AS RETIREMENT BENEFITS, AND ALL NONTAXABLE FRINGE BENEFITS.

Additional Data

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SCHEDULE O
(Form 990)**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.

Go to www.irs.gov/Form990 for the latest information.

2023**Open to Public
Inspection**Department of the Treasury
Internal Revenue ServiceName of the organization
PENNSYLVANIA STATE EDUCATION ASSOCIATION

Employer identification number

23-0961125

Return Reference	Explanation
FORM 990, PART VI, SECTION A, 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.
FORM 990, PART VI, SECTION A, 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. MEMBERS WITH RIGHTS TO ELECT THE MEMBERS OF THE GOVERNING BODY INCLUDE THE FOLLOWING MEMBERSHIP CLASSES DESCRIBED IN THE PSEA CONSTITUTION & BYLAWS: ACTIVE MEMBERSHIP: ANY PERSON WHO IS ACTIVELY ENGAGED IN EDUCATIONAL WORK IN PENNSYLVANIA. LIFE MEMBERSHIP: ANY PERSON WHO IS AN ACTIVE MEMBER OF THE ASSOCIATION AND WHO HAS PAID THE LIFE MEMBERSHIP DUES OF 20 TIMES THE ANNUAL ACTIVE MEMBERSHIP DUES OF THE ASSOCIATION, EFFECTIVE DECEMBER 31, 1972, SHALL BE CONTINUED AS AN ACTIVE LIFE MEMBER OF THE ASSOCIATION. EDUCATION SUPPORT PROFESSIONAL MEMBERSHIP: ANY PERSON ACTIVELY ENGAGED IN EDUCATIONAL SUPPORT WORK IN PENNSYLVANIA. RETIRED MEMBERSHIP: ANY PERSON WHO HAS RETIRED FROM ACTIVE SERVICE AS A SCHOOL EMPLOYEE. STUDENT MEMBERSHIP: ANY PERSON WHO IS AN ACTIVE DUES-PAYING MEMBER OF STUDENT PSEA AND IS A STUDENT MEMBER OF NEA.
FORM 990, PART VI, SECTION A, 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 MEMBERSHIPS 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.
FORM 990, PART VI, SECTION B, 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 TO MEMBERS OF THE BOARD OF DIRECTORS.
FORM 990, PART VI, SECTION B, 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.
FORM 990,	EXECUTIVE COMPENSATION REVIEW COMPENSATION FOR KEY EMPLOYEES, OTHER THAN THE EXECUTIVE DIRECTOR, IS SET

Return Reference	Explanation
PART VI, SECTION B, LINE 15	BY THE PERSONNEL COMMITTEE AND THEN APPROVED BY THE BOARD OF DIRECTORS. COMPENSATION FOR THE EXECUTIVE DIRECTOR IS SET BY THE EXECUTIVE DIRECTOR REVIEW COMMITTEE AND THEN APPROVED BY THE BOARD OF DIRECTORS. COMPENSATION FOR KEY EMPLOYEES, INCLUDING THE EXECUTIVE DIRECTOR, AND ALL MANAGEMENT TEAM MEMBERS IS DOCUMENTED IN WRITTEN EMPLOYMENT CONTRACTS. THE SALARIES FOR THE EXECUTIVE DIRECTOR AND ALL MANAGEMENT TEAM MEMBERS ARE BASED ON A DIFFERENTIAL (OR INDEXED RATE) FROM THE HIGHEST BARGAINING UNIT SALARY. THE PROCESS FOR DETERMINING THE EXECUTIVE DIRECTOR AND KEY EMPLOYEES' COMPENSATION INCLUDES A REVIEW OF COMPARABILITY DATA. COMPARISON DATA FROM OTHER NEA STATE AFFILIATES IS COLLECTED, SUMMARIZED, AND MADE AVAILABLE TO THE PERSONNEL AND EXECUTIVE DIRECTOR REVIEW COMMITTEES FOR THEIR CONSIDERATION. THE DELIBERATION PROCESS AND OUTCOME IS DOCUMENTED IN THE HUMAN RESOURCES CONFIDENTIAL FILES. THE PROCESS FOR DETERMINING THE OFFICERS' COMPENSATION IS BASED ON A DIFFERENTIAL FROM THE AVERAGE STATEWIDE INSTRUCTIONAL SALARY. THIS DIFFERENTIAL RATE IS APPROVED BY THE BOARD OF DIRECTORS.
FORM 990, PART VI, SECTION C, 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.
FORM 990, PART VII	COMPENSATION THREE OF 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.
FORM 990, PART XI, LINE 9:	EFFECT OF PENSION RELATED CHANGES OTHER THAN NET PERIODIC PENSION COST 12,545,658. EFFECT OF POST RETIREMENT CHGS OTHER THAN NET PERIODIC POSTRETIREMENT COST 119,824.

Additional Data

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**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047

2023

**Open to Public
Inspection**

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

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	No
(2) PSEA-PACE FOR STATE ELECTIONS 400 NORTH THIRD STREET HARRISBURG, PA 17101 23-2116856	PAC	PA	527	N/A	N/A		No
(3) PSEA RETIREE BENEFIT TRUST 400 NORTH THIRD STREET HARRISBURG, PA 17101 25-6862258	BENEFITS	PA	501(C)(9)	N/A	N/A		No
(4) PSEA SCHOLARSHIP TRUST C/O MELLON BANK NA PO BOX 185 PITTSBURGH, PA 15230 23-2225710	SCHOLARSHIPS	PA	501(C)(3)	PF	N/A		No
(5) PSEA EDUCATION FOUNDATION 400 NORTH THIRD STREET HARRISBURG, PA 17101 31-1649860	EDUCATIONAL/CHARITABLE	PA	501(C)(3)	PF	N/A		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?

- a** Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity
- b** Gift, grant, or capital contribution to related organization(s)
- c** Gift, grant, or capital contribution from related organization(s)
- d** Loans or loan guarantees to or for related organization(s)
- e** Loans or loan guarantees by related organization(s)
- f** Dividends from related organization(s)
- g** Sale of assets to related organization(s)
- h** Purchase of assets from related organization(s)
- i** Exchange of assets with related organization(s)
- j** Lease of facilities, equipment, or other assets to related organization(s)
- k** Lease of facilities, equipment, or other assets from related organization(s)
- l** Performance of services or membership or fundraising solicitations for related organization(s)
- m** Performance of services or membership or fundraising solicitations by related organization(s)
- n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)
- o** Sharing of paid employees with related organization(s)
- p** Reimbursement paid to related organization(s) for expenses
- q** Reimbursement paid by related organization(s) for expenses
- r** Other transfer of cash or property to related organization(s)
- s** Other transfer of cash or property from related organization(s)

	Yes	No
1a		No
1b		No
1c		No
1d		No
1e		No
1f		No
1g		No
1h		No
1i		No
1j		No
1k		No
1l	Yes	
1m		No
1n	Yes	
1o	Yes	
1p	Yes	
1q	Yes	
1r	Yes	
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	860,911	FMV
(2) FUND FOR STUDENT SUCCESS	R	900,000	FMV
(3) HEALTHCARE - PSEA	L	122,394	FMV

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

Return Reference	Explanation
SCHEDULE R, PART V	<p>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.</p>

Schedule R (Form 990) 2023

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