## Part I — Summary

1. Briefly describe the organization's mission or most significant activities: **SEE SCHEDULE O**

2. Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

   - **3**

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

   - **4**

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

   - **5**

5. Total number of individuals employed in calendar year 2019 (Part V, line 2a)

   - **6**

6. Total number of volunteers (estimate if necessary)

   - **7**

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

   - **7a**

7b. Unrelated business taxable income from Form 990-T, line 39

   - **7b**

### Revenue

- **8** Contributions and grants (Part VIII, line 1h)  
  - **9** Program service revenue (Part VIII, line 2g)  
  - **10** Investment income (Part VIII, column (A), lines 3, 4, and 7d)  
  - **11** Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)  
  - **12** Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)

### Expenses

- **13** Grants and similar amounts paid (Part IX, column (A), lines 1-3)
- **14** Benefits paid to or for members (Part IX, column (A), line 4)
- **15** Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)
- **16a** Professional fundraising fees (Part IX, column (A), line 11e)
- **17** Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)
- **18** Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)
- **19** Revenue less expenses. Subtract line 18 from line 12

### Net Assets or Fund Balances

- **20** Total assets (Part X, line 16)
- **21** Total liabilities (Part X, line 26)
- **22** Net assets or fund balances. Subtract line 21 from line 20

## Part II — Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

### Sign Here

- **Signature of officer**
  - **DATE**

- **Type or print name and title**

### Paid Preparer

- **Print/Type preparer's name**
- **Preparer's signature**
- **Date**
- **Check**
  - **Self-employed**
- **PTIN**
  - **00168809**

### Use Only

- **Firm's name**
  - **MAHER DUSSSEL, CPA'S**
- **Firm's EIN**
  - **25-1622758**
- **Firm's address**
  - **1800 LINGLESTOWN ROAD, SUITE 306**
  - **HARRISBURG, PA 17110**
- **Phone no.**
  - **717-232-1230**

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

- **X** Yes
- **No**
Part III Statement of Program Service Accomplishments

1. Briefly describe the organization's mission:

   PROMOTE EXCELLENCE IN PUBLIC EDUCATION AND SCHOOL BOARD GOVERNANCE
   THROUGH LEADERSHIP, SERVICE, AND ADVOCACY.

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 [X]

   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 [X]

   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 $ 370,893. including grants of $ __________ ) (Revenue $ 988,239. )
   PUBLICATIONS RELATING TO SCHOOL DISTRICT ACTIVITIES AND CONCERNS,
   LEGISLATIVE SUMMARIES. PUBLICATIONS INCLUDE DAILY EDITION, PSBA BULLETIN, SCHOOL LAW, AND INFORMATION EXCHANGE. TOTAL DISTRIBUTION OF 31,228 HARD COPIES AND 55,939 ELECTRONIC COPIES.

   4b (Code: ________ ) (Expenses $ 1,735,776. including grants of $ __________ ) (Revenue $ 2,769,328. )
   PREPARATION AND PUBLICATION OF POLICY GUIDES FOR PENNSYLVANIA SCHOOL BOARDS SERVING SCHOOL DISTRICTS, CAREER AND TECHNICAL CENTERS AND INTERMEDIATE UNITS AND SCHOOL PERSONNEL SERVICES. POLICY GUIDES REACH 565-MEMBER ENTITIES AND AGENDA MANAGEMENT SERVICES ARE BEING USED BY 188-MEMBER ENTITIES. SCHOOL SERVICES INCLUDE ADMINISTRATIVE SEARCH EMPLOYEE RELATION SERVICES, BACKGROUND SEARCH SERVICES AND CAREER EMPLOYMENT PLACEMENT. THESE SERVICES WERE PROVIDED TO 508-MEMBER ENTITIES DURING FISCAL 2018-2019.

   4c (Code: ________ ) (Expenses $ 4,492,025. including grants of $ __________ ) (Revenue $ 3,971,531. )
   LOCAL, REGIONAL, STATEWIDE AND NATIONAL CONFERENCES, SEMINARS AND MEETING FOR PENNSYLVANIA SCHOOL DIRECTORS AND ADMINISTRATORS CONCERNING SCHOOL BOARD INTERESTS, ACTIVITIES AND CONCERNS. CONFERENCES, WEB CONFERENCES, SEMINARS, TOWNHALLS AND WORKSHOPS OFFERED DURING THE YEAR INCLUDE PASA-PSBA ANNUAL LEADERSHIP CONFERENCE, SCHOOL SOLICITOR SYMPOSIUM, BOARD PRESIDENT TRAINING, NEW SCHOOL BOARD DIRECTOR TRAINING, EQUITY SYMPOSIUM, SCHOOL SAFETY AND SECURITIES EXCHANGE, AND SPRING LEGAL ROUND-UP. THE PSBA LEARNING PORTAL FEATURES 85 ONLINE COURSES. THERE WERE 2,297 WEBINAR ATTENDEES, AND 1,299 INDIVIDUALS ATTENDED THE LIVE EVENTS.

4d Other program services (Describe on Schedule O.)

4e Total program service expenses $ 6,598,694.
Part IV Checklist of Required Schedules

1. Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?
   If "Yes," complete Schedule A

2. Is the organization required to complete Schedule B, Schedule of Contributors?
   If "Yes," complete Schedule B

3. Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I

4. Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II

5. Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III

6. Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I

7. Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II

8. Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III

9. Did the organization report an amount in Part X, line 12, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV

10. Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? If "Yes," complete Schedule D, Part V

11. If the organization answered "Yes" to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.
   a. Did the organization report an amount for land, buildings, and equipment in Part X, line 12? If "Yes," complete Schedule D, Part VI
   b. Did the organization report an amount for investments · other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII
   c. Did the organization report an amount for investments · program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII
   d. Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX
   e. Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X
   f. Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Parts XI and XII

12. Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII

   a. Was the organization included in consolidated, independent audited financial statements for the tax year?
      If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional

13. Is the organization a school described in section 170(b)(1)(A)(iii)? If "Yes," complete Schedule E

14. Did the organization maintain an office, employees, or agents outside of the United States?
   b. Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? If "Yes," complete Schedule F, Parts I and IV

15. Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV

16. Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV

17. Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I

18. Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1.c and 8a? If "Yes," complete Schedule G, Part II

19. Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III

20. Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H
   b. If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?

21. Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 17? If "Yes," complete Schedule I, Parts I and II
Part IV Checklist of Required Schedules (continued)

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 27? If "Yes," complete Schedule I, Parts I and II

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? If "Yes," complete Schedule J

24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a

24b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?

24c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?

24d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?

25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I

25b 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? If "Yes," complete Schedule L, Part II

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? If "Yes," complete Schedule L, Part II

27 Did the organization provide 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? If "Yes," complete Schedule L, Part III

28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions, for applicable filing thresholds, conditions, and exceptions):

a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV

b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV

c A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? If "Yes," complete Schedule L, Part IV

29 Did the organization receive more than $25,000 in non-cash contributions? If "Yes," complete Schedule M

30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M

31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I

32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II

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? If "Yes," complete Schedule R, Part I

34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1

35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?

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)? If "Yes," complete Schedule R, Part V, line 2

36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?

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? If "Yes," complete Schedule R, Part VI

38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?

Note: All Form 990 filers are required to complete Schedule O

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

1a Enter the number reported in Box 3 of Form 1096. Enter 0 if not applicable

b Enter the number of Forms W-2G included in line 1a. Enter 0 if not applicable

c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?
**Part V: Statements Regarding Other IRS Filings and Tax Compliance (continued)**

<table>
<thead>
<tr>
<th>2a</th>
<th>Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return</th>
<th>71</th>
</tr>
</thead>
<tbody>
<tr>
<td>b</td>
<td>If at least one is reported on line 2a, did the organization file all required federal employment tax returns?</td>
<td>No</td>
</tr>
<tr>
<td>Note:</td>
<td>If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)</td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>Did the organization have unrelated business gross income of $1,000 or more during the year?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; has it filed a Form 990-T for this year? If &quot;No&quot; to line 3b, provide an explanation on Schedule O</td>
<td></td>
</tr>
<tr>
<td>4a</td>
<td>At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; enter the name of the foreign country. See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).</td>
<td></td>
</tr>
<tr>
<td>5a</td>
<td>Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</td>
<td>No</td>
</tr>
<tr>
<td>c</td>
<td>If &quot;Yes&quot; to line 5a or 5b, did the organization file Form 8886-T?</td>
<td>No</td>
</tr>
<tr>
<td>6a</td>
<td>Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?</td>
<td>No</td>
</tr>
<tr>
<td>7</td>
<td>Organizations that may receive deductible contributions under section 170(c).</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; did the organization notify the donor of the value of the goods or services provided?</td>
<td>No</td>
</tr>
<tr>
<td>c</td>
<td>Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?</td>
<td>No</td>
</tr>
<tr>
<td>d</td>
<td>If &quot;Yes,&quot; indicate the number of Forms 8282 filed during the year</td>
<td>No</td>
</tr>
<tr>
<td>e</td>
<td>Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</td>
<td>No</td>
</tr>
<tr>
<td>f</td>
<td>Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</td>
<td>No</td>
</tr>
<tr>
<td>g</td>
<td>If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?</td>
<td>No</td>
</tr>
<tr>
<td>h</td>
<td>If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?</td>
<td>No</td>
</tr>
<tr>
<td>8</td>
<td>Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?</td>
<td>No</td>
</tr>
<tr>
<td>9</td>
<td>Sponsoring organizations maintaining donor advised funds.</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Did the sponsoring organization make any taxable distributions under section 4966?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?</td>
<td>No</td>
</tr>
<tr>
<td>10</td>
<td>Section 501(c)(7) organizations. Enter:</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Initiation fees and capital contributions included on Part VIII, line 12</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Section 501(c)(12) organizations. Enter:</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Gross income from members or shareholders</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)</td>
<td></td>
</tr>
<tr>
<td>12a</td>
<td>Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; enter the amount of tax-exempt interest received or accrued during the year</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Section 501(c)(29) qualified nonprofit health insurance issuers.</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Is the organization licensed to issue qualified health plans in more than one state?</td>
<td>No</td>
</tr>
<tr>
<td>Note:</td>
<td>See the instructions for additional information the organization must report on Schedule O.</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Enter the amount of reserves on hand</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Did the organization receive any payments for indoor tanning services during the tax year?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; has it filed a Form 720 to report these payments? If &quot;No,&quot; provide an explanation on Schedule O</td>
<td>No</td>
</tr>
<tr>
<td>15</td>
<td>Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; see instructions and file Form 4720, Schedule N.</td>
<td>No</td>
</tr>
<tr>
<td>16</td>
<td>Is the organization an educational institution subject to the section 4968 excise tax on net investment income?</td>
<td>No</td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; complete Form 4720, Schedule O.</td>
<td>No</td>
</tr>
</tbody>
</table>
**Part VI | Governance, Management, and Disclosure**

For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on 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**

1a Enter the number of voting members of the governing body at the end of the tax year

If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.

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, 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?

b 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:

a The governing body?

b 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 on Schedule O

**Section B. Policies**

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

10a Did the organization have local chapters, branches, or affiliates?

b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization’s exempt purposes?

11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?

b Describe in Schedule O the process, if any, used by the organization to review this Form 990.

12a Did the organization have a written conflict of interest policy? If "No," go to line 13

b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?

c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in 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?

a The organization’s CEO, Executive Director, or top management official

b Other officers or key employees of the organization

If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).

16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?

b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization’s exempt status with respect to such arrangements?

**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 Forms 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
- [X] Another’s website
- [X] Upon request
- [ ] Other (explain on Schedule O)

19 Describe on 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

KYLE FRONK, SENIOR DIRECTOR OF FINANCE – 717-506-2450

400 BENT CREEK BLVD., MECHANICSBURG, PA 17050

DRAFT

12/18/20
Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

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

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.
- List all of the organization’s key employees, if any. See instructions for definition of “key employee.”
- List all of the organization’s highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.
- List all of the organization’s officers, key employees, and 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 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.

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week</th>
<th>(C) Position</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) MAURA BURI</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>AT LARGE REP. - EAST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) DANIEL O’KEEFE</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>AT LARGE REP. - WEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) JULIE PRESTON</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>AT LARGE REP. - CENTRAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4) BATHANNE ZEIGLER</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
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<td>0.</td>
</tr>
<tr>
<td>ADVISORY COUNCIL REPRESENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5) SABRINA BACKER</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>RDCC CO-CHAIRPERSON BBG</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6) THOMAS KEREK</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>RDCC CO-CHAIRPERSON</td>
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<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(7) DAVID HUTCHINSON</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>IMMEDIATE PAST PRESIDENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8) ART LEVINOWITZ</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>PRESIDENT ELECT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9) ERIC WOLFGANG</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>PRESIDENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(10) MICHAEL GOSSERT</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>TREASURER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(11) DAVID HEIN</td>
<td>3.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>VICE PRESIDENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(12) NATHAN MAINS</td>
<td>40.00</td>
<td>X</td>
<td>262,321.</td>
<td>0.</td>
<td>62,215.</td>
</tr>
<tr>
<td>CHIEF EXECUTIVE OFFICER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(13) JOHN CALLAHAN</td>
<td>40.00</td>
<td>X</td>
<td>147,802.</td>
<td>0.</td>
<td>24,579.</td>
</tr>
<tr>
<td>CHIEF ADVOCACY OFFICER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(14) STUART KNADE, ESQ.</td>
<td>40.00</td>
<td>X</td>
<td>144,571.</td>
<td>0.</td>
<td>29,030.</td>
</tr>
<tr>
<td>SENIOR DIRECTOR OF LEGAL S</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(15) BRITTA BARRICKMAN</td>
<td>40.00</td>
<td>X</td>
<td>121,116.</td>
<td>0.</td>
<td>40,597.</td>
</tr>
<tr>
<td>CHIEF MEMBER SERVICES OFFI</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(16) CHRISTINA GRIFFITHS</td>
<td>1.00</td>
<td>X</td>
<td>143,654.</td>
<td>0.</td>
<td>45,288.</td>
</tr>
<tr>
<td>EXECUTIVE DIRECTOR OF FOUN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week</th>
<th>(C) Position</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Individual trustee or director</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Institutional trustee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Officer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Key employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Highest compensated employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Key employee</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1b Subtotal: $819,464. 0 201,709.

c Total from continuation sheets to Part VII, Section A: 0 0 0.

d Total (add lines 1b and 1c): $819,464. 0 201,709.

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: 5

3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual: 

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? If "Yes," complete Schedule J for such individual: 

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person: 

### 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.

<table>
<thead>
<tr>
<th>(A) Name and business address</th>
<th>(B) Description of services</th>
<th>(C) Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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: 0
### Part VIII Statement of Revenue

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

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

<table>
<thead>
<tr>
<th>Program Service Revenue</th>
<th>Program Service Revenue</th>
<th>Program Service Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 a MEMBERSHIP DUES</td>
<td>2a</td>
<td>Business Code</td>
</tr>
<tr>
<td>b POLICY SERVICES</td>
<td>2b</td>
<td>900099</td>
</tr>
<tr>
<td>c EVENTS</td>
<td>2c</td>
<td>4,569,054, 4,569,054.</td>
</tr>
<tr>
<td>d MEMBER SERVICES</td>
<td>2d</td>
<td>1,317,839, 1,317,839.</td>
</tr>
<tr>
<td>e PUBLICATIONS AND PRINT</td>
<td>2e</td>
<td>739,473, 739,473.</td>
</tr>
<tr>
<td>f All other program service revenue</td>
<td>2f</td>
<td>646,025, 646,025.</td>
</tr>
<tr>
<td>g Total, Add lines 2a-2f</td>
<td>g Total, Add lines 2a-2f</td>
<td>286,470, 223,374, 63,096.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Other Revenue</th>
<th>Other Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Investment income (including dividends, interest, and other similar amounts)</td>
<td>3</td>
<td>105,318, 105,318.</td>
</tr>
<tr>
<td>4 Income from investment of tax-exempt bond proceeds</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5 Royalties</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6 a Gross rents</td>
<td>6a</td>
<td>(i) Real</td>
</tr>
<tr>
<td>b Less: rental expenses</td>
<td>6b</td>
<td>(ii) Personal</td>
</tr>
<tr>
<td>c Rental income or (loss)</td>
<td>6c</td>
<td></td>
</tr>
<tr>
<td>d Net rental income or (loss)</td>
<td>d Total, Net rental income or (loss)</td>
<td>-10,471, -10,471.</td>
</tr>
<tr>
<td>7 a Gross amount from sales of assets other than inventory</td>
<td>7a</td>
<td>(i) Securities</td>
</tr>
<tr>
<td>b Less: cost or other basis and sales expenses</td>
<td>7b</td>
<td>(ii) Other</td>
</tr>
<tr>
<td>c Gain or (loss)</td>
<td>7c</td>
<td></td>
</tr>
<tr>
<td>d Net gain or (loss)</td>
<td>d Total, Net gain or (loss)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Other Revenue</th>
<th>Other Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 a Gross income from fundraising events (not including $ of contributions reported on line 1c). See Part IV, line 18</td>
<td>8a</td>
<td></td>
</tr>
<tr>
<td>b Less: direct expenses</td>
<td>8b</td>
<td></td>
</tr>
<tr>
<td>c Net income or (loss) from fundraising events</td>
<td>8c</td>
<td></td>
</tr>
<tr>
<td>9 a Gross income from gaming activities. See Part IV, line 19</td>
<td>9a</td>
<td></td>
</tr>
<tr>
<td>b Less: direct expenses</td>
<td>9b</td>
<td></td>
</tr>
<tr>
<td>c Net income or (loss) from gaming activities</td>
<td>9c</td>
<td></td>
</tr>
<tr>
<td>10 a Gross sales of inventory, less returns and allowances</td>
<td>10a</td>
<td></td>
</tr>
<tr>
<td>b Less: cost of goods sold</td>
<td>10b</td>
<td></td>
</tr>
<tr>
<td>c Net income or (loss) from sales of inventory</td>
<td>10c</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Miscellaneous Revenue</th>
<th>Miscellaneous Revenue</th>
<th>Miscellaneous Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 a LICENSE &amp; ROYALTY AGRE</td>
<td>11a</td>
<td>Business Code</td>
</tr>
<tr>
<td>b SPONSORSHIP INCOME</td>
<td>11b</td>
<td>385,809, 385,809.</td>
</tr>
<tr>
<td>c SERVICES &amp; FACILITIES</td>
<td>11c</td>
<td>233,333, 233,333.</td>
</tr>
<tr>
<td>d All other revenue</td>
<td>11d</td>
<td>169,163, 17,841.</td>
</tr>
<tr>
<td>e Total, Add lines 11a-11d</td>
<td>e Total, Add lines 11a-11d</td>
<td>806,146.</td>
</tr>
<tr>
<td>12 Total revenue. See instructions</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

12/18/20
<table>
<thead>
<tr>
<th></th>
<th>(A) Total expenses</th>
<th>(B) Program service expenses</th>
<th>(C) Management and general expenses</th>
<th>(D) Fundraising expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21</td>
<td>342,784</td>
<td>257,088</td>
<td>85,696</td>
</tr>
<tr>
<td>2</td>
<td>Grants and other assistance to domestic individuals. See Part IV, line 22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Benefits paid to or for members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Compensation of current officers, directors, trustees, and key employees</td>
<td>4,006,581</td>
<td>3,004,936</td>
<td>1,001,645</td>
</tr>
<tr>
<td>6</td>
<td>Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)</td>
<td>651,160</td>
<td>488,370</td>
<td>162,790</td>
</tr>
<tr>
<td>7</td>
<td>Other salaries and wages</td>
<td>742,781</td>
<td>557,086</td>
<td>185,695</td>
</tr>
<tr>
<td>8</td>
<td>Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)</td>
<td>52,888</td>
<td>39,666</td>
<td>13,222</td>
</tr>
<tr>
<td>9</td>
<td>Other employee benefits</td>
<td>11,001</td>
<td>11,001</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Payroll taxes</td>
<td>995</td>
<td>995</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Fees for services (nonemployees):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Management</td>
<td>122,676</td>
<td>92,007</td>
<td>30,669</td>
</tr>
<tr>
<td>b</td>
<td>Legal</td>
<td>26,323</td>
<td>26,323</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Accounting</td>
<td>11,001</td>
<td>11,001</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Lobbying</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Professional fundraising services. See Part IV, line 17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f</td>
<td>Investment management fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)</td>
<td>246,211</td>
<td>184,659</td>
<td>61,552</td>
</tr>
<tr>
<td>12</td>
<td>Advertising and promotion</td>
<td>65,241</td>
<td>48,931</td>
<td>16,310</td>
</tr>
<tr>
<td>13</td>
<td>Office expenses</td>
<td>196,655</td>
<td>147,491</td>
<td>49,164</td>
</tr>
<tr>
<td>14</td>
<td>Information technology</td>
<td>261,491</td>
<td>196,118</td>
<td>65,373</td>
</tr>
<tr>
<td>15</td>
<td>Royalties</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Occupancy</td>
<td>285,728</td>
<td>214,296</td>
<td>71,432</td>
</tr>
<tr>
<td>17</td>
<td>Travel</td>
<td>104,659</td>
<td>78,494</td>
<td>26,165</td>
</tr>
<tr>
<td>18</td>
<td>Payments of travel or entertainment expenses for any federal, state, or local public officials</td>
<td>602,111</td>
<td>451,583</td>
<td>150,528</td>
</tr>
<tr>
<td>19</td>
<td>Conferences, conventions, and meetings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Payments to affiliates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Depreciation, depletion, and amortization</td>
<td>498,933</td>
<td>374,199</td>
<td>124,734</td>
</tr>
<tr>
<td>23</td>
<td>Insurance</td>
<td>113,169</td>
<td>84,876</td>
<td>28,293</td>
</tr>
<tr>
<td>24</td>
<td>Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)</td>
<td>171,182</td>
<td>128,387</td>
<td>42,795</td>
</tr>
<tr>
<td>a</td>
<td>PUBLICATION PRINTING</td>
<td>121,851</td>
<td>91,389</td>
<td>30,462</td>
</tr>
<tr>
<td>b</td>
<td>GOVERNANCE AND LEADERSHIP</td>
<td>71,116</td>
<td>53,337</td>
<td>17,779</td>
</tr>
<tr>
<td>c</td>
<td>POLICY SERVICES</td>
<td>70,596</td>
<td>52,947</td>
<td>17,649</td>
</tr>
<tr>
<td>d</td>
<td>SUBSCRIPTIONS AND MEMBERSHIP</td>
<td>55,776</td>
<td>41,833</td>
<td>13,943</td>
</tr>
<tr>
<td>e</td>
<td>All other expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Total functional expenses. Add lines 1 through 24e</td>
<td>8,821,908</td>
<td>6,598,694</td>
<td>2,223,214</td>
</tr>
<tr>
<td>26</td>
<td>Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Check here 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 X

<table>
<thead>
<tr>
<th></th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash - non-interest-bearing</td>
<td>392.</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td>4,528,571.</td>
</tr>
<tr>
<td>3</td>
<td>Pledges and grants receivable, net</td>
<td>3.</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>1,396,705.</td>
</tr>
<tr>
<td>5</td>
<td>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</td>
<td>5.</td>
</tr>
<tr>
<td>6</td>
<td>Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)</td>
<td>6.</td>
</tr>
<tr>
<td>7</td>
<td>Notes and loans receivable, net</td>
<td>7.</td>
</tr>
<tr>
<td>8</td>
<td>Inventories for sale or use</td>
<td>190,750.</td>
</tr>
<tr>
<td>9</td>
<td>Prepaid expenses and deferred charges</td>
<td>190,750.</td>
</tr>
<tr>
<td>10a</td>
<td>Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D</td>
<td>11,998,320.</td>
</tr>
<tr>
<td>10b</td>
<td>Less: accumulated depreciation</td>
<td>6,338,292.</td>
</tr>
<tr>
<td>11</td>
<td>Investments - publicly traded securities</td>
<td>11.</td>
</tr>
<tr>
<td>12</td>
<td>Investments - other securities. See Part IV, line 11</td>
<td>12.</td>
</tr>
<tr>
<td>15</td>
<td>Other assets. See Part IV, line 11</td>
<td>33,188.</td>
</tr>
<tr>
<td>16</td>
<td>Total assets. Add lines 1 through 15 (must equal line 33)</td>
<td>12,345,771.</td>
</tr>
<tr>
<td>17</td>
<td>Accounts payable and accrued expenses</td>
<td>537,990.</td>
</tr>
<tr>
<td>18</td>
<td>Grants payable</td>
<td>18.</td>
</tr>
<tr>
<td>19</td>
<td>Deferred revenue</td>
<td>1,384,997.</td>
</tr>
<tr>
<td>20</td>
<td>Tax-exempt bond liabilities</td>
<td>20.</td>
</tr>
<tr>
<td>22</td>
<td>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</td>
<td>22.</td>
</tr>
<tr>
<td>23</td>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td>23.</td>
</tr>
<tr>
<td>24</td>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td>24.</td>
</tr>
<tr>
<td>25</td>
<td>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</td>
<td>500,325.</td>
</tr>
<tr>
<td>26</td>
<td>Total liabilities. Add lines 17 through 25</td>
<td>1,922,987.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Net assets without donor restrictions</td>
<td>10,422,784.</td>
</tr>
<tr>
<td>28</td>
<td>Net assets with donor restrictions</td>
<td>28.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>Capital stock or trust principal, or current funds</td>
<td>29.</td>
</tr>
<tr>
<td>30</td>
<td>Paid-in or capital surplus, or land, building, or equipment fund</td>
<td>30.</td>
</tr>
<tr>
<td>31</td>
<td>Retained earnings, endowment, accumulated income, or other funds</td>
<td>31.</td>
</tr>
<tr>
<td>32</td>
<td>Total net assets or fund balances</td>
<td>10,422,784.</td>
</tr>
<tr>
<td>33</td>
<td>Total liabilities and net assets/fund balances</td>
<td>12,345,771.</td>
</tr>
</tbody>
</table>
### Part XI  Reconciliation of Net Assets

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VIII, column (A), line 12)</td>
<td>8,459,854</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part IX, column (A), line 25)</td>
<td>8,821,908</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses. Subtract line 2 from line 1</td>
<td>-362,054</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))</td>
<td>10,422,784</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain on Schedule O)</td>
<td>357,375</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))</td>
<td>10,418,105</td>
</tr>
</tbody>
</table>

### Part XII  Financial Statements and Reporting

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Accounting method used to prepare the Form 990: Cash ☐ Accrual ☑ Other ☐</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the organization changed its method of accounting from a prior year or checked &quot;Other,&quot; explain in Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Were the organization's financial statements compiled or reviewed by an independent accountant?</td>
<td>☑</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>If &quot;Yes,&quot; check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b Were the organization's financial statements audited by an independent accountant?</td>
<td>☑</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>If &quot;Yes,&quot; check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Separate basis ☑ Consolidated basis ☐ Both consolidated and separate basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c If &quot;Yes&quot; to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?</td>
<td>☑</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?</td>
<td>☑</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>b If &quot;Yes,&quot; did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Supplemental Financial Statements

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>
<thead>
<tr>
<th></th>
<th>(a) Donor advised funds</th>
<th>(b) Funds and other accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total number at end of year</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Aggregate value of contributions to (during year)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aggregate value of grants from (during year)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Aggregate value at end of year</td>
<td></td>
</tr>
</tbody>
</table>

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization’s property, subject to the organization’s exclusive legal control? Yes No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Yes No

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).

- Preservation of land for public use (for example, recreation or education)
- Protection of natural habitat
- Preservation of open space
- Preservation of a historically important land area
- Preservation of a certified historic structure

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

<table>
<thead>
<tr>
<th></th>
<th>Held at the End of the Tax Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Total number of conservation easements</td>
</tr>
<tr>
<td>b</td>
<td>Total acreage restricted by conservation easements</td>
</tr>
<tr>
<td>c</td>
<td>Number of conservation easements on a certified historic structure included in (a)</td>
</tr>
<tr>
<td>d</td>
<td>Number of conservation easements included in (b) acquired after 7/25/06, and not on a historic structure listed in the National Register</td>
</tr>
</tbody>
</table>

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Number of states where property subject to conservation easement is located</td>
</tr>
<tr>
<td>5</td>
<td>Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Yes No</td>
</tr>
<tr>
<td>6</td>
<td>Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year</td>
</tr>
<tr>
<td>7</td>
<td>Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year</td>
</tr>
<tr>
<td>8</td>
<td>Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No</td>
</tr>
<tr>
<td>9</td>
<td>In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization’s financial statements that describes the organization’s accounting for conservation easements.</td>
</tr>
</tbody>
</table>

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered “Yes” on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

1b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

- Revenue included on Form 990, Part VIII, line 1 $ 
- Assets included in Form 990, Part X $ 

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

- Revenue included on Form 990, Part VIII, line 1 $ 
- Assets included in Form 990, Part X $ 

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2019
### 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 make significant use of its collection items (check all that apply):
- Public exhibition
- Scholarly research
- Preservation for future generations

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?

### 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?

b If "Yes," explain the arrangement in Part XIII and complete the following table:

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>c Beginning balance</td>
<td></td>
</tr>
<tr>
<td>d Additions during the year</td>
<td></td>
</tr>
<tr>
<td>e Distributions during the year</td>
<td></td>
</tr>
<tr>
<td>f Ending balance</td>
<td></td>
</tr>
</tbody>
</table>

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?

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

### Part V Endowment Funds.
Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

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:

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>a Board designated or quasi-endowment</td>
<td></td>
</tr>
<tr>
<td>b Permanent endowment</td>
<td></td>
</tr>
<tr>
<td>c Term endowment</td>
<td></td>
</tr>
</tbody>
</table>

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 line 3a(ii), are the related organizations listed as required on Schedule R?

### 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.

<table>
<thead>
<tr>
<th>Description of property</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(c) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td>1,167,420</td>
<td></td>
<td>1,167,420</td>
<td></td>
</tr>
<tr>
<td>Buildings</td>
<td>7,612,769</td>
<td>3,562,886</td>
<td>4,049,883</td>
<td></td>
</tr>
<tr>
<td>Leasehold improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>2,507,897</td>
<td>2,284,798</td>
<td>223,099</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>710,234</td>
<td>490,608</td>
<td>219,626</td>
<td></td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)
### 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.

<table>
<thead>
<tr>
<th>(a) Description of security or category (including name of security)</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Financial derivatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) Closely held equity interests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(A)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(B)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(C)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(E)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(F)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(G)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(H)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Part IX Other Assets.

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

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
<tr>
<td>Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)</td>
<td></td>
</tr>
</tbody>
</table>

### 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 |                         | 500,325. |
| (2) REFUNDABLE ADVANCE   |                         | 500,325. |
| (3)                        |                         |          |
| (4)                        |                         |          |
| (5)                        |                         |          |
| (6)                        |                         |          |
| (7)                        |                         |          |
| (8)                        |                         |          |
| (9)                        |                         |          |
| Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) |                         | 500,325. |

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 FASB 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.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue, gains, and other support per audited financial statements</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part VIII, line 12:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Net unrealized gains (losses) on investments</td>
<td>2a</td>
</tr>
<tr>
<td></td>
<td>b. Donated services and use of facilities</td>
<td>2b</td>
</tr>
<tr>
<td></td>
<td>c. Recoveries of prior year grants</td>
<td>2c</td>
</tr>
<tr>
<td></td>
<td>d. Other (Describe in Part XIII.)</td>
<td>2d</td>
</tr>
<tr>
<td></td>
<td>e. Add lines 2a through 2d</td>
<td>2e</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part VIII, line 12, but not on line 1:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Investment expenses not included on Form 990, Part VIII, line 7b</td>
<td>4a</td>
</tr>
<tr>
<td></td>
<td>b. Other (Describe in Part XIII.)</td>
<td>4b</td>
</tr>
<tr>
<td></td>
<td>c. Add lines 4a and 4b</td>
<td>4c</td>
</tr>
<tr>
<td>5</td>
<td>Total revenue, Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)</td>
<td></td>
</tr>
</tbody>
</table>

### 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.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Total expenses and losses per audited financial statements</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part IX, line 25:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Donated services and use of facilities</td>
<td>2a</td>
</tr>
<tr>
<td></td>
<td>b. Prior year adjustments</td>
<td>2b</td>
</tr>
<tr>
<td></td>
<td>c. Other losses</td>
<td>2c</td>
</tr>
<tr>
<td></td>
<td>d. Other (Describe in Part XIII.)</td>
<td>2d</td>
</tr>
<tr>
<td></td>
<td>e. Add lines 2a through 2d</td>
<td>2e</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part IX, line 25, but not on line 1:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Investment expenses not included on Form 990, Part VIII, line 7b</td>
<td>4a</td>
</tr>
<tr>
<td></td>
<td>b. Other (Describe in Part XIII.)</td>
<td>4b</td>
</tr>
<tr>
<td></td>
<td>c. Add lines 4a and 4b</td>
<td>4c</td>
</tr>
<tr>
<td>5</td>
<td>Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)</td>
<td></td>
</tr>
</tbody>
</table>

### 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.
### Part I: Questions Regarding Compensation

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>a</strong> 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.</td>
<td></td>
<td></td>
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<tr>
<td>First-class or charter travel</td>
<td></td>
<td></td>
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<tr>
<td>Travel for companions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax indemnification and gross-up payments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discretionary spending account</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing allowance or residence for personal use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payments for business use of personal residence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health or social club dues or initiation fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal services (such as maid, chauffeur, chef)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 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, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? |     |    |
| 3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III. |     |    |
| Compensation committee                                                 |     |    |
| Independent compensation consultant                                   |     |    |
| Form 990 of other organizations                                       |     |    |
| Written employment contract                                            |     |    |
| Compensation survey or study                                           |     |    |
| 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 section 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 on 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)? |     |    |
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 aren't 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.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Breakdown of W-2 and/or 1099-MISC compensation</th>
<th>(C) Retirement and other deferred compensation</th>
<th>(D) Nontaxable benefits</th>
<th>(E) Total of columns (B)(i)-(D)</th>
<th>(F) Compensation in column (B) reported as deferred on prior Form 990</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) NATHAN MAINS</td>
<td>(i) 247,096, 14,745, 480, 42,719, 19,496, 324,536</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>CHIEF EXECUTIVE OFFICER</td>
<td>(ii) 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>(2) JOHN CALLAHAN</td>
<td>(i) 146,122, 1,200, 480, 24,457, 122, 172,381</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>CHIEF ADVOCACY OFFICER</td>
<td>(ii) 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>(3) STUART KNADE, ESQ. SENIOR DIRECTOR</td>
<td>(i) 144,331, 0, 240, 24,600, 4,970, 173,601</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>OF LEGAL S</td>
<td>(ii) 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>(4) BRITTA BARRICKMAN</td>
<td>(i) 120,636, 0, 480, 21,111, 19,486, 161,713</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>CHIEF MEMBER SERVICES OFFI</td>
<td>(ii) 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>(5) CHRISTINA GRIFFITHS</td>
<td>(i) 135,189, 7,985, 480, 23,336, 21,952, 188,942</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>EXECUTIVE DIRECTOR OF FOUN</td>
<td>(ii) 0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
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.

________________________________________________________________________
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Schedule J (Form 990) 2019

PENNSYLVANIA SCHOOL BOARDS ASSOCIATION

23-6003238

Page 3

12/18/20

12/18/20

DRAFT
### Part I: Excess Benefit Transactions

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 38a or 38b.

<table>
<thead>
<tr>
<th></th>
<th>(a) Name of disqualified person</th>
<th>(b) Relationship between disqualified person and organization</th>
<th>(c) Description of transaction</th>
<th>(d) Corrected?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

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, 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 V, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

<table>
<thead>
<tr>
<th></th>
<th>(a) Name of interested person</th>
<th>(b) Relationship with organization</th>
<th>(c) Purpose of loan</th>
<th>(d) Loan to or from the organization?</th>
<th>(e) Original principal amount</th>
<th>(f) Balance due</th>
<th>(g) In default?</th>
<th>(h) Approved by board or committee?</th>
<th>(i) Written agreement?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Total: $

### Part III: Grants or Assistance Benefiting Interested Persons

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

<table>
<thead>
<tr>
<th></th>
<th>(a) Name of interested person</th>
<th>(b) Relationship between interested person and the organization</th>
<th>(c) Amount of assistance</th>
<th>(d) Type of assistance</th>
<th>(e) Purpose of assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: $
### Part IV  Business Transactions Involving Interested Persons.

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

<table>
<thead>
<tr>
<th>(a) Name of interested person</th>
<th>(b) Relationship between interested person and the organization</th>
<th>(c) Amount of transaction</th>
<th>(d) Description of transaction</th>
<th>(e) Sharing of organization's revenues?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PENNSYLVANIA SCHOOL DISTRICT</td>
<td>PSBA CEO IS TREASUR</td>
<td>$352,601</td>
<td>SPONSORSHIP</td>
<td>No</td>
</tr>
</tbody>
</table>

**Part V  Supplemental Information.**

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

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF INTERESTED PERSON:

PENNSYLVANIA SCHOOL DISTRICT LIQUID ASSET FUND

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

PSBA CEO IS TREASURER OF THE PSDLAF BOARD

(C) AMOUNT OF TRANSACTION $352,601.

(D) DESCRIPTION OF TRANSACTION: SPONSORSHIP INCOME

(E) SHARING OF ORGANIZATION REVENUES? = NO
Name of the organization: PENNSYLVANIA SCHOOL BOARDS ASSOCIATION

Employer identification number: 23-6003238

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

TO TRAIN, SUPPORT, GUIDE, AND INSPIRE SCHOOL BOARD DIRECTORS BY PROVIDING THE TOOLS NECESSARY TO ELEVATE PUBLIC EDUCATION IN PENNSYLVANIA.

FORM 990, PART VI, SECTION A, LINE 6:

THE ORGANIZATION IS A NOT-FOR-PROFIT ASSOCIATION WITH MEMBERS.

FORM 990, PART VI, SECTION A, LINE 7A:

VOTES FOR CANDIDATES FOR OFFICER AND AT-LARGE REPRESENTATIVE POSITIONS ON THE GOVERNING BOARD ARE CAST BY MAJORITY VOTE OF THE GOVERNING BOARD OF EACH MEMBER ENTITY AT A PUBLIC MEETING OF THAT BOARD. THE RESULTS OF SUCH VOTING ARE UPLOADED AND TALLIED VIA A SECURE WEB-BASED VOTING SERVICE VENDOR UNDER THE SUPERVISION OF A CREDENTIALS COMMITTEE.

FORM 990, PART VI, SECTION A, LINE 7B:

REVISIONS TO THE BYLAWS ARE ACTED UPON IN A REPRESENTATIVE CAPACITY BY A DELEGATE ASSEMBLY COMPRISED OF DElegates APPOINTED BY THE GOVERNING BOARD OF EACH MEMBER SCHOOL ENTITY, WHICH MEETS IN CONJUNCTION WITH THE ASSOCIATION’S ANNUAL CONFERENCE. BEGINNING IN 2015, BYLAW CHANGES CAN BE PROPOSED DIRECTLY TO THE BYLAWS COMMITTEE BY AN ANCILLARY BODY KNOWN AS THE REGIONAL DIRECTORS COORDINATING COUNCIL (RDCC).

FORM 990, PART VI, SECTION B, LINE 11B:

A COPY OF THE COMPLETED FORM 990 AND RELATED SCHEDULES IS REVIEWED WITH THE AUDIT REVIEW COMMITTEE. THE AUDIT REVIEW COMMITTEE ACCEPTS THE COMPLETED
FORM 990 FROM THE ASSOCIATION’S AUDIT FIRM. THE AUDIT FIRM THEN REVIEWS THE

FORM 990 WITH THE ENTIRE BOARD OF DIRECTORS, WHO ALSO ACCEPT THE DOCUMENT.

FORM 990, PART VI, SECTION B, LINE 15:

AN INDEPENDENT COMPENSATION CONSULTANT IS ENGAGED TO REVIEW THE

ASSOCIATION’S COMPENSATION STRUCTURE. A FULL REVIEW WAS COMPLETED DURING

THE SPRING OF 2014. COMPENSATION ADJUSTMENTS WERE IMPLEMENTED EFFECTIVE

JULY 2014.

FORM 990, PART VI, SECTION C, LINE 19:

THE DOCUMENTS ARE AVAILABLE AT THE ASSOCIATION’S HEADQUARTERS. ANYONE

REQUESTING THE DOCUMENTS ARE PROVIDED WITH A COPY.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

GOVERNMENT GRANTS - PPP LOAN FORGIVENESS 357,375.
### Part I: Identification of Disregarded Entities

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN (if applicable) of disregarded entity</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Total income</th>
<th>(e) End-of-year assets</th>
<th>(f) Direct controlling entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>BENT CREEK EDUCATIONAL SERVICES, LLC - 74-3193754, 400 BENT CREEK BOULEVARD, MECHANICSBURG, PA 17050</td>
<td>EMPLOYMENT SERVICES</td>
<td>PENNSYLVANIA</td>
<td></td>
<td>PENNSYLVANIA SCHOOL BOARDS ASSOCIATION</td>
<td>27,955.00</td>
</tr>
<tr>
<td>PENNSYLVANIA PUBLIC EDUCATION FOUNDATION - 22-2837815, 400 BENT CREEK BOULEVARD, MECHANICSBURG, PA 17050</td>
<td>FOUNDATION</td>
<td>PENNSYLVANIA</td>
<td>501(C)(3)</td>
<td>LINE 12A, I</td>
<td>ASSOCIATION</td>
</tr>
<tr>
<td>PENNSYLVANIA SCHOOL BOARDS ASSOCIATION INSURANCE TRUST - 25-1827021, 400 BENT CREEK BOULEVARD, MECHANICSBURG, PA 17050</td>
<td>INSURANCE TRUST</td>
<td>PENNSYLVANIA</td>
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</tbody>
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### Part II: Identification of Related Tax-Exempt Organizations

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Exempt Code section</th>
<th>(e) Public charity status (if section 501(c)(3))</th>
<th>(f) Direct controlling entity</th>
<th>(g) Section 512(b)(13) controlled entity?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PENNSYLVANIA PUBLIC EDUCATION FOUNDATION - 22-2837815, 400 BENT CREEK BOULEVARD, MECHANICSBURG, PA 17050</td>
<td>FOUNDATION</td>
<td>PENNSYLVANIA</td>
<td>501(C)(3)</td>
<td>LINE 12A, I</td>
<td>ASSOCIATION</td>
<td>X</td>
</tr>
<tr>
<td>PENNSYLVANIA SCHOOL BOARDS ASSOCIATION INSURANCE TRUST - 25-1827021, 400 BENT CREEK BOULEVARD, MECHANICSBURG, PA 17050</td>
<td>INSURANCE TRUST</td>
<td>PENNSYLVANIA</td>
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</tbody>
</table>

For Paperwork Reduction Act Notice, see the Instructions for Form 990.
### 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.

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Direct controlling entity</th>
<th>(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)</th>
<th>(f) Share of total income</th>
<th>(g) Share of end-of-year assets</th>
<th>(h) Disproportionate allocations?</th>
<th>(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)</th>
<th>(j) General or managing partner?</th>
<th>(k) Percentage ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>Yes</td>
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**DRAFT**

PENNSYLVANIA SCHOOL BOARDS ASSOCIATION
23-6003238

**12/18/20**

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### 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? | (j) Yes | No |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | Yes | |
| | | | | | | | | | No | |
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PENNSYLVANIA SCHOOL BOARDS ASSOCIATION
23-6003238

**12/18/20**
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.

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?

- Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity
- Gift, grant, or capital contribution to related organization(s)
- Gift, grant, or capital contribution from related organization(s)
- Loans or loan guarantees to or for related organization(s)
- Loans or loan guarantees by related organization(s)
- Dividends from related organization(s)
- Sale of assets to related organization(s)
- Purchase of assets from related organization(s)
- Exchange of assets with related organization(s)
- Lease of facilities, equipment, or other assets to related organization(s)
- Lease of facilities, equipment, or other assets from related organization(s)
- Performance of services or membership or fundraising solicitations for related organization(s)
- Performance of services or membership or fundraising solicitations by related organization(s)
- Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)
- Sharing of paid employees with related organization(s)
- Reimbursement paid to related organization(s) for expenses
- Reimbursement paid by related organization(s) for expenses
- Other transfer of cash or property to related organization(s)
- Other transfer of cash or property from related organization(s)

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.

<table>
<thead>
<tr>
<th>Name of related organization</th>
<th>Transaction type (a-s)</th>
<th>Amount involved</th>
<th>Method of determining amount involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) PSBA - INSURANCE TRUST</td>
<td>0</td>
<td>145,114</td>
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<tr>
<td>(2) PA PUBLIC EDUCATION FOUNDATION</td>
<td>0</td>
<td>24,049</td>
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<tr>
<td>(3) PSBA - INSURANCE TRUST</td>
<td>0</td>
<td>136,879</td>
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<tr>
<td>(4) PA PUBLIC EDUCATION FOUNDATION</td>
<td>0</td>
<td>44,977</td>
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<td>(5)</td>
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</table>
**Part VI Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of entity</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)</th>
<th>(e) Are all partners sec. 501(c)(3) orgs.?</th>
<th>(f) Share of total income</th>
<th>(g) Share of end-of-year assets</th>
<th>(h) Disproportionate allocations?</th>
<th>(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)</th>
<th>(j) General or managing partner?</th>
<th>(k) Percentage ownership</th>
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Part VII  Supplemental Information

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

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Form **8868**

(Rev. January 2020)

**Application for Automatic Extension of Time To File an Exempt Organization Return**

▶ File a separate application for each return.  
▶ Go to www.irs.gov/Form8868 for the latest information.

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

<table>
<thead>
<tr>
<th>Type or print</th>
<th>Name of exempt organization or other filer, see instructions.</th>
<th>Taxpayer identification number (TIN)</th>
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<tbody>
<tr>
<td></td>
<td>PENNSYLVANIA SCHOOL BOARDS ASSOCIATION</td>
<td>23-6003238</td>
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</tbody>
</table>

**Enter the Return Code for the return that this application is for (file a separate application for each return)**

<table>
<thead>
<tr>
<th>Application Is For</th>
<th>Return Code</th>
<th>Application Is For</th>
<th>Return Code</th>
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<tbody>
<tr>
<td>Form 990 or Form 990-EZ</td>
<td>01</td>
<td>Form 990-T (corporation)</td>
<td>07</td>
</tr>
<tr>
<td>Form 990-BL</td>
<td>02</td>
<td>Form 1041-A</td>
<td>08</td>
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<tr>
<td>Form 4720 (individual)</td>
<td>03</td>
<td>Form 4720 (other than individual)</td>
<td>09</td>
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<tr>
<td>Form 990-PF</td>
<td>04</td>
<td>Form 5227</td>
<td>10</td>
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<tr>
<td>Form 990-T (sec. 401(a) or 408(a) trust)</td>
<td>05</td>
<td>Form 6069</td>
<td>11</td>
</tr>
<tr>
<td>Form 990-T (trust other than above)</td>
<td>06</td>
<td>Form 8870</td>
<td>12</td>
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**KYLE FRONK, SENIOR DIRECTOR OF FINANCE**

- Telephone No. ▶ 717-506-2450  
- Fax No. ▶

- If the organization does not have an office or place of business in the United States, check this box ▶
- If this is for a Group Return, enter the organization’s four digit Group Exemption Number (GEN) ▶. If this is for the whole group, check this box ▶. If it is for part of the group, check this box ▶ and attach a list with the names and TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until MAY 17, 2021, to file the exempt organization return for the organization named above. The extension is for the organization’s return for:

▶ calendar year or

▶ X tax year beginning JUL 1, 2019, and ending JUN 30, 2020.

2 If the tax year entered in line 1 is for less than 12 months, check reason: □ Initial return □ Final return □ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.  
3b $ 0.

b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.  
3b $ 0.

c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.  
3c $ 0.

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.