

## Here's everything you need to know about the Professional Fund

Soon you'll be receiving a form from the district asking you to let them know how you'd like your Professional Fund distributed. We thought we'd take this time to answer the most commonly asked questions about the fund. It's important for you to read and save this information for future reference.

### **Q. What is the Professional Fund?**

A. Each full-time employee covered under the LWEA contract receives \$2,000 per year to use at their discretion for professional purposes.

### **Q. What uses of the fund qualify for professional purposes?**

A. The fund can be used for anything that is professionally related to your job. Some examples are:

- Tuition, clock hours, workshop/conference fees and materials (no subs, hotel, or travel)
- Home DSL/high speed internet service / cell data (not text messaging)
- Memberships to professional organizations (except LWEA, WEA, NEA)
- Subscriptions to professional publications
- Classroom materials and supplies you purchase
- Repayment of student loans incurred after employment
- Other items that are related to your current or potential assignment

### **Q. Can I take the money as salary?**

A. Yes. You can choose salary in increments of \$250 for a half-day of work you perform outside of the contractual work day. This work can be performed at any place, any time, and in any increment of time.

### **Q. How about a combination of salary and non-salary?**

A. That's possible, too. You can split the fund between salary and non-salary items, as long as you do so in \$250 increments.

### **Q. What's the benefit in taking it as non-salary?**

A. Whatever amount you take as non-salary is **tax-free**. Therefore, you get the full amount of money without any deductions.

### **Q. Can you give me an example of this?**

A. Sure. Let's say you're charged \$35 per month for high-speed internet. That amounts to \$420 per year. If you spend another \$80 on classroom materials, that adds up to \$500. If you take that \$500 from your Professional Fund as non-salary, you'll get the full \$500. If you take it as salary, though, you'll only get about \$350 after taxes are taken out. So, you can see how it makes a lot of sense to take whatever you can in tax-free dollars.

### **Q. Is there any time when it's better to take it as salary?**

More questions and answers on page 2

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*Kevin Teeley,  
President*

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## Professional Fund (continued from page 1)

A. Two occasions come to mind. If you're close to retirement and you think this year might be a year that'll be used to calculate your retirement benefit, then you absolutely should take your entire fund in salary. The other time would be if you don't think you'll spend all the money on materials and other items. You should only select the amount of non-salary money that you're sure you're going to spend on professional expenses.

**Q. What if I select money for materials and I don't spend all of it?**

A. You will have to either spend the money on professional items, or return the unspent money to the district. So, it's really important to select an amount you know you're going to spend.

**Q. Can I change my mind later in the year once I make my selection?**

A. No. You need to make a final decision by the deadline as to how you want your fund paid to you.

**Q. If I purchase instructional materials, who owns them?**

A. The District. Otherwise, the IRS would tax you on their value. You can take the items with you to another building in the district as long as they are not permanently affixed, or are part of a bigger whole that would cause a hardship if your piece was removed. (This is for situations in which teachers pool their money to make a large purchase.)

**Q. What about using the fund to buy tech equipment – such as a laptop?**

A. You definitely can do this. The items must be from the district's approved list, however, and will be owned by the district. You can use the items at home and keep them for as long as you're employed by the district, but you'll need to leave them behind if you leave the district. For the list of approved items, go to the LWSD Portal.

**Q. What if I want to own the laptop myself?**

A. If you want to buy a laptop on your own, then you need to take your Professional Fund as taxed salary. You can buy whatever brand or type you want and you'll own it, but the District won't support it or service it.

**Q. Do I have to save receipts for purchases?**

A. Yes. Also, the state auditor prohibits personal items from being on the same receipts as those you turn in for your Professional Fund. Make sure you get a separate receipt for your purchases, and don't co-mingle your personal purchases with Professional Fund purchases. You'll be asked to turn in all your receipts once you've spent all the money, but no later than June 1, 2017.

**Q. How do I get receipts for high-speed internet when it's on my phone or cable bill?**

A. Save the part of the bill each month that shows the amount for internet or if you have a bundled plan, divide the total amount by 2 or 3 (depending on the number of services you have bundled), highlight those sections, and send the monthly statements in with your receipts by June 1, 2017.

**Q. When can I start spending money on materials and other items?**

A. Any expenses incurred from June 1, 2016 through May 31, 2017 qualify for the fund.

**Q. Can I use the fund for travel to a conference?**

A. No. The fund can't be used for meals, lodging, mileage, transportation, or substitute costs for attending workshops/conferences.

**Q. What if I have further questions?**

### LWEA Office

10604 NE 38th Place, Suite 212

Kirkland, WA 98033

425-822-3388

UniServ Rep: [Jennifer Silves](#)

Admin Assistant: [Sheila Hagerman](#)

Admin Assistant: [Ila Rhea Morrow](#)



## Take the Pledge!

October is National Bullying Prevention Month and NEA's goal is to help to create a bully-free nation. NEA has the research and the resources. Now it is time for individuals to act. [Take the pledge now](#)—be the caring adult for the students in your school.

As educators, we often know what bullying looks like, but we don't always know what to do about it. Check out Dave Seaburg's [story](#) to better understand how important this effort is.

NEA has resources for you. - go to the NEA website and then share this information with others in your building.

Together we will create a safe and secure learning environment for your students. Thanks for everything you do for your students.

*What if I still have questions about the Professional Fund?*

*Feel free to e-mail or call any of us in the LWEA office.*

## LWEA Officers and Executive Committee

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LWEA Office / 425-822-3388

Vice President:

[Howard Mawhinney](#)

RHS / 425-936-1800

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[Ken Egawa](#)

Blackwell / 425-425-936-2520

Intermediate Rep:

[Gerry Wilson](#)

Muir / 425-936-2640

Middle School Rep:

[Peggy Solum](#)

Kamiakin / 425-936-2400

High School Rep:

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Specialists Rep:

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Juanita Elementary Preschool /  
425-936-2570

Ethnic Minority Rep:

[Maryziel Galarpe](#)

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LWEA Office:

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## We have winners!

In the last prize puzzle, we asked which statement was incorrect in regards to open enrollment for benefits. The statement that was incorrect was **F. If you don't like the plan rate you've chosen, you will be allowed to make another change in January.** Of course, this is not an option as no changes can be made until the next open enrollment period at the beginning of the next school year.

We received a lot of responses and from those, we drew three names to each receive a \$10 Starbucks cards. Congratulations go to:

**Sue Hanson** (Rose Hill Elementary)

**Debra Wilson** (Wilder)

**Jennifer Harris** (JHS)

## Retirement calculator

NEA Member Benefits is offering a great way to determine if you are taking the right steps to be ready for retirement. Answer a series of questions, and your retirement forecast is quickly calculated for you. The [Retirement Calculator](#) can also help with concrete steps you can take to improve your retirement future.

If you find that you need more in-depth help with your retirement plans, you may want to attend the LWEA-sponsored "Taking Charge of Your Future Pre-Retirement Seminar." This 10-hour class has been specially designed for people who are within 5 years of retirement. To register, see this [flyer](#) for more information.

## More cell phone discounts

After last week's article on cell phone discounts, a number of you let us know that in addition to the companies that we listed, Verizon offers an 18% discount. Interested LWSD personnel should contact Verizon directly to determine the process you need to follow to get your discount.

## Register to vote before October 10!

The election is just around the corner and we want to remind everyone to make sure their voter registration is up-to-date. We've discovered a little secret – a lot of people are not registered voters. It's not that they didn't intend to register when they moved, or re-register when they missed that last election – it's just been that life is so busy and they didn't know where to go to get registered.

Well, we can help – and you can become a registered voter without a lot of fuss and time. Just click on this [link](#), and register online. You just need to do this by the October 8 deadline. You'll be all ready for November 8!

## WANTED

[Working iPhone](#) for daughter that can't afford a new one. I've been told that any carrier but Sprint will work. Let me know what you have & how much. Terry Taylor (RHS) 206-390-7923.

## SERVICES

[Questions about your retirement, social security benefits, or state retirement plan?](#) Utilize a knowledgeable & experienced financial professional to help you better understand your pensions, 403(b)s, 401(k)s, & IRA's. Contact Sean Tennis, Senior Associate with Foresters Financial, 206-204-3066, ext 403, or [sean.tennis@foresters.com](mailto:sean.tennis@foresters.com). (Brigitte Tennis, Stella Schola).

## FOR SALE

1998 [Saturn SL1](#), manual transmission. 140K miles, great mileage, 35-40 MPG. Great car for commuting. \$1,200 OBO. Sara Findley (Redmond Elem) [threemules@live.com](mailto:threemules@live.com).

## Human & Civil Rights Leadership Conference

Join fellow WEA educators and members of color at the 2016 Human and Civil Rights Leadership Conference. This conference is a collaborative effort to help current and future educators with issues of cross-cultural competency, social justice, and educational equity within the institutions that serve our state's students. This event is open to all WEA members.

This year's conference will be held at the Four Points Sheraton Hotel in Des Moines, on November 18-19. On Friday, the program starts at 5 PM with a keynote speaker and dinner. On Saturday, participants will continue with full day sessions from 8 AM to 3:30 PM (breakfast and lunch are included).

Nine clock hours and meals are included in the registration.

Registration closes soon so if you are interested in attending, please contact [Sheila Hagerman](#) in the LWEA office. LWEA will pay for the \$50 registration fee.

## Bargaining did this...

**THEN:** Teachers with families had no insurance pool to help with the cost of covering the high rates. Teachers had to choose between having a large out-of-pocket expense or not insuring their families.

**NOW:** Teachers working 1.0 FTE can access the insurance pool to get help with the costs of insuring a family. Each year, once open enrollment has ended, all unspent state allocation dollars are placed in the benefit pool to be used for medical premiums. In addition, the Association bargained that monies saved by the district from teachers utilizing the Section 125 Medical Reimbursement and Dependent Care plans would also be added to the benefit pool. Teachers can cover their whole family (if needed) with very little out-of-pocket expense.

## Marketplace

Ads are run in the Update on a first come, first served basis. All ads need to be in written form. Send directly to Sheila Hagerman at [shhagerman@lwsd.org](mailto:shhagerman@lwsd.org).

Ads are subject to approval of the LWEA Executive Committee and may be edited for length.

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[LWEA Website](#)

[Lakewashingtonea.org](http://Lakewashingtonea.org)

[Facebook](#)

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## Calendar

**Oct. 6**

Newbie Night 4:30—7 PM

**Oct. 10**

PGP & PGE Intersection  
4:15—6:45 PM

**Oct. 19**

Bargaining Input Meeting  
CTE Teachers (3:30 PM)

**Oct. 19**

Bargaining Input Meeting  
Elem PE & Music (4:15 PM)

**Oct. 25**

Rep Assembly