

## 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 internet service up to \$50 per month (\$600 per year)
- Cell data service (not text messaging) up to \$41.67 per month (\$500 per year)
- 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 workday. 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 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. You can claim up to \$50 per month for home internet, which is \$600 annually. You can also claim up to \$41.67 per month for cell phone data service, which is \$500 annually. Combined, that's \$1,100. If you take \$1,000 from your Professional Fund as non-salary to pay for this, you'll get \$1,000 tax-free. If you take it as salary, though, you'll only get about \$750-\$800 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.

*More questions and answers on page 2*



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## Professional Fund (continued from page 1)

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

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 technology?***

A. You can do this as long as the items are on the district's approved list.

**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, 2018.

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

A. Provide a complete bill for the first month you're claiming, and the number of months afterwards that you're also claiming when you submit your receipts by June 1, 2018.

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

A. Any expenses incurred from June 1, 2017 through May 31, 2018 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 or conferences.

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

A. As always, feel free to e-mail or call any of us in the LWEA office. We'll be happy to help!



**LWEA Office**

10604 NE 38th Place, Suite 212

Kirkland, WA

425-822-3388

UniServ Rep: Jennifer Silves

Office Manager: Sheila Hagerman

Admin Assistant: Ila Rhea Morrow

## LWEA Officers and Executive Committee

President:

[Kevin Teeley](#)

LWEA Office / 425-822-3388

Vice President:

[Howard Mawhinney](#)

RHS / 425-936-1800

Primary Rep:

[Heidi Wilson](#)

Parks / 425-425-936-2650

Intermediate Rep:

[Gerry Wilson](#)

Muir / 425-936-2640

Middle School Rep:

[Peggy Solum](#)

Kamiakin / 425-936-2400

High School Rep:

[Katie Badger](#)

RHS / 425-936-1800

Specialists Rep:

[Marilyn Hargraves](#)

LWHS / 425-936-1700

Special Services Rep:

[Sarah Cooper](#)

Juanita Elementary Preschool /  
425-936-2570

Ethnic Minority Rep:

[Maryziel Galarpe](#)

Blackwell / 425-936-2520

LWEA Office:

425-822-3388

## Great resource for you

After the August Building Rep and Principal training, the District and Association compiled the questions that came out of the training. The result is a jointly-developed FAQ document that will be a great reference tool.

On the District Portal, we've created a Team Site called "[2017-21 LWEA Contract Guidance Documents](#)". So far, the information includes:

- Caseload Management Time
- Contract Training FAQ
- LEAP Calendar Schedule and Procedures for 2017-18
- PCC Document – Professional Community and Collaboration
- WaKIDS Contract Clarification

## Help is still needed!



Shawna Rothaus, Franklin Elementary teacher, is still in need of additional sick leave as she deals with her long recovery after her surgery for lung cancer. If you have sick leave you can share, please fill out a Shared Leave Donation form and send it to HR.

Shawna would like to thank everyone who has been able to donate – it has made such a difference!

## 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.

## Register to vote before October 9!



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 9 deadline. You'll be all set for November 7!

## SERVICES

**House/Pet Sitting:** Licensed & bonded. Call Pam at Precious Pampered Pets @ 425-488-0833. Available 24/7. (Josephine Davis, Alcott).

Pretty tile – ugly grout? **Let the Grout Doctor take care of all your grout & tile needs.** For a free estimate, call John Start at 425-947-0060. (Ila Morrow, LWEA).

## FOR SALE

Solid wood **twin bed w/ head & foot board**, white, can be used w/ or w/o a box spring, \$125. Pottery Barn ottoman, khaki, perfect condition, \$150. Pictures available. Abby Rogers (Mead) [abbs@hotmail.com](mailto:abbs@hotmail.com).

IKEA Hemnes **vanity** & Rattviken **sink top**, 2 drawers, black-brown wood cabinet, 39 3/8 "x 19 1/4" x 35" H. Top is white. Sink has a small crack on the side but still functions perfectly. IKEA Ensen **faucet**. \$100 OBO for all. Contact Sara at [sbn724@gmail.com](mailto:sbn724@gmail.com). (Sheila Hagerman, LWEA).



## First prize puzzle of the year!

We've got \$10 Starbucks cards to give away! Send us the correct answer to this puzzle and we'll enter your name in our Prize Puzzle drawing to win one.

Which of these statements are **NOT** correct?

- A. Each full-time employee will receive \$2,000 per year to use at their discretion for professional purposes.
- B. You can choose a combination of salary and non-salary funds.
- C. If you attend a conference, Professional Fund money will not pay for lodging, transportation, or substitute costs.
- D. If I select materials and don't spend it all, I will have to return the unspent money.
- E. The last day to send receipts is May 31, 2018.

Send your best guess to [Sheila Hagerman](#) in the LWEA office  
Who knows – you just might be one of the winners!



## 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. 5

Newbie Nights (4:30 -7 PM)

### Oct. 11-12

Behavior Support for Challenging Students (4:30 – 7:30 PM)

### Oct. 16

School Board Meeting

### Oct. 16-17

Elementary Conferences

### Oct. 19

Elementary Conferences

### Oct. 20

LEAP Day – No students