



administered by 501(c) Services

MEMBER NEWS

Published as a Service for
All Members of:

501(c) Agencies Trust
10080 North Wolfe Road
Building SW3, Suite 250
Cupertino, California 95014
(800) 442-4867

In This Issue:

- 2008 Member Training Schedule Announced
- Gwendolyn Lee Named to Trust Board
- Lorraine Phillips Passes Away
- 2008 Officer Names; 6 Re-elected to New Trustee Terms
- Fax Claims Notices IMMEDIATELY
- FAQ's Reimbursement, Reserves and Billing
- Plan Carefully Before Cutting Staff
- Trustees
- A Reminder for When You Call
- From the Chair
- 123 New Members Join Trust

Providing Information and Updates to Nonprofit Organizations SPRING 2008

2008 Member Training Schedule Announced

Eighteen training sessions on unemployment procedures and practices will be held for members throughout the country during the remainder of 2008. Six will be on-site Workshops which will be held in various states. The remaining twelve will be Webinars — internet seminars — in which members can participate directly from their computer at work or home.

All workshops are conducted either by Paul Fountain, Senior Client Relationship Manager/Director of National Trust Programs, or Doug Adams, Member Services Director. The sessions are geared for managers and supervisors who are new to the claims process as well as for those with considerable experience.

Paul says that the goal of these sessions is to make members aware of things they can do to control their unemployment costs, both the long term before a claim is ever filed, and later after a claim is filed.

“We try to make people aware of the importance of counseling and documentation,” he says. “If the performance of certain employees needs improving, it’s important that you communicate that to them in counseling sessions and keep a written record documenting that. The agencies that have the best chance of having unjustified claims denied are the ones that provide specific documentation and show a record of clearly communicating to the employee what is expected of him or her.”

Other topics include:

- How to use the TALX claims consultant and the HR Services hotline to avoid potential costs.
- The importance of understanding the base year. “We want people to know how the base year works because keeping an unproductive employee too long can result in them paying unnecessary unemployment costs.”

Each workshop lasts two to three hours. There is a nominal charge of \$35 for the first person an organization sends to a workshop. Additional staff members

from that organization may attend the same workshop at no additional charge.

The Webinars, which are conducted by Paul, last about two hours. Participants will access the meeting's video on their computers and the audio via telephone conference call. There is no charge for the Webinar.

You can register for Workshops and Webinars by going to the Trust's web site at <http://www.501ctrust.org>, and under Member Support at the top of the page, click on Workshops. A Trust Member Services staffer will contact you about exact time, location and payment. For more information, call Doug Adams at **(800) 442-4867** or email him at dadams@501c.com

Webinars

April 23: Connecticut
April 30: New York
May 14: Texas
May 22: California
June 12: Wisconsin
July 9: Hawaii
August 6: Illinois
October 8: Pennsylvania
October 22: DC, Maryland, Virginia
November 12: Idaho
November 19: Florida
December 3: Iowa, Indiana, Minnesota

Workshops

June 4: Albuquerque, NM
June 26: Anchorage, AK
August 20: Portland, OR
September 10: Seattle, WA
September 23: Boston, MA
September 25: New York, NY

[Return to Top](#)



Gwendolyn Lee Named to Trust Board

[Return to Top ▲](#)



Gwendolyn Lee, Executive Director of The Arc of Anchorage in Anchorage, Alaska, has been elected to a three-year term on the Trust's board. The Arc of Anchorage is part of the world's largest community-based organization of and for people with intellectual and developmental disabilities.

Gwen has served in the nonprofit sector most of her professional life, first as an English Teacher in Minnesota, later as training and information consultant for parents of children with disabilities, and finally as Executive Director of two nonprofit organizations for nearly fifteen years. She became Executive Director of The Arc of Anchorage in June of 2001.

Gwen has served on numerous boards, committees, task forces and councils. She is the mother of four children and grandmother of a two-year-old. Her husband Dwayne serves as the CFO for two Alaskan nonprofits and is an accounting professor at the University of Alaska.

[Return to Top ▲](#)

"In today's environment, nonprofits have to continually seek ways to make the best use of their funds," she says. "We joined the Trust because we knew it would let us save on our unemployment costs and thus free up funds that we can use to help the people we serve."

Lorraine Phillips Passes Away

The members of the Trust lost a leader, a colleague and a friend when Member Services Director, Lorraine Phillips, passed away in late February. Lorraine, who joined the Trust in 2001, had been going through a serious illness since early last fall.



Prior to serving the Trust, Lorraine was Executive Director of the YWCA of the Mid-Peninsula in Palo Alto (CA) for four years and Executive Director of the YWCA of Watsonville (CA) for 14 years. For seven years prior to that she worked in social programs for children, including Head Start, food services and child abuse.



“Lorraine was a wonderful person and a hard working professional who personified compassion and caring for others,” said Harriet Tunison, President of 501(c) Services. “She really understood the needs of our members because she came to us after dedicating more than 25 years of her life to working in the nonprofit world. She truly made a difference.”

Lorraine is survived by her son Addison Phillips, his wife Elizabeth, and two grandsons.

2008 Officer Names;

6 Re-elected to New Trustee Terms

Three returning members of the Board of Trustees have been named officers of the Trust for 2008. Bill Tsoukalas, who had been Vice Chair, will serve as chair. Jack Holmes, formerly Secretary-Treasurer, is now Vice Chair. Kirk Springsted becomes Secretary-Treasurer.



Board Chair Bill Tsoukalas is Executive Director of the Boys and Girls Clubs of Snohomish County, located in Everett, WA, and has been associated with Boys and Girls Clubs since 1973. He has also worked in the private sector as Corporate Contributions Manager for a major Washington State bank, played professional baseball and was a college baseball coach.

[Return to Top ▲](#)

Vice Chair Jack Holmes, President and CEO of the United Way of Central New Mexico, is a lifelong nonprofit professional, having worked 36 years with United Way and six with the Boy Scouts. In his career, he has started a women's crisis center, a special needs transportation agency, and a homeless shelter. Most recently he helped develop a new Family Advocacy Center, one of 22 such new concepts in the country designed to provide a community-coordinated approach to assist victims of domestic violence.



Secretary-Treasurer Kirk Springsted is Vice President of Administration for Connecticut Community Providers Association, Inc., a nonprofit association whose member organizations provide services to people with disabilities. Prior to joining Connecticut Community Providers in 1987, Kirk served for 12 years as a social worker and an administrator for nonprofit agencies that provide services to people with disabilities.

[Return to Top ▲](#)

Bill Tsoukalas and five other board members whose terms expired at the end of 2007 have been appointed to new three-year terms. The remaining five are Pete Grignon, Vice President of Finance, United Way of Pierce County, WA; Russ Hayward, Executive Director, YMCA of San Joaquin County, CA; Doug McLendon, Advisory Council, Second Harvest Food Bank of Santa Clara and San Mateo Counties, CA; Dennis Morrow, Executive Director of Janus Youth Programs, OR and WA; Bill Underwood, Retired Chief Executive Officer, United Way of Sacramento, CA

Fax Claims Notices IMMEDIATELY

One of the major benefits of Trust membership is that you have a dedicated team of consultants who handle all your claims in order to help you contain your unemployment costs. Paul Fountain, Senior Client Relationship Manager/ Director of National Trust Programs, says Rule Number One in cost control is to immediately fax any claim and all related documents to your Claims Consultant whenever you receive a "Notice of Claim Filed" or a "Separation Request."

"Rule Number Two," he says, "is never violate Rule Number One because a delay of even a few days can be expensive. We must take the initial action on a

claim in as little as five to fifteen days, depending upon which state is involved.”

Below are the names of the Claims Consultants, their fax and phone numbers, their email addresses, and the states they represent.

Maile Salas. Ph: 1-800-955-4351 ext 5. Fax: 1-866-226-2359.

Email: msalas@talx.com.

States: Alaska, Arizona, Arkansas, California, Delaware, Idaho, Illinois, Iowa, Kansas, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Nebraska, Nevada, North Carolina, North Dakota, Oklahoma, Puerto Rico, South Carolina, Tennessee, Utah, Vermont, Virginia, West Virginia, Wisconsin.

Amy Darboe. Ph: 1-800-955-4351 ext 3. Fax: 1-866-229-1320

Email: adarboe@talx.com.

States: Alabama, Colorado, District Of Columbia, Georgia, Hawaii, Kentucky, Louisiana, Missouri, Montana, New Hampshire, New Mexico, Ohio, Rhode Island, South Dakota, Washington, Wyoming.

Cynthia Salas. Ph: 1-800-955-4351 ext. 8. Fax: 1-888-544-4144

Email: csalas@talx.com.

States: Florida, Indiana, New Jersey, New York, Oregon, Pennsylvania, Texas

Amy Heckler. Ph: 1-800-848-0287 ext. 3080. Fax: 1-866-564-5631 Email:

aheckler@talx.com.

State: Connecticut.

Plan Carefully Before Cutting Staff

If you are considering a staff reduction because of a funding cutback or any other reason, proceed with caution. While a layoff might result in an overall dollar savings, any reduction is never cost free because of the inevitable unemployment claims. If you don't plan properly, it is even possible that the costs could exceed the anticipated salary and benefit savings.

If a layoff may be necessary, do the following:

- Contact your **Claims Manager, Paul Fountain**, before you commit to any plan. He can advise you on what your true cost might be. You can reach him at **1-800-955-4351, ext. 7.**
- Estimate your future unemployment costs so you can consider them in your budget planning.
- Review your reserve account to determine if you need to make additional deposits to cover the costs. If you have questions about this, contact **Terri Oakley at 800-442-4867.**

Return to Top ▲

You can learn more about this topic in the section of your Program Manual entitled Planning for a Staff Reduction. The manual is also available on the Trust's website at www.501ctrust.org. Go to the pulldown menu "Member Support" on the far right of the homepage, and click on "Program Manual." You will be asked to enter your Member ID, which you can find on your quarterly statement.

If you still have questions, call **Doug Adams** at **(800) 442-4867**

Trustees



Bill Tsoukalas
Chair, 501(c) Agencies Trust
Executive Director of the Boys and Girls Clubs of
Snohomish County

William Tsoukalas, Chair
Executive Director
Boys & Girls Club of Snohomish County

Jack Holmes, Vice Chair
President and CEO
United Way of Central New Mexico

Kirk Springsted, Secretary-Treasurer
Vice President, Administration
Connecticut Community Providers Association

Virginia Clark
Human Resource Manager
Boys & Girls Club of South Puget Sound

Return to Top ▲

Kathleen DiChiara
President/CEO
Community FoodBank of New Jersey

Marilyn Ditty

Executive Director
South County Senior Services

Carol Frye
Chief Operating Officer
United Way of Columbia Willamette

Araceli Gaytan
Finance Officer
Virginia Garcia Memorial Health Center

Debby Graham-Hockstaff
Executive Director
Center Force

Pete Grignon
Vice President of Finance
United Way of Pierce County

Russ Hayward
Executive Director
YMCA of San Joaquin County

Irv Katz
President and CEO
National Human Services Assembly

Gwendolyn Lee
Executive Director
The Arc of Anchorage

JoAnn Lumsden
Vice President of Finance, CFO
Aloha United Way

Doug McLendon
Advisory Council
Second Harvest Food Bank of
Santa Clara and San Mateo Counties

Peggy Sanchez Mills
Representative
YWCA USA

Dennis Morrow
Executive Director
Janus Youth Programs, Inc.

[Return to Top](#) ▲

Shawn Mosey
Finance Director (CFO)
YMCA of the Inland Northwest

Glenn Permuy
Senior Vice President for Services to Clubs
Boys & Girls Clubs of America

Bill Underwood
Retired Chief Professional Officer
United Way of Sacramento

From the Chair

Last year at this time your Trust was just three months into its life as the combination of two separate and highly successful Trusts. I am happy to report that our first year went extremely well. We attracted a significant number of new members, had very good financial results, and increased our service levels to members. You will receive the specific results in these areas later this spring when our annual report is published.

Although so far in 2008 the news about our national economy has been troubling, we don't know what effect if any the downturn will have on the unemployment claims of our members. Last year we anticipated reimbursing the states for \$26 million in member claims. The actual number turned out to be \$23,383,649, just over 10% less than anticipated, for an estimated saving of \$48,375,939 over state unemployment insurance. This year we have increased our anticipated reimbursement to \$28 million, in part because of increased membership and in part because of economic uncertainty.

It is in times like these that Trust membership, with its policy of having each member maintain a prudent reserve account, is most valuable.

[Return to Top](#)



Your Trust is already hard at work on reaching a number of goals your Trustees have established for 2008. Notable among them are the following:

Membership. We intend to attract 100 new members this year with a gross annual payroll of \$225 million. This will further strengthen our Trust.

Claims Management. Our dedicated claims team expects to handle 25,000 claims this year, for an estimated liability savings to members of \$16,217,466.

Member Education. We will conduct 25 on-site and web-based training sessions for members in 21 different states, email more than 30,000 monthly and quarterly tips to HR and finance staff, and publish two newsletters.

HR Services. This valuable member benefit expects to respond to upwards of 6,000 calls with guidance on how to deal with human resources issues. Again this year HR Services will publish three editions of HR Update, its bulletin that informs members of trends, legislations and rulings in the area of human resources practices.

These are only highlights. The Board of Trustees is continuing to work on other initiatives to strengthen our Trust and bring even more services to members. If you have any questions, please contact our Trust Administrator, 501(c) Services, via phone at (800) 442-4867 or via email in care of info@501c.com.

Bill Tsoukalas
Chair, 501(c) Agencies Trust

FAQ's Reimbursement, Reserves and Billing

How does the reimbursement process work?

Each member organization builds its own reserve account to pay for future claims. The Trust reimburses the state for actual claims with money from this account.

How does the Trust calculate how much each member deposits into its reserve account?

The experience rating process used by the Trust has been developed and refined over the years to reflect the experience of each member, allowing for maximum control of costs through controlling claims.

The calculated deposit includes amounts for estimated claims and operating expenses as well as an amount calculated to build the member's reserve account to the targeted goal over 10 years. Since reimbursing employers in most states have no other reason to calculate taxable payroll for unemployment purposes, we base our calculations on gross payroll.

We also bill for deposits in equal quarterly amounts, instead of billing for a larger deposit in the first quarter or two of the year. To stabilize member deposits and simplify the member accounting process, we calculate a net annual deposit, including an offset for member reserve account investment income.

When should we make payments?

We bill you quarterly each year. The amount is based on your claims history and the size of your organization, and is set to provide adequate funds for your

current claims and to build reserves to cover future payments. If you expect increased claims for any reason, you should contact us to discuss adjusting your deposits.

123 New Members Join Trust

The Trust is extremely happy to welcome these 123 new members who joined during 2007 and the first three months of 2008.

Alaska

Alaskan AIDS Assistance Association, Anchorage
Northern Southeast Regional Aquaculture Association Inc., Sitka
The Arc of Anchorage, Anchorage

Arizona

Boys & Girls Clubs of Tucson, Tucson

California

A Woman's Place Of Merced And Mariposa Counties, Merced
Aviva Family & Children's Services, Los Angeles
B. J. Jordan Child Care Programs, Inc., North Highlands
Balance 4 Kids, Soquel
Boys & Girls Club of Burbank, Burbank
Boys & Girls Club of Camarillo, Camarillo
Boys & Girls Club of Santa Ana, Santa Ana
Boys & Girls Clubs of Ukiah, Ukiah
Burt Children's Center, San Francisco
C5 Children's School, San Francisco
California Alumni Association, Berkeley
California Family Foundation, Palo Alto
California Foster Families, Inc., Angels Camp
Children's Day School, San Francisco
Cipriani After School Care, Inc., Belmont
Coalition of Mental Health Professionals, Los Angeles
Community Action of Napa Valley, Napa
Community Health Centers of the Central Coast, Inc., Nipomo
D.A.V. Industries, Inc., Spring Valley,
Delano Association for the Developmentally Disabled, Delano,
Downtown Women's Center, Los Angeles
Fresno Rescue Mission, Inc., Fresno
Golden State Family Service, Kingsburg
Grail Family Services, San Jose
Imagine Supported Living Services, Capitola
Indian Health Center of Santa Clara, San Jose

Institute of Transpersonal Psychology, Palo Alto
Jamestown Community Center, San Francisco
Jewish Family Service of Los Angeles, Los Angeles
Junior Achievement of Silicon Valley & Monterey Bay, Santa Clara
Long Beach Symphony Association, Long Beach
Marin Services for Women, Inc., Greenbrae
Mokelumne River School, Lodi
New Door Ventures, San Francisco
New Leaf Services for our Community, San Francisco
Northeastern Rural Health Clinics, Inc., Susanville
Oakland East Bay Symphony, Oakland
Penny Lane Centers, North Hills
Project Angel Food, Los Angeles
Rancho Coastal Humane Society, Encinitas
Rescue the Children, Inc., Fresno
Ritter Center, San Rafael
Santa Barbara Neighborhood Clinics, Isla Vista
Santa Clara Valley Blind Center. Inc., San Jose
Santa Cruz Women's Health Center, Santa Cruz
Sexual Assault Recovery & Prevention Center, San Luis Obispo
Sisters of Social Service of Los Angeles, Encino
Teen Challenge Of Southern California, Riverside
The Arc of San Francisco, San Francisco
The Cedars of Marin, Ross
The Pegasus School, Huntington Beach
The Village Family Services, N Hollywood
Ventura College Foundation, Ventura
Wakeland Housing & Development Corporation, San Diego
West Contra Costa Youth Service Bureau, Richmond
Willow Glen Care Center, Yuba City
Wilmington Community Clinic, Wilmington
YMCA of Stanislaus County, Modesto
YMCA of the East Bay, Oakland
Youth Science Institute, Los Gatos

Colorado

Federal Employee Education & Assistance Fund, Littleton
Shepherd Valley Waldorf School, Niwot

Florida

Boys & Girls Clubs of Manatee County, Bradenton

Georgia

United Cerebral Palsy of South Carolina, Atlanta

Illinois

Central Counties Health Centers, Inc., Springfield

Indiana

Bosma Industries for the Blind, Inc., Indianapolis
Community Addiction Services of Indiana, Inc. (CASI), Indianapolis
Horizon House, Inc., Indianapolis
Indianapolis Museum of Art, Indianapolis
Logan Community Services, South Bend
The Assoc. for Retarded Citizens of Wabash County, Inc., Wabash

Kentucky

Luther F. Carson Four Rivers Center, Paducah

Massachusetts

Acre Family Day Care Corporation, Lowell
Hyde Square Task Force, Inc., Jamaica Plain
Interaction Institute for Social Change, Cambridge
TechMission, Inc., Dorchester
The Bridgespan Group, Boston
Volunteers of America of Massachusetts, Jamaica Plain

Maryland

National Center On Institutions & Alternatives (NCIA), Baltimore

New Jersey

After School Enrichment Programs, Whitehouse Station
Boys & Girls Club of Clifton, Clifton
Long Beach Island Community Center, Inc., Long Beach Township
St. Francis of Assisi Parish, Long Beach Township
The Work Family Connection, Inc., Whitehouse Station
Tri-City Peoples Corporation, East Orange
Yeshiva Shaarei Tzion, Piscataway

New Mexico

Forest Guardians, Santa Fe

Nevada

Boys & Girls Club of Western Nevada, Inc., Carson City

New York

AFS Intercultural Programs, Inc., New York

Oklahoma

Boys & Girls Clubs of Oklahoma County, Inc, Oklahoma City
Kiamichi Opportunities Incorporated, Hugo

Oregon

Cedar Mill Community Library Association, Portland
Community Cancer Foundation, Roseburg
Housing Development Center, Inc., Portland

[Return to Top](#) ▲

Mt. Angel Developmental Programs, Mt. Angel
Ride Connection. Inc., Portland
Saving Grace, Bend
St. Andrew Legal Clinic, Portland
Willamette Humane Society, Salem
Willamette Manor, Inc., Lebanon
Willamette Valley Rehabilitation Center, Lebanon
YWCA of Salem, Salem

Pennsylvania

Clean Air Council, Philadelphia
Humane League of Lancaster County, Lancaster
Linden Hall School for Girls, Lititz
New Kensington Community Development Corporation, Philadelphia
The Arc of Lehigh & North Hampton, Bethlehem

Rhode Island

Boys & Girls Clubs of Providence, Providence
Thundermist Health Center, Woonsocket

Texas

Volunteers of America Texas, Inc., Fort Worth

Utah

Volunteers of America Utah, Inc., Salt Lake City

Virginia

YWCA of South Hampton Roads, Norfolk

Washington

Alcohol Drug Dependency Services, Ellensburg
Boys & Girls Clubs of Thurston County, Tumwater
Community Health Association of Spokane, Spokane
Friends of Seven, Spokane
Washington Gorge Action Programs, Bingen

Wisconsin

Imagine a Child's Capacity, Inc., Madison
Volunteers of America of Wisconsin, Milwaukee