Member Educational Training Schedule

In what is its most ambitious training effort yet, the Trust has increased the number of training sessions for members during 2010. Fifty-two of the sessions will be webinars— internet seminars — in which members can participate directly from their computer at work or home. There will also be on-site workshops in Connecticut, New Jersey, and Oregon.

The sessions are geared for managers and supervisors who are new to the claims process as well as for those with considerable experience. The goal is to make members aware of things they can do to control their unemployment costs, both long-term before a claim is ever filed, and later after a claim is filed. Nine of the webinars will be devoted exclusively to the new Insight report system which is described on page one of this issue.

You can register for any of these by going to the Trust's web site at www.501cTrust.org and under the Events & news drop down menu click on Workshops and Webinars.

For further information on these training tools, please contact Doris King at (800) 719-8293 at dking@501c.com.

Training Topics

Discharge/Misconduct/Documentation: Can an individual receive unemployment benefits if they are discharged? What does the State look for in determining whether benefits are payable? What is "misconduct"? How do I document?

Making Sense of Unemployment: An overview of the basics of unemployment law.

Voluntary Quits: Can an individual receive unemployment benefits if they quit? What does the State look for in determining whether benefits are payable? What is "good cause"? How do I document a quit?

Base Period: What is it? Why is it important? Why am I charged for someone who worked for me last year?

Partial Unemployment Benefits: What are they? How are they determined? Who can collect partial benefits? How do I protect our account from unnecessary charges?

Unemployment Hearings: What takes place at a hearing? Who should attend? Who prepares the witnesses? What do I bring? What documentation is needed?

Insight Reports: What are they? How do I get access to these reports? How do I read them? How can these be used to reduce my unemployment costs?

501(c) Agencies Trust & TALX UC eXpress: An overview of the services provided and how the partnership works.

Who Is Your Claims Consultant?

Below are the names of the Claims Consultants, the states they represent, and their contact numbers and email addresses:

Maile Salas	Ph: 1-800-955-4351 ext 5. Fax: 1-866-226-2359. Email: msalas@talx.com States: AK, AZ, AR, CA. DE, ID, IL, IA, KS, ME, MD, MA, MI, MN, MS, NE, NV, NC, ND, OK, SC, TN, VT, VA, WV, WI.
Amy Darboe	Ph: 1-800-955-4351 ext 3. Fax: 1-866-229-1320 Email: adarboe@talx.com States: AL, CO, DC, GA, HI, KY, LA, MO, MT, NH NM, OH, RI, SD, UT, WA, WY.
Cynthia Salas	Ph: 1-800-955-4351 ext. 8. Fax: 1-888-544-4144 Email: csalas@talx.com States: FL, IN, NJ, NY, OR, PA, TX.
Amy Heckler	Ph: 1-800-848-0287 ext. 3080. Fax: 1-866-564-5631. Email: aheckler@talx.com State: CT.

When you leave a phone message with a consultant, please be sure you leave all of the following information:

- Agency name
- Your full name
- The return phone number
- If the call is about a claim, the name and Social Security number of the claimant

Refer to the Unemployment Program Manual for more claims handling tools.
To download the manual, log onto: www.501ctrust.org and click on Events & news tab.

501(c) AGENCIES TRUST
Maximizing Savings. Minimizing Risk.
Administered by 501(C) Services
MEMBER NEWS
WINTER 2010
Providing Information and Updates to Nonprofit Organizations

in this issue:

Trust Rolls Out Advanced Reporting System

Trust members now have a new state-of-the-art tool to help them keep their unemployment costs under control. The system is Insight Management Reports, developed by TALX UC eXpress, the Trust's Claims Manager. Insight, which replaces the previous reporting system, went "live" in mid-December.

"This isn't simply an incremental software upgrade," says Paul Fountain, Senior Client Relationship Manager at TALX UC eXpress. "This is a huge leap forward giving members far more capability to see precisely where their unemployment costs are going." Insight users will see two major advances: Customized reporting on demand and "virtually live" data.

Custom Reports

Formerly, members received an activity report for each month plus a quarterly report of charges. Now for the first time, members will be able to customize their reports by any date range they choose. They simply type in the range they want, and the report is right there in front of them. Under the old system, if they wanted a report for a special date range, they had to put in a specific request and then wait several days to get it.

"They can request reports over any time period and at many different levels of their organization," Paul says. "They can 'drill down' to the employee-level details that make up the report's summary numbers.You simply cannot overstate the importance of this because knowing how your unemployment dollars are being spent at the street level is one of the main keys to controlling your unemployment costs."

Data Updated Daily

The database is updated each evening, which means that the data in each report will be, in Paul's words, "virtually live."

"No matter which report you run, the information in it will be less than 24 hours old, not months old," Paul says. "This has huge implications. It means, for example, you could run a report today covering November 1 to November 30 to see what your activity was, and if you ran that same report tomorrow it could change because we might have updated several claims within that time period."

Also new in Insight is the ability to export the information to, for example, Excel or a PDF file. Once the report's data are in Excel, users can sort them by any number of factors such as separation date or social security number.

Although Insight offers users a number of report options, Paul recommends that they concentrate on two:

- Unemployment Summary
- Period Charges

Security & Password

All users will have an employer code that will enable them to access the TALX web site. Once there they will enter a user ID and a password to access their account and then select the report they wish to see. If a member already has a password, it will not change for the Insight system. If you need a password, email your name, title, email address and agency name to Paul Fountain at pfountain@talx.com.

Continued inside...

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Four Elected To Trust Board

Four nonprofit professionals joined the Trust's board during the past year: Lorraine Orr, Jim Mellor, Randy Evans, and Daphne Logan.

Lorraine Orr is Regional Vice President for the Boys & Girls Clubs of America in Atlanta. Lorraine began her career in 1988 when she was named Program Director of the Salvation Army Boys & Girls Clubs of Greensboro, subsequently was promoted to Director of Program Services and in 1992 was named the organization's Executive Director. In 1997 she became Regional Service Director for the Boys & Girls Clubs of America and was promoted to Senior Regional Service Director in 2001, and in September of 2007 promoted to her current position of Regional Vice President.

She has received professional honors from within and outside the Boys & Girls Clubs family and has been a member of numerous civic and professional organizations. Lorraine graduated from Greensboro College in 1988 and completed the Senior Women's Leadership Program at Northwestern University in 2006.

Jim Mellor is Chief Financial Officer of the YMCA of the USA, a position he has held since November of 2006. Jim came to the organization's national headquarters in Chicago from the YMCA of Metropolitan Atlanta, where he served for more than 11 years as Vice President of Finance/Chief Financial Officer.

Before joining the YMCA of Metropolitan Atlanta, Jim held financial leadership positions at Price Waterhouse, Chatham Properties, Brown & Root and Caterpillar Corporation—all of which have annual revenue in excess of $1 billion.

Jim earned a bachelor's degree in finance from Bob Jones University in Greenville, South Carolina, and has done graduate work at the University of South Carolina. He also has completed executive training programs at the University of Pennsylvania's Wharton School of Business and Texas A&M University.

Randy Evans has been Executive Director of Finance for Rio Rancho Public Schools since 1994, which is New Mexico's third largest school district with over $200 million in revenue. His areas of responsibility include accounting, budget, payroll, accounts payable, fixed assets, purchasing, internal audit, and general ledger.

For the eight years prior to that he served as Director of Finance, Personnel and Information Systems for the United Way of Central New Mexico, where he was responsible for management of all functions related to accounting and finance, human resources and technology. He holds a Bachelor of Science in Business Administration with a major in accounting from California State University at Long Beach.

Randy does extensive volunteer work. He is currently a member of the finance committee of the United Way of Central New Mexico, a current Trust member. From 1989 to 1995 he served on the board of the Joint Agencies Trust, the predecessor organization to the 501(c) Agencies Trust. Since 1996 he has been a member of the Trust's HR advisory Committee.

Daphne Logan has been Senior Vice President of Human Resources for Feeding America since 1997, and is based in the organization's Chicago headquarters. Through its network of more than 200 member food banks, Feeding America, formerly known as America's Second Harvest, supplies food to more than 25 million Americans each year, including nine million children and three million seniors.

Daphne brings to her work and to our board a wealth of experience in both the corporate and the nonprofit sectors. Prior to joining Feeding America, she was Human Resources Manager for the Teachers Academy of Mathematics and Science, a Chicago area nonprofit founded in 1990 to raise the mathematics and science skills of teachers and to improve student achievement.

Daphne, who graduated with a B.A. in Sociology from Northwestern University, is a Senior Professional in Human Resources (SPHR), and has earned additional professional certifications from DePaul University and the SHRM Academy.

Deposit Rating Calculations to be Mailed

The annual deposit rating calculations with a preliminary activity report for the past year are scheduled to be mailed by the end of February. Later in the year, members will receive their organization's finalized activity report along with the Trust's Annual Report.

Also included in the February mailing will be a notice of the amount the member will deposit in its organization's reserve account for the coming year. The actual deposits are made in quarterly installments due March 31, June 30, September 30, and November 30. Members will receive quarterly payment notices prior to those dates.

The Trust Is Working — Overtime

I am pleased to report that despite the difficult unemployment picture of the last two years the Trust has been working very hard for its members and is functioning just as it was designed.

How difficult these years have been came into sharp focus on December 4, 2009 when the Bureau of Labor Statistics (BLS) issued its monthly employment statistics. The BLS report said that both the number of unemployed persons, at 15.4 million, and the unemployment rate, at 10.0 percent, had "edged down" recently but added that at the start of the recession in December 2007, the number of unemployed persons was 7.5 million, and the jobless rate was 4.9 percent. In other words, even though the numbers had eased, we still have about twice as many unemployed people today as we did when the slide began.

Kirk Springsted
Chairman of the Board

The effect this has had on Trust members has been easily apparent to the Trust's support team, whose efforts with and on behalf of members has increased dramatically. Paul Fountain, who heads the 501(c) Services claims management group, says "We've been extremely busy for well over a year now. In addition to the increased level of claims activity, we're doing a lot of advising and projecting for items such as budgets and liabilities. We're talking to people we've never talked to before because many of them have never had a claim before." Thanks to those extra efforts, and despite the increase in activity, the Trust continues to enjoy a success rate of about 88% on behalf of members when it comes to protesting claims.

Activity also surged in the Trust's Human Resource Services whose staff field questions for members on numerous personnel matters. They report that the number of calls to their Hotline rose 23.6% during the first three quarters of the year and the most frequent question was about separation matters. Their work has proved extremely helpful to members who have had to deal with reductions in their workforces.

Our unique stop loss insurance program has also worked very well. When we tally the final stop loss figures for 2009 we expect the total amount that members recover from the Trust's stop loss insurance to be approximately $1.2 million or about 40% higher than the $835,000 of last year.

Finally, we have also seen a dramatic improvement in the investment arena where we have recovered nicely from 2008. All of this is to say that at a time like this when members need help most, the Trust has proven to be an invaluable asset to them and is working harder than ever to protect their interests.

Trust Rolls Out Advanced Reporting System

...Continued from page 1

The information in the reports is protected by a web-based encryption system. "This is far more secure than paper, fax or e-mail, all of which can fall into the wrong hands," Paul notes.

The Trust is conducting a series of free webinars, or online training sessions, to help acquaint our Trust members with the system. In addition, the Trust is sending a series of communications to members explaining Insight.

In the past, some members chose not to access the old reporting system. Beginning in mid-January, they too will have an opportunity to come on board with the new Insight system.