



the evergreen state society

tel: 206.329.5640

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May 19, 1999

### Cover Sheet for Online Version of 1998 990

1122 east pike st.  
suite number 444  
seattle, washington  
98122.3934

The Evergreen State Society provides people and organizations with tools and encouragement for building community. It was established in 1990.

#### Primary Services Provided.

- Creating forums for the exploration of community-related issues and ideas. In cooperation with the Center for Ethical Leadership, we have offered monthly public breakfast meetings under the title "Civil Society in Everyday Life." We also organize occasional roundtables for members and friends of the Society – the most recent was with Dean Marc Lindenberg of the Evans School of Public Affairs at UW – for exchange of views and information
- Collecting, composing, organizing and distributing useful information for community leaders through the Internet. The Society maintains a list of state agencies whose work impacts Washington nonprofits as a part of its website at <http://www.tess.org/misc/gov2.htm>. The Society has been the source of the widely used Nonprofit FAQ (Frequently Asked Questions) since 1994 and, in December 1998, took over responsibility for the Internet Nonprofit Center (<http://www.nonprofits.org>). A further project at this site is devoted to facilitating the posting of completed information returns (Form 990) on the Internet.
- Encouraging community service. The Society publishes *Front Steps*, a newsletter with advice and examples that support neighborly behavior by people in low- and moderate-income areas. The Winter 1998 issue of *Front Steps* was distributed to 50,000 households in 125 neighborhoods across the country. The content of each issue is also posted on the Society's website. The Society presents Evergreen Awards annually, based on nominations by its members identifying people who have made remarkable contributions to the communities of Washington state. In all, more than 150 Washingtonians – both famous and obscure – have been recognized in this way.
- Research and publication on nonprofit organizations and related public policy questions. The Society issued *Nonprofits in Washington*, the first systematic review of the subject, in 1994. A new edition will be published later in 1999.
- Influencing public policies for the benefit of community-building organizations. The Society convened a working group on the policies and administration of Washington's charitable solicitations regulations. As a result of these discussions, the Secretary of State's office made several significant improvements in procedures for nonprofits seeking funds from the public. Similar discussions on the policy questions involved in fundraising online have just begun.

Form **990-EZ**

# Short Form Return of Organization Exempt From Income Tax

Under section 501(c) of the Internal Revenue Code (except black lung benefit trust or private foundation) or section 4947(a)(1) nonexempt charitable trust  
▶ For organizations with gross receipts less than \$100,000 and total assets less than \$250,000 at the end of the year.  
▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No. 1545-1150

**1998**

This Form is Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

**A** For the 1998 calendar year, OR tax year beginning

- Check if:
- Change of address
- Initial return
- Final return
- Amended return (required also for state reporting)

Please use IRS label or print or type. See Specific Instructions.

**C** Name of organization  
**THE EVERGREEN STATE SOCIETY**

Number and street for P.O. box; if mail is not delivered to street address, Room/suite  
**206 E. PINE ST., #444**

City or town, state or country, and ZIP + 4  
**SEATTLE, WA 98122-3834**

**D** Employer identification number  
**91-1503642**

**E** Telephone number  
**206-329-5610**

**F** Check  if exemption application is pending.

**H** Enter four-digit group exemption number (GEN)

**G** Accounting method:  Cash  Accrual  Other (specify) ▶

**I** Type of organization—▶  Exempt under section 501(c)(3) (3) (insert number) OR  section 4947(a)(1) nonexempt charitable trust  
**Note: Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts MUST attach a completed Schedule A (Form 990).**

**J** Check  if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS; but if the organization received a Form 990 Package in the mail, the organization should file a return without financial data. Some states require a complete return.  
**K** Enter the organization's 1998 gross receipts (add back lines 5b, 6b, and 7b, to line 9) ▶ \$ **53192**  
**If \$100,000 or more, the organization must file Form 990 instead of Form 990-EZ.**

## Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Specific Instructions on page 30.)

Revenue		Expenses		Net Assets	
1	Contributions, gifts, grants, and similar amounts received (attach schedule of contributors)	1	49327	18	(60,400)
2	Program service revenue including government fees and contracts	2	175	19	86107
3	Membership dues and assessments	3	1806	20	29
4	Investment income	4	1804	21	25736
5a	Gross amount from sale of assets other than inventory	5c	0	17	113692
b	Less: cost or other basis and sales expenses	6c	0	18	(60,400)
5b		7c	0	19	86107
6	Special events and activities (attach schedule):	8	0	20	29
a	Gross revenue (not including \$ of contributions reported on line 1)	9	53192	21	25736
b	Less: direct expenses other than fundraising expenses	10	1100		
6a		11	0		
6b	Net income or (loss) from special events and activities (line 6a less line 6b)	12	3761		
7a	Gross sales of inventory, less returns and allowances	13	38988		
b	Less: cost of goods sold	14	1912		
7a		15	19344		
7b	Gross profit or (loss) from sales of inventory (line 7a less line 7b)	16	15245		
8	Other revenue (describe ▶)	17	113692		
9	Total revenue (add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8)	18	(60,400)		
10	Grants and similar amounts paid (attach schedule)	19	86107		
11	Benefits paid to or for members	20	29		
12	Salaries, other compensation, and employee benefits	21	25736		
13	Professional fees and other payments to independent contractors				
14	Occupancy, rent, utilities, and maintenance				
15	Printing, publications, postage, and shipping				
16	Other expenses (describe ▶ see attached statement)				
17	Total expenses (add lines 10 through 16)				
18	Excess or (deficit) for the year (line 9 less line 17)				
19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)				
20	Other changes in net assets or fund balances (attach explanation) Adjust prior year				
21	Net assets or fund balances at end of year (combine lines 18 through 20)				

## Part II Balance Sheets—If Total assets on line 25, column (B) are \$250,000 or more, file Form 990 instead of Form 990-EZ.

		(A) Beginning of year	(B) End of year
22	Cash, savings, and investments	88176	20736
23	Land and buildings	0	0
24	Other assets (describe ▶ value of domain name)	0	0
25	Total assets	88176	20736
26	Total liabilities (describe ▶)	2067	2063
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	86107	23702

For Paperwork Reduction Act Notice, see page 1 of the separate instructions.

Form 990-EZ (1998)

Part III Statement of Program Service Accomplishments (See Specific Instructions on page 34.)

Expenses (Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts; optional for others.)

Table with 3 columns: Description of program service, Grants amount, and Expenses amount. Includes entries for newsletter distribution, website development, seminars, and total program services.

Part IV List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated. See Specific Instructions on page 34.)

Table with 5 columns: (A) Name and address, (B) Title and average hours per week, (C) Compensation, (D) Contributions to employee benefit plans, (E) Expense account and other allowances. Entry: See attached schedule.

Part V Other Information (See Specific Instructions on page 35.)

Form with multiple questions (33-43) regarding organizational activities, income reporting, tax returns, and expenditures. Includes Yes/No columns and various input fields.

Signature and preparer information section. Includes fields for Signature of officer, Date, Preparer's signature, Date, Preparer's SSN, EIN, and ZIP + 4.



Schedule A (Form 990) 1998

Part III Statements About Activities

Table with 3 columns: Question, Yes, No. Rows include questions about lobbying activities, grants, and annuity plans.

Part IV Reason for Non-Private Foundation Status (See instructions on pages 2 through 4.)

The organization is not a private foundation because it is: (Please check only ONE applicable box.)

- 5 A church, convention of churches, or association of churches. Section 170(b)(1)(A)(i).
6 A school. Section 170(b)(1)(A)(ii). (Also complete Part V, page 4.)
7 A hospital or a cooperative hospital service organization. Section 170(b)(1)(A)(iii).
8 A Federal, state, or local government or governmental unit. Section 170(b)(1)(A)(v).
9 A medical research organization operated in conjunction with a hospital. Section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state.
10 An organization operated for the benefit of a college or university owned or operated by a governmental unit. Section 170(b)(1)(A)(iv). (Also complete the Support Schedule in Part IV-A.)
11a An organization that normally receives a substantial part of its support from a governmental unit or from the general public. Section 170(b)(1)(A)(vi). (Also complete the Support Schedule in Part IV-A.)
11b A community trust. Section 170(b)(1)(A)(vi). (Also complete the Support Schedule in Part IV-A.)
12 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its charitable, etc., functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Also complete the Support Schedule in Part IV-A.)
13 An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in: (1) lines 5 through 12 above; or (2) section 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2). (See section 509(a)(3).)

Provide the following information about the supported organizations. (See instructions on page 4.)

Table with 2 columns: (a) Name(s) of supported organization(s), (b) Line number from above.

- 14 An organization organized and operated to test for public safety. Section 509(a)(4). (See instructions on page 4.)

Schedule A (Form 990) 1998

**Part IV-A Support Schedule** (Complete only if you checked a box on line 10, 11, or 12.) *Use cash method of accounting.*  
 Note: You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting.

Calendar year (or fiscal year beginning in)	(a) 1997	(b) 1996	(c) 1995	(d) 1994	(e) Total
15 Gifts, grants, and contributions received. (Do not include unusual grants. See line 28.)	22399	22865	8599	3305	57188
16 Membership fees received	2356	2576	3208	2900	10840
17 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is not a business unrelated to the organization's charitable, etc., purpose.		98	759	123469	124326
18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	212				212
19 Net income from unrelated business activities not included in line 18					
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf.					
21 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge.					
22 Other income. Attach a schedule. Do not include gain or (loss) from sale of capital assets			1445		
23 Total of lines 15 through 22.	24967	25559	14011	129474	193799
24 Line 23 minus line 17.	24967	25461	13252	6005	69685
25 Enter 1% of line 23	250	256	140	1295	
26 Organizations described on lines 10 or 11:					26a
a Enter 2% of amount in column (e), line 24.					
b Attach a list (which is not open to public inspection) showing the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1994 through 1997 exceeded the amount shown in line 26a. Enter the sum of all these excess amounts.					26b
c Total support for section 509(a)(1) test: Enter line 24, column (e)					26c
d Add: Amounts from column (e) for lines:	18	19			26d
	22	26b			
e Public support (line 26c minus line 26d total)					26e
f Public support percentage (line 26e (numerator) divided by line 26c (denominator))					26f %
27 Organizations described on line 12:					
a For amounts included in lines 15, 16, and 17 that were received from a "disqualified person," attach a list to show the name of, and total amounts received in each year from, each "disqualified person." Enter the sum of such amounts for each year:	(1997)	(1996)	(1995)	(1994)	
	0	0	0	0	
b For any amount included in line 17 that was received from a nondisqualified person, attach a list to show the name of, and amount received for each year, that was more than the larger of (1) the amount on line 25 for the year or (2) \$5,000. (Include in the list organizations described in lines 5 through 11, as well as individuals.) After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year:	(1997)	(1996)	(1995)	(1994)	
	20000	0	0	0	
c Add: Amounts from column (e) for lines:	15	16			27c
	17	20	21		
	57188	10840	0		192354
d Add: Line 27a total	0				27d
					20000
e Public support (line 27c total minus line 27d total)					27e
					172354
f Total support for section 509(a)(2) test: Enter amount on line 23, column (e)					27f
					193799
g Public support percentage (line 27e (numerator) divided by line 27f (denominator))					27g %
					89 %
h Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))					27h %
					- %
28 Unusual Grants: For an organization described in line 10, 11, or 12 that received any unusual grants during 1994 through 1997, attach a list (which is not open to public inspection) for each year showing the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant. Do not include these grants in line 15. (See instructions on page 4.)					

**Part V Private School Questionnaire (See instructions on page 4.)**  
**(To be completed ONLY by schools that checked the box on line 6 in Part IV)**

		Yes	No
29	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?		
30	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?		
31	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe; if "No," please explain. (If you need more space, attach a separate statement.)		
32	Does the organization maintain the following:		
a	Records indicating the racial composition of the student body, faculty, and administrative staff?		
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?		
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?		
d	Copies of all material used by the organization or on its behalf to solicit contributions?		
	If you answered "No" to any of the above, please explain. (If you need more space, attach a separate statement.)		
33	Does the organization discriminate by race in any way with respect to:		
a	Students' rights or privileges?		
b	Admissions policies?		
c	Employment of faculty or administrative staff?		
d	Scholarships or other financial assistance?		
e	Educational policies?		
f	Use of facilities?		
g	Athletic programs?		
h	Other extracurricular activities?		
	If you answered "Yes" to any of the above, please explain. (If you need more space, attach a separate statement.)		
34a	Does the organization receive any financial aid or assistance from a governmental agency?		
b	Has the organization's right to such aid ever been revoked or suspended? If you answered "Yes" to either 34a or b, please explain using an attached statement.		
35	Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," attach an explanation.		

Schedule A (Form 990) 1998

Page 5

**Part VI-A Lobbying Expenditures by Electing Public Charities** (See instructions on page 6.)  
 (To be completed **ONLY** by an eligible organization that filed Form 5768)

Check here  **a** if the organization belongs to an affiliated group.  
 Check here  **b** if you checked "a" above and "limited control" provisions apply.

<b>Limits on Lobbying Expenditures</b> (The term "expenditures" means amounts paid or incurred.)		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
<b>36</b>	Total lobbying expenditures to influence public opinion (grassroots lobbying)	<b>36</b>	
<b>37</b>	Total lobbying expenditures to influence a legislative body (direct lobbying)	<b>37</b>	
<b>38</b>	Total lobbying expenditures (add lines 36 and 37)	<b>38</b>	
<b>39</b>	Other exempt purpose expenditures	<b>39</b>	
<b>40</b>	Total exempt purpose expenditures (add lines 38 and 39)	<b>40</b>	
<b>41</b>	Lobbying nontaxable amount. Enter the amount from the following table— If the amount on line 40 is— The lobbying nontaxable amount is— Not over \$500,000 . . . . . 20% of the amount on line 40. Over \$500,000 but not over \$1,000,000 . . \$100,000 plus 15% of the excess over \$500,000 Over \$1,000,000 but not over \$1,500,000 . \$175,000 plus 10% of the excess over \$1,000,000 Over \$1,500,000 but not over \$17,000,000 . \$225,000 plus 5% of the excess over \$1,500,000 Over \$17,000,000 . . . . . \$1,000,000	<b>41</b>	
<b>42</b>	Grassroots nontaxable amount (enter 25% of line 41)	<b>42</b>	
<b>43</b>	Subtract line 42 from line 38. Enter -0- if line 42 is more than line 38	<b>43</b>	
<b>44</b>	Subtract line 41 from line 38. Enter -0- if line 41 is more than line 38	<b>44</b>	

Caution: If there is an amount on either line 43 or line 44, you must file Form 4720.

**4-Year Averaging Period Under Section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 45 through 50 on page 7.)

Calendar year (or fiscal year beginning in) ▶	Lobbying Expenditures During 4-Year Averaging Period				
	(a) 1998	(b) 1997	(c) 1996	(d) 1995	(e) Total
<b>45</b> Lobbying nontaxable amount					
<b>46</b> Lobbying ceiling amount (150% of line 45(e))					
<b>47</b> Total lobbying expenditures					
<b>48</b> Grassroots nontaxable amount					
<b>49</b> Grassroots ceiling amount (150% of line 48(e))					
<b>50</b> Grassroots lobbying expenditures					

**Part VI-B Lobbying Activity by Nontaxing Public Charities**

(For reporting only by organizations that did not complete Part VI-A) (See instructions on page 8.)

During the year, did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:	Yes	No	Amount
<b>a</b> Volunteers			
<b>b</b> Paid staff or management (Include compensation in expenses reported on lines c through h.)			
<b>c</b> Media advertisements			
<b>d</b> Mailings to members, legislators, or the public			
<b>e</b> Publications, or published or broadcast statements			
<b>f</b> Grants to other organizations for lobbying purposes			
<b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body			
<b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means			
<b>i</b> Total lobbying expenditures (add lines c through h)			

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities.



**The Evergreen State  
Society -- 91-1503642**

**Officers & Directors**

1998

(A) Name and Address	(B) Title and hours per week	(C) Compensation (D) Contributions to benefits (E) Expense and other allowances
<b>Mason Jay Blacher</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>*Gene Edgar, Vice President</b> PO Box 20682 Seattle 98102-0682	Director 2	(C) -0- (D) -0- (E) -0-
<b>Les Eldridge</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>Bob Howard</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>Sandy Gill</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>Kathy Jenkins</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>Mary Joyce, CPA</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>Phillip Klein</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>*Dianne Kuhn</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-
<b>*Jim Pridgeon</b> PO Box 20682 Seattle 98102-0682	Director 2	(C) -0- (D) -0- (E) -0-
<b>*Pat Shanahan, Chair</b> PO Box 20682 Seattle 98102-0682	Director 3	(C) -0- (D) -0- (E) -0-
<b>*Sunny Speidel, Secretary Treasurer</b> PO Box 20682 Seattle 98102-0682	Director 3	(C) -0- (D) -0- (E) -0-
<b>Cynthia Upthegrove</b> PO Box 20682 Seattle 98102-0682	Director 1	(C) -0- (D) -0- (E) -0-

**D. Woody Woodhouse**  
PO Box 20682  
Seattle 98102-0682

Director  
1

(C) -0-  
(D) -0-  
(E) -0-

**Marion Woyvodich**  
PO Box 20682  
Seattle 98102-0682

Director  
1

(C) -0-  
(D) -0-  
(E) -0-

**Putnam Barber, *President***  
PO Box 20682  
Seattle 98102-0682

CEO  
45

(C) \$26,244  
(D) -0-  
(E) -0-

\* Member of the Executive Committee

**The Evergreen State Society  
91-1503642  
1998**

**Attached statement for 990-EZ, Part I, line 16: Other expenses:**

Fundraising expense	\$5
Internet Services Provider fees	2,975
Automobile parking and milage	47
Bank fees	90
Conference registrations	565
Membership dues	542
Equipment rentals	608
Insurance	3,545
Licenses and taxes	200
Office supplies	1,301
Other expenses	1,014
Computer rentals	694
Facilities rentals	583
Repairs	25
Travel (airfare, lodging, incidentals)	<u>3,071</u>
TOTAL	\$15,265

**Attached statement for Schedule A (Form 990), Part III, 2. d.:**

The Society's President is a full-time employee. During 1998, total compensation for this position equaled \$26,244.