SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No. 1545-0047

2017

Open to Public Inspection

Name of the organization	Employer identification number
International Test and Evaluation Association	52-1174656

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS OF THE ITEA BOARD OF DIRECTORS. CHAPTERS MAY, AT THEIR DISCRETION, DEVELOP RELATIONSHIPS WITH LOCAL UNIVERSITIES AND COLLEGES TO ASSIST WITH THE SELECTION AND AWARD OF SCHOLARSHIPS. CHAPTERS WILL DEVELOP ELIGIBILITY GUIDELINES SUCH AS, REQUIRED GRADE POINT AVERAGE, COURSE OF STUDY AND APPLICATION REQUIREMENTS. THE SELECTION OF INDIVIDUAL SCHOLARSHIP AWARDEES IS AT THE DISCRETION OF THE LOCAL CHAPTER. EACH CHAPTER MUST PROVIDE THE ITEA EXECUTIVE OFFICE WITH THE NAMES OF INDIVIDUAL SCHOLARSHIP RECIPIENTS. THE ITEA EXECUTIVE OFFICE ("EO") ADMINISTERS THE SCHOLARSHIP PROGRAM. THE ITEA EO WILL ASSIST THE CHAPTERS WITH THE FINANCIAL ADMINISTRATION OF THE SCHOLARSHIP PROGRAM INCLUDING THE ISSUANCE OF SCHOLARSHIP CHECKS AND THE ESTABLISHMENT AND MAINTENANCE OF AN EDUCATION ACCOUNT. THE ITEA EO WILL SEND THE CHAPTER A CHECK FOR PRESENTATION TO THE DESIGNATED EDUCATIONAL INSTITUTION. THE CHECK WILL BE WRITTEN PAYABLE TO THAT INSTITUTION. IN ACCORDANCE WITH IRS REPORTING REQUIREMENTS FOR YEAR- END TAX RETURNS, EACH CHAPTER MUST PROVIDE THE ITEA EO WITH THE NAMES OF THE INDIVIDUAL SCHOLARSHIP RECIPIENTS, THEIR TAX ID NUMBERS, FULL POSTAL MAILING ADDRESS, TELEPHONE NUMBER, ALONG WITH THE NAME, ADDRESS, TELEPHONE, AND TAX ID OF THE EDUCATIONAL INSTITUTION AND THE FINANCIAL/ PROGRAM POINT OF CONTACT.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

JOURNAL: QUARTERLY JOURNAL PRODUCED IN ORDER TO PROVIDE THE MEMBERSHIP WITH CURRENT INFORMATION ON THE TEST AND EVALUATION INDUSTRY . EXPENSES $ 64,988. INCLUDING GRANTS OF $ O. REVENUE $ 20,603.

FORM 990, PART VI, SECTION A, LINE 6:

EXPLANATION: ITEA CURRENTLY HAS 1,008 MEMBERS, ENCOMPASSING BOTH INDIVIDUAL PROFESSIONALS AND CORPORATE MEMBER REPRESENTATIVES.

FORM 990, PART VI, SECTION A, LINE 7A:

EXPLANATION: ELEVEN (11) OF THE ITEA BOARD DIRECTORS ARE ELECTED BY THE GENERAL MEMBERSHIP OF ITEA ON THREE (3) YEAR OVERLAPPING ROTATIONS.

Name of the organization: International Test and Evaluation Association

Employer identification number: 52-1174656

FORM 990, PART VI, SECTION A, LINE 7B :

EXPLANATION: CHANGES TO THE ORGANIZATION'S GOVERNING BYLAWS ARE THE ONLY DECISIONS REQUIRING ADDITIONAL APPROVAL/VOTE BY THE GENERAL MEMBERSHIP OF ITEA.

FORM 990, PART VI, SECTION B, LINE 11:

EXPLANATION: THE TAX RETURN WAS PREPARED BY THE EXECUTIVE DIRECTOR AND REVIEWED BY SENIOR MANAGEMENT.

SCHEDULE O (Form 990 or 990-EZ) Department of the Treasury Internal Revenue Service Supplemental Information to Form 990 or 990-EZ

UPON REVIEW, THE COMMITTEE SUBMITS THE REPORT TO THE ITEA BOARD OF DIRECTORS AS AN INFORMATION ITEM AT ITS NEXT REGULARLY SCHEDULED MEETING. A COPY OF FINAL 990 WAS SENT TO THE ENTIRE BOARD BEFORE IT WAS FILED WITH THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

EXPLANATION: BOARD MEMBERS ARE REQUIRED TO SIGN AN ACKNOWLEDGEMENT THAT THEY HAVE READ AND UNDERSTOOD THE CONFLICT OF INTEREST POLICY AND MUST DISCLOSE ANY RELATIONSHIPS. IF RELATIONSHIPS ARE DISCLOSED, THE INFORMATION IS ESCALATED TO THE BOARD PRESIDENT VIA THE EXECUTIVE DIRECTOR. THE PRESIDENT, POSSIBLY WITH THE EXECUTIVE COMMITTEE, WILL DETERMINE IF THE CONFLICT OF INTEREST MERITS FURTHER ACTION OR REMOVAL FROM THE BOARD

FORM 990, PART VI, SECTION B, LINE 15A:

EXPLANATION: UPON RECRUITMENT, CEO-LEVEL COMPARITIVE DATA IS SOUGHT FOR THE LOCAL MARKETPLACE AND THE SKILLS/EXPERIENCE OF THE CANDIDATES USED TO DETERMINE APPROPRIATE COMPENSATION LEVELS. THIS IS DONE BY A SUBSET OF THE ITEA BOARD IDENTIFIED TO MANAGE THE RECRUITMENT AND IT IS REEVALUATED EVERY THREE YEARS. YEARLY PERFORMANCE EVALUATIONS OF THE CEO OCCUR IN SEPTEMBER AND THIS PROCESS IS DOCUMENTED IN THE BOARD MINUTES. HE MOST RECENT COMPENSATION REVIEW FOR THE ORGANIZATION'S EXECUTIVE DIRECTOR WAS COMPLETED IN DECEMBER 2016.

FORM 990, PART VI, SECTION C, LINE 19:

EXPLANATION: THE ORGANIZATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Schedule O (Form 990 or 990-EZ), such as legislation enacted after the schedule and its instructions were published, go to *www.irs.gov/Form990*.

Purpose of Schedule

An organization should use Schedule O (Form 990 or 990-EZ), rather than separate attachments, to provide the IRS with narrative information required for responses to specific questions on Form 990 or 990-EZ, and to explain the organization's operations or responses to various questions. It allows organizations to supplement information reported on Form 990 or 990-EZ.

Don't use Schedule O to supplement responses to questions in other schedules of the Form 990 or 990-EZ. Each of the other schedules includes a separate part for supplemental information.

Who Must File

All organizations that file Form 990 and certain organizations that file Form 990-EZ must file Schedule O (Form 990 or 990-EZ). At a minimum, the schedule must be used to answer Form 990, Part VI, lines 11b and 19. If an organization isn't required to file Form 990 or 990-EZ but chooses to do so, it must file a complete return and provide all of the information requested, including the required schedules.

Specific Instructions

Use as many continuation sheets of Schedule O (Form 990 or 990-EZ) as needed.

Complete the required information on the appropriate line of Form 990 or 990-EZ prior to using Schedule O (Form 990 or 990-EZ).

Identify clearly the specific part and line(s) of Form 990 or 990-EZ to which each response relates. Follow the part and line sequence of Form 990 or 990-EZ.

Late return. If the return isn't filed by the due date (including any extension granted), attach a separate statement giving the reasons for not filing on time. **Don't use** this schedule to provide the late-filing statement.

Amended return. If the organization checked the *Amended return* box on Form 990, *Heading*, item B, or Form 990-EZ, *Heading*, item B, use Schedule O (Form 990 or 990-EZ) to list each part or schedule and line item of the Form 990 or 990-EZ that was amended.

Group return. If the organization answered "Yes" to Form 990, line H(a), but "No" to line H(b), use a separate attachment to list the name, address, and EIN of each affiliated organization included in the group return. **Don't use** this schedule. See the Instructions for Form 990, *I. Group Return.*

Form 990, Parts III, V, VI, VII, IX, XI, and XII. Use Schedule O (Form 990 or 990-EZ) to provide any narrative information required for the following questions in the Form 990.

1. Part III, *Statement of Program Service Accomplishments.*

a. "Yes" response to line 2.

b. "Yes" response to line 3.

c. Other program services on line 4d.

2. Part V, *Statements Regarding Other IRS Filings and Tax Compliance*.

a. "No" response to line 3b.

b. "Yes" or "No" response to line 13a.

c. "No" response to line 14b.

3. Part VI, *Governance, Management, and Disclosure.*

a. Material differences in voting rights among members of the governing body in line 1a.

b. Delegation of governing board's authority to executive committee in line 1a.

c. "Yes" responses to lines 2 through 7b.

d. "No" responses to lines 8a, 8b, and 10b.

e. "Yes" response to line 9.

f. Description of process for review of Form 990, if any, in response to line 11b.

g. "Yes" response to line 12c.

h. Description of process for determining **compensation** in response to lines 15a and 15b.

i. If applicable, in response to line 18, an explanation as to why the organization checked the *Other* box or didn't make any of Forms 1023, 1024, 990, or 990-T publicly available.

j. Description of public disclosure of documents in response to line 19.

4. Part VII, *Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors.*

a. Explain if reporting of compensation paid by a related organization is provided only for the period during which the related organization was related, not the entire calendar year ending with or within the tax year, and state the period during which the related organization was related.

b. Description of reasonable efforts undertaken to obtain information on compensation paid by related organizations, if the organization is unable to obtain such information to report in column (E).

5. Explanation for Part IX, *Statement of Functional Expenses*, line 11g (other fees for services), including the type and amount of each expense included in line 11g, if the amount in Part IX, line 11g, exceeds 10% of the amount in Part IX, line 25 (total functional expenses).

6. Explanation for Part IX, *Statement of Functional Expenses*, line 24e (all other expenses), including the type and amount of each expense included in line 24e, if the amount on line 24e exceeds 10% of the amount in Part IX, line 25 (total functional expenses).

7. Part XI, *Reconciliation of Net Assets.* Explain any other changes in net assets or fund balances reported on line 9.

8. Part XII, *Financial Statements and Reporting.*

a. Change in accounting method or description of other accounting method used on line 1.

b. Change in committee oversight review from prior year on line 2c.

c. "No" response to line 3b.

Form 990-EZ, Parts I, II, III, and V. Use Schedule O (Form 990 or 990-EZ) to provide any narrative information required for the following questions.

1. Part I, *Revenue, Expenses, and Changes in Net Assets or Fund Balances*.

a. Description of other revenue, in response to line 8.

b. List of grants and similar amounts paid, in response to line 10.

c. Description of other expenses, in response to line 16.

d. Explanation of other changes in net assets or fund balances, in response to line 20.

2. Part II, *Balance Sheets*.

a. Description of other assets, in response to line 24.

b. Description of total liabilities, in response to line 26.

3. Description of other program services in response to Part III, *Statement of Program Service Accomplishments*, line 31.

4. Part V, *Other Information*.

a. "Yes" response to line 33.

b. "Yes" response to line 34.

c. Explanation of why organization didn't report unrelated business gross income of $1,000 or more to the IRS on Form 990-T, in response to line 35b.

d. "No" response to line 44d.

Other. Use Schedule O (Form 990 or 990-EZ) to provide narrative explanations and descriptions in response to other specific questions. The narrative provided should refer and relate to a particular line and response on the form.

CAUTION ***Don't*** *include on Schedule O (Form 990 or 990-EZ) any social security number(s), because this schedule will be made available for public inspection.*