

Thursday February 15, 2024 5:00 pm IV Stream-Team headquarters- 331 E Cottage Park Dr Suite 1b Cave Junction OR 97523

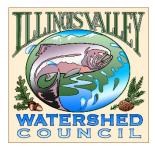
Illinois Valley Watershed Council is inviting you to a scheduled Zoom meeting.

Topic: Illinois Valley Watershed Council Monthly Meeting Time: 5:00 pm Thursday, February 15, 2024

Join Zoom Meeting https://us06web.zoom.us/j/4738236869?pwd=Z1ZxVlkyYUtWUkprMVVLL3BwdzdoZz09

Meeting ID: 473 823 6869 Passcode: SaveFish One tap mobile +12532158782,,4738236869#,,,,*76632288# US (Tacoma) +13462487799,,4738236869#,,,,*76632288# US (Houston)

Dial by your location +1 253 215 8782 US (Tacoma) +1 346 248 7799 US (Houston) +1 669 444 9171 US +1 669 900 6833 US (San Jose) +1 719 359 4580 US +1 253 205 0468 US +1 646 931 3860 US +1 689 278 1000 US +1 929 436 2866 US (New York) +1 301 715 8592 US (Washington DC) +1 305 224 1968 US +1 309 205 3325 US +1 312 626 6799 US (Chicago) +1 360 209 5623 US +1 386 347 5053 US +1 507 473 4847 US +1 564 217 2000 US Meeting ID: 473 823 6869 Passcode: 76632288 Find your local number: https://us06web.zoom.us/u/kq9K0ESEz



Illinois Valley Watershed Council 331 E Cottage Park Suite 1B - P.O. Box 352 Cave Junction, OR 97523 Phone: 541-592-3731

Monthly Council Meeting Agenda February 15, 2024

- I. 5:00 PM: Call to Order
- II. 5:02 PM: Acceptance of Minutes
- III. 5:05 PM: Acceptance of Financial Reports

IV. Committee Reports

- a. Programs and projects
- b. Budget
- c. Human Resources
- d. Organizational Development
- e. Policy
- V. 5:25 PM: Old Business a. QuickBooks issue/action?

VI. 5:50 PM: New Business

- a. "The Big Picture"
- b. Patty's 3 proposals email discussion/action
- c. E.D. signatory authority
- d. Let's Talk Website

VII. 6:15 Strategic Plan Check-In

- a. Board eligibility addition to by-laws proposal.
- **b.** Review of other actions completed.

VIII. 6:30 PM: Council Updates & Staff Reports

- a. Kevin report
- b. Arlyse report

IX. 6:45 PM Partnering Agency Reports

- a. Illinois Valley SWCD
- b. Others
- X. 6:55 PM: Public Comments (Relating to this agenda or IVWC Operations)
- XI. 7:00 PM: Adjournment

Illinois Valley Watershed Council Regular Monthly Council Meeting Illinois Valley WC Office/ZOOM

Meeting Minutes

Meeting Called to Order January 11, 2024 by Katrina Poydack, Chair at 5:05 pm.

ATTENDEES	ZOOM ATTENDEES	ABSENTEES
Carol Crawford	Gene Merrill	John Bellville
Janice Denney		
Katrina Poydack		
Patty Downing		
Bob Schmidt		
Don Young		
James Gurley		
Kevin O'Brien (staff)		
Arlyse DeLoyola (staff)		

SCRIBE

Notes were taken by: Arlyse DeLoyola

2024 Election:

- Nominations were opened for the Chair position.
 - Patty Downing nominated Katrina Poydack to serve as Board Chair.
 - Janice Denney seconded the nomination.
 - Katrina Poydack was elected by a unanimous vote.
- Nominations were opened for the Secretary position.
 - o Janice Denney nominated Patty Downing to serve as Secretary.
 - Carol Crawford seconded the nomination.
 - Patty Downing was elected by a unanimous vote.
- Nominations for Treasurer were opened. Discussion was held as to whether Gene Merrill would still be able to serve. He explained that he is unable to make it in to the office on a regular basis due to his current workload.
 - Janice Denney was nominated to serve as Treasurer.
 - Carol Crawford seconded the nomination.
 - Janice was elected by a unanimous vote.
- Minutes: The minutes of the December 2023 meeting were presented to the council for review.
 - o **Bob Schmidt made a motion to approve the minutes.**
 - o Carol Crawford seconded that motion.
 - o The minutes were approved without dissent.
 - **Financials:** The Financial Reports for December 2023 were presented to the Council for review.
 - o Carol Crawford made a motion to accept the financial reports.
 - o Bob Schmidt seconded that motion.
 - o The motion was approved without dissent.

OLD BUSINESS

• **Review of Land Acknowledgement Proposal** The Council tabled this to a future meeting.

• Reschedule Budget Meeting Date

The budget meeting was re-scheduled for January 24 at 3:30 and Janice Denney, as Treasurer, was added to the committee.

NEW BUSINESS

Values Statement:

A values statement was suggested to be added to the strategic plan.

- o Janice Denney made a motion to include the values Statement in the Strategic Plan.
- Jim Gurley seconded the motion.
- The motion passed unanimously.

Approval of By-Laws:

- Carol Crawford moved to approve the updated By-Laws with noted corrections.
- Don Young seconded the motion.
- The motion passed with Bob Schmidt abstaining.

Approval of Strategic Plan

Kevin opened the subject by expressing his thanks to the board and facilitator, Rob Hambleton for all their hard work over the past few months creating this plan. Rob was introduced to discuss the community feedback he received, discussed the process of creating the document and how he felt it went.

Bob Schmidt noted an error in an Agency name in the Strategic Plan, and Rob agreed to correct it in the final document.

The differences in mission between the Council and District were discussed.

- Patty Downing moved to accept the IVWV 2024-2026 Strategic Plan with edits as noted.
- Carol Crawford seconded the motion.
- The motion passed with Bob Schmidt abstaining.

CONTINUING

Strategic Plan Check-In:

Kevin noted that this item would now be on every meeting agenda so that the Council can maintain accountability in upholding the Strategic Plan.

- Carol Crawford moved to establish a committee to identify necessary committees. The committee would include Patty Downing, Katrina Poydack and staff members, Kevin and Arlyse.
- Janice Denney seconded the motion.
- The motion passed unanimously, and a meeting date was set for January 18th at 3:00pm.

The agenda item of appointing a policy committee was tabled to a future meeting. Patty suggested compiling a list of needed policies first.

Staff were asked when the new By-Laws and Strategic Plan could be posted to the website. Arlyse responded that she could put them up as soon as the final draft came back from Rob. She would also put some copies in binders for the office.

• Staff and partnering agency reports:

• Kevin reviewed his written report. He has just come through an intense round of grant-writing that included steady work without days off since the last week of December. He submitted three grant proposals as a result.

He had a very positive review team visit for the OWEB (Oregon Watershed Enhancement Board) East Fork grant proposal on Tuesday. He stated it was one of the best attended review team visits in his experience including landowners and review team members. Kevin then explained the timelines for each grant.

• Arlyse had nothing to add to her written report.

• Partnering Agencies:

There were no partnering agencies represented at this meeting.

• Public Comment

Don Young made the Council aware that there is some questionable activity going on directly across the river from the Carlin Mine property. Don was given the "who to call" guide produced by the District.

NEXT MEETING \cdot

The next monthly meeting is to be held at 5:00 pm on February 8th, 2024.

ADJOURNMENT

Meeting Adjourned by Katrina Poydack, Chair, at 7:00 PM.

Approved Minutes:

Signature_____

Date	

2:54 PM 02/07/24

Cash Basis

Illinois Valley Watershed Council Profit & Loss January 2024

	Jan 24
Ordinary Income/Expense	
Income Contributions Received	
Contributions - Unrestricted	25.63
Total Contributions Received	25.63
Total Income	25.63
Gross Profit	25.63
Expense	
Contracted Services	5,000.00
Other	
Bank Fees	1.21
Copier Lease	44.49
Dues & Subscriptions	25.00
Internet Services	21.25
Payroll Fees	143.00
Rent Expense	534.50
Telephone	84.78
Total Other	854.23
Salaries & Wages	
401K Automatic Contribution	537.74
Employee Contributed 401K	377.40
Employer Matching Funds 401K	537.74
Employer Paid Payroll Taxes	1,132.06
Tax Witholding- Employee	1,968.45
Salaries & Wages - Other	8,409.06
Total Salaries & Wages	12,962.45
Supplies & Materials	
Postage, Mailing Service	0.00
Supplies & Materials - Other	43.13
Total Supplies & Materials	43.13
Training and Associated Travel	418.34
Total Expense	19,278.15
Net Ordinary Income	-19,252.52
Other Income/Expense	
Other Income	
Refunds	249.75
Total Other Income	249.75
Net Other Income	249.75
Net Income	-19,002.77

Illinois Valley Watershed Council Profit & Loss July 2023 through January 2024

Ordinary Income Expense Income 575.63 Contributions Received 575.63 Grants Received 575.63 Grants Received 52.073.30 Grants Received 75.306.30 Total Contributions Received 75.881.93 Groors Profit 75.881.93 Gross Profit 75.881.93 Gross Profit 75.881.93 Expense 3.213.46 Insurance 1.249.75 General Liability Insurance 2.449.00 Total Insurance 3.698.75 Other 8 Bank Fees 14.74 Copier Lease 565.34 Dues & Subscriptions 589.00 Food & Water 263.16 Internet Services 23.775 Payroll Fees 743.00 PO Box Rent 113.00 Rent Expenses 387.77 Total Other 8.993.80 Project Expenses 387.77 Salaries & Wages 387.77 Salaries & Wages 387.77 Salaries & Wages 387.77 Salaries & Wages 387.77		Jul '23 - Jan 24
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Taxes 90.00	Total Supplies & Materials	5,645.18
	Taxes	90.00

Illinois Valley Watershed Council Profit & Loss July 2023 through January 2024

	Jul '23 - Jan 24	
Training and Associated Travel Lodging Training and Associated Travel - Other	168.44 2,098.34	
Total Training and Associated Travel	2,266.78	
Total Expense	87,290.16	
Net Ordinary Income	-11,408.2	
Other Income/Expense Other Income Refunds	249.75	
Total Other Income	249.75	
Net Other Income	249.75	
Net Income	-11,158.48	

Illinois Valley Watershed Council Balance Sheet As of January 31, 2024

	Jan 31, 24
ASSETS Current Assets Checking/Savings Checking Account IVWC PayPal	74,164.73 407.84
Total Checking/Savings	74,572.57
Total Current Assets	74,572.57
TOTAL ASSETS	74,572.57
LIABILITIES & EQUITY Liabilities Current Liabilities Accounts Payable Accounts Payable	-16.99
Total Accounts Payable	-16.99
Credit Cards Umpqua Bank CC IVWC	15.00
Total Credit Cards	15.00
Total Current Liabilities	-1.99
Total Liabilities	-1.99
Equity Unrestricted Net Assets Net Income	85,733.04 -11,158.48
Total Equity	74,574.56
TOTAL LIABILITIES & EQUITY	74,572.57

Illinois Valley Watershed Council

Register: Checking Account

From 01/01/2024 through 01/31/2024 Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	С	Deposit	Balance
01/03/2024			Refunds	Deposit		Х	249.75	93,443.03
01/08/2024	1050	Pacific Office Autom	Accounts Payable		44.49	Х		93,398.54
01/17/2024	ach	Cardinal-Employee	Accounts Payable	pp ending 12/3	4,162.76	Х		89,235.78
01/17/2024	ach	Cardinal-Tax Impound	Accounts Payable		2,662.68	Х		86,573.10
01/17/2024	ach	Cardinal Business Se	Accounts Payable		50.00	Х		86,523.10
01/17/2024	1051	Soul Canyon Trainin	Accounts Payable		5,000.00	Х		81,523.10
01/17/2024	1052	A+ Storage	Accounts Payable		84.50			81,438.60
01/17/2024	1053	IV DATA CENTER	Accounts Payable		21.25	Х		81,417.35
01/17/2024	1054	IV DATA CENTER	Accounts Payable		450.00	Х		80,967.35
01/22/2024	1055	Staples Advantage	Accounts Payable		43.13			80,924.22
01/22/2024	1056	US Cellular	Accounts Payable		84.78			80,839.44
01/25/2024	1057	Cardmember Services	Umpqua Bank CC IV		25.00			80,814.44
01/29/2024	ACH	Cardinal-Employee	Accounts Payable	pp ending 1/15/	2,919.84	Х		77,894.60
01/29/2024	ACH	Cardinal-Tax Impound	Accounts Payable	PP ending 1/15	1,486.57	Х		76,408.03
01/29/2024	ACH	Cardinal Business Se	Accounts Payable		93.00	Х		76,315.03
01/29/2024	ACH	Slavic 401K Fund	Accounts Payable		1,028.26	Х		75,286.77
01/29/2024	1058	Kevin O'Brien	Accounts Payable		403.34			74,883.43
01/30/2024			Contributions Receive	Deposit		Х	0.63	74,884.06
01/31/2024	ACH	Slavic 401K Fund	Accounts Payable	_	702.34	Х		74,181.72
01/31/2024	1059	Amazon Business Ca	Accounts Payable		16.99			74,164.73
					/ /			,,

From Secretary, Patty Downing

Dear Board -

At our last meeting we approved our Strategic Plan and By-Laws, however one director abstained since he said he had not read the most recent copy. Katrina and I sent him the final copy to read and asked if he might consider, after reading it, to change his vote from Abstained to Yes. But after reading it he instead changed his vote to No.

As American citizens we can vote yes or no for certain laws, but however we voted, if the majority passes that law we are all expected to abide by it - so too is it with our WC Board approved Mission, Values, Goals and By-laws that we have just passed.

To address this I have made the following proposals:

Three Proposals for February 2024 WC meeting

1. Proposed that, in alignment with the newly adopted By-Laws, (Article IV, Structure): We immediately change the job title of Watershed Coordinator to Executive Director. Job description and job duties to be designated with a proposal from the HR Committee as soon as possible but no later than March 14 2024. Job description shall include "Senior Program Coordinator" in addition to other Executive Director duties.

2. Proposed that we amend the By-Laws to say "Council Board" in sentence #2 of Article IV, instead of just "Council" and add, in parentheses: (with full voting powers) immediately after the words "Executive Director" in the same sentence.

(Both proposals 1 and 2 were discussed and informally agreed at strategic planning meetings.)

3. Proposed that, in alignment with Article IV, Sections 1 and 2, all board members pledge to support the full Mission, Values, Vision and Goals of the Strategic Plan.

The importance of full team support for our Mission and Goals is supported by designation in the By-Laws. This means that unlike day to day decisions made at regular board meetings with a majority vote, abstentions and Nay votes in this case, *could* mean a Council Director is not in support of the basic tenets of the Council. However, just as we citizens can vote yes or no on laws, but whatever the majority decides become the laws of the land, and everyone is expected to abide by them - so too our board should expect that all voting board members agree to support the Mission, Vision, Values and Goals, and abide by the By-Laws, whether they voted Yes, No or Abstained. Therefore all current and future board members would be asked sign a simple pledge stating they support the Mission, Vision, Values and Goals and agree to abide by the By-Laws.

By-Laws References:

Section 1: BOARD ELIGIBILITY

Qualifications are as follows:

- 1. With the possible exception of the Executive Director, be a resident of the Illinois Valley River Watershed.
- 2. No more than one member of any family or household may hold a position on the Council at any time.
- 3. Demonstrate the ability to work in cooperation with other community members.
- 4. Be committed to the goals and mission of the Council.

Section 2: DIRECTOR DUTIES

Duties shall include establishing and maintaining Council positions and serving as part of the policymaking body for the corporation, **approving the Strategic Plan**, adopting and amending bylaws, and electing officers. **These positions will uphold the stated mission, goals, and policies of IVWC,** provide staff support and guidance, assume responsibility for staff and Council operations, designate powers or terminate powers of authority as required by the Board."

Committee I.D. Committee 1/31/2024 3:00 p.m.

Patty Downing, Kevin O'Brien, Arlyse DeLoyola

What standing committees should exist and what are their responsibilities?

- 1. Programs and Projects to include but not limited to the following:
 - Water Quality
 - Community Engagement
 - Develop project prioritization matrix.
 - Identify diverse and non-traditional projects/partnerships.

2. Budget

- Meets in May for crafting of fiscal year budget.
- Other budgeting issues as needed.
- 3. Human resources
 - Hiring, selection, compensation, and benefits
 - Board recruitment
 - Employee handbook
 - Board Handbook
- 4. Organizational Development
 - Identify new funding sources
 - Identify new partners
 - Nurture and maintain current partnerships
- 5. Policies
- Review current policies and identify policy needs
- Craft necessary policies for board review

All committees, standing or ad hoc, research and make recommendations, but do not make decisions on behalf of the board. Recommendations are made by majority vote, but consensus is strongly encouraged.

How are committees composed?

- Minimum of three persons
- At least one of whom is a Director other than the Executive Director
- At least one of whom is staff
- Remaining seats may be filled by public, board, or staff
- One member shall serve as committee chair

What are the responsibilities of the chair?

- Plan meetings
- Produce agendas as needed.
- Report committee action (or inaction) at monthly board meetings.



February 2024 Staff Report of the IVWC Watershed Coordinator

(02/07/2024)

Please note that I'm slamming this together on our morning break at the2024 River Restoration Northwest Symposium at Skamania Lodge in Stevenson, WA. Because of my limited time to put this together for you, I expect it will be brief. Please come prepared to our meeting prepared to ask about anything in here you'd like me to flesh out for you more. Thanks.

Crooks Creek Project:

As orally reported at our regular meeting last month, OWEB's Regional Review Team (RRT) site visit went very well. (Contractor) Shorty Villers and (BLM Hydrologist) Bob Lange played key roles on the visit helping me deliver our message to the team and answering questions they had. Mark Grenbemer (OWEB's program representative for our region) indicated he'd have the grant proposal rankings out by about the middle of the month. I'm hoping I have that info to share with you at our meeting next week.

Strategic Planning:

Again, good on us for approving our revised By-laws and 2024-2026 Strategic Plan! Woohoo!! 😊 We are moving forward with it and have already been able to check boxes off on some of our early objectives and are actively moving forward on several others. More on this at the meeting, probably ahead of my report during the Strategic Planning section of our meeting.

Restoration Partnership Initiative/Strategic Alliance with Josephine County:

John and I have resumed developing our plans for this and have meetings next week; one with a potential contractor about the planned post-cannabis property assessment and rehab guide and the other with Alex Lopez (DOGAMI). Alex has been assisting John and I with preliminary scoping and development. This is a very painstaking process. Thanks for your patience. A lot more of that will be needed from all of us to effectively establish a sustainable partnership.

Water Quality Monitoring Program:

Awaiting notification (by late March 2024) from ODFW regarding the PFA initiative grant John worked so hard on and submitted for the program. Fingers crossed.

IV Country Club Restoration Project with ODFW:

This project is still hibernating awaiting OWEB's anticipated Spring announcement to fund or not fund. Rankings from OWEB available later this month.

<u> East Fork Illinois River – Phase 1:</u>

The OWEB RRT also visited this site on January 9th. It sure seemed as though it went swimmingly. Again, OWEB will post their recommendation ranking sheet sometime around mid-February. We should hear on the ask to the Drinking Water Providers Partnership for the project by the end of this month and by the end of next month (March) for the ask we submitted to ODFW under the Private Forest Accord initiative. I'm continuing to move forward with collaborative processes for acquiring the large wood and regulatory permitting needed.

Oregon Community Foundation Spring 2024 Offering:

Last time this will be in this report for a while since as long as we DON'T get contacted by them on 2/22/2024 we are still in the running for the \$30K for a grant writer and will be notified sometime in May 2024.

Respectfully submitted, /s/ Kevin O'Brien, Watershed Coordinator



GENERAL ADMIN

- Payroll submitted.
- Payroll accrual tracked.
- Grant specific expense tracking in QuickBooks and Excel.
- Preparations for board meeting (pre-meeting packet assembly, QB reporting, coordinating agenda, minutes).
- Kept up with partnering agencies' newsletters and memos.
- Reconciled QB to bank account for January, filed December.
- Voicemails, email and phone calls.

The year is off to a roaring start.

I received word that QuickBooks will never sell the desktop version again after the end of July this year. They will get everyone moved online eventually. I had a phone meeting with one of their sales reps yesterday. I am planning to ask the board for advice on which way to go. We'll need to do an update regardless of whether we stay desktop or join the online world. If we go online, we will need a license for each entity. It starts at \$45 a month for the first year (half-price), then increases to \$90. Paid annually, there's a 10% discount, which would make the price \$485 for the first year. The second year would cost \$972 each. I have looked at other options but I'm not convinced there is a better one. I'll keep looking. We'll need to make a decision this meeting. I just joined us up with TechSoup, so maybe I'll get some more options there.

We've held several committee meetings already since approving the Strategic Plan. Things are progressing well so far. Thanks to all who have participated.

Arlyse



Arlyse DeLoyola *Office Manager* Staff Report- February 2024

QuickBooks Online Plus, 1-Year Subscription, 5 Users



This is the offer from Tech Soup.

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		th Training and Support	
	\$349.00	Add this offe	

Description

QuickBooks Online Plus is online accounting software that helps organizations manage essential financial tasks like creating invoices, producing reports, and tracking expenses, contributions, and payments.

This donation provides a one-year subscription for up to five users for QuickBooks Online Plus. You must renew your QuickBooks Online account with TechSoup every 12 months and pay \$75 to reconfirm your eligibility for this program and continue your use of the subscription. The \$75 admin fee allows TechSoup to continue to make this program available. See the **Subscription Details** tab for more information.

Benefits for Organizations

You can use QuickBooks Online Plus to

- · Create a chart of accounts that categorizes and views expenses the way IRS Form 990 requires
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- · Use business planning and analysis tools, such as the Statement of Financial Income & Expense
- · Organize tax, donor, vendor, employee, and general company information in separate centers while

Major Capabilities

- Email integration: You can directly email invoices and estimates from within QuickBooks Online.
- Data import: QuickBooks Online can import data from Excel, the QuickBooks desktop edition, or CSV files.
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- · Mobile access: The QuickBooks Online mobile app works with iOS and Android devices.
- Built-in business reports: QuickBooks Online Plus includes more than 65 built-in business reports and budget planning tools to help you estimate future donations and expenditures
- Donor management app integration: QuickBooks Online syncs with DonorPath and Method Donor. Each application is subject to additional terms, conditions, and fees.
 See a full list of features included in QuickBooks Online Plus.

Support

QuickBooks Online includes free online support from Intuit.

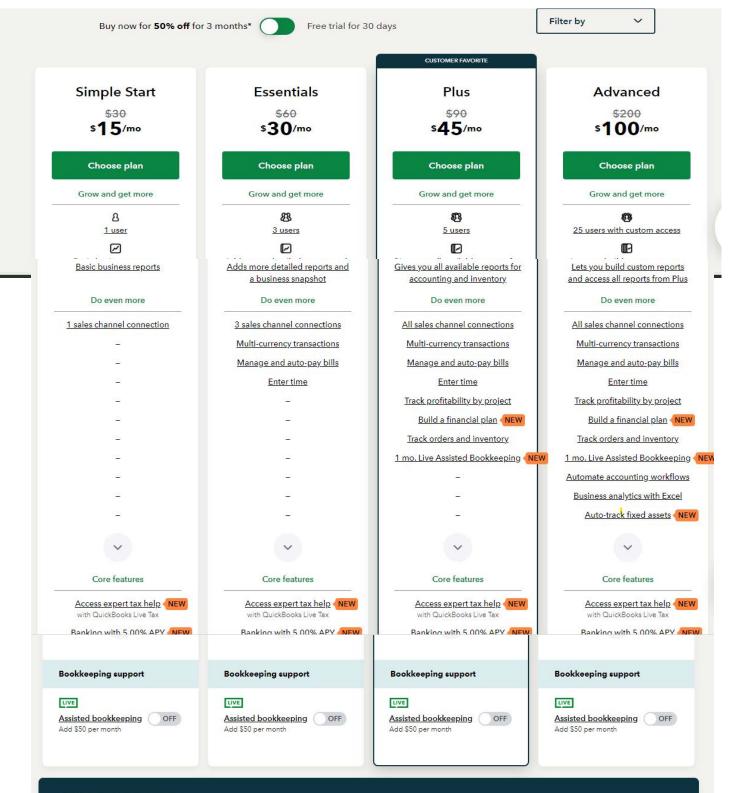
Subscription Details

Please consult TechSoup's Intuit QuickBooks Online FAQ for information not listed in the table below

System Requirements	See QuickBooks Online system requirements.		
	Up to five users can access QuickBooks Online Plus.		
Subscription Limits	Up to two outside accountants can work with your data.		
Start Date	Your one-year subscription begins on the date the product request is approved, not the date the account is set up.		
Continuing Service	To continue access to QuickBooks Online after the initial year of your subscription ends, Intuit requires that we reconfirm your eligibility each year. If you do not reconfirm your eligibility in time or are no longer eligible, Intuit will contact you to either convert to the full retail price or disable your account.		
After One Year	TechSoup will send you reminders 30, 15, and 5 days before your subscription is set to expire. The reminders will tell you about the actions you can take to renew or end your subscription. Renewal will incur a \$75 admin fee.		
Data Import	You can import data from a desktop version of QuickBooks, Microsoft Excel, or a text file. Read the Intuit QuickBooks Online FAQ for more information.		
Data Retention	If your organization is no longer eligible for QuickBooks Online or you choose not to renew your subscription, Intuit will retain your data for one year beyond the date of cancellation. See Intuit's data retention policy for more information.		
Existing Subscribers	If your organization obtained a QuickBooks Online subscription outside of TechSoup, you can copy your company from your existing subscription to your new one as long as your existing subscription level is QuickBooks Online Advanced. Otherwise, you can upgrade your existing subscription and then cancel that subscription after you've copied your company. Instructions for this process are available in the Intuit QuickBooks Online FAQ and will also be sent to you after you request this offer.		
Additi <mark>onal Service</mark> s	Features like QuickBooks Online Payroll and the ability to accept online and mobile payments are available directly from Intuit for additional fees. If you activate the payroll feature, you will see a price listed for QuickBooks Online, but you will not be charged.		
Compatibility of QuickBooks Data	You can import data into QuickBooks Online from QuickBooks Pro 2008 or later, Premier 2008 or later, or Mac 2013 or later. Earlier versions require a downloadable tool.		
with QuickBooks Versions	You must import from QuickBooks desktop within the first 60 days of setting up your new QuickBooks Online account.		

Data Retention	If your organization is no longer eligible for QuickBooks Online or you choose not to renew your subscription, Intuit will retain your data for one year beyond the date of cancellation. See Intuit's data retention policy for more information.
Existing Subscribers	If your organization obtained a QuickBooks Online subscription outside of TechSoup, you can copy your company from your existing subscription to your new one as long as your existing subscription level is QuickBooks Online Advanced. Otherwise, you can upgrade your existing subscription and then cancel that subscription after you've copied your company Instructions for this process are available in the Intuit QuickBooks Online FAQ and will also be sent to you after you request this offer.
	Features like QuickBooks Online Payroll and the ability to accept online and
Additional Services	mobile payments are available directly from Intuit for additional fees. If you activate the payroll feature, you will see a price listed for QuickBooks Online, but you will not be charged.
Compatibility of QuickBooks Data	You can import data into QuickBooks Online from QuickBooks Pro 2008 or later, Premier 2008 or later, or Mac 2013 or later. Earlier versions require a downloadable tool.
with QuickBooks Versions	You must import from QuickBooks desktop within the first 60 days of setting up your new QuickBooks Online account.

Below is the offer directly from Intuit- same plan would be the one labeled "Customer Favorite", which was suggested for our organization by their representative as the best fit. This would be what the District would have to pay because they do not quality for TechSoup. If I had trouble adjusting to online, we could pay for assisted bookeeping at \$50 a month as needed. I will meet with her again February 26th.





LIVE Assisted Bookkeeping NEW

Get help from our bookkeepers when you need it. They'll provide guidance, answer your questions, and teach you how to do tasks in QuickBooks, so you can stay on track for tax time and run your business with confidence.

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Add \$50/month