

**President's Message**

**Times Have Changed. Has your PTA?**

by Maureen Christensen



Are you old enough to remember the simpler, easier time in PTA? There was a room mom chair who would host a "tea" to give instructions on

how to put on a classroom party. There were multiple people running for PTA positions. PTA meetings were held in the morning. You didn't need a degree in accounting to be the PTA treasurer. PTA meetings were social events. It was a chance for stay-at-home moms to "get out of the house." You would bring your children along, and if you were one of the lucky PTAs, you had someone watch your kids during the meeting so you could relax.

The world is a different place now. Most mothers work outside the home. Our population is different. Orange County has over 50 different languages that are spoken in the homes of our families. We have so many different electronic helpers that we spend less and less time communicating with people face-to-face. Everyone is busy. So why in this ever-changing world do we still need PTA?

I got involved in PTA so that I could be close to my children. It was a way for me to know who their teachers were, who their friends were. PTA gave me a chance to meet other parents and become involved in my community. As my children got older and became teenagers, PTA was my excuse to be at the school. Once I had a call from a friend in the front office at my daughter's high school. Did I know that my daughter was in an "inappropriate outfit"? Believe me, I hadn't sent her to school in that outfit. A quick trip by the school with a change of clothes and my daughter said to her friends, "See, I can't get away with anything because my mom knows everyone!"

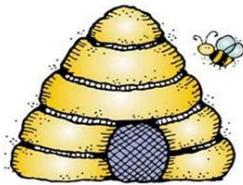
Why did you get involved in PTA?

Did you want to make a difference in the lives of children? Did you see a need and want to fill it?

The theme I have chosen for Fourth District PTA this term is "Sweeten the World, One Drop at a Time!" The honeybee contributes just one-twelfth of a teaspoon of honey during its life

time. But each drop of honey contributes to the efforts of the hive. As we work together as PTA members, as fellow human beings, the small, simple acts that we do contribute to the work of PTA. And those acts can also contribute to making the world a better place for children everywhere.

*Sweeten the World*



*One Drop at a Time*

**Fourth District  
PTA®**

*everychild.onevoice.®*

*Artículos en español  
paginas 10 y 11*

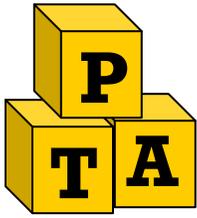
**Inside this Issue**

<b>Historian—PTA Basics</b>	2
<b>Secretary; Parliamentarian Calendar</b>	3
<b>Tax Responsibilities; Local Control Funding Formula</b>	4
<b>Communications</b>	5
<b>OCDE: Technology and the Education Revolution</b>	6
<b>Membership</b>	7
<b>Advocacy</b>	8
<b>Fall Workshops Flier</b>	9-10
<b>Artículos en español</b>	11
<b>Advocacy Roundtable</b>	Back



[www.fourthdistrictpta.org](http://www.fourthdistrictpta.org)

*Continued on page 5 >>*



# Basics: Historian

## The Whys and Hows of Tracking Volunteer Hours

By Karrie Mann, Fourth District PTA Historian

### 1. You've been asked to be Historian....Now what?!

Congratulations. You now get to assemble and preserve the record of activities and achievements for your PTA for the upcoming year. You will also be responsible for preparing the Annual Unit Historian Report near the end of the school year. This is a simple, one-page report found in the *California State PTA Toolkit* in "Forms," Chapter 9; 2.3.13a. And it really is simple as long as you have your PTA members track their volunteer hours throughout the year.

### 2. What volunteer hours do you collect?

The time spent by everyone for PTA meetings, events and activities, including the planning, preparation, communication and travel time involved, are reported as volunteer hours. Let everyone know that if PTA asks them to do it, they count it towards volunteer hours.

### 3. How do you capture volunteer hours on a regular basis?

There are many ways to keep track of volunteer hours during the PTA year. As the historian, decide at the start of the term which process and method might work best for your PTA and discuss these options with the board. For example, some

PTAs hand out tally sheets at meetings and events to capture volunteer hours. Others set up a web page or google.doc for everyone to add their volunteer hours for PTA each week or each month. You can also develop a spreadsheet to send out by email and/or keep in the school office to track the total number of volunteer hours for a PTA.

### 4. Why do you need to collect and report these hours?

The information on volunteer hours is used for PTA audits, advocacy and grant applications. It also maintains PTA's federal IRS status as a non-profit 501(c)(3) organization. This tax exempt status is granted to non-profit organizations like PTA that show one-third of their support from the general public. The recorded hours from volunteers that you collect and submit for your PTA on the Annual Historian Report Form are proof of this.

So go ahead and set up your tracking systems. Come next spring when you are required to complete the Annual Historian Report Form, you will be so happy you took the time now to get it going.

## Fourth District PTA

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*Orange Leaves* is published  
nine times per year.

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Fourth District PTA comprises  
20 councils in Orange & Los Angeles Counties with over 400 unit PTAs.

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## The PTA Secretary Plays a Vital Role

From Barb Shangraw, Fourth District PTA Secretary



The PTA secretary is a vitally important position. In fact, it is one of three positions required for a PTA unit to be in good standing.

Here are three reasons why:

- First, the PTA secretary keeps the unit records. These are legal documents that your organization must be able to produce if required. They include your PTA charter, your bylaws and the current and previous minutes.
- Second, keeping complete and accurate minutes protects the officers of your unit and helps assure that PTA funds are used appropriately.
- Finally, a clear and complete record of decisions made at each meeting helps eliminate confusion and misunderstanding, and allows your organization to run more smoothly.

Take your job as secretary seriously and learn how to do it correctly. If you did not attend a secretary workshop at the PTA State Convention or the Fourth District PTA Spring Workshops, plan to attend the Fourth District fall training on September 9.

You can get information about the secretary's duties from the *California State PTA Toolkit*, which is sent to all unit presidents. Ask your president for a copy of the job description for secretaries. You can also access the *Toolkit* and get other information from California State PTA at [capta.org](http://capta.org) or from Fourth District PTA at [fourthdistrictpta.org](http://fourthdistrictpta.org).

## What Exactly Does a PTA Parliamentarian Do?

By Erin Jenks, Fourth District PTA Parliamentarian

Many of you are new parliamentarians, and you might have taken the job because your friend is the president and you were told you didn't have to do anything. But the parliamentarian's job is important and does have specific duties and responsibilities.

First and foremost, the parliamentarian advises the president on rules and points of order and procedural questions. Following basic parliamentary procedure at PTA meetings ensures order, promptness, and fair and impartial treatment for all. The parliamentarian attends all meetings of the association and the executive board.

The parliamentarian's reference guide is *Robert's Rules of Order, Newly Revised*. The "handbook" is the current bylaws. *Robert's Rules of Order* gives instructions on basic parliamentary procedure, such as correct ways to conduct the business of the organization. Your unit's bylaws give direction about duties, responsibilities, and financial procedures that pertain specifically to your unit or council. Every member of your board should have a copy of the bylaws.

By being prepared and reviewing your responsibilities, you contribute directly to a successful year for your PTA.



## FOURTH DISTRICT PTA CALENDAR

### September

- 2 Office closed for Labor Day
- 9 **Fall Training Workshops in English** (see flier in this issue)  
Orange County Department of Education, 200 Kalmus Drive, Costa Mesa  
Morning and evening sessions
- 19 **District General Meeting**  
OCDE, 200 Kalmus, Costa Mesa  
9:30 am—CP Roundtable  
10:30 am—General Meeting
- 20 **Advocacy Training Roundtable**  
9:30 am—11:45 am  
Fountain Valley District Board Rm.  
10055 Slater Avenue, Fountain Valley

### October

- 4 **Workshops in Spanish**  
(see flier in this issue)  
9 am—Noon  
Orange Unified School District  
1401 North Handy Street, Orange
- 17 **District Board Meeting**  
9:30 am—CP Roundtable  
10:30 am—Board Meeting

### November

- 11 Office closed for Veterans Day
- 14 **Council Presidents' Roundtable**  
9:30 am Fourth District Office
- 15 **Advocacy Roundtable**  
9:30 am—11:30 am  
Fountain Valley District Board Rm.
- 21 **Executive Committee Meeting**  
9:30 am Fourth District Office

### December

- 12 District Board Meeting  
Location TBD

# Complete Your PTA's Tax Responsibilities

From Angela Carswell, Fourth District PTA Treasurer

In order to close out the 2012-13 PTA fiscal year for your unit or council, you need to determine if the tax forms for last year were completed and submitted by the previous officers over the summer. If so, you should be able to see a copy of each form and get specifics about who submitted it to the proper government agency. If these requirements have not been completed, it is time for the incoming officers to take care of them.

All PTAs are responsible for the following tax filings and other governmental forms:

1. Internal Revenue Service (IRS) **Form 990** –Which version depends on your PTA's total gross income:
  - Under \$50,000 – Use online form 990N.
  - \$50,000 - \$200,000 – Use 990EZ, including Schedules A & O
  - Over \$200,00 – 990, including Schedules A & O
2. California Franchise Tax Board (FTB) **Form 199**–Which version depends on your PTA's total gross income:
  - Under \$50,000 – Use online form 199N
  - Over \$50,000 – Use form 199
3. California Attorney General/ Department of Justice – Charitable Trust Renewal — **Form RRF-1**
  - May have a fee associated, depending on your gross income
  - Figures for income, etc. must match your tax forms
4. Some PTAs may need to file additional paperwork:
  - Incorporated units have slightly different needs—consult a tax preparer.
  - PTAs that plan to hold a raffle (any drawing that involves giving money for a ticket/chance) need to register their anticipated 2013-2014 raffles with the California Attorney General's office.
  - PTAs that received a donation from a single donor of \$5,000 or more during 2012-2013 need to file a Schedule B with their 990 form



**DEADLINES:** For PTAs with a July 1-June 30 fiscal year, the due date for all the forms mentioned above\* is Nov. 15. These can be completed as soon as the 2012-2013 financial records are complete and audited. (\* Due date exception is the raffle registry, which is due Sept 1 for the upcoming year)

**GROSS INCOME:** This is the total of all deposits to the PTA in a fiscal year, with the exception of dues per capita not belonging to your unit or council, and for councils, unit insurance premiums that pass through the council account. Note that for a product fundraiser, this would include the entire amount received, not the net amount after the product is paid for.

**RECORD-KEEPING:** Make three copies of all your tax forms, one to keep and two to pass up to your council. The PTA's password for online filing of the 990N and 199N should be part of the treasurer's records and part of the president's records.

**MORE INFORMATION:** See more details at <http://www.capta.org/sections/finance/tax-requirements.cfm> and consult a tax professional who is experienced with nonprofits.



## What is the Local Control Funding Formula?

By Shereen Walter, Fourth District PTA Vice President for Advocacy

The Local Control Funding Formula (LCFF) is a major restructuring of how money goes from the State of California to school districts.

Here are some features of the new system:

- Directs more money to high need students (low income, English Language Learners, and foster youth)
- Shifts decision-making to local school districts and gives more flexibility over how they spend the funds
- Requires Local Control Accountability Plans (PCAPs) and requires parent input
- Aligns budgeting with accountability

Though the base grant was increased in the final budget passed by the legislature, it will take several years for school districts to be restored to 2007-08 funding levels. While 2007-08 was a high year for school funding, it is insufficient to provide our students with a 21<sup>st</sup> century education.

It is crucial that we continue to advocate for adequate funding for our schools.

Multimedia options**PTA Communications: More than Email and Newsletters!**

By Kathleen Fay, Fourth District PTA Vice President for Communications

A new PTA year means it's time to get the word out! How will you communicate with your current and potential members about all that your PTA has to offer? How can you let your school community know about what you've accomplished and what's coming up next? How can you find out what's on the minds of teachers and parents?

When it comes to developing a communications strategy for your PTA, you probably have more options than you suspect.

Consider these ways to reach out.

**The personal touch**

PTA leaders have always relied upon one-on-one, personal contact to bring people into the organization – *because it works!* A personal invitation to join in PTA activities is always the most meaningful incentive. You can get your message out directly at your local monthly PTA association and council meetings. Interact with other leaders at Fourth District and California State PTA meetings and events. Consider representing your PTA by attending student council meetings, speaking at Back-to-School Night, Open House, and other major events. Engage your school district's educational foundation in cooperative efforts, and speak to relevant topics at school board meetings. Try to get PTA representation on community councils, committees, and youth-related organizations.

**Telephones: We still use 'em!**

Making personal calls to members is another way to engage directly with parents and provides instant feedback on important matters. Use school-wide telephone call-outs (via the administrator) to remind members about tomorrow's PTA meeting, big event or fundraising deadline.

**Paper persists**

There's nothing quite like holding something in your hand that demands

attention; its physical presence requires a decision and resolution, and it can be brought along to be given full consideration at the right time. Fliers, brochures and guides, postal mailings, school/district/PTA newsletters, membership invitation letters via the annual school registration process, and written thank-you notes are all ways to reach out and touch someone in a tangible way.

**Electronic media: Look at me!**

Website postings, direct emails, Constant Contact or other electronic marketing e-blasts, and social media (Facebook, Twitter, LinkedIn, Pinterest, YouTube, Instagram, Tumblr, MySpace,

Plus, Reddit, Skype) provide a link to where so many of our members focus their attention today. Get to them where they live, virtually, that is!

**Public displays: You are here.**

Use your school's bulletin board for important postings, the marquee (electronic or letter board) for announcements, banners to advertise events, posters at your school or in the community (e.g., library, city hall, community center) to promote PTA, and always have a membership "station" at your school's front desk to remind visitors to join PTA.

**Publicity spreads the word**

Raise awareness of your PTA, its contributions, and its positions via letters to the editor, press releases to local papers, feature and news stories covered by the press, public service announcements, a congratulatory "ad" in the annual yearbook, or by issuing communications in conjunction with school district public/media relations.

**Organizational communications**

Consider structured, established ways to communicate your PTA messages. Your school is likely to allow

you to access their on-site interoffice (district) mail distribution system to communicate with teachers, staff, and administrators. Gain the attention of potential leaders by offering or promoting training workshops and events. Informational and/or parent education presentations, forums, and roundtable events are a good way to communicate important information about complex issues. Awards and recognition send a message of appreciation to your dedicated volunteers. And don't forget to utilize surveys, suggestion mechanisms, and feedback systems to solicit communications *from* the members of your school community in the hopes of discovering new ways to better meet their needs.

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**>>President's Message, continued**

Now, that doesn't mean that we don't have to take care of housekeeping items. Your taxes still need to be filed. Your meetings still need to follow parliamentary protocol. We still need your board lists. But remember, if someone makes a mistake...if someone let's you down... treat them with kindness. Don't gossip about them. Smile and say, "Next time we will get it right!" Let's remember that every act of kindness we do makes the world a sweeter place!

Sometimes in this busy, hectic world we forget why we became involved in PTA. We forget that it is about the kids. I encourage you to step back at the beginning of this year. Step back and remember why you became involved in PTA. And then remember that PTA is really about the kids. It isn't about the fundraisers or the carnivals. It isn't about the programs or the politics. It is about making the world a better place, one child at a time.

*Maureen Christensen*



# Technology and the Education Revolution

By Al Mijares, Ph.D., Orange County Superintendent of Schools



In today's world, technology drives innovation and affects virtually every aspect of our lives. The U.S. Bureau of Labor Statistics estimates that at least 8,654,000 U.S. science, technology, engineering, and mathematics (STEM) jobs will exist in 2018. Additionally, out of the 50 states in the nation, California ranked number one in projected STEM jobs by 2018. The bulk of these jobs (71%) will be in computing.

The 21st century student is walking into school classrooms with more significant technology experience than ever. Our students have multi-tasking abilities and technological experiences that call for a revolution in how we teach and engage them to their full capacities. However, they may

not realize the vast possibilities that open up with a degree or training in the STEM fields. In order to best support our students, we must not lose sight of the fact that the future supply and demand for a workforce to fill STEM careers is enormous. From robotics engineering to cloud computing, the possibilities and opportunities within the STEM fields are endless.

We should be motivating and preparing our students to enter the STEM pipeline by capturing their imagination and supporting their aspirations and interests. We must continually shift teaching methods in order to foster the innovation and creativity that keep our students engaged in their education and are the driving force behind prosperity and economic progress in this country. This requires

**From robotics engineering to cloud computing, the possibilities and opportunities within the STEM fields are endless.**

educators to inspire and support the success of students by providing relevant curriculum and utilizing the technologies that are a part of their daily lives. As educators, we must take advantage of the technology explosion that drives our students in order to woo more kids into STEM fields.

At the Orange County Department of Education (OCDE), we recognize that learning environments need to foster

global innovation while meeting the diverse needs of students. The OCDE Educational Technology Department has established four key pillars that support the educational community and twenty-first century learners, including partnerships, events, consultations, and professional development.

OCDE provides consultations to our district technology leaders to develop and write technology plans, implement digital learning environments, and design custom training programs to support each district's unique technology vision for the future. Additionally, OCDE delivers training in technological devices such as the iPad and Google Chromebooks while demonstrating the pedagogy of teaching in a blended learning environment.

These options allow teachers to see the potential of technology and how to implement its effective use in their classrooms to build self-guided learning, critical thinking, collaboration, creativity, and communication skills that can lead students on their path to college and into a continually evolving job market.

According to Bill Gates, "... innovation has been the engine of prosperity in this country. Now, economic progress depends more than ever on innovation. And the potential for technology innovation to improve lives has never been greater.... If we make the right choices, the United States can remain the global innovation leader that it is today." It is up to us to empower and motivate our young people to pursue their interests in STEM. We should reiterate at every opportunity that the best-paying and most secure jobs of the future will be in the STEM fields.

There will never be a shortage of opportunities for STEM professionals who are motivated, innovative, and driven by curiosity, and we will never run out of the real-world problems they will be tasked with solving. The world of education is changing rapidly. Just as technology has revolutionized the world, it is also influencing the classroom. The Orange County Department of Education is committed to supporting educators in preparing today's students for tomorrow.



**Do you have an idea to share?**

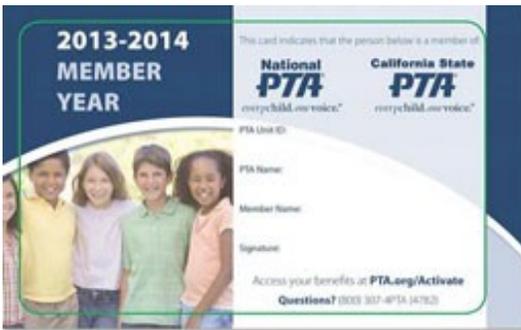
Share your PTA successes and creative ideas.

Send us a brief description, and *Orange Leaves* will share the idea in a future issue:

[orange-leaves@fourthdistrictpta.org](http://orange-leaves@fourthdistrictpta.org)

# This is the Year for your PTA Membership to Soar!

By Lisa Boler, Fourth District PTA Vice President for Membership



Membership ensures that PTA's voice is heard on issues affecting young people as well as providing opportunities for parent education, communication and leadership development. Organizing and running a PTA membership campaign can be fun, and easy! Videos to help you build PTA membership are available on the California State PTA website ([www.capta.org](http://www.capta.org)). Additional helpful information that you can find there include the following:

## Logos and Graphics

Reinforce the message that PTA connects families and schools message by using the graphics in your social media and on your website. Customize a PTA logo for your school. Be sure to use your PTA unit logo as your Facebook profile image. Website banners can also use your PTA logo. Logos and the connecting families graphics are available on the State PTA website.

## "PTA Connecting Families and Schools"

The new flier provided by State PTA is a great marketing tool. Simply customize it by filling in the blanks on the template, add a few photos and quotes, and save it to your computer. Your customized membership flier can be sent out electronically or copied and distributed at PTA or community events.

## Member Perks

We know people join PTA to support children and their schools, but PTA member perks can help make joining PTA an even greater value. Print or email the member perks flier and share the benefits with your members.

## Here are some important PTA Membership points to remember:

- ☀ Membership dues = amount due to National PTA \$2.25, California State PTA \$1.25, and Fourth District PTA \$0.60, plus your council and unit dues.
- ☀ Everyone who joins your PTA should receive a membership card. The card is proof of membership, and entitles the member to vote, apply for scholarships, and receive benefits from the *Members Only* section of the National PTA website. This is the first year the e-membership card is available, and you should have received the flier on how to use it. If not you can find it on the website also.
- ☀ The PTA Unit ID number used on the card should be your *National* PTA number, which you can find in your bylaws.
- ☀ Dues forwarded to council PTA are **per capita**. "Per capita" means per person, so if your school has a family membership and a family has four members, the forwarded dues are four times the dues amount. Why? These dues are the only form of income for the council and district PTA,

and make up a major portion of the income for state and national PTA as well. The dues help to cover training, support, and the important legislative and advocacy work that PTA performs.

- ☀ Please make payment to your council at the first council meeting, to cover the per capita dues for the number of members you currently have at your school.
- ☀ Continue to offer membership throughout the school year. Have membership forms available at meetings, back-to-school night, family nights, and other events. When you receive these memberships, please continue to remit the per capita dues to your council at least monthly.
- ☀ Do not forget to invite teachers, administrators, and staff to join the PTA. As members, they can take advantage of PTA grant and scholarship opportunities.
- ☀ Invite school board members, your district superintendent, and local business owners who may benefit from your school community to join your PTA; it does not hurt to ask!

Please remember to give a check to your council treasurer for your portion of the PTA membership dues at each monthly meeting!

Thank you for taking on the membership responsibilities at your school. I know it is a big job, especially at the beginning of the school year. We are here to help if you have any questions.





### Tips for new Advocacy Chairmen

# How Can We Help You Be The Best Advocacy Chairman Possible?

By Shereen Walter, Fourth District PTA Vice President for Advocacy

The Board of Managers just adopted the Mission and Goals for the California State PTA for the 2013-2015 term. One of these goals is to “Empower and support PTA members and leaders and .....Deliver training and materials in easily accessible formats.” Your Advocacy Team at Fourth District PTA plans to do just that!

How can we help you do your job as Advocacy Chairman?

**Advocacy Training Roundtable** – Friday, September 20, 9:30 – 11:45 a.m., Fountain Valley School District. Perennial favorite Ron Bennett, will be our keynote speaker followed by breakout training sessions for beginning and advanced advocates. Come hear what the new Local Control Funding Formula means to Orange County Schools.

**Advocacy Roundtables** – Mark your calendars for November 15, January 24, and April 4 from 9:30 – 11:30 a.m. (locations to be announced). You will hear from outstanding guest speakers about current hot topics and learn the latest and greatest about Fourth District PTA happenings.

**Sacramento Safari** – March 17-18, 2014, with an orientation tentatively scheduled for March 7. This is our

annual Fourth District PTA two-day trip to Sacramento where you will hear from key policy makers and top education experts – and also have the opportunity to advocate directly to OC legislators in the State Capitol. Ask your PTA now to allocate about \$600 in the annual budget for this not-to-be-missed trip!

**Advocacy Email Alerts (aka “Leg Links”)** – These alerts will keep you up-to-date with all of PTA’s breaking news *so sign up now!* Click on “Legislative Alerts & News” on the “A d v o c a c y ” t a b a t [www.fourthdistrictpta.org](http://www.fourthdistrictpta.org) and look at the bottom of the right column, you will see “Publication Sign-up”: Enter your email address and check the “Leg Links” box. It will take you less than one minute, and in exchange, you’ll be kept fully in-the-loop about all that is happening in PTA advocacy!

**Advocacy Communicator** – Our monthly e-newsletter filled with valuable, in-depth information for you to use in multiple ways: Use the content in your own PTA newsletters; distribute the document as an email to your PTA members; or offer it as a hand-out at PTA meetings. (You will receive these automatically as long as you are signed up for Leg Links). In

the Leg Link message that accompanies the *Advocacy Communicator*, we also provide you with talking points to use as your oral report at PTA meetings, to make life simple for you.

**Website** – For up-to-the-minute advocacy information; go to [www.fourthdistrictpta.org](http://www.fourthdistrictpta.org) and then click on the “Advocacy” tab. There you will find the following:

- Programs & Resources*
- Sacramento Safari*
- Legislative Agenda*
- Advocacy Communicator*
- PTA & Elections*
- Advocacy Roundtables*
- Our Legislators*
- Legislative Alerts & News*

...and more, so please check it frequently!

**Other important websites** to sign up to get legislative alerts from are:

- California State PTA: [www.capta.org](http://www.capta.org) Go to Advocacy; Legislative Alerts; and click on the “Join our Legislative Alert list” box on the top right.
- National PTA: [www.pta.org](http://www.pta.org) Go to Advocacy; and click on “Join the Network, PTA Takes Action.”

**Speaker’s Bureau** – At your request, members of our Fourth District PTA Advocacy Team will come to your school or council PTA meeting to speak about any topics important to you. These could include the Local Control Funding Formula, Education Funding in California, Elections & PTA, Top Ten Things a Great Advocate Does, History of PTA & Advocacy, How to Get Parents to Take Action on Advocacy Issues, or any advocacy subject you choose.

If you have any questions, please don’t hesitate to contact me at: [advocacy@fourthdistrictpta.org](mailto:advocacy@fourthdistrictpta.org)

## Save the Date

### Fourth District PTA’s Annual Meeting & Administrators’ Dinner

Will be held

Wednesday, March 12

Time and location details to follow.

# Fall PTA Workshops Monday, September 9, 2013



*everychild.one voice.®*

*Sweeten the World*



*One Drop at a Time*

**Orange County Department of Education  
200 Kalmus Drive, Costa Mesa, CA**

Map & Directions available at [www.fourthdistrictpta.org](http://www.fourthdistrictpta.org)

**Registration Fee:** \$10 per person

*No Refunds. Workshop fees are a legitimate and reimbursable PTA expense.*

Two Ways to Register:

- 1. Online:** GO TO [www.fourthdistrictpta.org](http://www.fourthdistrictpta.org). **DEADLINE: TUESDAY, SEPTEMBER 3rd**  
Pay online with a credit card or through PayPal and receive an email confirmation
- 2. BY MAIL:** Complete and return this form with check payable to:  
Fourth District PTA at 1520 Brookhollow Drive #40, Santa Ana, CA 92705  
**DEADLINE:** Must be delivered to the office by **WEDNESDAY, SEPTEMBER 4th.**

**REGISTER NOW! SPACE IS LIMITED.**

**First Come, first served. All materials may not be available to walk-in registrants.  
Sorry, we are not able to provide childcare.**

**PLEASE PRINT CLEARLY. ONE FORM PER PERSON**

<b>First Name</b>	<b>Last Name</b>	<b>Phone Number</b>
_____	_____	_____
<b>Email</b>	<b>PTA Unit/School</b>	<b>PTA Council</b>
_____	_____	_____

**MORNING SESSION: BUILDING D** Registration at 8:30 AM. *Coffee and light refreshments provided.*

**9:00 AM-12 PM**

- Presidents & Executive Vice Presidents
- General Financial Procedures

**9:00 AM to 10:30 AM**

**10:45 AM to 12:15 PM**

- |   |                                    |
|---|------------------------------------|
| <input type="checkbox"/> Membership             | <input type="checkbox"/> Historian |
| <input type="checkbox"/> Parliamentarian/Bylaws | <input type="checkbox"/> Secretary |
| <input type="checkbox"/> Auditor                |                                    |

**EVENING SESSION: BUILDING A** Registration at 5:45 PM. *Beverages and light refreshments provided.*

**6:00 PM to 9:00 PM**

- Presidents & Executive Vice Presidents
- General Financial Procedures

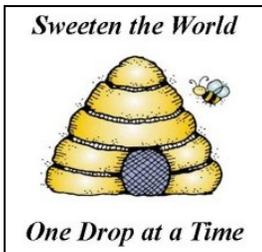
**6:00 PM to 7:30 PM**

- Secretary

**NOTE:** *Workshops in Spanish will be held on October 4. Information to follow.*

# Talleres de Capacitación en Español

## Viernes 4 de octubre, 2013



**Orange Unified School District**  
**1401 North Handy St., Orange, CA 92867**  
**9:00am a 12:00pm**

**Inscripción:** \$10.00 por persona - No habrá reembolsos  
 El costo de inscripción es un gasto legítimo y reembolsable por su unidad.

**Fecha límite de Inscripción:** lunes 23 de septiembre 2013. Sírvase completar esta forma y envíela por correo adjuntando el cheque pagadero a Fourth District PTA. Dirección de envío:

**Fourth District PTA**  
**1520 Brookhollow Drive, #40**  
**Santa Ana, CA 92705**

**¡Inscríbese hoy mismo! El espacio es limitado.**

Al no registrarse antes del 23 de Septiembre podrá inscribirse en la puerta, pero no hay garantía de materiales educativos.

Se cubrirán temas de PTA para presidentes y tesoreros, secretario financiero, auditor, estatutos, membresía y elecciones. Concluida la capacitación, habrá comida de "traje." Por favor traiga su platillo favorito para compartir.

**Horas de Capacitación: 9:00am - 12:00pm**

- Aspectos Esenciales para Presidentes
- Aspectos Esenciales de Membresía, Estatutos y Elecciones.
- Aspectos Esenciales para Tesoreros, Secretarios Financieros y Auditores

**Escriba claro y sin abreviaturas. Un formulario por persona. ¡No habrá servicio de guardería!**

**Nombre y Apellido:** \_\_\_\_\_ **Teléfono:** \_\_\_\_\_

**Unidad/Escuela:** \_\_\_\_\_ **Concilio/Distrito Escolar:** \_\_\_\_\_

**Platillo que desea compartir:** \_\_\_\_\_

## Los tiempos han cambiado. ¿Ha cambiado su PTA?

por Maureen Christensen, Cuarto Distrito Presidenta

¿Es usted lo suficientemente mayor para recordar los tiempos sencillos y fáciles en PTA? Había una mamá representante de salón de clase que invitaba a tomar “el té” para dar instrucciones en cómo hacer una fiesta en salón de clases. Celebrábamos la Navidad y la Semana Santa y no las vacaciones de primavera e invierno. Había varias personas que deseaban ser candidatas para diversos puestos en PTA. Las juntas se llevaban a cabo en las mañanas. No se necesitaba tener un título en contabilidad para servir de tesorero de PTA. Las juntas de PTA eran eventos sociales. Era una oportunidad para que las amas de casa salieran de su casa. La mayoría traían a sus niños, ya que muy pocas tenían la fortuna de que alguien se los cuidara y así, relajadamente poder discutir asuntos importantes de su PTA.

Ahora el mundo es muy distinto, la mayoría de las madres trabajan fuera de sus casas. Ha cambiado nuestra población, hay mucha más diversidad. En los hogares de nuestras familias en el condado de Orange se hablan más de 50 idiomas distintos. Ahora todo mundo está ocupado, tenemos diversos asistentes electrónicos por lo cual cada vez nos comunicamos menos cara a cara. Entonces, ¿porque aun necesitamos PTA en este mundo tan cambiante?

Yo me involucre en PTA para estar cerca de mis hijos. Fue una forma para conocer a los maestros y amigos de mis hijos. A través de PTA tuve la oportunidad de conocer a otros padres de familia y a mi comunidad. PTA fue mi excusa para estar en la escuela, cuando mis hijos eran adolescentes. En una ocasión mi amiga, la recepcionista de la preparatoria de mi hija me llamo. “¿Sabías que tu hija trae un atuendo inapropiado para la escuela?” Créame que yo no la envié a la escuela es ese atuendo. Una carterita por la escuela con un cambio de ropa y mi hija. Posteriormente ella comento a sus amigos: “Vean, por eso no me puedo salir con la mía, mi mamá conoce a todo mundo.” ¿Porque se involucró usted en PTA? ¿Quiso hacer una diferencia en la vida de los niños? ¿Vio una necesidad y quiso llenarla?

El tema que he escogido para este término es “Endulzar el Mundo, Una Gota a la Vez”. Durante su vida, una abeja contribuye solo una duodécima parte de una cucharadita de miel, pero cada gota de miel contribuye al esfuerzo integral de la colmena. Moraleja: Mientras trabajemos juntos como miembros de PTA, los actos pequeños, simples, que hacemos contribuyen con la labor integral de PTA. A su vez, esos actos contribuyen a hacer un mejor mundo para todos los niños.

Ahora bien, esto no significa que nosotros ya no tenemos que encargarnos de nuestro papeleo. Aún debemos pagar nuestros impuestos. Sus juntas aún deben seguir el protocolo parlamentario. Nosotros aún necesitamos la lista con los datos de su mesa ejecutiva. Pero recuerde, si alguien comete un error o le decepciona...trátelos con amabilidad. No lo convierta en chisme. Sonría y diga, ¡“la próxima vez lo haremos de manera correcta!” ¡Recordemos que cada acto de bondad hace que el mundo sea más dulce!

A veces en este mundo ocupado y frenético se nos olvida porque nos involucramos en PTA. Se nos olvida que es por los niños. Le exhorto que a principio de este año de un paso hacia atrás y trate de recordar la razón por la cual se involucró en PTA. Entonces recuerde, que en realidad, PTA es para el bienestar de los niños. No se trata de las recaudaciones de fondos o carnavales. No se trata de programas, de política o de agrandamiento personal. Se trata de hacer de un mundo mejor... ¡Un niño a la vez!

## Cumpliendo con las Responsabilidades Tributarias de su Unidad

por Angela Carswell, Cuarto Distrito Tesorero

Para cerrar el año fiscal 2012-2013 de su unidad o concilio de PTA necesita determinar si los formularios tributarios del año anterior fueron llenados y presentados por los oficiales anteriores durante el verano. Si así fue, usted deber tener una copia de cada formulario y/u obtener la información específica de quien y a qué agencia gubernamental esto fue presentado. Si estos requisitos no han sido cumplidos, es hora de que los oficiales entrantes se encarguen de presentarlos.

Todas las PTAs son responsables de presentar los siguientes formularios gubernamentales:

**Internal Revenue Service (IRS) Formulario 990** – La versión depende del total de sus ingresos brutos:

- Menos de \$50,000 – Use el formulario electrónico 990N.
- De \$50,000 - \$200,000 – Use el formulario 990EZ, incluyendo Anexos A y O
- Más de \$200,00 – Use el formulario 990, incluyendo Anexos A y O

**California Franchise Tax Board (FTB) Formulario 199**– La versión depende del total de sus ingresos brutos:

- Menos de \$50,000 - Use el formulario electrónico 199N
- Más de \$50,000 – Use el formulario 199

**California Attorney General/Department of Justice – Charitable Trust Renewal Form RRF-1** (Renovación del Número de Fundación Benéfica)

- Dependiendo de sus ingresos brutos tendrá que pagar una cuota.
- Los números de ingresos tienen que ser iguales a sus formularios tributarios

### Algunas PTAs tendrán que presentar papeleo adicional.

- Unidades incorporadas tienen necesidades ligeramente distintas. Consulte a un contador.
- Las PTAs que planean sostener rifas (cualquier rifa en donde se colecta dinero a cambio de un boleto/o juego de azar) necesita registrar con anticipación sus rifas para el año escolar 2013-2014 con la oficina del Procurador de California.
- Las PTAs que recibieron donación de un solo contribuyente de \$5,000 o más durante 2012-2013 tiene que presentar el Anexo B con su formulario 990.

**FECHA LIMITE:** Para PTAs con año escolar de julio1-june 30, la fecha límite para la preparación y presentación de todas las formas mencionadas arriba es noviembre 15\*. Las mismas pueden ser finalizadas tan pronto como los reportes financieros sean completados y auditados. (\*Excepción: El registro de rifas tiene fecha límite del 1<sup>o</sup> de septiembre del año escolar que empieza)

**INGRESO BRUTO:** Es la cantidad total de todos los depósitos a la PTA durante el año fiscal, con la excepción de los pagos de membrecía que no le pertenecen a su unidad o concilio y por concilios, cuotas de seguro de la unidad que pasan a través de la cuenta fiscal del concilio.

Note que para productos de recaudación de fondos, esto incluye la cantidad total recibida, no la cantidad neta después que el producto se ha pagado.

**MANTENIMIENTO DE DATOS:** Haga tres copias de todos los formularios de impuestos, una para mantener en su unidad y el dos para enviar a su concilio

La clave (Password) de su PTA para enviar electrónicamente los documentos 990N y 199N deben formar parte de los archivos del presidente y del tesorero.

**INFORMACION ADICIONAL:** Información más detallada puede ser encontrada en <http://www.capta.org/sections/finance/tax-requirements.cfm>. También puede consultar a un profesional en asuntos de impuestos y con experiencia en organizaciones “Sin Lucro”.

