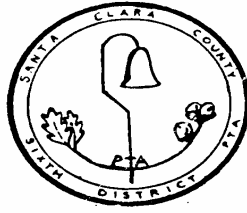


THE



BELL

Volume 12, Issue 1

“Working Together for All Children”

Sept-Oct 2008

Important Notice for ALL Units Concerning IRS Forms

Please note, this year all units must file IRS forms in November 2008 for the 2007-08 school year.

Please plan ahead.

See pages 10 and 11.

Our Mission

The Sixth District PTA supports and empowers PTA leaders through training, parent education, financial support, and mentoring, to enable them to advocate more effectively on behalf of children and families.

Dear PTA Leaders:

State PTA's **first-ever** Bay Area Leadership Training will be held on Saturday, September 27, at Allen at Steinbeck K-8 School, 820 Steinbeck Drive, San José.

This is a very special event. State PTA officers, including President Pam Brady, and members of the Leadership Commission, are coming to present the workshops. People will be coming from all over the Bay Area and beyond to hear them and to participate.

These sessions will be valuable for all Unit and Council leaders. We strongly encourage **all** officers to attend

Six will get you sixty -- six hours on a Saturday will save you sixty hours over the year.

Your State PTA and Sixth District dues are at work for you. Sixth District PTA is paying the registration fee for all attendees from units and councils in Santa Clara County, a savings of \$10 per attendee. You are not limited to any specific number of people. If you have people who you think will grow into officers or chairs, please bring them along as well!

Note: there will be one double-length session in Spanish.

See you there!

Barbara Spreng
President
Sixth District PTA

For more information, see pages 6—8 or online at CAPTA6.org

Letter from Charles Weis, Ph.D. Santa Clara County Superintendent of Schools

“New School Year, New Start”



As an educator for more than 36 years, I've always equated September with new beginnings and fresh starts. This fall, however, marks the start of a *very* new beginning for me. Born and raised in southern California, I spent my entire career in the LA and Ventura area – until I moved north a few months ago to become Santa

Clara County Superintendent of Schools. Like a new student in a new school, my enthusiasm and excitement is tempered by a bit of trepidation, and gratitude to the staff member who gave me a lapel pin that reads “Be nice to me, I'm new!”

Armed with that plea, I've set out to introduce myself to students, teachers, staff, administrators, parents and community leaders – and to learn as much as I can, as quickly as I can, about the state of Silicon Valley schools. Not only have local educators been “nice” to me, but they've provided invaluable insights and information.

PTA President Barbara Spreng was among the first to knock on my door and bring me up to speed on 6th District goals and accomplishments. As I said in the summer “Bell” newsletter, I'm a huge supporter of the PTA -- a longtime member of the 12th District chapter and a member and past president of the Tri-County Education Coalition. The inestimable value of parent-teacher-student partnerships has always been apparent to me as an educator *and* as the father of a daughter and two sons.

I'd like this article to shed a little light on both those roles that I hold dear – educator and parent -- so let me note that my daughter KD is in high school, my son Charlie is a student at San Diego State University, and Trevor is a recent San Diego State alum. My own degree is from UCLA (Go Bruins!). I have a master's degree from Cal State University Northridge and doctorate from UC Santa Barbara. My wife Patricia Walsh is an outstanding education consultant in her own right and grew up in the Bay Area.

I began my career in education as a teacher's aide in the Los Angeles Unified School District. Later I owned and operated a firm that provided educational psychology services and program evaluation consulting for schools throughout the state. My range of experience widened in the 1980s when I served as a special education director, school principal, preschool operator, and assistant superintendent for a unified school district.

In 1990 I headed to the Ventura County Office of Education to become assistant superintendent of curriculum and instruction and in 1993 became County Superintendent of Schools. Two years ago, I was re-elected to my fourth term and had completed 15 years in that post when I came north.

A common thread throughout my career has been my passion for improving services for students with special needs, English learners, migrant students, and other disadvantaged youth. Closing the achievement gap, providing preschool opportunities, improving the dropout rate, and increasing data-based decision-making have been – and will continue to be – among my top priorities.

I welcome opportunities to teach and I take every opportunity to join colleagues in advocating for our schools through organizations like the Association of California School Administrators (for which I'll serve as president in 2009-10).

These first few months as a new superintendent have been filled with greetings and meetings, fact findings and observations. I already see many ways in which we can improve the quality of our services, add value to our programs, and achieve greater economies of scale for the 32 school districts and 396 schools we serve.

In 1853, Santa Clara County's first superintendent provided no direct services to students and had fiscal responsibilities related to a handful of schools, including just one (in a blue denim tent) in all of San Jose. As I settle into the office 155 years later, I'm delighted to join a staff whose mission is to be “a champion for children, schools and community” and whose community (notably the PTA) insists on giving students the finest education in the world.

Dr. Charles Weis
Santa Clara County Superintendent of Schools

President's Letter

Barbara Spreng, 6th District President

Welcome to the new school year! I hope you're filled with the same sense of energy, enthusiasm and anticipation of good things to come as I am.

The Sixth District PTA Board began the second year of our two-year term at a planning retreat last month, reflecting on the successes and challenges of the past year, exploring themes for ongoing projects and charting our course for the coming year.

Among the things we discussed were the varied qualities of leadership that contribute to the success of an organization. We reviewed the "Qualities of Leadership"* (on page 9), expressing appreciation for the qualities we see in ourselves and each other, sharing insights and tips about how to strengthen the qualities we feel less competent in, and acknowledging the value that each one of adds to the group's effectiveness. I was struck by the balanced distribution of strengths among board members. Recognizing that no single person can be exemplary in every single quality, we acknowledged the value of complementary skills and talents that individuals contribute to the overall effectiveness of the team.

A discussion of strengths naturally leads to a conversation about *lesser* strengths (otherwise known as weaknesses), as it did at the retreat. We identified our greatest "Qualities of Leadership" challenges to be sharing and grooming future leadership. While we have the best intentions, the results have not matched our aspirations. You may have a similar dilemma in your own unit or council. Leaders often get so busy and caught up in *doing* that we don't invest the time in *inviting and collaborating*. Several vacancies on our own board make outreach and inclusion all the more imperative to future success, ensuring that "building leadership capacity" will be a recurring theme this year for Sixth District PTA. Unit and council leaders should also be thinking about how to best engage new leaders and keep your team fresh.

One of PTA's greatest strengths is the abundance of leadership opportunities and training offered to its members. This year, we're especially lucky to have some tremendous events held right here in the Bay Area. I know...it's hard to take time away from family and work commitments. But I firmly believe that the benefits of attending these events will result in greater effectiveness and job satisfaction. The time you invest

will save you much more time in the long run. Trust me. Please join us at ...

California Emerging Minority Leaders Conference

September 20, 8:30 am—4:00 pm
Oakland Airport Hotel
Details available online at www.capta.org

Bay Area PTA Training

September 27, 8:15 am—3:00 pm
Allen at Steinbeck K-8 School, San Jose
Details available in this newsletter and online at www.capta6.org

And remember...San Jose is host to the California State PTA's 110th Annual Convention, April 30—May 3.

In closing, I'd like to extend a hearty PTA welcome to Dr. Charles Weis, Santa Clara County Superintendent of Schools. His "New School Year, New Start" letter is a terrific illustration of why we're so very lucky that he has joined the Santa Clara team. Dr Weis "walks to the talk" of his avowed appreciation for the PTA by serving as an advisor to the California State PTA Education Commission. On the local level, he has already asked how the County Office of Education can support Sixth District PTA. A new superintendent, already familiar with and supportive of the PTA...it doesn't get much better than that does it? I'm looking forward to a great new year, working together to speak up and speak out on behalf of all children.

Warmly,
Barbara Spreng
President, Sixth District PTA

*When you review the list on page 9, I hope you'll notice that the bullet points are heart shapes. While the *products* of leadership are *accomplishments*, every *act* of leadership comes from the *heart* and a passion for doing good works.

News

Attention: Membership Chairs

2008 - 2009 6th District's

+5

Membership Drive + 5

It is that time of year for all unit PTAs to start their membership drive, and this year, we're aiming for + 5. What does the "+ 5" mean? It means our goal is to increase membership by 5% -- or more! -- over last year! Let's renew past memberships and ADD new ones to increase membership by 5%.

PTA dues help cover the cost of valuable PTA services and materials....like the Regional Training Day coming up on September 27. More members also strengthen PTA's "onevoice" for "everychild."

Remember the first date for per capita (money) remittance to be sent to councils is **Oct 1st for the "Early Bird"** award (minimum 15 memberships); earn the "**Chairmen's Club**" award by remitting 50 memberships by **Oct 17th**. (remittance form on page 14)

6th District has always had a high % of its units receive these 2 awards. Let's keep up the tradition!

If you need help, information, training, or *anything* to do with Membership, just give me a call or email.

Richard Velasquez
6th District Membership Chair
408/238-7050
richard_velasquez@sbcglobal.net

Reflections News, Theme and Deadline

"WOW!"

Hi Everyone,

Welcome to 2008-2009!!! The theme this year is "Wow!". An exciting open-ended theme that will have endless interpretations, I am sure.

The 6th district deadline is **Friday, December 5th, 2008**. Drop-off entries at Suman Ganapathy's residence: 10125, Parkwood Dr, #7, Cupertino, CA-95014, (408) 863-0549, sumanmitraganapathy@gmail.com, or the 6th District PTA office at the county office of education.

The top 5 entries per category per age group will be accepted for councils; or top 2 entries per age group if you are an out-of-council unit, or a unit in a council that does not have a Council Reflections chair.

A handy set of spreadsheets, "Pointers", rules and entry forms are posted on the 6th district website (capta6.org) to make life much easier for all you hardworking Reflections chairs!

Contact Suman Ganapathy for training requests or any questions.

Good luck everyone,
Suman Ganapathy, Roxane Mehta, Adla Nicholson, Paula Traynor and Gautam Ganapathy.
Reflections Team

Health and Community Concerns/National PTA

Juvenile Justice

Newspaper articles on "Broken Families, Broken Courts" have focused on the judges views that the child welfare system "designed to protect children from abuse often does more harm than good." A letter from Judges Tondreau (delinquency court) and Lucero (dependency court) to California's Supreme Court Justice Moreno stated that the system disproportionately affects children of color and women with addiction problems while focusing little attention to prevention and reunification services. Time and money play a part . In Santa Clara County Dependency Court, there is now a morning set aside for "the Wellness Court" for new mothers on drugs.

The committee that has been learning about the courts plans to attend one of the Wellness Court sessions in the near future. Recently, several of us attended Judge Yee's court. It was interesting to see children present at the sessions. In some instances the children involved expressed their wishes. Judge Yee listened intensely to the children (as well as to the family members). There are usually 15 cases presented each morning. Lawyers are in abundance.

Besides planning to visit the Wellness Court, the committee is planning to visit the Juvenile Court at the end of August or the beginning of September. Anyone wishing to join the group is welcome. If interested, contact Barbara Emerich at e-mail: careervol@aol.com

Propositions

Proposition 5, the November ballot measure which would expand funding treatment and oversight for non-violent drug offenders, will be discussed at a pre-election forum on Sunday, September 28, at 1:30 p.m. at Congregation Beth Am, 26790 Arastradero Road, Los Altos Hills.

As of this date, speakers include Steven Manley, Santa Clara County Superior Court Judge, and Jane Marcus, Women of Reform Judaism Board Member. As of 8/12/08 sponsors include League of Women Voters, Beth Am Women, Beth Am Peninsula Interfaith Action, Beh Am Tzedek Council, and Beth Am Men.

Barbara Emerich
Sixth District Health and Community Concerns
650-948-3666
Careervol@aol.com

National PTA's New CEO



In June 2008, Byron V. Garrett was officially introduced to PTA members as the new and first-ever male, African-American CEO of the national PTA. In his remarks, Garrett paid homage to the founders of PTA and to his predecessor, Warlene Gary. He said,

"Now is the time for us to build a bridge from the past to the present and the future."

He urged PTA members to "remain on the cutting edge for our children and the members we serve." Garrett told attendees, "There is an urgent wake up call in society today...the call is for you."

You can read more about PTA's inspiring CEO Byron Garrett on the web at www.pta.org

Fall Leadership Training—Sept 27

California State PTA Regional Leadership Training for Unit & Council Officers & Chairs in 6th, 17th, 20th, & Peralta Districts

VERY SPECIAL EVENT!

The Bay Area has never had this kind of PTA training extravaganza!

Workshops will include "PTA Basics" in Spanish...

Don't miss out --

SIX HOURS will save you SIXTY!

Sat Sep 27, 2008

8:15 a.m. - 3:00 p.m.

Allen at Steinbeck K-8 School

820 Steinbeck Dr., San José 95123

RSVP by Tue Sep 23.

Late registrations and walk-ins accepted on a space available basis...so sign up today!

YOUR STATE PTA and SIXTH DISTRICT DUES AT WORK!

Sixth District PTA is investing in developing local leadership by paying the registration fee for all participants from PTA units and councils in Santa Clara County.

Schedule

8:15-9:00	Registration & Continental Breakfast
9:00-10:00	First General Session -- What Every PTA Leader Should Know
10:00-10:15	Break
10:15-12:30	Double-Length Courses (Session 1 &2)
10:15-11:15	Session 1 Courses
11:30-12:30	Session 2 Courses
12:30-1:15	Lunch & Second General Session -- How to do Effective Meetings
1:15-2:45	Session 3 Courses

September 27 Training Courses

Double Length Courses

Meet during both Session 1 and Session 2

10:15-11:15 am and 11:30 am-12:30 pm

(101D) Unit President (double session)

Resources & Doing the Job. Learn the skills to lead the PTA executive board & association to success. Discover PTA resources to make your job easier.

(102D) Beginning Treasurer (double session)

Basic financial procedures for treasurers, financial secretaries, and auditors. Topics include banking, budgets, tax filing, contracts, money handling, and financial reporting.

(104D) Council Board Training (double session)

The Integral Link. For council and district leaders only. Learn the important role of the council PTA leader, how to support the units in the council, and the council's function in maintaining the strength of the organization.

(105D) Membership (double session)

Everything you need to know about membership from what resources are available to the procedures for conducting a membership campaign. Understand the role of the membership campaign in publicizing PTA and its ability to expand the representation of your community in PTA. Strategies and best practices will be shared. Bring your ideas and your questions.

(106D) PTA y tú (en español) (sesión doble)

Cosa que dibe saber de PTA. Aprenda de caba aspecto de PTA, inclugendo los dinancias, las reglas, liderazgo, secretario, ingreso y la estructura organisaimal de la PTA.

(108D) Health / Community Concerns (double session)

Session 1 Courses

10:15-11:15 a.m.

(103) Unit Parliamentarian -- Bylaws

Need to update your bylaws? If your unit's bylaws are more than 2 years old, the answer is "YES"! We'll walk you through the updating process, and take you page by page through the current bylaws template. Bring a copy of your current bylaws if you'd like.

(107) Secretary

Responsibilities, including how to take minutes that are correct, concise, and complete; what should be "on the record," and what to leave out. Learn how to approve, correct, file, & publish the master copy of the organization's minutes.

Session 2 Courses

11:30 a.m.-12:30 p.m.

(203) Unit Parliamentarian -- Procedures

Learn the basics, from meeting policies & procedures to nominating committee instructions.

(207) Advocacy / Legislation

Session 3 Courses

1:15-2:45 p.m.

(301) Unit Presidents' Roundtable

with beginning & advanced presidents, to deal with questions & share best practices & successes, as newbies really benefit from this opportunity to talk with different, experienced presidents.

(302) Fundraising / Advanced Money Matter\$

Discussion of creating and executing a fundraising plan for the year, as well as safe procedures for holding events.

(303) Council Parliamentarian Training

Learn how to review unit bylaws. Bring some bylaws you need to review!

(304) Council Board Roundtable

An opportunity for council PTA leaders to share strategies for supporting struggling units and working within the PTA structure.

(305) Parent Involvement in Diverse Populations

Introduce National PTA's Standards and State PTA's resources for Parent Involvement. Discuss barriers to parental involvement with emphasis on the importance of male/father involvement and outreach to diverse populations.

California State PTA

Bay Area Leadership Training Registration

Saturday, September 27, 8:15 a.m. – 3 p.m.

Allen at Steinbeck K-8 School,
820 Steinbeck Dr., San José, CA 95123
Map & directions: <http://capta6.org/map>

Lunch and Materials provided by Sixth District PTA for attendees from Units
& Councils in Santa Clara County -- your Sixth District PTA dues at work!

Course Names and Numbers – see previous page

Registration Instructions

- (1) Fill out this form (also available online)
- (2) You can use this form to register a single person or a group; add more lines as needed
- (3) It's not a problem if you send multiple forms from the same PTA Unit or Council
- (4) E-Mail your info to registration@capta6.org or Fax it to 650-327-1585 by **Tue Sep 23**.
- (5) You may also mail registrations to Sixth District PTA c/o Barbara Spreng, 1585 Edgewood Drive, Palo Alto, CA 94303
- (6) On-site registrations, and registrations received after Tue Sep 23, will be accepted only if space is available.

Please indicate how many people will attend each course, so we can provide enough handouts and refreshments for everyone. **Thanks!**

Unit Name _____ Council _____ District _____

Contact Person: _____ Phone _____

	--- Course Numbers ---			
Attendee Name	E-Mail	Session 1	Session 2	Session 3
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Number of Vegetarian Lunches ---- _____

Qualities of Leadership

♥ **Have a vision.**

Believe that something must happen and it is worth your time to make it happen.

♥ **Keep a dream alive.**

Feel passionate about what you are doing, remind people of the dream and the vision when things are not going well.

♥ **Focus attention on priorities.**

Make sure projects aren't sidetracked. When you are diverted from important things by the trivial, refocus and redirect everyone to the ultimate goal.

♥ **Be positive and enthusiastic.**

Expect temporary setbacks but continue to move forward; turn your challenges into new and better strategies.

♥ **Know when to let go.**

Empower others rather than control them.

♥ **Urge yourself and others to reach goals.**

Do not micromanage. Keep your eye on what needs to be achieved, and build the momentum that propels the cause forward.

♥ **Groom future leadership.**

Give talented individuals opportunities to gain experience, acquire new skills and grow.

♥ **Share leadership.**

Involve people/groups with similar goals to partner with you for the sake of the vision you share.

♥ **Listen to others.**

Work hard to understand the individual needs and motivations of others.

♥ **Make decisions.**

Understand that some things should change and some things shouldn't. Make the necessary decisions to move a project forward.

♥ **Understand change is constant.**

Understand when change is unavoidable and don't waste time lamenting it. Help others get through the change.

~ Motivating, Managing, and Recognizing Volunteers – National PTA

Important Tax Information for ALL UNITS

Every PTA MUST File a Tax Return This Year! There are NO Exceptions!

- PTAs with Gross Receipts normally \$25,000 or less and PTAs with average gross receipts less than \$25,000 over the last three (3) years file the **IRS 990N** form. (This is a major benefit if a PTA has been filing a 990 because sometime in the past it was required to file a 990, but in the last few years revenues have significantly changed.) The 990N return is filed online at www.IRS.gov/charities.
- PTAs with Gross Receipts over \$25,000 and less than \$100,000 and with assets less than \$250,000 file the **IRS 990EZ** form.
- PTAs with Gross Receipts over \$100,000 and/or with assets of more than \$250,000 file the **IRS 990** form.

Most unit and council PTAs will not need to file a **California 190** or an **IRS 990T**, unless they are separately incorporated. However, if the PTA has unrelated income in excess of \$1000, these forms are required.

- Sale of advertising (not recommended) is unrelated business income.
- Sponsorship income is related income and not unrelated business income.
- There are exceptions to unrelated business income.

Schedule B must be completed if the PTA receives a donation of \$5,000 or more from a single donor.

Consult Your Tax Professional!!

The California State PTA strongly recommends the PTA units use a Tax Professional with nonprofit experience to file the 990 or 990EZ.

The due date for all of these forms is the 15th day of the fifth month after the fiscal year end. For example, a PTA with a fiscal year end of June 30 must file these forms by November 15th.

- Extensions of time to file are available if properly requested using IRS Form 8868.

Doug Pickford
Treasurer, California State PTA

Cada PTA TIENE que Hacer una Declaración de Impuestos Este Año. ¡SIN Excepción!

- Las PTA con recibos brutos de normalmente \$25,000 o menos y las PTA con recibos brutos promedio de menos de \$25,000 en los últimos tres (3) años presentan una declaración **990N**. (Este es un beneficio grande, si la PTA ha estado presentando un 990 porque en algún momento anterior se requería presentar un 990, pero en los últimos años las entradas han cambiado mucho.) La declaración se presenta en línea en www.IRS.gov/charities.
- Las PTA con recibos brutos de más de \$25,000 y con activos menores de \$250,000 presentan una declaración **990EZ**.
- Las PTA con recibos brutos de más de \$100,000 y/o activos de más de \$250,000 presentan una declaración de **IRS 990**.

La mayor parte de PTA de unidad y consejo no necesitan presentar una declaración **California 190** ni una declaración **IRS 990T**, a menos que estén incorporadas por separado. Sin embargo, si la PTA tiene ingresos no relacionados superiores a \$1000, se necesitan esos formularios.

- La venta de anuncios (no recomendada) es un ingreso comercial no relacionado.
- El ingreso por patrocinio es un ingreso relacionado en lugar de no relacionado.
- Hay excepciones a los ingresos comerciales no relacionados.

El formulario **Schedule B** se debe completar si la PTA recibe una donación de más de \$5,000 o más por parte de un solo donador.

¡¡¡Consulte a Su Profesional de Impuestos!!!

La PTA de California recomienda Enfáticamente que las unidades de PTA use los servicios de un profesional de impuestos con experiencia en organizaciones no lucrativas para presentar las declaraciones 990 o 990EZ.

Las fechas límite para presentar todas esas declaraciones es el 15 del quinto mes después del final del año fiscal. Por ejemplo, una PTA con un fin de año fiscal del 30 de junio debe presentar esas declaraciones para el 15 de noviembre.

- Las extensiones para presentar están disponibles si se solicitan adecuadamente con el formulario **IRS Form 8868**.

Doug Pickford, Tesorero, PTA de California

Every PTA or PTSA Must File

The basic rule:

Federal purposes - If your unit normally has under \$25,000 in gross receipts (including net dues) they may be required to file a Form 990-N, the "e-postcard". If Gross Receipts are normally over \$25,000 they are required to file a tax return Form 990 or 990-EZ.

State purposes - Incorporated units with over \$25,000 in gross receipts are required to file a Form 199. Units not incorporated are included in a group filing of the California State PTA.

When is the Deadline?

The deadline to file your unit taxes is the 15th day of the 5th month after the close of your fiscal year. For example, if your fiscal year (as specified in your bylaws) ended on June 30, 2008, you are required to file by November 15, 2008. You cannot file until after your fiscal year ends.

How do I file?

You can find instructions for filing at <http://www.irs.gov/pub/irs-pdf/f990-ez.pdf> (It is 47 pages long, so refer to it as necessary). If you have further questions, go to the IRS website at <http://www.irs.gov/charities>, or the FTB website at <http://www.ftb.ca.gov/individuals/faq/beExempt.shtml>, or consult with a tax advisor.

Things You Should Know:

- Every PTA and PTSA is chartered as a 501(c)(3).
- Each unit is responsible for its own returns.
- Gross receipts are a total of all cash going through the PTA account – not just profit made. It is important to note that expenses incurred for a fundraiser or the cost of the fundraising product are **NOT** deducted from gross receipts for the \$25,000 test. (Dues are the exception and are included at the net amount retained by the unit.)
- Banks report all accounts to the IRS that hit the \$25,000 mark in gross receipts – even PTAs.
- The figure the IRS uses is actually a three-year average, giving leeway for the first over-\$25,000 year, but a big-earnings year will affect later years.
- To avoid problems, once your unit starts filing, keep filing. There is a box to check if your unit did not hit \$25,000 this year.
- Current IRS actions seem to be two to three years behind, and fines accrue by the day. Don't think the IRS is just letting PTAs slide.
- Contact your Council and 6th District if the IRS contacts you.

**Incorporated units are required to have a State Charity Registration Number and file a Form RRF-1 annually. The Form CT-1 Registration Application and Form RRF-1 can be obtained from the Attorney General's office at <http://ag.ca.gov/charities/>.

What forms do I use?

The following federal forms may be downloaded from the IRS web site. Some can be filled out online and then printed.

➤ If you have gross annual receipts under \$24,999:

If you have filed in the past but had lower gross receipts this year, file the 990-EZ as usual but check the appropriate box.

If you have not filed in the past, as of this year (for any fiscal year which began after December 31, 2006), **YOU ARE NOW REQUIRED TO FILE** an e-Postcard (Form 990N). To file your e-Postcard and for more information about how to file, go to www.irs.gov/charities/article/0,,id=169250,00.html.

➤ If you have gross annual receipts of \$25,000-\$99,999:

File Form 990-EZ (3 pages) <http://www.irs.gov/pub/irs-pdf/f990ez.pdf> and 990-Schedule A (6 pages) <http://www.irs.gov/pub/irs-pdf/f990sa.pdf>, and maybe 990-Schedule B listing contributions of \$5,000 or more from single contributors.

➤ If you have gross annual receipts over \$100,000:

Form 990 (6 pages) <http://www.irs.gov/pub/irs-pdf/f990.pdf> and Schedule A (6 pages) <http://www.irs.gov/pub/irs-pdf/f990sa.pdf> and maybe 990-Schedule B listing contributions of \$5,000 or more from single contributors.

➤ **If your PTA ran a student store, stocked large amounts of SCRIP**, or in other ways resembled a retail business you may have to pay taxes on income over \$1,000. The forms for that are a 990-T from the IRS and form 109 from the California Franchise Tax Board.

➤ **Extensions** may be requested with the IRS form 8868.

➤ **Request copies** of old returns with IRS form 4506.

➤ **If your unit is incorporated and has gross receipts over \$25,000**, the State Form 199 may be downloaded from the FTB web site: http://www.ftb.ca.gov/forms/07_forms/07_199.pdf.

Reprinted with permission from Eighth District PTSA, The Voice, August 2008.

6th District Budget

**Sixth District PTA
Financial Report
Proposed/Prelim Budget 2008_9**

	<u>Year End Totals 2007-2008</u>	<u>2008/2009 Budget</u>
Beginning Balance Checking	\$11,899	\$14,890
Money Market Account	\$22,370	\$22,438
Beg'g Cash Available to 6th D	\$34,269	\$37,328
<u>Sixth District Income</u>		
Convention		\$ 6,000
District Out of Council Fee	\$ 1,833	\$ 1,500
District Luncheon/Hon Srv Aw	\$ 1,460	\$ 1,500
District membership	\$25,054	\$26,550
Donations & Grants	\$ 1,000	\$ 1,000
Misc. Income	\$ 735	\$ 800
Office Resale	\$ 1,363	\$ 1,400
Total Receipts - Sixth District	\$31,445	\$38,750
<u>Expenses</u>		
Convention Nat'l	\$ 0	\$ 2,200
Convention State	\$ 3,154	\$ 8,500
Conferences	\$ 0	\$ 2,300
Donations and Grants	\$ 1,929	\$ 2,500
District Luncheon/Hon Srv Aw	\$ 0	\$ 2,000
Fees, Dues & Subscriptions	\$ 100	\$ 125
Insurance-District	\$ 755	\$ 800
Misc. Expense	\$ 89	\$ 150
Newsletter (The Bell)	\$ 1,310	\$ 2,000
Officer/Chair/Administrative Expense	\$ 813	\$ 2,400
Office Staff Training	\$ 0	\$ 300
Office Staff Salary	\$15,832	\$17,000
Office Supplies	\$ 135	\$ 200
Postage	\$ 464	\$ 500
Prior Year Expense	\$ 650	\$ 4,549
Programs (incl Grants)	\$ 0	\$ 4,000
Office Resale	\$ 630	\$ 500
Reflections	\$ 313	\$ 400
Teacher of the Year Donation	\$ 1,300	\$ 1,000
Training Workshops (incl printing)	\$ 2,126	\$ 3,000
Technology	\$ 0	\$ 500
Unit grants and assistance	\$ 314	\$ 1,350
Total Expenses - Sixth District	\$29,914	\$56,274

6th District Budget (cont.)

**Sixth District PTA
Financial Report
Proposed/Prelim Budget 2008_9**

	<u>Year End Totals 2007-2008</u>	<u>2008/2009 Budget</u>
Net Income - Sixth District	\$ 1,531	(\$17,524)
Pass Through Receipts		
Founder's day	\$ 450	\$ 500
Insurance	\$ 36,710	\$ 38,500
Insurance Late Fees	\$ 150	\$ 75
Membership	\$149,826	\$158,800
Membership new unit	\$ 717	\$ 500
New Unit Holding	\$ 437	\$ 0
Other	\$ 3,419	\$ 0
Workmen's Comp	\$ 973	\$ 1,500
Unit/Council Overpayment	\$ 483	\$ 0
Total Pass-through Receipts	\$193,165	<u>\$199,875</u>
Pass Through Expenses		
Founder's day	\$ 0	\$ 500
Insurance	\$ 36,710	\$ 38,500
Insurance Late Fees	\$ 150	\$ 75
Membership	\$149,856	\$158,800
Membership new unit	\$ 525	\$ 500
New Unit Holding	\$ 0	\$ 0
Other	\$ 0	\$ 0
Workmen's Comp	\$ 973	\$ 1,500
Unit/Council Overpayment	\$ 3,558	\$ 0
Total Pass Through Expenses	\$191,772	<u>\$199,875</u>
Net Inc (exp)Pass Thru Act'y	\$ 1,393	\$ 0
Net Income for Total 6th D act'y	\$ <u>2,924</u>	<u>(\$ 17,524)</u>
Ending Checking Balance	\$ 14,823	(\$ 2,634)
Money Market Account	\$ 22,438	\$ 22,438
Ending Cash Available to 6th D	\$ 37,261	\$ 19,804
Outstanding Liabilities - Cash Reserved	\$ 10,631	\$ 6,000
Unallocated Reserves	\$ 26,630	\$ 13,804

Sixth District PTA - Unit Remittance Form

Please use this form when submitting payments and reports.
Remember to make a copy for your records before submitting.

PTA Name _____ Date _____

Treasurer Name _____

Address _____ Zip Code _____

E-mail _____ Phone _____

Membership Dues & Insurance: Check bylaws for *per capita*

		In Council Units	<u>Out-of-Council Units And Councils</u>	<u># of members</u>	
<input type="checkbox"/>	Early Bird Award Remittance..... (Minimum 15 members)	<i>See council for your deadline.</i>	October 15		\$
<input type="checkbox"/>	Chairman Award Remittance Minimum 50 members	<i>See council for your deadline.</i>	November 3		\$
<input type="checkbox"/>	Required Remittance. Minimum 15 members	<i>See council for your deadline.</i>	November 19		\$
<input type="checkbox"/>	Insurance Premium Due Premium tba early Nov.	<i>See council for your deadline.</i>	December 22		\$
<input type="checkbox"/>	Workers Comp Insurance.....	<i>See council for your deadline.</i>	December 31		\$
<input type="checkbox"/>	Final Remittance.....	<i>See council for your deadline.</i>	March 2		\$
Total Amount Enclosed					

Reports Due:

	Please indicate which report is enclosed with an X	Due Dates In Council Units	Due Dates: Out-of-Council Units and Councils
<input type="checkbox"/>	End of year Audit (for 2 nd half of previous year) - ending 6/30/08	<i>See Council</i>	October 24
<input type="checkbox"/>	Annual Financial Report (for previous year) - 2007-2008	<i>See Council</i>	October 24
<input type="checkbox"/>	Annual Adopted Budget (for current year) - 2008-2009	<i>See Council</i>	October 24
<input type="checkbox"/>	Worker's Compensation Annual Payroll report form (forward with insurance premium)	<i>See Council</i>	December 31
<input type="checkbox"/>	Mid Year Audit (covers current year, 1st half)	<i>See Council</i>	<i>tba</i>
<input type="checkbox"/>	New Officers List (Board-Elect)	<i>See Council</i>	<i>tba</i>
<input type="checkbox"/>	Unit Annual Report form	<i>See Council</i>	<i>tba</i>

- Tax Returns** (After you file with the IRS & FTB, send a copy to your Council, or to 6th District PTA for out-of-council units.)
- Bylaws** (Must be reviewed annually, updated every two years.) PTAs in councils, submit original plus 4 copies to council parliamentarian ~ Out of council PTAs, submit original plus 4 copies to 6th District parliamentarian.

Out-of-Council Units and Councils: Return form to Sixth District Office. **In Council Units:** Return form to your council treasurer.

Information

6th District PTA Board 2007-2009

Elected Positions

President	Barbara Spreng
Executive VP	open
Recording Secretary	Anne Westbrook
Treasurer	Susan Canty
Auditor	Ernie Cortes
VP Convention	open
VP Leadership	open
VP Communications	Lynn Magill
VP Organizational Services	Suman Ganapathy
VP Education	Laura Casas Frier
VP Health/Community Concerns	Barbara Emerich
Historian	Diane Straetker

Appointed Positions

Out of Council Team	Julia Rosenberg Dinah Showman Chris Gray Monique Migdol open
Leadership Team	Diane Foote Margot Harrigan
Directory Newsletter Editor (<i>The Bell</i>) Webmaster	Wendy Akers-Ghose open Erwin Morton
Membership Reflections Reflections Team Annual Luncheon	Richard Velasquez Suman Ganapathy open Joan Cooper
Special Ed Community Concerns Fit for Learning Emergency Preparedness	Stacey Ashlund Barbara Emerich Andrea Wheeler Catherine Vonnegut
Director of Legislative Action	Erwin Morton
Parliamentarian	open
Community Svc Scholarship	Barbara Emerich

If you'd like to volunteer for an open position, please contact Barbara Spreng at president@capta6.org

Sixth District Office

All local PTAs and councils of PTAs in Santa Clara County are served by the Sixth District PTA office. The office is here for your benefit, whether it be for materials, video loans or inquiries on PTA matters, such as obtaining information about past Honorary Service recipients. Many of the California State PTA publications are available in the office. These items may be requested over the phone, or you can stop by to see what materials are on hand.

If you are planning to come down to the office, please call first to make sure that our office manager, Paula Traynor, will be there to assist you. For information on ordering supplies or obtaining videos please contact Paula Traynor at the Sixth District PTA Office number listed below.

The **Sixth District PTA office** is located in the
Santa Clara County Office of Education,
1290 Ridder Park Dr.,
San Jose 95131-2304.

The phone number is **(408) 453-6536.**
Email for Paula is **paula_traynor@scooe.org**

The office is open Wednesday, Thursday and Friday from
9:00 AM to 3:00 PM.

The office is closed on all school and county holidays.

BELL Information

The "Bell" is the 6th District PTA newsletter, full of valuable information on what is happening in 6th District/Santa Clara County. However, it does not take the place of attending District Meetings. We welcome your feedback about the "Bell" and look forward to receiving some. Please take time to read the entire "Bell".

Article authors: please keep the deadline dates below in mind and submit your articles (by email, please) and other information on time. If time sensitive, special information must get out, arrangements will be made to do that. If problems arise regarding deadlines, please contact Wendy Akers-Ghose.

2007-2008 Bell Deadline Dates

<u>Issue</u>	<u>Deadline</u>
November	tba

Please send article submissions to:
Wendy Akers-Ghose at
wendyghose@yahoo.com,
phone 650-813-0192

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California Congress of Parents and Teachers

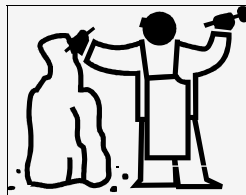
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Sixth District
PTA newsletter

President Barbara Spreng
Editor Wendy Akers-Ghose

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San Jose, CA 95131-2304
Phone: (408) 453-6536



What sculpture is to
a block of marble,
education is to the
human soul.

Joseph Addison
(1672-1719)
British Politician and Writer

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