

Council News

Saddleback Valley Council PTA * Fourth District PTA * CCPTS

25631 Peter Hartman Way * Mission Viejo, CA 92691 * www.svpta.org

President: Julie Schwarz * Newsletter Editor: Tina Dunn

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August 2008

President's Message

By Julie Schwarz,
SVPTA President

svpresident@svpta.org

Hello PTA Friends. My name is Julie Schwarz and I have the honor of serving as the Saddleback Valley PTA Council President. I am excited to work with you as your unit and you strive to achieve your goals. I am sure we will have another exciting year.

This will be my second term as President and seventh year on Council. I have been involved with PTA for sixteen years – serving as President at both de Portola Elementary and Laguna Hills High School. My husband and I are celebrating 23 years of marriage and we have three children. The older two are in college and my youngest will be a junior at Laguna Hills High School. I appreciate that

my husband, Mike, supports my PTA volunteer work. We both strongly believe that it is important to be involved in your children's education. We believe that it is not only important to participate in school events, but to also know what is going on. PTA has been a wonderful vehicle to accomplish this.

As you start your new school year, I encourage you to stay informed. Try to know what is happening at your school site, your PTA unit, the PTA Council and school district. I know attending our meetings requires another night out, but we will work hard to make the time valuable. If there is one thing I am committed to – that would be to “not waste your time”. I ask that you attend our meetings, and in return we will work hard to make them valuable, informative, and brief. If I am ever falling short in this effort, please let me know.

Our first meeting is August 28th. If you are unable to attend, please send a representative. Remember that we are here to help train your officers, back you up in any situation, provide information and be your friend. I look forward to getting to know

you. I have made many friends through my PTA contacts and I cherish those relationships.

Again, I am looking forward to an awesome year!

Upcoming Events:

September:

- 2nd—School Board Meeting—SVUSD Board Room—6:15 PM
- 4th—First Day of School
- 10th—Presidents/Principals Breakfast—SVUSD Board Room—9 AM
- 18th—Council Meeting—SVUSD Board Room—7:00 PM
- 25th—Elementary School Back to School Night—Time TBD by individual school

Items to bring to Aug. meeting:

- An updated roster of your Executive Board
- Your meeting schedule for the year
- A list of your unit's goals for the year

Inside this issue:

| | |
|------------------------------------|---|
| Special Education Chair Positions | 2 |
| Membership Dues | 2 |
| Membership | 3 |
| Reflections | 4 |
| Presidents/Principals Breakfast | 4 |
| New Electronic Filing Requirements | 5 |
| Council Calendar | 6 |

SVPTA SPECIAL EDUCATION COMMITTEE INVITATION TO ALL UNITS

By Caroline Paltin, Ph.D.

Special Education Committee - Collaboration & Inclusion

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As I sit here sipping lemonade with the air conditioner cranked, I write the first installment of our Fall 2008 newsletter and try to understand where the summer went. I hope it was restful for everyone. In the months ahead, we will begin developing a special education PTA committee, and I am thrilled to serve again as your Chairman. I hope that this year we can begin to work towards greater participation in legislative change with regards to special education funding issues, as well as increasing awareness, acceptance and inclusion for all children. To view the State PTA's positions on these issues, visit their website at www.capta.org and go to the Legislation page.

I would like to invite all units who have not yet done so to feel free to contact me to explore options of establishing a Special Education Chairman at your school. If your Chairman has changed, please update me with his/her contact information as well. Also, please note that the Family Resource Center has some wonderful materials including a great selection of videos for loan to use for parent and teacher presentations on issues of special needs. This was recently updated to include some of the Richard LaVoie videos you have seen at past trainings. Start thinking now about plans for ability awareness activities at your school, and feel free to contact me with questions.

IMPORTANT NOTE: One function of the Special Education Chairman is to provide materials and resources to the parents and staff related to special needs. Please note that flyers concerning workshops or speakers available to the community should not be sent for distribution through student back-packs, but instead could be mentioned in your local newsletter or provided to parents at PTA meetings for distribution.

Thanks to all those who have chosen to serve as Chairman. I look forward to our continued work together as this program grows and develops!

Membership Dues

By Dennis Walsh

SVPTA Treasurer

svtreasurer@svpta.org



Membership dues should be forwarded to Council each month. The current amount due per member is \$4.25. Of that amount, \$1.75 goes to the National PTA, \$1.25 goes to the CA PTA, \$.60 goes to the 4th District PTA, and \$.65 goes to Saddleback Valley Council. Please make sure you submit a Unit Remittance Form, which can be found on the Council website www.svpta.org under the resources and form/documents page, along with your check with two signatures.

Membership

By Andrea Padian

SVPTA Membership Chairman

svmembership@pta.org

Welcome back to school! As everyone knows, the job of membership begins the moment school starts. Hopefully everyone is ready to go with their 2008-09 Membership Campaigns, Welcome Back events and other ideas planned to build a strong and diverse PTA membership and volunteer base. It's important to get all parents, teachers, staff, students and community partners to join PTA. At a time when continual school budget cuts seem to be the soup de jour, we need the power of all the people behind an organization like PTA, to keep our elected officials focused on the needs of our kids. Together, as an organization, we saved many programs this past school year. But, with no budget out of Sacramento at this time, our job is never done. And so, be creative this year, have a presence at all your events promoting PTA, approach new families at your school, invite second language families to join and get dads and grandparents involved as well. Form a strong membership committee and be sure you communicate with everyone the things that your PTA is doing. Make sure you let people know what benefits there are as a PTA member. But above all, never stop trying to get new members.

Membership cards will be given to all schools at the Council Meeting, August 28th. Try to make sure someone from your school is there to pick them up. Each school will be given the same amount of cards as they had members last year, plus another 10%. Once you have paid dues for that amount of members, you may ask for more cards. You cannot copy and print the cards, they must be originals. The only copies you should make would be used to help line up your printer to make sure the cards print properly.

Membership dues have increased this year so, when you turn in your per capita dues at the September Council meeting, be sure to include your unit remittance form and \$4.25 for each member. In previous years, all units were rewarded for obtaining the *Early Bird and Chairmanship Awards for Membership*. Based on our council meeting schedule and unit due dates, **units will need to submit a check for at least 50 members by the September Council meeting to qualify for the Early Bird (minimum 15 members) AND Chairman's Club Awards (50+ members)**. Also keep in mind that to qualify for the *Creative Membership Award*, you must be a member of the Chairman's Club. All dues do not need unit approval but must have the president's and the treasurer's signature. Forward all checks for membership monthly – **do not hold on to these dues**.

Please be sure your membership VP or Chairman has reviewed the membership information included in the State Toolkit, as well as the Council Training Manual or CD given out during training last June. It should answer any questions and provide lots of ideas to help with your membership goals. If you have any questions regarding membership, dues or training materials, please feel free to contact me.

Like last year, we are looking for a membership increase of 5%. Schools that achieve this will be awarded at the end of the year – so get to work and good luck!

**“WOW”
2008–2009 Theme**

By Colleen Logomasini
SVPTA Reflections Chairman
svreflections@svpta.org
Source: 4th District PTA Website

Just a couple of reminders for the Reflections Chairmen:

* The deadline date for entries at Saddleback Valley PTA Council level will be:

Monday, November 3rd, 2008.

At my Home: 25692 Skybird Lane, Lake Forest

* Please remember to submit “Merit of Excellence” school winners ONLY for each Grade Division and Category preferably all in one portfolio paper tote (available at Michael’s for under \$15.00, please include the cost in your school’s PTA Reflections Program 2008-09 budget) for Council level judging. Please make sure that the tote is clearly labeled with your school’s name. The sign-up sheet for scheduled drop off of entries will be e-mailed soon.



* Remember to give a set of rules to each judge. Judges should not see artists’ names when they review the entries. Recognize and thank your judges.

* Please fill in your council name (Saddleback Valley PTA Council) and district name (4th District) on each “Merit of Excellence” entry form. Complete the section on the entry form marked “To be completed by local PTA.” A list of the Saddleback’s schools “Local Eight Digit National PTA ID #s” will be e-mailed to you.


* Complete “Form A, Unit - PTA Participation Form” and forward it with your entries to your council level for judging.

* Celebrate all entries by displaying them at your school. Make every participant feel like a winner!

If you have any questions, be sure to contact me at svreflections@svpta.org or 949-859-3294.



Saddleback Valley Council PTA cordially invites you
to our annual
Presidents and Principals Breakfast
Wednesday, September 10, 2008
9:00 a.m. ~ 10:30 a.m.
Saddleback Valley Unified School District Board Room
25631 Peter Hartman Way Mission Viejo, California
Continental breakfast will be served.





New Electronic Filing Requirement for PTA's - Annual Electronic Notice — e-Postcard (Form 990-N)

By Dennis Walsh
SVPTA Treasurer
svtreasurer@svpta.org

Striving to comply with local, state and federal laws is important to maintain your PTA's continued operation. Acceptable excuses for noncompliance do not include: "I didn't know." The penalty for noncompliance may be financial, or in the case of a recent filing requirement change adopted by the IRS, could result in loss of your nonprofit status. It's up to PTA leaders to educate themselves on an ongoing basis. Countless resources exist to assist your staying abreast of changing regulations, including state, district and council PTA resources.

Beginning in 2008, PTA's that previously were not required to file returns **will be** required to file an annual electronic notice, Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations not Required To File Form 990 or 990-EZ. This filing requirement applies to tax periods beginning after December 31, 2006.

Who Is Included?

PTA's whose gross receipts are normally \$25,000 or less, are not required to file Form 990, Return of Organization Exempt From Income Tax, or Form 990-EZ, Short Form Return of Organization Exempt from Income Tax. With the enactment of the Pension Protection Act of 2006, PTA's will now be required to file electronically Form 990-N, also known as the e-Postcard, with the IRS annually.

Next Steps

The IRS will mail educational letters starting in July 2007 notifying small tax-exempt organizations that they may be required to file the e-Postcard. If you believe the IRS may have an incorrect address for your organization, file Form 8822, Change of Address, with the IRS. You will need to complete Parts II and III. To get Form 8822, go to www.irs.gov/eo and click on "Forms and Publications."

Filing Access

The IRS plans to deliver a simple, Internet-based process for filing the e-Postcard (there will be no paper form for the e-Postcard) and will publicize filing procedures when the system is completed and ready for use. The IRS anticipates that organizations that do not have access to a computer can go to places such as the local library to file the e-Postcard. Because the system will be Internet based, organizations should not need to purchase software to file the e-Postcard. To file your e-postcard, go to <http://epostcard.form990.org/>. There is no charge for using this system, although it is run by a private business.

Filing Frequency

Beginning in 2008, the e-Postcard will be due every year by the 15th day of the fifth month after the close of your tax period. For example, if your tax period ends on June 30, 2008, the e-Postcard is due November 15, 2008.

If you prefer to file an information return, Form 990 or 990-EZ, you must complete the entire return. An incomplete or partially completed Form 990 or 990-EZ will not satisfy the annual filing requirement.

Penalty for Noncompliance

The Pension Protection Act of 2006 requires the IRS to revoke the tax-exempt status of any organization that fails to meet its annual filing requirement for three consecutive years. Therefore, organizations that do not file the e-Postcard (Form 990-N), or an information return Form 990 or 990-EZ for three consecutive years, will have their tax-exempt status revoked as of the filing due date of the third year.

Tax-Exempt Reinstatement

You must apply (or reapply) and pay the appropriate user fee to have your tax-exempt status reinstated if it was revoked because you failed to file for three consecutive years. Reinstatement of tax-exempt status **may be retroactive** if you can show that you had reasonable cause for not filing.

What Information Will Be Required?

The e-Postcard will require you to provide the following information:

- Organization's name,
- Any other names your organization uses,
- Organization's mailing address,
- Organization's Web site address (if applicable),
- Organization's employer identification number (EIN),
- Name and address of a principal officer of your organization,
- Organization's annual tax period,
- A statement that your organization's annual gross receipts are still normally \$25,000 or less.

If you have any questions, or need help, please contact the Saddleback Valley Council Treasurer, Dennis Walsh at svtreasurer@svpta.org. It is a lot harder to straighten things out later, than to do it correctly now.

August 2008

28th Council Meeting 7:00 PM @ SVUSD Board Room
(Executive Board Meeting 5 PM)

September 2008

2nd School Board Meeting 6:15 PM @ SVUSD Board Room

4th First Day of School

10th President/Principal Breakfast 9 AM @ SVUSD Board Room

18th Council Meeting 7:00 PM @ SVUSD Board Room
(Executive Board Meeting 6 PM)

25th Elementary School Back to School Night Time TBD by individual school

October 2008

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