

MT PTA VOICE

Providing PTA news and information for Montana PTA local units, councils, and members

Volume 3, Issue 4

October 2011

990 FILING INSTRUCTIONS: DEADLINE QUICKLY APPROACHING



Hey Treasurers, it is time again for you to file your annual 990 tax returns. Don't let that spook you! It is usually very simple. The deadline to file is the 15th day of the 5th month after your

tax year end. So, if your tax year end is June 30th, the deadline to file is November 15th.

The next question to ask yourself is whether your total receipts are *normally* \$50,000 or less. What that means is if your total receipts for this year are over \$50,000 only because of a onetime grant or fundraiser, then you can still file the 990N. If your total receipts are *normally* over the \$50,000 limit, you must file the 990 EZ. The IRS uses a 3 year average to determine *normally*.

Another thing to consider is that when you are looking at your total receipts, you don't have to add in the dues that you send to the MT PTA . In other words, if you charge \$8 for dues per person, and \$5 of this went to the MT PTA (MT and NPTA dues), then you only

include the \$3 dues per person that your unit keeps. For some of you that may help you stay under the \$50,000 limit.

Once you have determined whether you can file the 990N or the 990EZ you can continue. You will need your unit tax ID number. If you aren't sure what that is, just call the MT PTA office.

To file the 990N, go to the IRS website at www.irs.gov.

Choose the 3rd tab for Charities and Non-Profits.

In the center of the next page that appears, the 7th item down says: Form 990-N (e-postcard); filing electronic. Choose this.

In the new screen that opens, the 4th paragraph says: "Click here". Choose this. It will take you to a new web page called e-Postcard with the Urban Institute. This is where you do the postcard filing.

There are now 5 steps:

Register and get a Log-in ID.

You will have to wait for a response from e-Postcard. They send you your login via email.

(Continued on page 5)

Upcoming Deadlines

- October 28 — Application Deadline—Take Your Family to School Grants
- November 1 — Deadline for 1st Dues Remittance and Insurance
- November — PTA Healthy Lifestyles Month
-

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PRESIDENT'S MESSAGE TRANSITION, HOW'S THAT WORKING FOR YOU?

"The times, they are a changing" and we are creatures of habit. The unasked questions may be: So how do we do business? What do they want from me? Who has the power? Where do I fit in this Transition? Doing business the same way, just because that is the way it has been done for years, may not best serve your students, members, school and local unit. There's no doubt that with a change in leadership, there's a possible elevation of the barometer. Keep your cool, "passing the torch" doesn't mean someone should get burned. Igniting a burning passion about advocacy in children's issues is what we should all be sharing.

Leadership styles play a big part in the flow of transition. Will your next two years be white water rapids or a babbling brook? Change is what keeps our association fresh, timely, dynamic and growing. Our volunteers follow their students, there will be turnover by the very nature of our membership; our students move through classes to the next grade level as they age and we parents follow their journey into new classes, buildings and schools. This shift will change the culture and character of the local unit. If possible, allow some overlap in leadership, it is very helpful to include and respect the

outgoing officers, and in turn the past officers should be available for consultation and share information with new officers.

If your board in concert with the membership has established a plan of direction and budget, adjustment will be easier for transition. As a leader remember to take into account the experience and skills of past leaders as well as those currently serving. Be an active listener, ask more open-ended questions, and paraphrase to double-check your interpretation and understanding. Remember to acknowledge what each of the officers bring to the board from his or her life experience that can enrich the local unit based on the expertise and actual interests of each board member. Your local unit may shift and morph. What a concept! Set parameters and clear expectations for the transition. Have reasonable expectations and accomplish your plan as defined by your budget and timeline. By having it in writing, defined by an established period of time will help the new person get a running start and set up the accountability to keep things moving forward. Both past and current officers should create opportunity for a good, vital, fertile environment for positive growth. Keeping in mind Montana PTAs vision and mission and embracing the new energy these

leaders bring to the table, success will be the future of your local unit.



It's not easy to step into someone's shoes so I don't recommend it; find your own fit and stride. We all have our own style and strengths, work to find people who will open your mind to new perspectives, not people who will simply say yes because you are an officer. Your greatest volunteer may be someone you never expected; give them an opportunity to show themselves in a new light and they may become your units' next leader. When new leaders come onto the board, make sure your budget includes every opportunity for training. This action will set in motion success for your local unit.

I applaud all the new and past officers. I wish you well as you dive into your school year and remind you the power of association is Montana PTA and we are here to help you navigate when your babbling brook becomes rocky rapids.

Dee Hensley-Maclean
MT PTA President

PTA—the "A" does make a difference!

HOW CAN PTAS MAKE PARENT-TEACHER CONFERENCES MORE SUCCESSFUL

Parent-Teacher Conferences are one of the most vital pieces in the parent involvement puzzle. Thus, PTAs should take an active role in making them successful events.

Here are several ideas for ways your PTA can help:

- Provide a meal or snacks for the teachers during the conference times. Most schools have conferences running through an afternoon and into the evening. Having a nutritious meal available on site allows teachers to recharge their energy with

Parent Teacher conferences are one of the most vital pieces in the parent involvement puzzle.

less stress and focus on quality interactions with the parents.

- Provide and staff an area for students and siblings to play or work on homework. This allows parents to focus on their discussion with the teacher.
- Showcase PTA information. Set up a display showing all of the ways the PTA works to improve the quality of education at your school. Or create a brochure or flier containing this information

and ask that it be included with the report cards.

- Provide the tips below to the parents at your school.

Ten Tips for a Successful Parent-Teacher Conference:

1. Ask your child if there is anything that he would like you to discuss with the teacher.
2. Make a brief list of what you want to talk about.
3. Arrive Promptly!
4. Begin with positive comment about teacher or classroom.
5. Avoid lengthy discussion of topics not related to the purpose of the conference.
6. Be open-minded to suggestions from the teacher
7. Keep your emotions under control.
8. Take notes about what has been discussed to share with your child.
9. Express appreciation for the conference.
10. Do not stay beyond your allotted time.



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PTA PROGRAMS

Have you taken a recent look at www.pta.org? There are so many exciting PTA Programs that are a great opportunity for your PTA. It's a great time to take a look and see if you are familiar with all the National PTA programs. In addition, take a look at www.montanapta.org and all the program information Montana PTA has available.

National PTA not only has many programs to help, but also many grant opportunities to bring money to your PTA. As well as great programs, these websites help to inspire and help you refocus on your vision of PTA life and volunteering.

I promise if you take time and surf around these sites it will be a wonderful time investment for you and your PTA. Bring what you found to your next meeting. I challenge you to find some great information. I know you will find not only Program information but many other great resources for each section of PTA life. Take the time and have some fun reading.

Michelle Duncan

MT PTA Program Chair



To promote childhood health and wellness, National PTA created Healthy Lifestyles Month. Throughout the month of November, PTAs nationwide participate in PTA Healthy Lifestyles Month by conducting programs and events that promote health education, physical activity and parental involvement. Knowing that a healthy child can achieve and learn more, PTAs are encouraging families to increase their physical activity, eat fresh fruits and vegetables, develop

community oriented physical activity programs and promote healthy lifelong behaviors. National PTA's Healthy Lifestyles Month has encouraged PTA to get creative and develop clever initiatives that make living healthy fun.

National PTA's Healthy Lifestyles Program is sponsored by Malt-O-Meal®, a [Proud National Sponsor of National PTA](#).

Visit www.pta.org/goodchoices to find the Healthy Lifestyles Promotional Toolkit. This toolkit is a marketing tool to assist PTA units in promoting the Healthy Lifestyles Program. It contains web banners and posters that can be used to promote the Healthy Lifestyles program at your school, on your website, and in your newsletters.



(Continued from page 1)

This could take some time but my response time was almost immediate.

Once you receive your login, return to this site. Now, create your 990-N by responding to the questions.

Submit by clicking the “submit” button.

You will receive an email from the IRS that your E-postcard has been accepted.

Check your filing status page to view your filing. Print out a paper copy of your electronic filing at this time. Make sure you print out a copy to send to the MT PTA office or you can save a copy to your computer and email it to the office.

If you determine that you need to file the 990EZ, go to the IRS website and print out the 990EZ form and the Schedule A that goes along with the 990EZ.

As always, if you need help, email me or the MT PTA office. Good luck and Happy Halloween!

Elleen Nichols

MT PTA Treasurer



BUILD MONTANA

Last month, the Montana Nonprofit Association (MNA) officially launched the Build Montana website. Build Montana is the first statewide online portal that makes it easy for Montanans to search for volunteer opportunities anytime and anywhere in the state. As a program of MNA, Build Montana also provides a place to search for nonprofits, learn about the impact of the nonprofit sector and make donations directly to organizations that are at work strengthening our communities.

Check it out today at www.buildmontana.org! Find a volunteer opportunity in your area or post an upcoming volunteer event for your organization



Fundraisers that work – any time of the year.



Mixed Bag Designs

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HALLOWEEN RULES FOR CONTROLLING SUGAR INTAKE

Tips for parents to keep their kids from eating too much candy this Halloween season.

It's the time of year for zombie children, dark, decayed teeth and exploding waistlines. What else could it be but Halloween?

And let's face it, having children face-to-wrapper with that much candy in a concentrated period can be worrisome as parents decide how to deal with it. If parents concerned about the effects of excessive sweets – weight gain, sugar-fueled appetites and dental caries – nutrition experts have a word of advice.

Relax. "My philosophy is to let children be children and enjoy this special day the way most of us did," says Christine M. Palumbo, registered dietitian, Naperville, Ill. One day in which children have an overflow of candy won't do them long-term harm, say the experts.

But even with the inevitable excess, parents can moderate the sugar effects and rein in the overflow with some simple planning. Brainstorm with children before the holiday, says Sarah Krieger, registered dietitian, spokesperson for the American Dietetic Association. Decide together that you'll donate a portion to a local food bank or nursing home, if appropriate. "Talk

about it beforehand so your children aren't surprised," says Krieger, St. Petersburg, Fla.

Give children a healthy snack or dinner before they head out. "If you head out before eating, while you're hungry, of course you'll eat more. My rule is you'll have to eat something before you head out," Krieger says.

As children sort through their candy loot have them separate out the items they don't especially like for a donation elsewhere.

Make thorough tooth brushing part of the evening ritual even though the little zombies may be exhausted.

A post-Halloween strategy depends on the children's ages, too. Do parents hide candy and budget it for their children, or leave it out and rely on their self-control? "My 8-year old would notice it being gone. With younger children it's out of sight, out of mind," Krieger says.

When it's candy time encourage children to mix the sweets with healthier foods, says the Florida dietitian. "If you eat candy on an empty stomach you'll crave it more. Have candy with a glass of milk," she says.

Parents may notice that after a week or two the snack bowl isn't being touched. "By Thanksgiving we threw

the leftovers away," says Palumbo, recalling her family's Halloween practices.

There are healthier options for candy givers, too. Unless you're inviting tricksters you won't be giving out non-fat milk cartons.

Palumbo suggests the following that

both ghouls and their parents will appreciate:

- Chocolate-covered raisins
- Roasted sunflower seeds in single-serve packets
- Small granola bars
- Small bags of pretzels
- Envelopes of hot chocolate mix
- Mini bags of microwave popcorn for popping at home

Remember, children aren't the only ones with designs on the candy bag. Most parents have probably scoped it out, too. That can be a good thing.

Having a plan and being mindful of what is being eaten is better than simply snacking on sweets because they're available, Krieger says.

The same goes for the candy jar at work, which will be brimming on November first.

Be discriminating. If, however, some candies are triggers and you can't stop with just one, don't start, Palumbo says.



2011-2012 MONTANA PTA REMITTANCE FORM

REQUIRED:

Membership dues(\$5.50/member), insurance premium and submission of this completed form (including page 2) submitted by November 1, 2011 to remain in good standing.

Second required dues remittance-January 1, 2012 @ \$5.50/member.

Final required dues remittance date is April 1, 2012, @ \$6/ member

Unit Name: _____ Date: _____

Unit Address: _____
(must be permanent PTA address with city and zip)

_____ Number of Members @ \$5.50 per member =	\$ _____
<i>Dues become \$6 per member effective January 1, 2012!</i> (Attach unit's membership list when submitting dues)	
Liability Insurance premium \$50.00 due by Nov. 1, 2010 (required)	\$ _____
Fidelity Bonding Insurance – (optional, if selected remit by Nov. 1)	\$ _____
\$10,000 Coverage - COST \$ 90.00	
\$25,000 Coverage - COST \$105.00	
\$50,000 Coverage - COST \$131.00	
*See Fidelity Bonding Insurance information at the bottom of page 2	
Founders Day Contribution to Montana PTA (optional)	\$ _____
* ½ forwarded to NPTA; ½ kept by MT PTA	
Montana PTA Scholarship Contribution (optional)	\$ _____
*Scholarships provided for high school & college students entering a Teaching/Education field	
Montana PTA Honorary Life Membership Fee \$75.00 (optional)	\$ _____
*Must include Montana PTA Honorary Life Membership Form	
TOTAL AMOUNT ENCLOSED	\$ _____

CHECK MADE PAYABLE TO: MONTANA PTA
 Mail check, this form and local membership list to:
SEG FEDERAL CREDIT UNION
PO BOX 69, Laurel, MT 59044

Unit Treasurer _____ Signature _____

Treasurer's Phone _____ E-Mail _____

MUST COMPLETE BOTH PAGE 1 AND 2 AND RETURN

REQUIRED IRS REPORTING INFORMATION

Required for the Montana PTA Internal Revenue Code 501(c)(3) non-profit group tax exemption; failure to comply with these new reporting requirements may result in revocation of your tax exempt status. All units are now required to file an annual IRS return (FORM 990N or 990EZ) on or before the 15th day of the 5th month following the unit's fiscal year end.

This unit has gross receipts for the 2010-2011 school year of:

- Gross receipts under \$50,000 and properly filed FORM 990N on-line at www.irs.gov on _____ date. OR will be filed on _____ date.
- Gross receipts over \$50,000 and properly filed FORM 990EZ and Schedule A to the IRS on _____ date. OR will be filed on _____ date.

This unit's fiscal year end is: _____.

2010-11 Gross Receipts _____ 2010-11 Estimated Volunteer Hours _____

As required by MT PTA Bylaws, this unit is incorporated with the State of Montana _____ YES

As required by MT PTA Bylaws, this unit has completed an Annual Financial Review. _____ YES

Signature of PTA Officer verifying the above information: _____

Printed Name: _____ PTA Position _____

Required Attachments:

- Financial Review Report Form
- Copy of appropriate IRS FORM 990-N or 990EZ

FIDELITY BONDING INSURANCE INFORMATION

Fidelity bonding insurance covers losses sustained by a PTA unit through any fraudulent or dishonest act or acts committed by any of the officers or members who are authorized to handle PTA monies acting alone or in conspiracy with others. Fidelity bonding insurance is not required in the PTA Bylaws, but is in the best interest of each unit's financial security.

Unit must meet the following Fidelity Bonding Insurance Requirements:

- ✓ **Unit completes an annual financial review by an Audit Committee or a qualified accountant**
- ✓ **Unit must complete a monthly review of the bank statements by a non-signer of the bank account(s)**

The amount of annual fidelity bonding coverage is determined by the unit's annual budget.

Annual Operating Budget	Optional Coverage
\$10,000 coverage	\$90
\$25,000 coverage	\$105
\$50,000 coverage	\$131

SEEKING NOMINATIONS: PRESIDENTIAL AWARDS FOR EXCELLENCE IN MATH & SCIENCE TEACHING

Do you know a great Montana science or math teacher, teaching in grades K-6, with 5 or more years of professional teaching experience? Do you think that person should get some special recognition for their expertise and dedication to student learning?

Would that person mind receiving a \$10,000 award from the National Science Foundation, along with an expenses-paid trip to DC to meet with other awardees and attend math and science professional development opportunities?

If your answer is yes to the questions above, please consider taking a few minutes to nominate that person for the 2012 Presidential Awards for Excellence in Mathematics and Science Teaching (PAEMST). In addition, please share this important nomination



information with your staff and colleagues and encourage them to make nominations as well.

To nominate a teacher for the award simply go to the following website and fill out the short form.

<http://www.paemst.org/controllers/nomination.cfc?method=nominate>

To see a detailed description of the PAEMST award, click on the "About the Awards" tab on this website.

If you have any questions please contact:

Marco Ferro
Montana Professional Teaching Foundation
1232 E 6th Avenue
Helena, MT 59601
Phone: 406.447.1462
Email: mferro@mea-mft.org



Congratulations to all of our Montana communities that had successful and vibrant Walk to School Day events last week. Thirty nine of our communities and schools registered at www.walktoschool.org. Please send me details and photos of your Walk to School events so we can all share in your successes.

For many of us, Walk to School Day is the big event of the fall, or the year. I would like to encourage each of you to think of ways you can take the success of Walk to School Day and expand it to encouraging students, parents, and staff to walk, bike, and wheel to school more often. That could mean once a month, a week, and eventually everyday. Walk to School Day is always fun and exciting. I believe a large part of that feeling is the sense of camaraderie for the students, parents, staff and community. I suspect that many of you (adults and children) felt invigorated for the remainder of your day. That feeling likely came from two sources: increased activity is good for us all and your chance to genuinely interact a bit more that morning. Why not strive to feel that way every day. Jumping to every day may feel daunting. If so, start with a monthly walk at your school. You can then step to weekly and eventually every day.

As always please let me know how I can support you in your efforts,

Taylor Lonsdale

Montana Safe Routes to School

MONTANA PTA DUES INCREASE: HOW WILL IT BE IMPLEMENTED?

Delegates at the 2011 Montana PTA Convention held September 16 and 17, in Great Falls approved an amendment to the Montana PTA Bylaws which increases the Montana PTA annual dues to \$3.75 per member. *This increase is effective on January 1, 2012.*

So now, many of you are probably wondering how we plan to implement a dues increase that goes into effect in the middle of a membership year. Here's the process we will be using to collect dues for the remainder of the year:

- November 1 — Submit your dues and insurance premium using the Montana PTA Remittance Form. At this time you will submit \$5.50 per member (\$3.25 Montana dues,

and \$2.25 National PTA dues.) Remember to include your \$50 Annual Liability Insurance Premium. At that time, your unit may also choose to make a donation to the MT PTA Scholarship Fund or a Founder's Day donation. In addition, your unit may wish to purchase supplemental insurance such as Fidelity Bonding Insurance.

- January 2012 — Your unit should submit dues for any members who joined your PTA between your first submission and December 31, 2011. Your unit will submit \$5.50 per member.
- January 1, 2012 — Be sure that from this point forward your

unit charges enough in dues to cover the increased dues. You may need to amend your standing rules.

- April 1, 2012 — Submit your final dues remittance for the 2011-12 year. Your unit will now submit \$6.00 per member (\$3.75 Montana dues and \$2.25 National PTA Dues).

We know this may be a confusing process, so please feel free to contact the office or any state board member for assistance and clarification.

Reminders will be sent when deadlines are approaching and additional information will be included in future editions of this e-newsletter.

A Fresh concept in Fundraising!



A Proven program to raise Money

PTAs and schools throughout Montana have used CITY BREW COFFEE as a very successful fundraising venue. We have now developed several different programs, to allow smaller schools to

participate. There are pre-sale programs, upfront ordering programs, and combinations of the two.

Private labeling for individual schools

By putting the label on the coffee, we have found most schools and PTAs have had significantly higher results due to the novelty and clarity of where the funds are being used.

Finally—a manageable product!

As opposed to so many products, coffee does not have concerns such as needing to be refrigerated or being kept warm and doesn't have any breakage issues. Next to oil, coffee is the number one most traded commodity in the world! There

will be almost 10 million pounds of coffee consumed in Montana this year. People love to buy products that they know that they will consume.



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**For more details please contact
Michael Taylor at
406-534-3541 or 888-545-4675.
Email: MichaelT@citybrew.com**

TAKE YOUR FAMILY TO SCHOOL WEEK GRANTS

PTA® Take Your Family to School Week® is celebrated each February to pay tribute to PTA's legacy of building family-school partnerships. PTA Take Your Family to School Week will be held **February 12–18, 2012** with the purpose of expanding and enhancing family engagement in schools across the country.

National PTA® offers grants to PTAs to implement programs that engage families in the school community. These grants can be used to build positive partnerships with teachers and families, connect parents to their children's school experiences, and give children fun ways to share what they are learning and doing in class with their families.

Apply now!

How to Apply:

Your application should be submitted in two steps:

Step 1: Please complete the **grant application** available at: (http://www.pta.org/take_your_family_to_school_awards.asp) and save it as a Word or PDF document. Please use your PTA's name as your document's file name (e.g. your final document is called "SpringfieldPTA.doc"). You will submit your grant application online in Step 2.

Step 2: Submit your demographic information online and **upload** your grant application.

Application deadline is **October 28**.



PTA Take Your Family to School Week is sponsored by the AXA Foundation, the philanthropic arm of AXA Equitable. The [AXA Foundation](#) is a Proud National Sponsor of PTA. The AXA Foundation provides more than \$1.3 million a year in scholarships to make college a reality for students across the country.

AXA offers free seminars to PTA units on how to apply for college and on other financial issues facing families. Consider having AXA provide a seminar during your Take Your Family to School Week activities. Learn more at AXA-Achievement.com/PTA.

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**MONTANA CONGRESS OF
PARENTS & TEACHERS ASSOC.**

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