

**SPECIAL
POINTS OF
INTEREST:**

- National Changes
- Back to School Kits
- Just Between Friends
- Happy New (school) Year!

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President's Perspective

Back to school time is rapidly approaching.

Stores already have their back to school displays and supplies in place.

The start of school is always a new beginning. I set more "New Year's" goals at the beginning of the school year than the beginning of the calendar year. There is still plenty of time to enjoy summer, but now it is the time to start setting our PTA goals for the upcoming school year.

Take a look at your PTA and see what you want to accomplish. Then, figure out what you need to do to get there. Don't do it alone. Gather your board so that everyone has the same goals and vision.

It is surprising to me how many times we forget to set goals and then we are surprised when we do what we always have done and get the same results.

Unless your PTA is perfect, and if you are, please let me know the secret, there are probably some things to

change. Einstein defined insanity as doing the same thing over and over again and expecting different results.

We have been traveling on the road to endless possibilities, but it is time to start creating some waves of change.

Our waves might be small ripples or large tsunamis. Whichever it is, let's be sure to get new or different results. As you sit down to develop goals, look to see what your PTA has done well and what needs improvement. Take the things you do well and expand on them, and change the things that need changing. Look at your school and community and see what resources are there and what your PTA can build on. Partnerships with parents, teachers, staff, students, and community are vital in moving forward.

National PTA reminds us of exactly what PTA is all about in the tagline *every child.one voice*. Wisconsin State PTA will be working on increasing the number of people contributing to the one voice as well



as making the voice louder and more easily heard by those making decisions. We are going back to the basics of what makes PTA unique.

We will be contacting units and councils throughout the state to see how we can better work together to improve education for every Wisconsin child.

I look forward to working with you in making waves of change for our youth.

Creating waves of change,

Kim Henderson

President,
Wisconsin PTA

Legislatively Speaking

Jill Gaskell, WI PTA BOD, State Legislative Chair

To receive
Legislative
Alerts
send your
email address
to:

[wi_office@
pta.org](mailto:wi_office@pta.org)

Budget cuts in education have been all over the news and political advertisements recently. There is a good reason for that. They were HUGE! The cuts amounted to \$1.6 billion, or more than 15% of the past education budget. This varies from district to district because of the property tax portion of each district's budget, but schools are really feeling the hurt.

On top of that, we are now finding out that several provisions of the budget bill lowered taxes on large corporations and banks. Between now and 2017, the corporate tax rate will drop from 7.9% to 0.4%. This report by Jack Norman of the Institute for Wisconsin's Future (<http://www.milwaukeeelabor.org/data/>

[news/IWFWhoDoesNotPayTaxe0July11.pdf](#)), says that the state will lose \$129 million in revenue yearly with this provision. Wisconsin is already 4th lowest state in the nation on taxation of new business capital investments. Currently, small businesses pay an unequal share of the business taxes because they don't make enough money to qualify for the tax loopholes that allow the big corporations to pay little or no taxes.

This bears the question "How can we invest in our schools if we don't bring more revenue into the state?" We need to have large

corporations and wealthy individuals pay their fair share in taxes in order for our state to be able to provide services to all of her citizens. Businesses in Wisconsin depend on schools to provide a skilled workforce. So they need to help pay for the education of that workforce.

Jobs and education go hand in hand. Without an educated workforce, there are not people to fill the jobs. And it takes educated people to create jobs, start small businesses and make innovations that build our economy.



PTA
Dues



Increase
to
\$5.25

Highlights from Orlando

Election of Officers

National PTA installed Betsy Landers as the association's 52nd President. At the 115th Annual Convention, held in Orlando this past June, delegates elected Otha Thornton as President-elect and Laura Bay as Secretary-Treasurer. Thornton becomes National PTA's first-ever male, African-American president-elect.

Delegates Vote on Topics Affecting Children

PTA members held debate and voted on the adoption of two

national resolutions. Sexting: Legal Consequences; and Head Injury Reporting.

Resolutions were proposed by PTA members and approved by the National PTA Board of Directors to be voted on by convention delegates. National PTA has adopted hundreds of resolutions and positions on a wide variety of education, health and safety issues since its first convention in 1897. Summaries of the resolutions can be found on the National PTA website at: www.pta.org.

Sexting: Legal Consequences. PTA will work with school systems and law enforcement to prevent kids from sexting by educating students and parents about the legal consequences.

Head Injury Reporting. PTA will educate families and school personnel about the seriousness of head injuries and the need to report them to families. PTA will also work with education agencies to establish communication procedures to contact families when a child injures their head at school

Dues Went Up, But...

Cyndi Barbian WI PTA BOD Membership Commissioner

At the National PTA Convention there was lengthy, sometimes heated debate resulting in a fifty cent dues increase which went into effect on July 1st.

This will impact all Wisconsin PTAs in several ways, but most the most attention-grabbing detail is that units will now be sending \$5.25 in to the State office for every PTA member (this is up from the four dollar and seventy-five cents that you previously sent).

This is an increase. It may cause some people to think twice about joining PTA. BUT... And there is always a "but."

When I met with the reactions from PTA members who had been following the vote from home and didn't hear too many happy comments, I decided to do a little research. This dues increase is the first in more than eight years, and all in all, you are still getting a tremendous bang for your buck.

But...to those who still find a reason to question a higher cost for PTA membership, think about this, \$5.25 is at least \$5.00 less than membership dues/fees for other organizations, including Rotary, Womens Club, Lions, service groups and most, if not all, political parties.

Spending \$5.25 for a PTA membership will be less expensive than a quart of custard, and much more beneficial to you kids! The dues paid by individual members takes nothing away from your unit or school treasuries. In fact, the money members spend to join can only help to strengthen the education experience of all children.

Please, let people know what value they are getting for their investment – invite everyone you meet to be a member of PTA and a voice for all children – do it today!

"This dues increase is the first in more than eight years..."

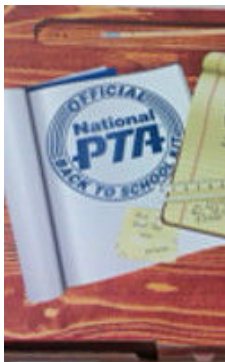
**Annual Form 990
Filing Requirements for Tax-Exempt
Organizations Forms 990, 990-EZ,
990-PF and 990-N (e-Postcard)**
<http://www.irs.gov/pub/irs-pdf/p4839.pdf>

*\$50,000 amount
will save many PTAs from
having to file this year!*



Back to School Kit

The Official Back to School Kit contains the PTA Quick-Reference Guides, membership posters, program and advocacy resources, tools needed for a successful PTA year.



Make sure your PTA gets these valuable resources. Register to receive your free 2011 – 2012 kit at PTA.org/OfficialKit.

PTAs must register to receive their kit for 2011-2012. The incoming 2011-2012 PTA president or other authorized leader will need to specify the unit's preferred shipping address and date. Kits will ship weekly starting July 1 through September 16, based on unit orders.

Please e-mail any questions to National PTA at info@pta.org or call (800)307-4782 ext. 3098

Please note: The address units provide on the kit registration form will be used one time only, for the specific purpose of shipping the Official Back to School Kit. The form will clearly state this and will inform units that they must complete all change-of-officer/address paperwork for the state PTA. The state PTA will still need to update unit records with the National PTA office to ensure that units get National PTA's other valuable mailings throughout the year.

"in the summer packet" to "on page 5"

Steps to Updating Bylaws

Ellen Chicka, WI PTA BOD Bylaws Chair



Is it time to update your bylaws? Have you given a copy of them to each of your board members? Knowing the rules and procedures of how your PTA will be governed makes everything run more smoothly and helps each of the officers to know what their jobs are. Summer packets will be coming out shortly, and included is a bylaws packet that shows when they are due to be updated, which is at least every three years for your PTA to be in good standing. If you do not have a current copy of your bylaws, you can contact the state office to obtain a copy of them.

The latest version of the local unit bylaws dated 7/11 and council bylaws dated 1/11 can be found on the website at: www.wisconsinpta.org. Click on the members only link on the left side of the home page, enter your user id and password (they can be found on the back of your membership card), and then click on the bylaws link. You can complete them in a Word format online, or print a PDF formatted copy and fill in the blanks.

Follow the simple instructions listed, and you will then be ready to vote on them at a regular meeting. Once ap-

proved at the local level, you'll need to send four copies to the state office for approval.

***Please note, National PTA did increase its dues by 50 cents, so the amount you'll be sending in for each member to the state office will be \$5.25. See the information in the summer packet that explains how to amend your bylaws to be collecting the increased amount from your members.

As always, if you have any questions, you can email or call the WI PTA office for more information.

"Just Between Friends is offered free to PTAs and parents in your school communities"



Communications Made Easy

You know how important communications are to growing your membership, engaging current members and retaining membership. That's why Just Between Friends, the official PTA communications and membership management system, has built a robust communications module. There's no need to pay for email services because Just Between Friends is offered free to PTAs and parents in your school communities. And, unlike email services and listservs, with Just Between Friends when you send out notices and deadlines, you can send automatic reminders.

Just Between Friends has an email template library for you to choose from. Plus, you

have the ability to insert your PTA logo, our state PTA logo and your school colors. It's as easy as browsing for your images, uploading them and selecting colors.

Need to attach forms, flyers or newsletters to your email? That's simple with Just Between Friends. When you send emails you can attach files of the most popular formats.

Sending emails about events and deadlines using Just Between Friends? Events and deadlines automatically appear in the recipient's email in-box, on their personal start page and on their customizable calendar. So, your single email reaches them three times. You'll never have to hear, "I didn't see that email!"

again.

In June, Just Between Friends presented a workshop and several labs at the 115th National PTA Convention and Exhibition and showed how easy it is to communicate using the system. If you didn't have an opportunity to attend the convention, please visit www.LearnJBF.com where you can discover how to use the communications module. Don't delay – you can begin communicating efficiently today!

If you're not using Just Between Friends, it's easy to get started. Visit www.JustBetweenFriends.com/PTAquickstart to enter your unit. If you have questions, click on **Contact Us** and a Just Between Friends Customer Support Representative will promptly help you.

Changing Your Local Unit's Dues

The raise in National PTA dues that was voted on, and passed, during the National PTA convention this past June, may possibly affect the amount of local dues you collect for your PTA/PTSA.

Check your current bylaws, Article VI to see if there is a provision as to how the amount of local dues collected will be decided and if there is a dollar amount listed.

- If there is a provision listed you must follow this procedure to decide whether to raise your local dues and by how much.
- If there is not a procedure for changing dues in your bylaws, there must still be a vote by either the executive board or the general membership to change your local dues.
- If there is a dollar amount listed for local dues collected, you may have to amend your bylaws.

Examples

Many units collect \$5.00 for dues. \$4.75 is sent in to the state and the unit keeps \$.25. You now must send in \$5.25, so the amount you collect must be changed.

- If there is no dollar amount listed in your bylaws, you can change the amount collected without amending your bylaws.
- If you have \$.25 in your bylaws as the amount of local dues:
 - * If you raise the amount collected to **\$5.25** so that the unit no longer keeps any

dues, you must amend your bylaws to delete that provision.

- * If you raise the amount collected to **\$5.50**, the unit will still keep \$.25 and your bylaws will not need to be amended.
- * If you raise the amount collected to **\$6** to keep the dollar amount even, the unit will now keep \$.75 and you must amend your bylaws to raise the local dues amount from \$.25 to \$.75.

If you collect over \$5.25 in dues, you must decide whether the unit will keep less than it did in the past or whether you will raise your dues. The same procedures outlined above apply.

Amending PTA/PTSA Bylaws

- Follow the regular procedure for amending bylaws (check your bylaws).
- You only need to present the single amendment to your membership.
- Change that one provision in your bylaws.
- On the signature page write, "Article VI amended and approved by membership on (date approved)." Have both the president and the secretary sign underneath.
- Make four copies to submit to Wisconsin PTA – remember to make a copy for the unit to

keep

- Include the amendment on a separate piece of paper and note that this was the only thing changed.
- The bylaws reviewer will only review/approve that one amendment.
- The date of your next revision will not change.
- If your bylaws are due to be revised soon, you may just want to go through the revision process early.

Addendum to Local PTA/PTSA Bylaws

A National PTA dues increase was approved by delegates to the 2011 National PTA Convention, raising the National portion of dues from \$1.75 to \$2.25. The following must be included in all local unit bylaws under #Article VI: Membership and Dues to replace the current Section 4a:

Article VI: Membership and Dues

Section 4a: Such annual dues shall include the portion of two dollars and twenty-five cents (\$2.25) per member payable to National PTA.

Please attach this addendum to your current bylaws and be sure to include the addendum when making copies for your PTA/PTSA's officers and members of your board.

“You only need to present the single amendment to your membership”

Now What?



So, your year as Treasurer is over. The bills are paid. The vouchers are filled out. The bank statements are balance. Your financial statements are filed. Now what needs to be done?

All of the items above need to go to the auditing committee. The committee is set-up per your bylaws. The treasurer should not participate in the audit, but should be available to answer questions by phone.

Audit Procedures:

- Start with the Statement of Audit – fill in line J from last year to line A of this year or the beginning checkbook balance which should be the same.
- Check to see if the bank statements have been reconcile by the Treasurer.
- Make sure each check has a voucher with a receipt showing reason for disbursement and signatures or the person requesting the money and the president
- Make sure the check was recorded to the right budget area especially State and Local PTA

Membership Fees.

- Do the same for deposits too.
- Check off each check/ deposit in the checkbook has you have reviewed them for simplicity purposes.
- If you find errors, have the treasurer correct them and then draw a line under the last entry made in the checkbook.
- After all is reviewed, you will need to fill out the Statement of Audit.
 - * Line B – add up all deposits for the year and enter amount on line
 - * Line C – add line A and B and enter amount on line
 - * Line D – Add up all the checks written and other fees deducted from the checking account and enter on this line.
 - * Line E- Take figures in line C subtract line D figure and enter difference on line E
 - * Line F -- Enter your bank balance on the bank statement for the end of the year.
 - * Line G – Fill out the checks that have not

Linda Dubiak, WIPTA Treasurer

been cashed by the bank list. Enter the total amount on line G.

- * Line H - If you have deposits that have not been recorded by the bank, enter on this line.
- * Line I – Take line F less G plus H and enter the total on this line.
- * Line E and Line I should be the same.

The audit is then presented along with the annual report at an executive board meeting and again at the first general meeting of the year.

Copies must also be sent to the state office and needs to be received in the office by November 1st signed by the Secretary, President and Treasurer.

If you are having problems with your audits, please contact your Region Advisor for assistance or direction.

Other members of the Wisconsin State PTA Board of Directors are always willing and available to help you in any way they can.

PTA Units

**“In
Good
Standing”**

**Must have
an Audit
Filed
on/before
November 1st**

It Is a New Year for Your PTA

By now, these tasks should have been completed:

- The 2010-11 Treasurer has written an annual report.
- The 2010-11 Treasurers has given the books to the auditor or auditing committee for the annual audit.
- The audit report form and instructions can be found in the Treasurer's Handbook and online at www.wisconsinpta.org.
- The signatures on the accounts have been changed for new officers who have come into office.
- 2011-12 treasurer has possession of all financial documents except for those still with the auditor.
- The Wisconsin Certificate of Registration to Solicit funds has been renewed – due July 31.
- If you don't know if your PTA is registered with the state, you can find that out at: <http://online.drl.wi.gov/LicenseLookup/OrganizationCredentialSearch.aspx>
- Your budget committee has met and prepared a proposed budget based on the goals of the PTA
- The treasurer of the ending year is responsible for arranging the meeting time and place, preparing budget worksheets for the meeting, bringing reference documents and presiding at the meeting.
- The budget committee is usually appointed by the board and is generally made up of an odd number of people with a mix of officers and committee chairs and possibly the principal and/or teacher representative
- If the budget committee was not made up of the executive board, the budget must next be presented to the board. The board has the opportunity to make amendments. Then the proposed budget must be presented to the general membership for approval, where it can again be amended.
- Once the proposed budget is voted on by the committee or the board, it cannot be changed prior to presenting it to the next level without the approval of the appropriate voting body. The budget must be posted prior to the general membership meeting and receive a majority affirmative vote of the general membership present or if not posted, receive a 2/3 affirmative vote of the general membership present in order to pass.
- The treasurer is responsible for preparing a proposed budget document to be presented to the general membership for approval. This document generally only contains the previous year's budget and actual, the proposed budget as approved by the committee/board and a blank column in case there are amendments at the general membership meeting. If it is a transitioning year, this job should be given to the incoming treasurer.

Upcoming tasks and deadlines:

- Filing an annual report with the IRS
 - * If the gross income is under \$50,000 file form 990N, over \$50,000 file

form 990EZ and Schedule A.

- * Even though the return is not due until November 15, it is the responsibility of the treasurer of record during the period being reported to file the return.
- * However, if that person does not complete this task, the responsibility falls to the current treasurer.
- Filing an annual report with the Wisconsin Dept. of Regulating and Licensing
 - * Details for accomplishing this can be found at: http://drl.wi.gov/prof_docs_list.asp?profid=85&locid=0
 - * Due date is November 30.
- Renewing and paying insurance policies
- Submit a copy of your audit to Wisconsin PTA by November 1st.
 - * This must be done in order to keep your unit in good standing status.
 - * A unit must be in good standing to receive resources, awards or participate in National and State PTA programs
- Submit at least the first portion of membership dues to Wisconsin PTA by November 1.
 - * This must be done in order to keep your unit in good standing status.





everychild.one voice

Wisconsin PTA
4797 Hayes Road, Suite 102
Madison, WI 53704

Phone: 555-555-5555
Fax: 555-555-5555
E-mail:

Reminder to PTAs:
Update Board Rosters
with all:
Additions, Deletions
or Changes
throughout the year!



WI PTA Calendar

July

29-31 WI PTA Board of Directors Meeting, Madison, WI

September

5 WI and National PTA offices closed ~ Labor Day
14-16 WASDA Conference, Madison
30 Back to School award deadline

October

15-16 WI PTA Board of Directors Meeting, Site TBD
26-28 AWSA Convention, Wisconsin Dells

November

1 First installment of dues & Audit due to WI PTA office
M,O.R.E. & Student Shout Out awards due to WI PTA office
11 National PTA offices closed ~ Veteran's Day
15 IRS Annual Return due
24-25 WI and National PTA offices closed ~ Thanksgiving

Take Note

Disability Awareness Curriculum

Easter Seals has created an updated, on-line version of its disability awareness curriculum for elementary students.

Friends Who Care helps students learn what is involved when someone has a disability and how kids with disabilities adapt to live life, go to school, make friends, and play. The program encourages typically developing children to accept their peers with disabilities as people first, and to find ways to include everyone in school and after-school activities.

Originally developed in 1990, the curriculum explores a range of disabilities and includes specially-crafted learning activities, hands-on exercises, guided discussions, and guest guidelines. It includes a new section on autism, ADHD, and intellectual disabilities. The fun and colorful components can all be downloaded separately for use at home or in the classroom.

www.easterseals.com/friendswhocare