

Report Topics

- Leadership Training
- Convention Evaluation Winners
- Membership Information
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- National PTA® Healthy LifestylesSM Grants
- Good Standing Requirements
- Convention Workshop Presentations and Photos
- NOTICE: Local Unit Highlight Section Addition
- Worldwide Day of Play
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**2011 Convention
Overall Evaluation
Drawing Results**

Brenda Lambertus,
Stetson Hills PTSA:
Challenger Space Center
Field Trip for one class

Candice Wright,
Corte Sierra PTSA:
Hilton Phoenix
East/Mesa, 2 night stay

Congratulations to
Brenda and Candice and
thanks to everyone who
provided the valuable
feedback to help us bet-
ter serve you in your
training needs.

A Word from the State Office

**From Your President,
Rochelle Wells**



The start of this new school year renews our hopes and dreams for our children and our PTA's. For over 115 years, PTA has been the voice for children by working with families, schools, and communities to ensure that all children will reach their potential. At this year's National PTA convention, Betsy Landers, National PTA president, told the delegates that if we are in doubt, to stick with the mission of PTA. The mission of PTA is to be: a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child. Arizona PTA's board of managers is committed to assisting your PTA to achieve this mission and your PTA's goals. Please contact us!

**Congratulations New State Officers
2011-12**

Congratulations to the new officers that took on their roles effective July 1st. The State organization will be led by Rochelle Wells with the assistance of officers, Grace LaMoureaux, Vice President, Cristina Hite, Secretary and Treasurer, Fuji Vorseth. They all look forward to serving you and offer their assistance in whatever is needed. Their contact information is posted on the Arizona PTA website. Also check the website for the full list of officers and their various roles.

Leadership Training

The Leadership Team will be traveling to all Arizona regions in July through September to provide training. If you have new board members that were unable to attend convention, or just want to get a refresher before the new school year, consider attending. It is important to stay on top of the latest tips, techniques, tools and information. The training is a "mini" convention of PTA Basics and officer training presentations. Advance training courses will also be available. Remember to include Officer Training in your budget. This is a PTA legitimate allowable expense.

The registration form is available to download from the www.azpta.org website.

Current Remaining Schedule:

- **August 20 - Prescott**—Abia Judd Elementary School, 1749 Williamson Valley Road, Prescott, AZ 86305 - 9:00 am to 1:30 pm
- **August 27 - Phoenix** - Deer Valley Unified School District, 20402 N. 15th Ave., Phoenix, AZ 85027 - 9:00 am to 1:30 pm

If you are interested in hosting a training in your region, contact Cristina Hite at secretary@azpta.org.

**DON'T FORGET TO SHARE THE
INFORMATION FROM THIS
MAILER WITH THE OTHER
MEMBERS OF YOUR BOARD.**

Official Back to School Kit—Available Online



All local, council, district, and region PTAs must register to receive their Official PTA® Kit. The incoming 2011-2012 PTA president or other authorized PTA leader must fill out the registration form to select the preferred shipping address and date for the kit. The order form will be available through September 16, and kits started shipping weekly in late June. For more details, read the kit FAQs on the National PTA website at <http://pta.org/3104.asp>.

The National PTA Official Back to School Kit is available exclusively to PTAs that submitted

Unit Requirements and Program Deadlines

1. ****Liability & Bonding Insurance** is due into the State office. Remit \$150, which includes the \$25. Late Fee. Your current coverage expires August 31, 2011. Remit now. Some AIM requirements to remember:
 - Dual, unrelated signatures are required on all outgoing checks
 - No pre-signing of checks
 - There will be a monthly bank reconciliation performed by an association's officer who does not have authorization to sign checks. (This warrant forces discovery of deposits that have not been made, from accumulating over a period of months or years.)
1. ****Unit 2011-2012 Officers List** is due to State office and new Officers will assume their duties for the 2011-2012 term on July 1.
2. ****Outgoing Treasurers** should have compiled the past year's financial records and performing a financial review that is signed off by non-signer members. A copy of the report should be submitted to the State office once completed. Sample review forms can be found in Money Matters. It has many good tips and sample worksheets that can be used. Please feel free to save a copy onto your hard-drive for your use.
3. ****Though the IRS 990 form** is not required until November, this is a good time to complete and submit it, also providing a copy for the state office. Review the Treasurer Report section of this News Report for specific details.
4. ****Membership Dues** as previously communicated have been increased by .50 effectively immediately for the 2011-12 membership term to the amount of \$4.50 per member. You may report and pay dues monthly, however the first requirement period is November 1, 2011. Forms can be downloaded from the Members Only section of the Arizona PTA website.
5. **National PTA® Healthy LifestylesSM Grant** deadline is September 2, 2011. Check out the article contained within for details.
6. **Reflections Program**—designed to enhance rather than replace a quality art education, this program provides opportunities for students to express themselves and to receive positive recognition for their artistic efforts. The 2011-2012 theme: **Diversity Means...** Students in preschool through grade 12 are encouraged to create for fun and recognition in six areas: dance choreography, film production, literature, musical composition, photography and the visual arts (includes drawing, painting, print making, and collage). Watch for more details for the kickoff event, "Start the Art" Week in October.

**** Requirements to be in Good Standing.**

Worldwide Day of Play—September 24, 2011

National PTA® and Nickelodeon are also collaborating on **Worldwide Day of Play**, an initiative that encourages kids to go outside and play. On September 24, Nickelodeon will suspend all programming and go dark all afternoon. On this day, thousands of schools and community organizations will be hosting events engaging kids in physical fitness around the world. In 2010, more than 100 PTAs held events and activities to encourage families to be active together.

When you plan that special event to promote active and healthy play, make sure to capture those events to share the ideas and photos. Perhaps your event is a neighborhood day at the park with organized areas for board games, craft stations, the old fashion sack race, jump rope or water relay. Turn off that television set, get out of bed, put away that i-pod and get physically active. Encourage PLAY on Saturday, September 24th!

My name is Fuji Vorseth and I have around 8 years experience in my local unit in Mesa, and decided to join Arizona PTA to get more involved in the "bigger picture". My email is treasurer@azpta.org. Please feel free to email me at any time with questions. I will try my best to respond back within 48 hours of your email.

The following are points of information regarding various financial topics:

Tax Returns due November 15, 2011: Federal & State

Local PTA units have a fiscal year of July 1 through June 30. This is what is stated on page 11, Article XIV of the AZ PTA Unified Local Unit Bylaws. Therefore, the deadline for filing your tax return is November 15 of each year. The tax return that is required to be filed by a tax-exempt corporation is (1) either the IRS Form 990, 990EZ or 990N postcard and, (2) the related AZ Department of Revenue Form 99.

For example, for the fiscal year that just ended: July 1, 2010 through June 30, 2011, if your gross receipts are normally (generally an average for past 3 years) equal to or less than \$50,000, a local PTA unit can file the IRS 990N postcard. You may voluntarily file an IRS Form 990 or 990EZ, but you are eligible to do the postcard 990N. This is generally done through the IRS website: www.IRS.gov

If for the fiscal year, your gross receipts are between \$50,001 and \$200,000 and your total assets are less than \$500,000, a Form 990EZ (or Form 990) may be filed. When your gross receipts are equal or more than \$200,000 or your assets are equal or greater than \$500,000, the local unit is required to file the Form 990. The forms and instructions can be found on the IRS website.

Arizona PTA uses the services of a CPA to prepare this tax return. Her name is Carolyn Sechler, CPA and she specializes in non-profit/tax-exempt tax compliance. She may be contacted if you prefer to have a CPA prepare your unit's return for a fee. Her website is www.azcpa.com.

A little background: Beginning in 2008, the IRS announced that they were having every tax-exempt organization file something with them as evidence of its continuing basis for tax exemption. Therefore, there are a few Local PTA units that are working on catching up their annual tax filings and the AZ PTA is working with them to get this done efficiently. National PTA has provided excellent guidelines for us to follow.

Please remember, the Form 990s and the IRS exemption letter are public documents and must be available to the public for a period of three years. Copies must be provided without charge, other than a reasonable fee for reproduction and actual postage costs, to any individual who makes a request for such copies in person or in writing. You can find a copy of the AZ PTA IRS exemption letter on our website: www.azpta.org. Go in the Members Only section to get a copy. (I keep a copy of this at the school's front office, so that it is convenient for anyone to review these documents.)

Budgets

Your Local Unit budget expresses the organization's policies in financial terms that are then translated into specific types, qualities, and amounts of services in order to achieve the organization's objectives and mission. The budget serves as a tool/guide for measuring a local PTA unit's success in acquiring and allocating resources. Regularly issued financial statements from the treasurer can be measured against the budget to identify areas needing attention. Examining last year's budget to see how a local PTA unit did can help in developing this year's budget and also gives the unit the opportunity to evaluate if it wants to continue with a project or program.

Please remember, the budget is a guide for the year. Ideally, the treasurer should suggest the budget. The Board reviews it and makes any changes before presenting it at a General Meeting with PTA members for vote of approval. Be prepared for questions and suggestions before final approval. Note, changes can be made to this budget; however, they need to be approved by a majority vote at a General Meeting. You might want to include some general line items so that special requests may fall into.

Also, remember to include PTA training in the budget, if it allows. Arizona PTA has an annual conference in late May, early June where we host at least 50 vendors from around the valley and many breakout sessions applicable for each board member type. Remember to include any "summer expenses" that next year's board members may incur such as a welcome back meal for the teachers (since this occurs prior their General Meeting where this expense can be approved).

PTA Money Matters on AZ PTA website

Arizona PTA has guidebooks for every board member position. The one for the Treasurer is called Money Matters; it has many good tips and sample worksheets that can be used. Please feel free to save a copy onto your hard-drive for your use.

Introducing McDonald's® McCafé® Meetings and Open Door Tours

PTA Chapters, want to "perk up" your monthly meetings? McDonald's will treat your group to FREE McCafé Coffees when you hold a meeting at your local McDonald's restaurant. McDonald's is also inviting PTA members to experience an Open Door Tour. You will receive an exclusive behind-the-counter look at how McDonald's serves up historic favorites, sample the latest menu items, including new McCafé products and learn how McDonald's Ingredients go from farm to table.

To book your meeting at a McDonald's restaurant, call Rhonda Grundemann at 602-739-8810 or email rhonda@grundemanngroup.com.

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New Feature—Local Unit Highlights

A section of this quarterly News Report will be dedicated to Local Unit News. We would love to share your successes, ideas, questions and any programs for others to view. Submit your articles, photos, information to post to the Local Unit Highlights page by November 1 to be in the next publication. Mark your calendars now to submit material for the Winter edition.



PHOTOS, PHOTOS, PHOTOS! Check out the 2011 Convention Highlights section of our website or the Arizona PTA Facebook page to view and obtain copies of great photos taken by our convention photographer, Lifetouch. Frame that memorable occasion of your unit in General Meeting, in a training session, at the award breakfast, in the exhibition hall or on the Disco dance floor.

**Just Between Friends –
Communicate. Manage Membership. Earn Revenue.**

Anne Gabriellini—Membership Chair

Just Between Friends is available to all units in our state **free of charge!** Take advantage of the opportunity to use this online system to grow and strengthen your PTA. With Just Between Friends, you can communicate with your entire school community; manage membership; create paper or online directories; earn non-dues revenue; and manage volunteers – all on a private, secure system. You can read Just Between Friends strict privacy policy by visiting www.JustBetweenFriends.com.

It's easy to enter members into Just Between Friends. There are three methods: member self-entry, individual manual entry, and spreadsheet upload. Once your members are entered, it's time to begin communicating with them. Just Between Friends has an email template library for you to choose from. When sending emails, you can attach files of the most popular formats. And when you send notices or deadlines, the system will send automatic reminders – **all at no cost to your unit!**

Parents will want to join your communications group in Just Between Friends to keep informed about what's happening at your school. If parents have children in one or more schools that use Just Between Friends, they only need one household account to receive communications and see events and reminders posted to their start page and calendar from all of the other communication groups they've joined. This makes it so easy for parents to manage their family's schedule.

If you'd like a single sheet flyer to distribute to parents that presents the benefits to them of joining your communications group in Just Between Friends, please contact Fran Lytle fran@mailjbf.com.

Your unit will enjoy another great benefit when you use Just Between Friends for communications – **revenue share**. Please contact your PTA/Just Between Friends liaison to get all the details about revenue share (412-561-0500 x 1203).

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

Then, learn how to use the system by visiting www.LearnJBF.com. Here you'll find lots of "How-to" information. Plus, you'll see a training webinar schedule. Sign up for as many webinars as you'd like – it's a fun and easy way to learn how to use the system.

12 in 2012 Membership Campaign

Anne Gabriellini—Membership Chair

We are excited to announce a special Membership Campaign for Arizona: 

If each PTA in the state enrolled **12** new members, the Arizona PTA would achieve an immediate membership increase to over 24,000 members strong statewide.

Each PTA that increases its membership by at least **12** members and has paid for those members by March 1, 2012 will be given special recognition at the State PTA Convention in June 2012.

How can you increase your previous year member total? Consider adding more teacher members, staff members, and community members – ask grandparents, family members, school board members, local government official—whoever you decide to invite to join your PTA – **Just Ask!**

This recognition program will be tallied by the Arizona State PTA office – no application process is necessary. Simply add **12** new members to your 2011 - 2012 membership totals and you will receive special recognition at the State Convention in 2012.

If you have questions regarding this statewide membership program, please contact Anne Gabriellini at membership@azpta.org.



PTA's National Standards for Family-School Partnerships

Building Family-School Partnerships for Student Success

Now that you have started the year to execute your individual unit missions, hopefully expanding family involvement is one area of focus. The PTA National Standards for Family-School Partnerships provides a framework for strengthening family engagement programs, activities and policies. Based on evidence-based research, the PTA National Standards shift the focus from what schools should do to involve parents to what parents, schools, and communities can do together to support student success.

Standard 1: Welcoming all families into the school community—Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

Standard 2: Communicating effectively—Families and school staff engage in regular, meaningful communication about student learning.

Standard 3: Supporting student success—Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

Standard 4: Speaking up for every child—Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

Standard 5: Sharing power—Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.

Standard 6: Collaborating with community—Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

For more information about the National Standards and PTA programs that promote family-school partnerships, visit www.pta.org.

Welcome New PTA Units!

Inspire PTSA, Phoenix
Sonoran Heights PTA, Surprise
Western Peaks PTSA, Surprise
Utterback PTA, Tucson
Quartsite Elementary School PTA, Quartsite



Safe Routes To School - national school bike helmet scientific study --

your participation requested

Richard Perry, Health & Welfare Commissioner

The National Institute of Child Health and Human Development is offering a grant for participation in a scientific school bike helmet study. The project goal is to create and evaluate an online program to teach bike and pedestrian safety to middle school students and their parents. The program is short, highly engaging, and teaches kids how to avoid common crash situations. Traffic accidents are a leading cause of death and disability among kids this age, and the overarching goal of this research is to lower those statistics.

They are looking for 40 middle schools to evaluate the program. Each school would receive up to \$3,000 for participating. To receive this compensation, schools will be asked to have students who ride bikes to school view the program (about 30 minutes) and take three surveys over the course of three months. These students' parents will also be asked to view a short program and take one survey. Additionally, a researcher will be observing helmet use over three 1-week intervals, but this is planned so that it will have minimal to no impact on school routine.

Interested in this opportunity, contact Brian Fellows, Safe Routes To School Program Coordinator, Arizona Department of Transportation, at (602) 712-8010.

National PTA® Healthy LifestylesSM Grants

Richard Perry, Health & Welfare Commissioner



**Apply for the National PTA® Healthy LifestylesSM grants today!
National PTA will award up to 10 grants of up to \$1,000 each!**

National PTA Healthy Lifestyles Program promotes good nutrition and regular physical activity in order to address the nation's childhood obesity epidemic. One-third of American children are either obese or at risk of becoming obese. Increased access to high-calorie good-tasting, inexpensive foods, along with increasingly sedentary lifestyles, has contributed to the rise in childhood obesity. The reduction and elimination of recess in as many as 40 percent of U.S. school districts has limited students' physical activity during the school day. Furthermore,

PTAs can play an important role in increasing physical activity and improving nutrition in the school community by engaging families, teachers, administrators and students in programs and activities that encourage the school community to be active and to eat healthier foods.

National PTA's Healthy Lifestyles Program is sponsored by [Malt-O-Meal®](#), a Proud National Sponsor of National PTA. Questions about the grant, the application, or funding decisions should be directed to National PTA's Healthy Lifestyles Program Specialist at HealthyLifestyles@pta.org or (800) 307-4PTA (4782).

Go Active! Academic Award Program



2011 Go Active Grant winners at PTA/PTSA Schools are:

| | |
|------------------------------|--------------------------|
| Aguilar (Tempe) | Ashton Ranch (Surprise) |
| Canyon Rim (Mesa) | Country Place (Tolleson) |
| Islands (Gilbert) | Paseo Hills (Phoenix) |
| Park (Holbrook) | Pine Forest (Flagstaff) |
| Santa Fe Elementary (Peoria) | Villa de Paz (Phoenix) |

NEW Web Site

www.azpta.org

We are here to provide support, training, networking and assistance with all your Arizona PTA needs. On this new web site you will find:

Forms & Reports
Bylaws & Standing rules
Workshops
Legislative updates
FAQ
Directory to AZ PTA Board of Managers
Programs
Safe practices
Convention Updates

Scholarship Applications
Event dates
Duties of Officers
PTA Newsletter
Grant applications
Reflections
Resolutions

Password for Members Only section is on the back of your membership card. Don't have your card, email any board member for the details.

And much, much more.

ARIZONA PTA
EVERYWHERE

Follow Arizona PTA on Twitter!



www.twitter.com/arizonapta

We have our own YouTube channel!



www.youtube.com/user/ArizonaPTA

We are also on Facebook too!

facebook

www.facebook.com/pages/Arizona-State-PTA/100700791365

Address Correction Requested

If you are no longer a PTA President, please forward this and all mailings IMMEDIATELY to your successor and forward the current President's name and address to the Arizona PTA Office.

Want to Advertise in the Arizona PTA News Report? Contact Grace LaMoureaux at vicepresident@azpta.org for ad rates and information!