

Leadership Essentials

California State
PTA
everychild. onevoice.

September 23, 2020



In This Issue:

- Announcing the "Leadership Monthly"
- New Census deadline
- "MyPTEZ Made Simpler" webinar recording now available
- What's the name of my PTA?
- Read the CCEE and PACE reports on school reopening and distance learning
- November election updates
- SB 793 statement
- Phishing scam warning
- Service Mailing reminder

Para leer en español, [clic aquí](#).

ANNOUNCING THE "LEADERSHIP MONTHLY"

The Leadership Team at California State PTA will be hosting a **monthly call for local leaders** where we discuss timely, hot topics, then open the call up to questions you may have.

Our first call is **Tuesday, September 29th at 7:00 pm**. Topics we will cover include approvals at the beginning of the year, compliance requirements, recruiting volunteers, and taxes.

Please use the following link to register:

https://docs.google.com/forms/d/e/1FAIpQLScW_s8Glg7ml1C4tj9pD8ydvgnNNrYXkleu_vjKxgwucvvcg9A/viewform?usp=sf_link

Once you register, you will get an email with a link for the Zoom meeting. We hope to see you there!



NEW CENSUS DEADLINE

Due to the pandemic and its effect on census operations, the U.S. Census Bureau has moved the deadline to complete the 2020 Census forward to **September 30th**.

United States
**Census
2020**

If you haven't already, we encourage you to [complete your census form](#) before that date to ensure you are counted! It's important that everyone in our communities is counted, so that we don't miss out on critical funding. To learn more about how to complete the census and how it impacts the distribution of funds to the state, [click here](#).

Just five minutes of your time will impact our state for the next 10 years – so participate in the Census today!

"MYPTEZ MADE SIMPLER" WEBINAR RECORDING NOW AVAILABLE

Were you unable to attend the "MyPTEZ Made Simpler" webinar on August 25? If so, you can watch a recording of it on the California State PTA website.



During this webinar CSM, the creator of MyPTEZ, and members of the Leadership Services Commission covered both the basics of MyPTEZ and more advanced topics, including deposits and check writing, reporting options, Bank reconciliations, Uploading documents, Accounting for income from third-party systems like PayPal or Square, and handling fees related to donations.

[Click here](#) to watch the recording, see the presentation slides, or learn more about MyPTEZ.

WHAT'S THE NAME OF MY PTA?

When you're filling out bank, tax or grant forms for your PTA, you might be stumped by the very first question: what's the name of your PTA?

Is the answer:

- A) PTA California Congress of Parents, Teachers, and Students, Inc.
- B) The name on the cover of my unit's bylaws
- C) A combination of A and B
- D) All of the above



The answer is **D, all of the above**. Which name you should use depends on which tax form you are filing, what requirements your bank has, and the requirements of other organizations/businesses (matching grants, restaurants, etc.)

Today, we'll answer the question "what's the name of my PTA" as it relates to **tax forms**.

- With the **IRS**, all PTAs in California have the official name of "PTA California Congress of Parents Teachers & Students Inc", but each PTA has its own Employer Identification Number (EIN) and is its own separate legal entity. On the IRS 990N, 990EZ, or 990 your unit's name should be **PTA California Congress of Parents Teachers & Students Inc dba [the name on the front of your bylaws]**. (Note: dba = "doing business as")
- The state of California decided that it made no sense to have more than 3000 PTAs with the same name. When you file returns with the **Franchise Tax Board** (199N or 199) or with the **California Attorney General** (RRF-1 or raffle permits) it is important to use the **name on the front of your bylaws** as your unit's official name.
- **Important note concerning the Franchise Tax Board:** Using the wrong name on FTB forms frequently causes your filing to be rejected or misfiled. Late or missing FTB filings may result in your PTA losing its tax-exempt status in California. Please do **NOT** use "PTA California Congress of Parents Teachers & Students Inc" for the FTB or AG. You must use the PTA name shown on the front of your bylaws for ALL filings with

California government agencies. Many accountants/tax preparers use software which will automatically fill in the name that matches the EIN in the IRS database. Make sure your tax preparer has the correct name on the 199 before e-filing, or if you are mailing the return, please cross out "PTA California Congress of Parents Teachers & Students Inc" and change it to the name on your bylaws.

READ THE CCEE AND PACE REPORTS ON SCHOOL REOPENING AND DISTANCE LEARNING

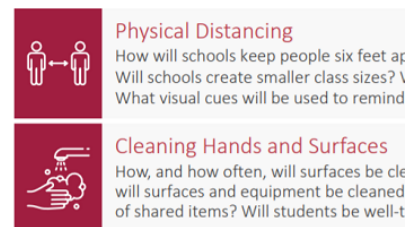
Educators, parents and families are facing uncertainties and competing priorities as they weigh the risks and benefits of opening school campuses, supporting distance learning, or using a hybrid strategy. What do we know about COVID-19 at this point? How can we optimize physical safety in schools? What can we do within our communities to minimize transmission? How can we ensure learning whether schools are physically open or closed? What can schools do to help meet the social-emotional needs of students? These are just some of the questions schools need to address as the school year begins.

California State PTA and our partner the California Collaborative for Educational Excellence (CCEE) held a series of [listening and networking sessions](#) in May and June to learn more about what was going on across the state with families and schools. We compiled [this report](#) which analyzes the lessons learned from the three sessions.



Additionally, Policy Analysis for California Education (PACE), in cooperation with California State PTA, produced "Navigating the Uncertainty of Reopening Schools: A Guide for Parents, Families and the Public." [This report](#) summarizes the current state of knowledge about key issues, and suggests a set of questions that parents and educators should ask when considering plans for reopening during the pandemic. [This summary infographic](#) serves as a valuable handout for community discussions.

The PACE report details families' experiences during the first months of the pandemic, and identifies available resources to address the needs of parents and families. It also summarizes key take-aways for schools around decision making in distance learning and the safe reopening of schools.



California State PTA encourages the wide distribution of these important sources of information to families, school leaders and communities.

Please also visit our [COVID-19 Resources for Parents, Families and Educators page](#) for additional resources.

NOVEMBER ELECTION UPDATES

Just a reminder that the November 3 election is fast approaching, so if you haven't registered to vote yet, now is the time! The last day to register to vote in the General Election is **October 19**. You can register online at the [California Secretary of State website](#). If you are already registered, you can visit this site to check your status and make any changes needed. You will also find plenty of information about the upcoming election. Check with your county registrar of voters for information about elections for local offices such as school board and city council.

California State PTA supports Propositions 15 and 16. Prop. 15 will change the way commercial and industrial real estate is taxed, while protecting all residential properties. It will raise as much as \$11.5 billion in additional revenues for schools and other local governments. Prop. 16 will repeal a previous proposition and allow the use of race, gender, and ethnic diversity as factors (but not decisive factors) in public education (including college admissions), government hiring, and government contracting.



For information on both measures, go to <https://capta.org/focus-areas/advocacy/state-ballot-measures/>

Click the image below to watch a short video made by Shereen Walter, our Director of Legislation, and Carol Kocivar, our Legislative Advocate, about why PTA supports Propositions 15 and 16:



Be an informed voter! Here are some non-partisan websites to use and share:

- **Voter's Edge:** <https://votersedge.org/ca>
- **Find your state legislators:** http://www.legislature.ca.gov/your_legislator.html
- **Information about campaign contributions:** <http://powersearch.sos.ca.gov/>

STATEMENT ON SB 793

Thanks to the efforts of the California State PTA and a broad coalition of health organizations and local municipalities, California just outlawed the sale of flavored tobacco products. This includes products for vaping. And it's not just for kids. This bill, SB 793, bans all sales – including sales to adults.



To read our official statement about this legislative victory and the role California State PTA played in it, [click here](#).

PHISHING SCAM WARNING

Beware of "phishing" scams! If you receive an email requesting money transfers or gift cards that looks like it comes from a board member, proceed with caution. Scammers are really good at finding data online about our PTA boards, then using it to try to convince you to wire money or purchase gift cards. They may also ask you to send them the gift card information, including authorization codes.

If you get such a request, always verify by sending a completely new email (do not reply to the original email), to the person in question, in order to find out if they are actually requesting money from you. And please remember, PTAs cannot purchase gift cards! This could save your PTA or one of your volunteers a lot of money.

Always check things out! You can never be too cautious.



SERVICE MAILING REMINDER

If you haven't already gotten a copy of the summer service mailing, here's a reminder of the four ways you can get it:

- Download a PDF copy directly to your computer
 - [Click here](#) for the **Leadership Made Easy** packet
 - [Click here](#) for the online magazine, "**Running Your PTA...Made Easy**"
- View or download just the parts you need, when you need them, on our [Service Mailing web pages](#)
- Request a hard copy be mailed to you by completing our [online request form](#)
- Request a hard copy from your District President



TAKE ACTION!

Check Out TOTEM's New U/C/D Lookup Feature



The TOTEM electronic membership system recently rolled out a new directory feature that lets you easily look up any district, council or unit, anywhere in the state.

TRY IT NOW

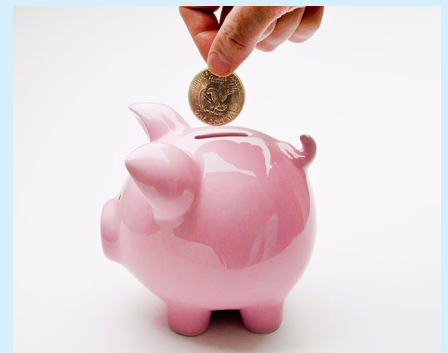
Tell Us Your Arts Success Story



Whether you started an arts club at your school, raised funds for arts programs, or voiced concerns about arts education to your school board, we want to hear your story.

SHARE NOW

October 1 Deadline For Scholarships and Grants!




Did you know you can apply for a continuing education scholarship for yourself, or a program grant for your PTA? Don't wait – the October 1st deadline is fast approaching!

LEARN MORE

This email is being sent to all unit, council and district PTA leaders.

This message was sent to officeassistant@capta.org by californiastatepta@capta.org
2327 L Street, Sacramento, CA, 95816

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