

# ALASKA PTA Training Moment

***MAY TRAINING (END OF YEAR)***

**Alaska**  
**PTA<sup>®</sup>**  
**Chartered 1957**

## ■ New Officers List

Email, fax or mail new officers list to AK PTA office as soon as possible. Why????

- Insure that your unit will receive annual leadership information from Alaska PTA and from National PTA such as membership cards, Back to School kit, Alaska PTA annual resource information, monthly newsletters, and much, much more.
- Officers List form found on AK PTA website at <http://www.alaskapta.org/AKPTAOfficersList20102011.pdf> or go to our webpage and click on the forms menu and look for the local unit new officers list and there is a word version also.

# Before your Fiscal Year end

- Check your Bylaws to determine the Fiscal Year end
- Determine who will be auditing the books – Audit Committee or Accountant
- Executive Board fills out the AK PTA Financial Management Checklist to be delivered with books to Audit Committee/Auditor (see Audit Package)
- Audit Package link:  
[www.alaskapta.org/PTAAUDITPackage.pdf](http://www.alaskapta.org/PTAAUDITPackage.pdf)



# To 990 or Not?

All units are required to report their income to the IRS.

- Form 990-N is electronic and less than \$25,000.
- Form 990-EZ is for those who made a little more.

# Form 990-N

- Also known as the e-Postcard
- Must be filed electronically
- Due 4-1/2 months after fiscal year end
- For organizations whose gross receipts are normally \$25,000 or less
- IRS link:  
<http://www.irs.gov/charities/article/0,,id=169250,00.html> for information on the Form 990-N
- ePostcard filing link:  
<http://epostcard.form990.org/>



# Survey Reminder

- Please take a couple of minutes at the end of the PowerPoint to take a short survey. This helps us make these training moments more informative.

# Form 990-EZ

- For exempt organizations that normally have more than \$25,000 in gross receipts
- *OR*
- When the IRS says you need to file the Form 990EZ anyway
- Due 4-1/2 months after fiscal year end

# Form 990 EZ continued

- Instructions on IRS website – link:

<http://www.irs.gov/pub/irs-pdf/f990ez.pdf>

<http://www.irs.gov/instructions/i990-ez/index.html>

- National PTA's Money Matters has a section with instructions on filling out the Form 990EZ – link:

[http://www.pta.org/local\\_leader/MoneyMatters\\_QRG.pdf](http://www.pta.org/local_leader/MoneyMatters_QRG.pdf)

# Form 990EZ continued

- It is okay to hire an outside party to fill out the Form 990EZ – budget for it and take the pressure off of your Treasurer
- Be sure to send a copy of the Form 990EZ and all it's schedules to the Alaska PTA office

# The AUDIT

- Should be performed by Audit committee or professional accountant
- Download Audit Package from AK PTA website at:  
<http://www.alaskapta.org/PTAAUDITPackage.pdf>
- Executive Board should fill out AK PTA Financial Management Checklist and deliver with books for audit.
- Be sure to send a copy of the Audit to the Alaska PTA office



# Build a Bridge to Next Year

The best time to organize and plan for next school year is during the summer.

Have a transitional meeting; invite:

- New Board Members
- Outgoing Board Members
- Committee Members
- Interested Staff
- Interested Members
- Principal



# Plan For Next Year

- Sign up for Board training with AK PTA
  - Give each Board member a copy of the [Alaska PTA Incoming Officer's Guide](http://www.alaskapta.org/AKPTAOfficersGuide2007-2008.pdf)  
<http://www.alaskapta.org/AKPTAOfficersGuide2007-2008.pdf>
- Set Goals for your PTA
- Formulate a proposed budget
- Form committees
- Set your PTA's calendar



# PTA Annual Report

Report to your members about what your PTA has accomplished in the past year. Talk about :

- Events
- Programs
- Goals set, goals met
- Accomplishments

# H.U.G.S.

## Healthy Unit in Good Standing

- The Board list, audit, & copy of the 990 form are all elements that the Alaska PTA needs on file annually for your unit to qualify for the HUGS award.
- A transitional meeting is a good time to ask the old Board if these items are up to date with our office.
- Don't assume it is done- check with us!



# CONTACT ALASKA PTA:

Please take a few minutes and click on the below link which will ask you to evaluate this training. There are only a few questions and we promise it is quick.

<http://www.surveymonkey.com/s/KSBDJ9Q>

Our contact information is:

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