### Avon Lake PTA Council - Zoom Meeting

Thursday, October 15th, 2020

**President**: Jennifer Dalman called the meeting order at 9:04

## **Meeting opened with Superintendent Bob Scott:**

Finished up the parent survey of remote students, lots of good information.

Professional development day for teachers on November 3rd

Overall doing well, some tweaking needed.

Commented at Board of Education meeting they announced cost for school thus far has spent beyond normal 2 million dollars. \$350,000 from government, 1.6 mil hit beyond what normally spend. But in a good spot.

Next week is the fall reading test, ridiculous in his eyes. But the state says we have to do it.

General conversation about testing ensued. Spring testing will not be waived.

Weekly meetings with David, and Athletic Dept. and Winter Sports will be discussed tomorrow.

The window for people to switch between remote and in-person learning, right after Thanksgiving. Grant for technology, received 60 laptop computers with free Wi-Fi. Parents can apply for those if they have a need at home.

Replying to questions previously submitted

"How can parents help to get the state to ease up on testing requirements?"

Parents can write House and Senate and governor's office and make voice heard.

"What if a parent is not comfortable sending their student in for third grade testing?"

That is the parent's choice, perfectly ok.

"During Maps testing, the band could be heard playing, very distracting."

It will not happen again. Band and chorus have been warned to not rehearse.

"Are you anticipating an increase of online learners for the second semester?"

Could go both ways

"Substitutes for remote learners, are there some setup?"

Yes, one is always assigned to online sub. In one incident the teacher just set up work ahead of time for students to do, did not feel the need for a sub.

Bob left. Jack kept replying.

"Do you know if or when Drama will resume?

No. Waiting for the green light,

"Is there a possibility for an online choral club?"

Will look into that.

"How many masks were approved for mask exemption?"

18 for the entire district. With a doctor's note.

"How can parents support the district?

Parents are doing an amazing job. Just continue to check in with your students daily. Be positive. Meet their emotional needs.

"What will be offered in the second half of the year?"

Everything will continue. The cost will only go up if they need additional equipment.

Jennifer thanked Jack for all his information. Will continue to ask for questions from parents.

Revised Agenda; special guest, Dr. Megan Barlow

Meghan shared presentation (attached) she is a member of PTA at Erie, Troy, and Learwood, she is a pediatric psychologist and does in services for personal development for the district.

For district working on a new idea to manage work/life balance with help of school social worker.

October Council PTA – Page 2

Workshop for stress and mental health issues for teachers.

"AL Cares" Avon Lake Community Advocate for Relief and Caregiver Support.

She wants to provide real resources to help. Envisions a committee of PTA members, encourages teachers/staff to use the committee for relief. Will provide a way for the administration to assist staff. Trying to prevent educators from burn out. Parent harassment, lack of social support. (need slides to

Trying to prevent educators from burn out. Parent harassment, lack of social support. (need slides to attach)

She is hoping AL Cares will provide resources/materials/services for educators.

Ex: AL teacher taking time off to provide help to her family.

Could we help her with home life, meals, etc?

Implementing services would help the culture of the community. Not for the children, but an indirect benefit to them.

"As parents, we care for you" is the message trying to portray.

Reciprocity ring research shows how when we do for others, we feel better ourselves.

Possibly have HS students earn service hours by putting together activity bags for teachers' children at home.

Working parent guilt, we want to try to give relief.

She is looking for credibility and support from PTA to communicate to parents and educators to create a committee for "A.L. Cares".

Charla: How can we encourage teachers to utilize this service?

Spread the word, to teachers and staff you know. Principals can also funnel needs to them.

Jennifer: can PTA assist? Any feedback?

Discussion: generally seems like a good idea. We will need a representative from each school.

There are some items going on at HS. Just need volunteers.

# Request from District: MTSA Day: "Mid Term Staff Appreciation Day" December 9<sup>th</sup> District-Wide

Giant Thank you from BOE and a video including kids from all schools, with alumni.

They need help with the food. 600 staff across the district. Bob Scott will pay for a portion of this.

General discussion: It's crazy to ask PTA's to pay for this. Table for now. Jennifer will ask Bob for a dollar amount they need.

Or use a "sign up genius" district-wide for parent to donate

Or have this replaced the usual Cookie Walk... Or staff appreciation in the spring.

And if teachers don't join the PTA to begin with, why should we allocate dollars to them?

Most By-Laws would say a teacher must be a member to be eligible for school gifts.

### Back to Agenda:

### **President Report (Jennifer):**

PTA conference form was sent with agenda

Parents survey, discussion committees from different schools.

(attach link here)

To help with banking, there is a \$ 39 cost for Trade Name registration (email - attach copy)

#### 1st Vice President (Membership): Christa Olijar

District Conference, member hub meeting, October 24<sup>th</sup> at 10:00.

First membership dues should be received by Ohio PTA by end of November. Done thru e-check on member hub

## 2<sup>nd</sup> Vice President (Fundraising): Stephanie Athey – nothing to report

### **Library:** Shea Alltmont:

Only down 2% from last year's circulation numbers.

The staff is upfront at the welcome desk now.

Lots of parents with students. Magazine use is up.

Has a trustee vacancy open, if you know anyone passionate about reading and the community, please drop off an application between now and November 6<sup>th.</sup> 7-year term.

Reminder: "Trail of Haunted Tales" is at Weiss Field, this Saturday, contact the city with any questions. Library donated craft bags for kids.

Book Jacket Fundraiser by the "Friends of the Library" - 20 businesses or organizations can create a book (theme) on a jacket.

On display at the library for 6 weeks, then a Wine and Cracker - April 2021 event with a silent auction. Application packets will be available next month for anyone interested.

"Whitey" the deer, will be returning for the 90<sup>th</sup> anniversary in 2021, for 3 months.

DIY Storytime bags & book bundles still available. Also science & craft kits.

Teen "make and take crafts" starting at the end of October. Rock Candy Making.

Zoom murder mystery sign up available.

Mental Health awareness Discord programs every other Monday, for teen and tweens.

"Discovery Works" is still not open.

Still no teacher classroom activities physically in the library. But they have been creating more activity bags for the teachers. First grade finished, working on second grade next.

YouTube Storytime URL: /AvonLakePublicLibrary is the name!

### **Committee Reports:**

<u>Health and Safety:</u> Lisa Rish - "Screenagers" computer online version is available. Still Waiting for Bob's input.

Legislation: Christa – No Report

**Luncheon**: no report

Reflections: Ashley Whitehead: Remind your schools everything is Due November 19th.

**Scholarships:** Kristen Masa – nothing to report

<u>AL School Foundation</u>: Kristen Masa – "Sale by the Lake" craft show was canceled. "Connect for a Cause" raised \$2,600 Community Council matched some, \$ 3,000 total Carwash made a couple of hundred dollars. No Shoreman Shuffle 5 k race this year.

Looking for a sophomore board member, (looks for volunteers for activities, gives us student insight for grants) you stay on for 3 years if interested. Create a resume and submit by October 22nd. Will go over some grants at the next meeting, next week.

<u>Curriculum:</u> <u>Jennifer Tilley</u> - continues to meet with Jack D for questions pertaining to curriculum.

Encourage PTA presidents to ask members for questions for Jennifer to submit.

She will also give a curriculum update monthly from him.

Really want to answer questions and stop miscommunication.

**Bylaws:** Erin – Presidents received an email regarding By-Laws that needed updates.

Redwood, ALEPTA, and Troy are done. Learwood is forming a committee and will do it in January. Erieview and Eastview need to update bylaws.

Westview and HS are compliant, just have the presidents confirm with Erin. Ashley confirmed for HS

### **Treasurer Report (Erin)**:

Treasurer's need to check in with your bank to see if you need "Trade Name Registration" to be compliant with their bank policy.

Presented September Monthly Financial Report for, YTD (also located on google drive) Balance \$ 17,133.93 (\$200 outstanding check)

All dues were paid early. Before October 8<sup>th</sup>.

All units have filed 990 and Charitable Trust, Eastview is the only school not filed.

Approved Budget posted on-screen (also located in google drive)

Presidents and Treasurers received a message from Erin, regarding scholarship money for the PTA council

is due by January 1st.

If your unit is not donating to the council scholarship this year, please let Erin know.

Kristen: City Schools Impact Scholarship will not be available this year, as their was no fundraiser due to Covid.

Jennifer Dalman: Approval of minutes, all looked good, no changes. Erin Motion, to approve minutes.

Poll: all good 93%

Also voted for September Finances.

Poll: all good 88%

All handouts and paper are in google drive.

### **Delegate Reports:** located in Google-drive

**New Business:** 

Ashley, for purchasing Zoom meetings, can the council purchase one for \$ 150 and all units share? Ohio PTA was giving away Zoom accounts if a unit hosts a town hall meeting.

Jenn T: Zoom -Non-profit discount is \$10 And it can be used for multiple breakout rooms.

Jenn D will check into it further, for sharing options.

Next meeting November 19, 2020, at 9:00 am Motion to adjourn by Jennifer at 11:04

Respectfully submitted,
Nancy Klingshirn A.L.P.T.A. Council Secretary

# **Avon Lake PTA - Unit Reports for October 2020**

		Current			
		Membership			
School/Unit Name	Delegate Name	Total	Current Programs	New Updates to Report	Questions for Curriculum Director
ALHS	Missing				
early childhood	Ashley Vicarel	85	Virtual Santa Visits, Members Only Trunk or Treat, Spread Cheer Penpal Program	Santa visits will be released to the public on 10/19. Visits are \$35 for nonmembers. Your zoom call will be recorded and you will receive a side by side screenshot.	
Eastview	Jennifer Tillery	220 Parents 24 Staff	PTA is working on putting together a plan to host an Eastview Pumpkin Patch for Halloween. It will be pumpkin party with decorating. More details to come. Halloween parade was canceled. Teachers will have activities in the classroom for students, but not a normal party. Students are permitted to wear costumes.  A mom's morning yoga event was held by the PTA outside behind Eastview on Saturday 9/26. It was led by Eastview parent and Inner Bliss Yogi, Katie Brown. It was held to encourage Eastview moms to come and get to know each other from a social distance.	None	With the third grade testing approaching, what happens if a family is not comfortable sending their online learner to the PAC for testing due to Covid-19? During MAPS testing in the PAC for online learners, the band could be heard playing and this was distracting for some students. Will something be done to ensure that it will be quiet during the state testing?
Erieview	Kristie Flannery	66	25th from 12-4 (socially distanced) during the Browns game	Virtual Book Fair Nov 9th- 23rd	
Learwood	Lisa P Rish	Parent 139 , Staff 33	Nugs is currently doing a fundraiser all online, all direct delivered \$ goes to his use for student activities. 10/24 PTA assisting Student Council with Glow Walk,. NovDec fundraiser for PTA unit with winning class attending Nugs doing a Polar Plung & individual student raffle for all that participate.	virtual. DC trip currently scheduled for the spring, late Nov. Nugs will know	What will be offered in the second half of the year remotely? Will everything continue as it is now? How many students were approved for mask exemption?

Redwood	Keely Brickley	30 Couples,	We currently are having our Stoller	No Pumpkin Festival this	
		59 Single, 34	Fundraiser. It is online only ordering this	year.	
		Staff	year. Last day to order is 10/28 and		
			delivery will be 11/18.		
			We are about to start another fundraiser		
			selling AL Spirit Signs and Redwood		
			Raccoon Stickers.		
Troy	Charla Rafn	145	Virtual Bookfair, upcoming membership	Shelly Collier is the new	none
			drive, upcoming saleless shoe fundraiser	president.	
Westview	Jackie Romito	81	Finished Mum sale		

Avon Lake PTA Council		Approved:	
		1st /2nd	
Proposed Budget		ist/znd_	
For Year Ending 6/30/21			
Beginning Cash Balance	\$16,623.18	\$12,921.59	\$12,921.59
Items Committed but not paid 19/20	1,225.00		906.00
Total	\$ 15,398.18	\$ 12,015.59	\$ 12,015.59
1000			
	2020/2021	2019/2020	2019/2020
	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>
Receipts			
Dues:			
Council Operations	320.00	320.00	320.00
District 7 & Convention	120.00	120.00	120.00
Potts Award	0.00	200.00	200.00
Reflections Program	1,400.00	1,575.00	1,575.00
Spring Luncheon	600.00	1,200.00	1,200.00
Scholarship: Reflections	1,000.00	1,000.00	1,000.00
Scholarship: Council	1,400.00	1,400.00	1,400.00
Bonding insurance: council	120.00	0.00	0.00
Reflections Credit from BOE	300.00	300.00	300.00
Scholarship: Donations from Units	2,000.00	4,078.00	3,200.00
Scholarship: from District Office	1,000.00	0.00	1,000.00
Fund Raiser	2,000.00	3,982.56	2,800.00
Other Fund Raising	0.00	5.19	0.00
Interest	0.00	9.93	5.00
Total Receipts	10,260.00	14,190.68	13,120.00
Operating Disbursements			
Copy center fee	75.00	0.00	75.00
Insurance: Bonding	115.00	0.00	0.00
Insurance: Liability	105.00	75.00	105.00
Meetings and Conventions	120.00	0.00	120.00
Potts Awards	0.00	225.00	200.00
President's Uses	100.00	0.00	100.00
Treasurer/Office Supplies	30.00	16.93	30.00
Fund Raising (Spirit Wear)	500.00	2,909.18	2,000.00
Miscellaneous	50.00	0.00	50.00
Total Operating Disbursements	1,095.00		2,680.00
D			
Committee Disbursements	4 400 00	054.00	4 500 00
Reflections Program	1,400.00	854.28	1,500.00
Scholarship Selection Process	110.00		110.00
Spring Luncheon	1,200.00	0.00	1,200.00
Special Program Staff Appreciation: District	755.00	34.70	1,000.00
Total Committee Disbursements	100.00 3,565.00	0.00	100.00 3,910.00
Total Committee Dispursements	3,303.00	987.98	3,910.00
Philanthropic Disbursements			
Misc. Donations	200.00	0.00	700.00
Scholarship: Council	1,400.00	1,500.00	1,400.00
Scholarship: Council-Additional	2,000.00	4,000.00	3,000.00
Scholarship: Reflections	1,000.00	1,000.00	1,000.00
Scholarship - District	1,000.00	1,000.00	906.00
Total Philanthropic Disbursements	5,600.00	7,500.00	7,006.00
Total Disbursements	10,260.00	11,714.09	13,596.00
Net Inflow/(Outflow)	0.00	2,476.59	(476.00)
Ending Cash Balance:	\$15,398.18		
Enumy Cash Dalance:	\$T5,398.18	\$15,398.18	\$12,445.59

Avon Lake PTA Council								
Financial Statement								
For Months Ending 7/31 until 6/30/21								
For Month's Ending 7/31 until 6/30/21	0	0						
Beginning Cash Balance	\$15,398.18	\$15,398.87	\$15,399.52	15,399.52	15,398.87	15,398.87	15,398.87	
beginning Cash Balance	Months Ending	Months Ending	Month Ending	Current	Year-to-	2020-2021	Over/Under	
	7/31/20	8/31/20	9/30/2020	Months	Date	Budget	Budget	
		0.020	0.00.2020	<u> </u>				
Receipts	15,398.18	15,398.87	15,399.52					
Dues:	.0,0000	,	.0,000.02					
Council Operations	0.00	0.00	120.00	120.00	120.00	320.00	200.00	
District 7 & Convention	0.00	0.00	45.00	45.00	45.00	120.00	75.00	
Potts Award	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Reflections Program	0.00	0.00	525.00	525.00	525.00	1,400.00	875.00	
Spring Luncheon	0.00	0.00	225.00	225.00	225.00	600.00	375.00	
Scholarship: Reflections	0.00	0.00	375.00	375.00	375.00	1,000.00	625.00	
Scholarship: Council	0.00	0.00	525.00	525.00	525.00	1,400.00	875.00	
Bonding insurance: council			45.00	45.00	45.00	120.00	75.00	
Reflections Credit from BOE	0.00	0.00	0.00	0.00	0.00	300.00	300.00	
Scholarship: Donations from Units	0.00	0.00	0.00	0.00	0.00	2,000.00	2,000.00	
Scholarship from District	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	
Fund Raiser - Spirit Wear	0.00	0.00	0.00	0.00	0.00	2,000.00	2,000.00	
Fund Raising - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Interest otal Receipts	0.69 <b>0.69</b>	0.65 <b>0.65</b>	0.63 <b>1,860.63</b>	0.63 1.860.63	1.97 <b>1,861.97</b>	0.00 <b>10,260.00</b>	(1.97) <b>8,398.03</b>	
otal Necelpts	0.69	0.65	1,000.03	1,000.03	1,001.97	10,200.00	0,380.03	
One wetting Diehumeem								
Operating Disbursements		0.00	2.00	0.65	0.00	75.00	75.00	
Copy center fee Insurance: Bonding	0.00	0.00	0.00	0.00	0.00	75.00	75.00	
		0.00	115.00	115.00	115.00	115.00	0.00	
Insurance: Liability Meetings and Conventions	0.00	0.00	0.00	0.00	0.00	105.00 120.00	105.00 120.00	
Potts Awards	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
President's Uses	0.00	0.00	0.00	0.00	0.00	100.00	100.00	
Treasurer/Office Supplies	0.00	0.00	11.22	11.22	11.22	30.00	18.78	
Fund Raiser - Spirit Wear	0.00	0.00	0.00	0.00	0.00	500.00	500.00	
Miscellaneous (checks()	0.00	0.00	0.00	0.00	0.00	50.00	50.00	
Total Operating Disbursements	0.00	0.00	126.22	126.22	126.22	1,095.00	968.78	
						,		
Committee Disbursements								
Reflections Program	0.00	0.00	0.00	0.00	0.00	1,400.00	1,400.00	
Scholarship Selection Process	0.00	0.00	0.00	0.00	0.00	110.00	110.00	
Spring Luncheon	0.00	0.00	0.00	0.00	0.00	1,200.00	1,200.00	
Special Program	0.00	0.00	0.00	0.00	0.00	755.00	755.00	
Staff Appreciation: District	0.00	0.00	0.00	0.00	0.00	100.00	100.00	
otal Committee Disbursements	0.00	0.00	0.00	0.00	0.00	3,565.00	3,565.00	
Philanthropic Disbursements								
Misc. Donations	0.00	0.00	0.00	0.00	0.00	200.00	200.00	
Scholarship: Council	0.00	0.00	0.00	0.00	0.00	1,400.00	1,400.00	
Scholarship: Council-Additional	0.00	0.00	0.00	0.00	0.00	2,000.00	2,000.00	
Scholarship: Reflections	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	
Scholarship from District	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	
otal Philanthropic Disbursements	0.00	0.00	0.00	0.00	0.00	5,600.00	5,600.00	
Total Diahuraamanta	0.00	0.00	106.00	106.00	106.00	10.260.00	10 122 70	
Total Disbursements	0.00	0.00	126.22	126.22	126.22	10,260.00	10,133.78	
N 11 5 110 110 1			4 70	4=0	4 =	2.25	(4.76	
Net Inflow/(Outflow)	0.69		1,734.41	1,734.41	1,735.75	0.00	(1,735.75)	
inding Cash Balance:	\$15,398.87	\$15,399.52	\$17,133.93	\$17,133.93	\$17,134.62	\$15,398.87	\$13,663.12	
reviously commited expenses for district impact scho	135.00	135.00	135.00					
otts awards	225.00							
scholarship checks April 2020	1,000.00							
let Cook Bolomes Avell-1-	644.000.00	645 004 50	£46.000.00					
let Cash Balance Available	\$14,038.87	\$15,264.52	\$16,998.93					
receiver EOM Coursil	45 200 27	15 004 50	16 022 02					
reasruer EOM - Council	15,398.87	15,284.52	16,933.93					
Scholarships Additional for all additional	money collecte	d from units fro	m either earm	arked funds or	donations fro	m families.		

# Request for Parent Input -- Ohio's State Tests Performance Standards Confirmation

The State Board of Education adopts performance standards for the Ohio's State Tests that are used to determine whether a student meets the proficiency level. Because of the importance of the performance standards, the Board's Assessment and Accountability Committee has directed the Ohio Department of Education to conduct a confirmation process to review where the performance levels are set for the English language arts and mathematics tests.

Achieving a proficient level on a state test has significant impact for students and families. As part of the review process, the Ohio Department of Education is seeking input from parents around the meaning of performance standards for their children as they progress in school and as they prepare for life beyond high school.

We are looking for parents to participate in six virtual discussion committees. Participants should have online access for viewing the meeting information virtually, but video capability is not required. There will be six separate interactive discussions with parent committees, and they will take place on the following dates and times.

- Elementary School (grades 3-5) ELA will be on Tuesday, October 27, 10am 11:30am.
- Middle School (grades 6-8) ELA will be on Wednesday, October 28, 10am
   11:30am.
- High School ELA will be on Thursday, October 29, 10am 11:30am.
- Elementary School (grades 3-5) Math will be on Tuesday, October 27, 10am 11:30am.
- Middle School (grades 6-8) Math will be on Wednesday, October 28, 10am 11:30am.
- High School Math will be on Thursday, October 29, 10am 11:30am.

Information from this discussion will be shared with educator committees as they take a technical look at how the performance levels were originally set. Finally, the State Board will receive a report on the feedback from parents and the outcomes of the educator review committees as board members evaluate whether the performance levels are accurately determining whether a student is proficient in English language arts and math.

If you are interested in participating on one of these parent discussion committees you may complete the online application located at:

https://www.surveymonkey.com/r/standardsparentgroup2020

# Please be sure to identify your subject and grade band

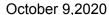
preference. Applications for these parent discussion committees must be submitted by **4:00pm on Friday, October 16<sup>th</sup>.** Applicants selected to participate will be notified during the week of October 19<sup>th</sup>. Logistical information about the meetings will be sent to participants when they are notified of their committee status. Please be sure to also include an active email address for notifications.

If you have any questions, please contact the Office of Assessment at statetests@education.ohio.gov or call Dr. Marie-Elena Hall at 614-306-3467.

Questions on the Nomination Form:

This particular parent nomination form is really quick.

- 1. Contact information
- 2. District/School information the nominee's student(s) currently attend or attended.
- 3. Content area (ELA or Math) for the committee wanting to serve on.
- 4. Grade band (3-5, 6-8, high school) for the committee wanting to serve on.
- 5. Role of the person completing the form (self-nomination or nominating someone else)
- 6. IF nominating someone else, that person's contact info
- 7. Gender (optional)
- 8. Ethnicity (optional)





Dear unit and council leaders.

It has recently come to my attention here in the Ohio PTA office that financial institutions have a new requirement for non profits in their verification process. Several units have experienced the impacts of this already. The result of new guidelines set forth by financial institutions is that nonprofits and their subordinate units must establish a trade name and act ASAP. Many units have had trouble with adding new signers on bank accounts, establishing new bank accounts, and getting approved for programs such as Amazon Smile in their name verification process.

This is not a requirement of the Secretary of State or IRS, it is a result of new guidelines financial institutions have started following. This was not a previous requirement of units because as subordinates only Ohio PTA had to file for this.

Here are the steps and suggestions to obtain your unit's trade name

It takes one day for online transactions to be processed Here are the steps

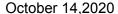
- 1. Go to ohiobusinesscentral.gov
- 2. Click Submit Business Filing
- 3. Next select click create a profile
- 4. Select New business/Register Trade Name (your pta name)

This will have to be renewed every 5 years. I was advised you can use your school as the address of the filer if that is the best way to ensure communications are received by future officers. Additionally they will send an email notification too, so if there is a shared pta account that gets passed down, I advise creating your account with this information.

If you are asked specifically for an IRS letter of determination when working with these financial institutions, these are still provided by the office as the IRS has not issued these for several years. Please send requests for letters of determination to <a href="mailto:office@ohiopta.org">office@ohiopta.org</a>

Please feel free to let me know if you have any questions regarding these changes. You can also confirm this information with the Secretary of State's office like I have done by contacting the business division at 614.466.3910.

Sincerely, Brandy Shaffer Ohio PTA Administrative Coordinator





### Dear PTA Leaders,

There have been several questions since the previous letter regarding trade name requirements for non profit organizations by financial institutions. I have created a few step by step instructions to get you started and ensure you are selecting the correct form. Once you have selected the correct form and start the process, any questions you have are still best directed to the Secretary of State business customer service line (they are open until 8pm on weekdays and 9-5 Saturdays)contact 614-466-3910 option 2 or 877-767-3453 option 2

If you come across something you think helpful for other units to know, please feel free to let me know as I am creating an FAQ as these questions come and we find the answers. Here are a few Questions that have come up already:

### Do I have to file for a trade name?

No, you do not have to. Over the past week I have learned of several units being required to have this for awhile and many units who have successfully changed banks or added new signees to accounts this school year with no problem. I have however also had units unable to access their banking for months, I have had units unable to add a new signee to their account and per their bylaws were unable to write checks without the current treasurer being added to the bank account. The dozen units who have encountered this problem were often told their name verification failed and that was it, it came out of nowhere, and it caused a lot of problems and confusion sometimes resulting in an individual paying out of pocket to do the filing. This is why we strongly encourage units to act now as we do know that financial institutions have changed their regulations and there is no warning before they enforce these changes.

### What is my date of first use?

This can be the date that the first bank account was opened, EIN established, or year your unit name was updated. There is not really a right or wrong answer here, just has to be a date prior to the date of application is what I was advised.

### What is my registrant name?

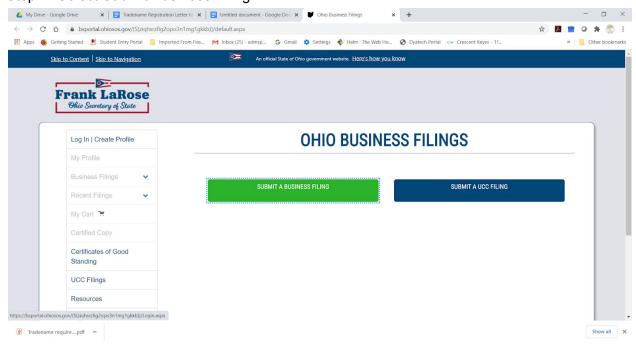
This can be Congress of Ohio Parents and Teachers as you are subordinates of this organization. You can also register as an individual, this is another situation where there is not a right or wrong answer as I was advised.

### Should there be costs?

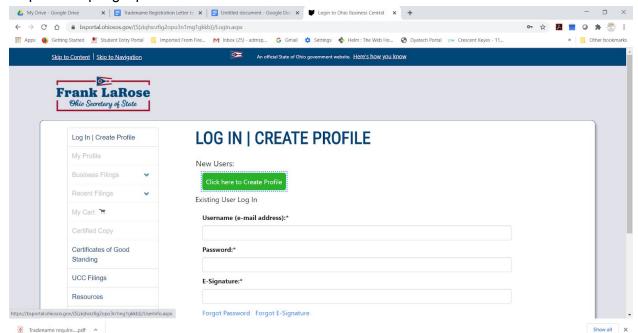
I have shown in the steps below that yes, the form you select does have a 39.00 filing fee. As of right now, every 5 years you will renew this and that is 25.00.



# Step 1- Select Submit Business Filing

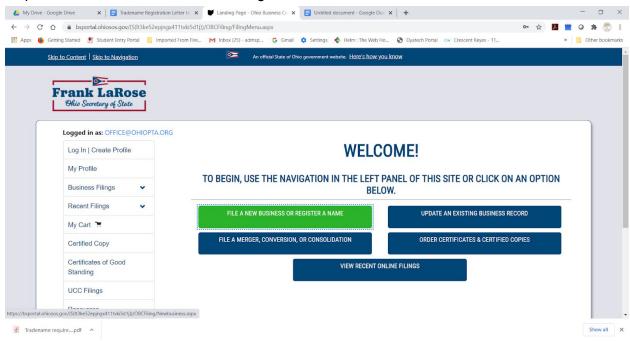


# Step 2- Setup login/profile





# Step 3- Select file a new business or register a name



# Step 4-Select form "Trade Name Registration" 39.00\$

