

Leadership Essentials

California State
PTA
everychild. onevoice.

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EXPANDED CORONAVIRUS RESOURCES ON CAPTA.ORG

We have expanded and updated the [COVID-19 Resources for PTA Leaders](#) page on the California State PTA website with even more information that is relevant to you as a PTA leader.

- Guidance and FAQs on conducting PTA meetings, events and elections
- Tools and FAQs for teleconferencing and videoconferencing
- FAQs for financial transactions, audits and taxes
- A [recording of the webinar](#) we did last week titled "Tools and Best Practices to Hold Effective Virtual Meetings," as well as a copy of the [presentation](#) from the webinar.

We have also created a dedicated page to help [parents and families cope with COVID-19](#); it's got dozens of resources for distance learning, social and emotional well-being, and maintaining healthy habits while confined to the house. And lastly, we've got a new page that details [COVID-19 enacted legislation](#) at both the national and state level. [Click here](#) to see all our resources.

FINANCIAL CHECKLIST FOR UNITS

It is not the end of the PTA fiscal year, but there are things we can be working on to ensure the end of the year goes smoothly. Here are some tips and suggestions on what you can work on during this time:

- **Reconcile bank statements each month** - If you don't currently have access to online banking, sign up now. Contact your branch and see what you need to do in order to review the PTA bank statements. Online access will allow you to produce a financial statement for an executive board meeting. If possible, get "view only" access for your auditor or another non-check signer who can review the bank statements and reconciliations monthly. Remember, these need to be signed and dated by the reviewer. Electronic signatures are allowed. Once the shelter in place order is lifted, you will still need to get any mailed bank statement reviewed and signed by a non-check signer if they were not able to do that electronically.
- **Membership** - Review your membership numbers and make sure you have forwarded all your per capita dues to your council or district. If you find any discrepancies, contact your council or district on how best to forward the money through channels.
- **Review outstanding bills** - Do you owe money to your school district or members of your association? Get in touch with these businesses or individuals and plan to make these payments once the quarantine has been lifted. Can they accept Electronic Funds Transfers (EFTs) or payments from your bank's online bill payment system? If so, see if you can make payments via this method. Please review the guidelines from California State PTA [here](#).
- **Excess funds** - Be cautious with funds that are left over from this fiscal year. We all want to help with relief efforts for the health crisis, but finances for next fiscal year could be uncertain. While we always suggest spending money on the families that actually raised the funds, in these unprecedented times, we should proceed with caution. The IRS allows an amount up to 49.9% of your budgeted expenses to be carried over to the next fiscal year and next year's board will need sufficient operating funds to hold activities and events in the fall, often before any fundraising can be done.



REPORTING NEWLY ELECTED OFFICERS

Have you already held your election for the 2020-21 school year? **If not**, visit our [COVID-19 Resources for PTA Leaders web page](#) and scroll to the section titled "FAQs for Elections via Teleconference."



If you **have** held your election, now you need to enter the officer information into the PTAEZ Officer Reporting System. [Click here](#) for a full tutorial on how to enter this information. If you cannot upload the information into PTAEZ, please submit it via [this form](#) to leadership@capta.org.

CALIFORNIA STATE LIBRARY'S EXPANDED ONLINE ACCESS

The California State Library has expanded access to its online resources for parents, caregivers, and students during the COVID-19 school closures. On their website you can access:

- Research databases
- Children's and young adult books brought to life with author interviews, audiobook performances, activities and lessons
- The Encyclopaedia Britannica for elementary, middle and high school-aged learners (including a Spanish version)



Be sure to check out this amazing resource for distance learning by clicking [here](#).

STATE ADVOCACY AWARD

In this time of uncertainty and anxiety, we know that a little good news can go a long way. That's why we wanted to share this with you.

At the 2020 National PTA Legislative Conference in Washington D.C. last month, California State PTA was recognized with the **Outstanding State Advocacy Award** for our efforts in raising awareness about healthier school start times and securing the passage of SB 328, the Late School Start bill. The legislation, which was signed into law by Governor Newsom in October, requires that middle schools in California start no earlier than 8:00 a.m., and high schools no earlier than 8:30 a.m.

Carol Kocivar, CAPTA's former president and current legislative advocate, was also honored individually. She received the **2020 Shirley Igo Advocate of the Year Award**, which is presented to an individual PTA member who, through their leadership and advocacy efforts, affected federal policy priorities within PTA's annual Public Policy Agenda. Carol's advocacy includes work on increasing investments in quality public education, school infrastructure, public school choice and charter accountability, as well as safe and supportive school environments.

While they were in Washington, our delegation of 14 from California also met with the offices of Senators Feinstein and Harris, as well as the offices of a number of our Congressional representatives. Our talking points focused on the inclusion of schools in any federal infrastructure legislation as well as the reauthorization of the Child Nutrition Act. Director of Legislation Shereen Walter and California State PTA President Celia Jaffe also presented a standing-room-only **workshop on effective grassroots advocacy techniques** as one of the Spotlight presentations being highlighted at the conference.



TAKE ACTION!

Stay Connected During the Outbreak



CETF can help families affected by COVID-19 find low-cost or free internet and computer solutions.

[LEARN MORE](#)

Engage with the Arts at Home!



Our partners at Create CA have curated an amazing list of free resources to help you create at home while schools are closed.

[READ MORE](#)

See What's New in the PTA Store!



Whether you are shopping for recognition gifts, need items to promote your unit, or just want something fun for yourself – we've got you covered!

[SHOP NOW](#)

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

This message was sent to deckman@capta.org by californiastatepta@capta.org
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