

Leadership Essentials

California State
PTA
everychild. onevoice.

August 25, 2020



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Para leer en español, [clic aquí.](#)

ATTEND THE "MYPTEZ MADE SIMPLER" WEBINAR - AUGUST 25

Are you new to MyPTEZ (formerly PTAEZ), the online accounting system for PTAs? Are you an experienced user looking for more information? Then join the "MyPTEZ Made Simpler" webinar on **Tuesday, August 25 from 7:00-8:30 p.m.**

CSM, the creator of MyPTEZ, and members of the Leadership Services Commission will go over 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
- Handling fees related to donations

Click the following Zoom link to join the webinar: <https://zoom.us/j/95642454337>

To learn more about MyPTEZ, [click here.](#)



YEAR-END AUDIT REMINDER

Your year-end audits should be completed by now, and should be presented to your general association at the first meeting of the year.

If you have not completed your audit, please [click here](#) to review the requirements and find the various forms you'll need.



PTA AND ELECTION 2020

It is election season and it is really important to remember what we can and can't do as PTA leaders. While we are free to endorse anyone in our personal lives (without using our PTA titles), in our roles as volunteers we need to stay away from endorsing candidates. This applies to any elected office, including nonpartisan ones such as school board members. A good rule of thumb is that we can support **issues**, but not **people**.

[Click here](#) to review all the guidelines that need to be followed in order to keep your PTA unit on the good side of governmental agencies. If you have more questions, please reach out to our Legislative Team at legislation@capta.org.



PTA is supporting two propositions on the November Ballot.

- Proposition 15 - Raises up to \$11.5 Billion for schools and local community service.
- Proposition 16 - Restores affirmative action in California public education, government contracting and government hiring.

Your PTA unit, council or district does not need to take a vote to advocate in support of these propositions. For more information on these ballot measures, [click here](#).

ARE YOU USING TOTEM YET?

Managing membership drives while not on campus can be tough, but CAPTA has the perfect solution....TOTEM! Our electronic membership system is a great way to "virtually" reach out to your families and community members and ask them to support your PTA.

If you haven't signed up for TOTEM yet, [click here](#) to review the system and learn what steps you need to take to start.



REQUESTING A LETTER OF DETERMINATION

A Letter of Determination is evidence of your PTA's tax-exempt status as a non-profit, subordinate organization of the California State PTA. It is often needed to change signers on a PTA bank account, and to procure donations.

To request a Letter of Determination, please email LOD@capta.org.

In the subject line, enter "LOD Request."

Please include the following in the body of the email:

- Name of unit (as shown on bylaws)
- California ID number (if known)
- Employer Identification Number - EIN (if known)
- District PTA (if known)
- City located in (required)
- Your name (required)
- Your position (required)



FOUR WAYS TO GET THE SERVICE MAILING

The service mailing is here! This packet of tools and resources, which encompasses the "Leadership Made Easy" packet, "Running Your PTA...Made Easy" and lots of other materials, helps incoming officers more effectively run their PTAs.



If you haven't already gotten a copy, there are now four ways to 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

UPDATED TOOLKIT NOW AVAILABLE AT CAPTA.ORG

The California State PTA Toolkit, which provides guidance, instructions and ideas for unit, council and district leaders, has recently been revised to reflect changes to procedures and policies. Updates include revisions to several sections of the finance chapter, election campaign information, and resolutions information, including the resolutions passed at the Statewide Annual Meeting in June.

The Toolkit is available online in English and Spanish at <https://toolkit.capta.org/> in both web and print versions. The complete list of changes is also available online.

The Toolkit is reviewed on an ongoing basis and is updated twice a year.



TAKE ACTION!

Lessons we learned
from our "listening sessions"

PTA in California
summer issue now available

Summer 2020
Member Perks are Here



Read the final report about our listening sessions! Find out what we learned from you – and what recommendations we have going forward.

[LEARN MORE](#)



Read about how our members, schools and families are adapting in response to the pandemic and demands for greater racial equity, and what PTA is doing to support them.

[LEARN MORE](#)




Check out our great offers from SkyOne, Lifetouch, Legoland and more – only for PTA members!

[LEARN MORE](#)

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

This message was sent to communications@lcepta.org by californiastatepta@capta.org
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