

# Leadership Essentials

California State  
**PTA**  
everychild. onevoice.

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## In This Issue:

- Virtual Summer Leadership Academy – Session 3
- PTA "time outs"
- Summer financial checklist
- Elections and MyPTEZ updates
- Connecting with your families
- Register for "Discover Math Together" sessions
- Service Mailing update

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## VIRTUAL SUMMER LEADERSHIP ACADEMY – SESSION 3

The first two sessions of California State PTA's first-ever Virtual Summer Leadership Academy have already happened, but if you missed them, there's still time to register for the third and final session!

Registration will re-open on **July 27th** for session 3, which runs from August 10-13. During this session we'll be offering classes on distance learning, marketing your PTA, family engagement, public speaking, fundraising, advocacy for student learning, safe driving, and understanding racial equity.

By registering, your board members will not only get access to as many session 3 classes as they like, but they'll also be able to watch recordings of the classes from sessions 1 and 2!

Don't miss out on this chance to hone your leadership skills in preparation for the coming school year, and to get up to speed on what you need to know to more effectively run your PTA.

Registration is open from July 27-August 5, and the fee is \$20 per PTA unit. For more information and to register, [click here.](#)



## PTA "TIME OUTS"

We have been asked several times over the past few weeks "Can I put our PTA on 'time out?'"

At first we were confused by what these units were asking, but after a few conversations we came to understand. These leaders were asking if they could basically put all PTA functions on hold for the upcoming school year. There really isn't a simple answer.

While we are not on campus, PTA can and should still provide support to our families, teachers and community. We are still planning programs, providing much needed supplies and most importantly, being a source of communicating and connection. During these uncharted times, your council, district and CAPTA are here to help you as your PTA leads the charge to promote families connecting with other families. Membership in PTA supports the partnership between school and families, which is more important than ever.

Yes, you can put some aspects of your PTA on hold, but not all. You can put fundraising and many of the programs that you usually host on campus on hold.

Last year's normal end-of-year tasks will still need to be completed. Taxes, audits and annual financial reports have due dates.

For the current year, you still need to have the three required officers (president, secretary, and treasurer), host a membership drive, and pay your yearly insurance premium. Your PTA is covered for more things than just an accident at an event.

Several of our Virtual Summer Leadership Academy workshops provided ideas to stay connected with your parents. In July, we presented two social media classes and "Engaged Families are the Key to Students' Success!" Both are available as recordings to registered attendees. Coming up in session 3 in August is a workshop on "Family Engagement During COVID-19", a class on supporting your children, and another on distance-learning platforms.

In addition, we have great resources for you to share with your families and communities at [www.capta.org](http://www.capta.org).



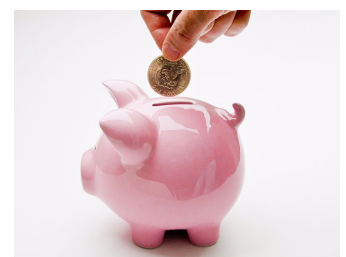
## SUMMER FINANCIAL CHECKLIST

Summer is the perfect time to get the financial records for your PTA in order to close out the fiscal year. The end of year audit, one of the compliance items required from all Units, Councils and Districts, should be conducted right after the end of your fiscal year. For most of our entities that is June 30th. Please practice safe distancing and hand over of the documents needed from the treasurer to the auditor.

Once the audit is complete, the treasurer should compile the end-of-year Annual Financial Report. Another compliance document that shows a budget to actuals for the fiscal year we just completed.

Next, it is time to file the PTA taxes. Every nonprofit entity in California is required to file a form 990, 990EZ or 990N with the Internal Revenue Service, a form 199 or 199N with the Franchise Tax Board, and the RRF-1 with the California Attorney General's Registry of Charitable Trusts. In addition, there is a new form from the Attorney General: the CT-TR-1, which is also required for some units. Full information is available in our Tax Filing Support Center at <https://capta.org/pta-leaders/services/tax-filing-support-center/>

**Don't forget the bank:** When you are taking care of all those other financial summer tasks, keep in mind you may also need to make changes to the signature cards at the PTA bank. In these difficult times, it is more important than ever to contact your branch to make sure you have all the proper documentation you need to update the check signers. You will also need to confirm hours of operation and the procedure they are using to allow members to visit the branch and make changes to accounts.



## ELECTIONS AND MYPTEZ UPDATES

Have you held your elections yet for the 2020-21 School Year? If not, please make arrangements with your Council or District to hold that meeting virtually as soon as possible. PTA Units and Councils cannot function after the end of the term without electing new officers. A few months ago, California State PTA made the decision to allow virtual general association meetings. This is a way for our Units and Councils to continue the great work of PTA while in these very challenging times. For instructions on how to hold a virtual election, 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 elections, please make sure you input the officer contact information into MyPTEZ, formerly known as PTAEZ. Inputting this information will ensure that the new leaders of your PTA receive important information over the summer months, including our Summer Service Mailing. Full instructions on how to access MyPTEZ can be found here: <https://capta.org/pta-leaders/services/online-office-contact-system>.

## CONNECTING WITH YOUR FAMILIES

In the past a PTA could host a welcome back social for all the families at the school. It was a time for students to see who their new teacher would be and reconnect with friends and for parents to purchase some school essentials like PTA memberships. That does not look like a reality for the upcoming school year. There are still ways for your PTA to connect with your families and promote membership at your unit.

Host a virtual "Welcome Back Social" via one of many meeting platforms available today. Invite different grade levels to attend at different times and have the teachers who will be virtually teaching those students on the call. Maybe you could have a theme like "my pets" or "my favorite book". It could be a way for everyone to talk and have some fun before the virtual school year starts.



You should also sign up with TOTEM Online Membership System. This is the easiest way for your parents to join your PTA. For more information about TOTEM, click here: <https://capta.org/pta-leaders/services/electronic-membership-system/>.

## REGISTER FOR "DISCOVER MATH TOGETHER" FREE SESSIONS

Join **Alex Kajitani, California Teacher of the Year** and "The Rappin' Mathematician" this summer during the remaining two fun-filled sessions that will give you tips and resources you can use with your children to help them learn math during this time of distance learning - or anytime!



- **Session II – Engaging & Amazing Resources for Learning Math Online:** Wednesday, July 29 4:30-5:30pm
- **Session III – Ten Ways Parents Can Help Their Kids Succeed in Math (Even If They Don't Consider Themselves a "Math Person"):** Wednesday, August 5 4:30-5:30pm

There is no cost to register. Just click the following Zoom link to sign up for either (or both) of the sessions: <https://zoom.us/meeting/register/tJlpu2hrjsoHdR3fK1JHCdWmLleRZ6kV2QW>

[Click here](#) to learn more about Alex on the California State PTA website.

## SERVICE MAILING UPDATE

Great news: The summer service mailing is almost ready!

This starter guide to PTA success offers all the tools you need as a leader to effectively run your PTA. It provides practical tips for running your association, resources for your PTA membership campaign, and leadership tips and information to help make your PTA job easier! You'll also find a variety of resources on children's issues, advocacy, family engagement and PTA programs and services.



Normally we send every leader a copy in the mail, but this year we are doing things a little differently!

We'll be offering four options for getting it:

- You can download and print a PDF copy from the [capta.org](http://capta.org) website
- You can view just the parts you need, when you need them, on our Service Mailing web pages
- You can request a hard copy be mailed to you by completing our online request form
- You can request a hard copy from your District President

You'll get an **email** in the next couple of days with specific links and other details on how to access the Service Mailing. We'll also post information on how to get it on [capta.org](http://capta.org) and on social media around the same time. And finally, we'll be sending a postcard in the mail in mid-August with access instructions.

## TAKE ACTION!

### #DiscoverTogether Science Learning for Everyone



Science is everywhere, and for everyone! Check out our tools to help your child learn science simply by exploring the world around them.

[LEARN MORE](#)

### Promote Your PTA With a Banner



Adorn your fence or window with a colorful outdoor banner from the online PTA Store – there are 8 different theme options to choose from!

[SHOP NOW](#)

### Did You Know That PTAEZ Is Now MyPTEZ?



PTA's online accounting and financial management system has a new name – but the same great service!

[LEARN MORE](#)

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



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This message was sent for the sole purpose of testing a draft message.