



Sixth District PTA Newswire, Feb/Mar 2014
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NEWSWIRE

FEB/MAR 2014

SPRING TO ACTION

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Spring is almost here! Well, with the weather we've been having lately we can probably say that it's already here! Spring signals the traditional winding down for the school year for most students. They look at the year as being 2/3 done! However, as PTA's get closer to Summer, we tend to be more busy! Inside this issue you'll find information to help you with Bylaws updates, Elections, End of Year Finances, and Records Retention. You'll also see what the California PTA Legislative Conference was all about and what you can do to continue to support our students through legislative action. In addition, we've listed the Sixth District winners of our 2013-14 PTA Reflections contest. Hopefully you will enjoy the articles and find something useful to apply to your PTA. We also hope to see you at the annual Sixth District Luncheon on March 7th!

Once again, please feel free to contact me at newsletter@capta6.org with comments/suggestions.

Happy Spring!

—Terri Jimenez, Editor

Upcoming Meetings and Events

Color Key:		
for Board & CPs	Deadlines	Cancelled
		for Everyone
Event	Date & Time	Location <small>(click for maps & forms)</small>
Sixth District PTA Annual Luncheon [reserve now!]	Fri Mar 7	David's Restaurant, 5151 Stars & Stripes Dr. , Santa Clara
Sixth District PTA Association Meeting	Mon Mar 31	County Ofc of Education, 1290 Ridder Park Dr, SJ
State PTA Convention	Wed-Sat May 7-10	Los Angeles
Sixth District PTA Reflections Reception	Mon May 19	Santa Clara USD Office, 1889 Lawrence Rd. , Santa Clara
Sixth District PTA Spring Training	Sat May 3	Peterson MS, 1380 Rosalia Ave. , Sunnyvale

UPDATING BYLAWS

Unit bylaws need to be updated whenever something changes in them or every 3 years if there are no changes. The most common changes to bylaws are changing the amount of dues, changing the meeting days, or changing the officers (adding or eliminating positions). The 3-year limit is from the date the bylaws were signed by the CAPTA Parliamentarian, which means that bylaws signed in 2011 or before are due for an update.

Here's how to update bylaws in a nutshell:

- Form a committee chaired by the parliamentarian to determine what, if any, changes are needed.
- The parliamentarian completes the E-Bylaws on the CAPTA site, prints out the new bylaws and sends them with required forms (see the Sixth District Website "Forms") to the Council Parliamentarian or to the Sixth District Parliamentarian if Out Of Council.
- Spanish/English Bylaws are available from the Sixth District Parliamentarian, not on E-Bylaws. After requesting a copy, complete the information and send in as explained above.
- The CAPTA Parliamentarian signs and returns the bylaws. The unit follows the steps to adopt the bylaws at a meeting.

There is help available for updating bylaws on the CAPTA website, the Sixth District Website, and most importantly from Council Parliamentarians and the Sixth District Parliamentarian. Trainings are scheduled periodically as well--sign up and come to one to learn more!

—Elena Shea, Parliamentarian, Sixth District PTA



PTA ELECTIONS

Nominating Committees should be underway looking for next year's PTA leaders. The election is the culmination of this process. The CAPTA website has a great deal of information on this-- from the home page, look under "Management" then under "Nominations/Election." Elections are held during an association meeting. After that, the new board can start making plans for next year so everything is in place for the fall.

—Elena Shea, Parliamentarian, Sixth District PTA

PTA REFLECTIONS

Below is the list of winners for the 2013-14 PTA Reflections Contest. The first place winners in each category have been forwarded on to the California State PTA competition. Congratulations to all who participated! Next year's theme will be "The World Would Be a Better Place If..."

Sixth District Reflections Winners 2014

Film Production

Primary - Gio Cabaltica - Blue Hills Elementary - Cupertino Fremont Sunnyvale
 Intermediate - Neil Shenoy - Evergreen Elementary - Evergreen Council
 Middle School - Alice Huang - Jacquin Miller Middle School - Cupertino Fremont Sunnyvale
 High School - Olivia Walker - Lynbrook High School - Cupertino Fremont Sunnyvale

Music Composition

Primary - Abhinav Chikkatur - Stocklmeir Elementary - Cupertino Fremont Sunnyvale
 Intermediate - Sneha Revanur - Carolyn Clark - Evergreen
 Middle School - Elizabeth Hung - Redwood Middle - Out of Council
 High School - Nin Soo Hong - Lynbrook High - Cupertino Fremont Sunnyvale

Photography

Primary - Benjamin Pierson - Huff Elementary - Los Altos Mtn View
 Intermediate - Kaaya Sharma - Carolyn Clark - Evergreen
 Middle School - Elizabeth Hung - Redwoow Middle - Out of Council
 High School - Steven Newman - Fremont High School - Cupertino Fremont Sunnyvale

Literature

Primary - Hemani Kamarshi - Faria Academics Plus - Cupertino Fremont Sunnyvale
 Intermediate - Ankita Acharya - Eisenhower Elementary - Cupertino Fremont Sunnyvale
 Middle School - Andrew Zhong - Evergreen Elementary - Evergreen
 High School - Kate Bacher - Cupertino High School - Cupertino Fremont Sunnyvale

Dance Choreography

Primary - Adhya Kasamsetty - Collins Elementary - Cupertino Fremont Sunnyvale
 Intermediate - Cecilia Sun - Blue Hills Elementary - Cupertino Fremont Sunnyvale
 Middle School - Nishanth Manjunath - Evergreen Elementary - Evergreen
 High School - Dorothy Lin - Lynbrook High School - Cupertino Fremont Sunnyvale

Visual Arts

Primary - Emilie Chambon - Ruskin Elementary - North Valley
 Intermediate - Kelly Lu - Carolyn Clark - Evergreen
 Middle School - Lillian Zeng - Redwood Middle School - Cupertino Fremont Sunnyvale
 High School - Yihao Xu - Lynbrook High School - Cupertino Fremont Sunnyvale
 Special Artist - Cedric Fish - Sutter Elementary - Santa Clara

COMMUNITY RESOURCES-ENGAGING KIDS

The following websites are a great resource for ideas to keep kids engaged! They cover fun and educational activities at locations throughout the Bay Area.

<http://www.celebrate-family.com/>

<http://www.bayareaparent.com/>

LEGISLATIVE CONFERENCE

First . . . a huge thank you to the Councils and units who participated in the two-day 2014 Legislation Conference in Sacramento. What a phenomenal, educational experience.

To all Councils and units: if you haven't done so already, please add the Legislation Conference as a line item expense in your annual PTA budgets, and encourage parents to attend. Twelve fantastic Sixth District PTA representatives joined a couple hundred other advocates at the 2014 Conference.

PTA Advocacy: "Speak Out, Speak Up"

PTA leadership repeatedly urged everyone to "Speak out, Speak up" for our children. Tell your story, share your vision for your child's education. Link your priorities to a story.



Cat Urbas, Erwin Morton, Nancy Krop, Wanna Kapoor, Tara Dhillon, Sandi Spires, Madhavi Gupta, Rebecca Fox, Tracey Neistadt, Ramji Digumarthi - Sixth District Advocacy Team at Leg Conference

The 2014 state PTA advocacy goals are (1) adequate, stable, long term school funding, and (2) investing in pre-school.

Advocacy VP/Chair Job Description. The PTA advocacy job description is three-levels (newcomer, continuing, advanced) – whether district, council or unit level. An advocate may pick from the menu of job description options, based on (1) their strengths and talents and (2) what will be most meaningful for their PTA. Look for that position description on the Sixth District advocacy webpage: <http://advocacy.capta6.org> (click on "Getting Involved"). The direct link is: http://advocacy.capta6.org/?page_id=785

Resources for local PTA advocates: sign up to receive state PTA Legislation Alerts: <http://www.capta.org/sections/advocacy/legislative-alerts.cfm>

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Sign the Sixth District PTA petition to Restore Excellence in California Schools!

A huge thank you to everyone who signed our Sixth District PTA petition! Our voices are being heard! Governor Brown, in January, proposed to increase school funding from \$8,000 to \$9,000 per student. While that's great news for many Californians, we still have a long way to go. Top performing education states spend \$16,000 - \$22,000 per student, and the national average is \$12,000 per student. To view the petition, go to the www.capta6.org [Advocacy](#) home page and click [Read more](#) under Act Now! From there, click [Sign the Petition!](#) which will open the petition for you to read and sign.

Sixth District PTA Advocacy Web Pages

On the [Sixth District PTA](#) home page, click the [Advocacy](#) box to learn more about PTA advocacy and state school funding. Browse a multitude of resources to help you advocate for our schools.

LEGISLATIVE CONFERENCE

(Continued from page 4)

LCFF and LCAP

The new school funding formula, the Local Control Funding Formula (LCFF) is two parts: (1) a per-student funding base (amount varies by grade level), plus (2) supplemental and concentration grants for low income, English Learners and foster youth.

Every school district is to have a Local Control Accountability Plan (LCAP) implementing the eight LCFF state priorities.

The LCAP roadmap: (1) school district drafts a plan, (2) the plan is presented to parent groups, there is written feedback and oral feedback at public hearings, (3) the school district responds to the feedback from parent advisory groups and individual parents, and (4) July 2014, there is a plan.

State PTA will provide the Conference power point presentation on LCFF and LCAP. Sixth District will post the presentation as soon as we receive it.

School Funding Update and Options

A repeated Conference concern was the need to educate voters about California's woefully inadequate school funding. PTA is very concerned about a misperception that Proposition 30 "fixed" CA public school funding.

Not only do California schools remain profoundly underfunded, but also, the Prop. 30 funds are temporary – expiring in 2016 and 2018. Rick Simpson, Deputy Chief of Staff for the Assembly Speaker, estimates California schools need an additional \$25 - \$35 billion, based on several sources including studies underlying the Getting Down to Facts report and the percentage of personal income California spent on education when CA was a top performing education state.

Rick Simpson said the additional funds won't come from the state, given the Proposition 13 two-thirds threshold requirement to raise revenues at the state level. So, options to address this severe education underfunding discussed at the Conference included:

Local Funding of Schools: CA constitutional amendment.

Rick Simpson urged local funding for our schools, via a CA constitutional amendment, authorizing school boards and/or their local communities to levy taxes for their school districts. Up until 1978 (before Prop. 13), local school districts funded their local schools through local taxes. The state could address any funding inequities between districts.

The local taxes should not, and would not, be limited to parcel taxes. Rick does not like parcel taxes, calling them regressive, not economically sensitive, and they do not grow as the economy grows.

Timing: The November 2016 ballot initiative. Why? 2014 will be a low voter turn-out (2016 will be a contested presidential election), and 2016 is closer to the Proposition 30 drop-off of school funding.



Meeting with Rick Simpson, Deputy Chief of Staff, CA Assembly Speaker Perez - in the CA Assembly chambers

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LEGISLATIVE CONFERENCE

(Continued from page 5)

Oil Severance Tax

Senator Leno reminded conference attendees that "Oil is a natural resource. It belongs to all of us. Private entities are taking it for their own profit, returning nothing for our collective benefit." In 21 of 22 states – *all states where oil is extracted except California* – the states collect an oil severance tax.

Vehicle License Fee

CA had a vehicle license fee for 50 years. It's broad, not deep, grows with the population and it's progressive (those with more expensive cars, pay more). But it's politically poisonous, and not polling well even in as progressive a place like San Francisco.

Restore Commercial Property Taxes

Regularly re-assess commercial property to restore commercial property taxes that funded our schools when California schools ranked in the top five in the U.S. Commercial property held by huge conglomerates is still assessed at 1% of 1976 property value assessments.

Investing in Pre-school

A recent Stanford research study shows by age five, low income children are two years behind in language development.

A First-Five speaker stated that the wisest investment is in the early years. Early investment means less drop-outs, and less special education. Every \$1 spent saves \$7 later. As she noted,

"LCFF addresses the achievement gap. Early education investment *prevents* the achievement gap."

Asm. Weber added:

"The persistent achievement gap feeds our prison system, social justice system, poverty among women. People who go to preschool generally don't go to prison."

The greatest obstacle to early childhood education is funding. There is a consensus on quality early childhood education, but a lack of funding.

CA Budget Spending Proposals

According to Senator Leno, the state Democrats propose an equal spending distribution of state revenues: 1/3 to repay state debt, 1/3 to reserves, and 1/3 to re-invest in programs, while Governor Brown proposes 90% to debt repayment and reserves, and 10% re-investment in programs. So, we all need to watch as those negotiations go forward this Spring until the final budget is passed July 2014. The May 2014 budget revise will be a key document.

The need to set aside reserves is because California heavily relies on volatile revenue sources (personal income tax, sales tax). The reserve addresses shortages during economic downturns. If California relied more on stable property taxes (as do top performing education states), then a smaller reserve would be necessary.

—Nancy Krop, Director of Legislative Action, Sixth District PTA



"Sit down protest in Governor Brown's office for adequate, long term, stable school funding!" Sandi Spires, Erwin Morton, Rebecca Fox, Tracey Neistadt, Madhavi Gupta, Nancy Krop, Ranji Digumarthi

The Communicator Spring 2012

Finance Commission

Do's and Don'ts concerning PTA finances:

- When presenting a report at a meeting, the treasurer should be prepared to answer all questions promptly and to have records available.
- The executive board has a fiduciary responsibility to disclose to all members of the association all plans for expenditures and to secure the association's approval prior to incurring expenses. Members have the right and the fiduciary responsibility to ask questions and approve only expenditures that meet the PTA's Purposes and goals. The budget may be amended by the association provided notice has been given.
- Association funds should not be deposited in the personal account of the treasurer, nor should they be deposited in any school/school district account.
- Two PTA members, one who is a board member or chairman, must always count the money (in every situation such as fundraising and membership envelopes) and both should sign a Cash Verification Form verifying the amount. Each should receive a copy of the form. If the treasurer should sign the Cash Verification Form of the person delivering the funds indicating receipt of the funds after counting the funds again.
- All monies collected should be given to the treasurer without delay and deposited into the PTA bank account.
- The treasurer pays by check – never by cash – all bills as authorized. Purchases should not be made without prior authorization.
- Submit all check requests (authorizations for payment), receipts, bank statements, cancelled checks, association approved budget, financial reports and both executive board minutes and association meeting minutes to the auditor for the semiannual audit.
- The Audit Report must be supported by the Audit Checklist and recommendations. All three documents comprise the "audit report" that needs to be forwarded through channels.
- Every association must file the appropriate Form 990 with the Internal Revenue Service. Every association must file the appropriate Form 199 with the California Franchise Tax Board.
 - When tax filings are late, incomplete, or not filed at all, the PTA will eventually receive notices requesting further information, a prompt filing, or even penalties and interest from the IRS. Not acting quickly can become very expensive. **Contact the District PTA treasurer for assistance as soon as a notice is received.** Always respond to a tax notice immediately! Do not throw the notice away or ignore it.



California State PTA

www.capta.org**NOW, More than Ever!**

Finance Commission

Records retention schedule

It is very important the certain PTA records be retained. Listed are items that must be reviewed on a periodic basis and kept in a safe place. Develop a record retention policy based on this list.

PERMANENT STORAGE

- Audit reports
- Articles of Incorporation
- Canceled checks, for important transactions (e.g., taxes, contracts)
- Checks should be filed with papers pertaining to the transaction
- Corporation reports filed with the Secretary of State
- Legal correspondence
- Insurance records:
 - Accident reports/Incident report
 - Claims
 - Policies
- Ledgers
- Minutes of executive board, association and committees (bound)
- PTA Charter
- Tax documents:
 - Exempt status
 - Group exemption
 - Letter assigning Employer Identification Number (EIN)
 - State and federal tax forms, as filed
- Correspondence with state or federal agencies
- Trademark registrations



Consider getting a file cabinet at your school site so that PTA officers don't misplace these items at home or move away with them.

California State PTA

www.capta.org

NOW, More than Ever!

10 YEARS

- Financial statements (year-end) and budgets
- Grant award letters of agreement

7 YEARS

- Payment authorization and expense forms
- (receipts attached) for payments to vendors or reimbursement to officers
- Cash receipt records
- Checks (other than those listed for permanent retention)
- Expired contracts and leases
- Insurance incident reports
- Invoices
- Purchase orders
- Sales records

3 YEARS

- General correspondence
- Employee records (post-termination)
- Employment applications

1 YEAR

- Bank reconciliations
- Correspondence with vendors if non-contested
- Duplicate deposit slips
- Current Bylaws, approved by state parliamentarian
- Standing Rules
- Certificates of Insurance
- Inventories of products and materials, updated yearly

Finance Commission

Treasurer's checklist for the Spring

Current Treasurers

- Ensure all per capita dues have been forwarded through channels.
- Issue convention advances or reimbursement checks for authorized expenditures for elected delegates.
- Request authorization and pay all remaining outstanding bills.
- Compare year to date income and expense to budget, avoid last minute surprises
- Prepare Annual Financial Report.
- Prepare books and financial records for end-of-term audit and provide to current auditor, as stipulated in the bylaws (after close of fiscal year).
- Provide training to your successor.
- Give financial records and materials to the incoming financial officer (except those in audit).
- Assist the incoming officers in changing bank signatures.
- Prepare tax return (990N) or coordinate preparation of tax return (990EZ or 990).

Newly Elected or Continuing Treasurers

- Treasurer-elect chairs budget committee.
- Board-elect develops and adopts preliminary budget based on proposed PTA programs for the upcoming year.
- Present proposed budget to the current executive board and the membership for adoption at the last PTA association meeting of the year. (This allows the board-elect the ability to cover routine summer expenses as outlined in the bylaws.)





You're invited to the Sixth District PTA

Annual Luncheon

An annual event to celebrate the many ways PTAs throughout Santa Clara, Santa Cruz, Monterey and San Benito counties build community unity and enrich the lives of children and families.

featuring

Colleen A. R. You

California State PTA President

Friday, March 7, 2014 11:30-1:30

David's Restaurant
5151 Stars and Stripes Drive, Santa Clara

\$25 per person

RSVP by Friday Feb. 28. Please select an entrée and mail the reservation form below, along with a check payable to Sixth District PTA for \$25 per guest. Questions? dstraetker@sbcglobal.net or 408-472-9642

Diane Straetker, VP Organizational Services
3212 Corbal Court, San Jose, CA 95148

Braised Snapper

in a lemon butter sauce

Chicken Piccata

breast of chicken in a wine and caper sauce

Angel Hair Pasta

with fresh tomatoes and basil

Guest Name	PTA Unit/Council/District or Other Affiliation	Title	Menu Selection
			<input type="checkbox"/> Snapper <input type="checkbox"/> Chicken <input type="checkbox"/> Pasta
			<input type="checkbox"/> Snapper <input type="checkbox"/> Chicken <input type="checkbox"/> Pasta
			<input type="checkbox"/> Snapper <input type="checkbox"/> Chicken <input type="checkbox"/> Pasta
			<input type="checkbox"/> Snapper <input type="checkbox"/> Chicken <input type="checkbox"/> Pasta



Barbara Emerich Scholarship 2014

Barbara Emerich has held PTA leadership positions, from local schools to the state level, for more than 50 years. Her commitment to children is unparalleled, particularly in the areas of juvenile justice, gun control, teenage health and special needs.

The Sixth District PTA proudly honors Barbara Emerich's extraordinary service by awarding scholarships to two high school seniors who best exemplify her dedication to youth and families.

February 2014

Dear PTA Presidents, Scholarship Advisors, Career Centers and Staff:

We are pleased to announce that the Barbara Emerich Scholarship Fund is now accepting applications from qualified 2014 graduating seniors. Barbara Emerich, a PTA volunteer and leader for over 50 years, continues to dedicate her time and talents in support of children, particularly in the areas of juvenile justice, gun control, teen health and special needs. This scholarship was created to honor her exemplary service.

Two scholarships of \$750.00 each are available to support students who are planning to attend a 2- or 4-year college. Applicants must be current high school seniors with at least a 2.5 GPA and should have a strong record of community service/volunteering in education, counseling, mentoring, tutoring and preschool or with special needs children.

Applications should be emailed or postmarked no later than March 31, 2014. Finalists will be contacted for a phone interview in April. We will proudly announce the two recipients by letter and present them with certificates in May 2014.

Please review this scholarship application and forward it on to the appropriate counselor who may be aware of potential candidates. Thank you for helping us to appreciate and support students who give back to our community.

If you have any questions, please write to office@capta6.org. Applications can also be found on our website at www.capta6.org.

Sincerely,

The Barbara Emerich Scholarship Committee

Sixth District PTA
"serving the children of Monterey, San Benito, Santa Clara, and Santa Cruz Counties"
1290 Ridder Park Drive M/C 214
San Jose, CA 95131-2304
www.capta6.org
(408) 453-6536



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Application Criteria and Procedure for \$750 Scholarship Award:

- Attends a PTA or PTSA school in Sixth District PTA
- Currently a 2014 high school senior planning to attend a 2 or 4 year college
- 2.5 minimum GPA
- Has community service/volunteer experience in **education/counseling/mentoring/tutoring/preschool or with special needs children**
- Submit applications to Emerich Scholarship, Sixth District PTA, 1290 Ridder Park Drive, M/C 214, San Jose, CA 95131-2304. **Deadline for postmark is March 31, 2014.**
- Additional copies of the application can be found online at www.capta6.org
- Finalists will be called for a phone interview in April; selections will be announced in May 2014.
- The two scholarship recipients will receive a letter and a certificate from the Sixth District PTA.
- Scholarship monies will be awarded after providing proof of registration for college semester in the Fall 2014.

Application:

Name _____ phone _____

Address: _____

E-mail: _____

High School attending _____ GPA _____

Colleges applied to _____

What do you plan to study in college? _____

References (may be contacted by phone):

High School staff reference

Name _____ phone _____

Community reference

Name _____ phone _____

Applications attachments should include:

- A list of the community service you have been involved in relating to **education, counseling, mentoring, tutoring, and/or working with preschool and/or children with special needs.**
- A newspaper article you have written about yourself describing your accomplishments **as if you had won this scholarship.** Article should be printed in 12 point font, single spaced, and fit on one 8 ½ x 11" piece of paper.