

**President's Message**

**The Art of Recruiting New PTA Leaders**

By Fourth District PTA President Maureen Christensen



For many PTA leaders I meet, the toughest job isn't raising money or hosting family events or even getting regular volunteers for the carnival.

Those tasks are easy compared with finding parents who will lead your PTA in the future.

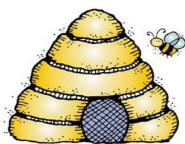
If you're a leader, I imagine there's a part of you looking forward to the day you can pass your job on to your successor. And maybe you're a bit worried because you can't figure out who that might be.

There's no doubt that volunteering to help at the book fair seems much easier than running the entire PTA. So it's no wonder that filling the key positions in PTA seems daunting.

Everyone knows that serving on the board of your PTA isn't easy. The same old tricks (free coffee and the 3rd graders singing holiday songs) won't help you find your next treasurer. Filling that kind of job takes long-term cultivation, personal approaches, and a commitment to making the roles less taxing (both in appearance and in reality).

If you are the kind of leader who continually emphasizes how busy you are and how crazy-hard the leadership job is, then you're going to have a heck of a time finding your replacement. That's like trying to sell your car and only talking about the dents and bad gas mileage. Emphasizing the positive throughout the year will be a big help when it comes to recruitment time.

*Sweeten the World*



*One Drop at a Time*

Recruiting and developing your next crop of leaders starts now and ends in June. If you're hoping to just elect a nominating committee and watch the new leaders pour in, then you're likely to be disappointed. Your next batch of leaders will almost certainly come from your current gang of good volunteers. The more regular volunteers you have now, the better your odds of finding new leader types for next year. The key is to create many manageable jobs that can increase your pool of leadership candidates.

Make leadership recruitment personal. Mass emails and newsletters are great tactics to increase your attendance at meetings. But when it comes to recruiting the two or three perfect leadership candidates, that is a personal job. You probably know who those people are already. Don't just hope that they will step up. Invite them to participate in leadership opportunities. Work on making your job more attractive by eliminating efforts that aren't working or just aren't necessary anymore.

Remember: "The art of leadership is the ability to make what one is doing attractive to others ... attractive enough for others to want to join and take on responsibilities!" (Leadership Essentials, Feb 2013) There is no better feeling for a current leader than to hand over the gavel knowing that a great successor is going to build on your hard work.

So get to work. Invite others to share in your PTA joy! And keep an eye out for your future leaders!

*Maureen*

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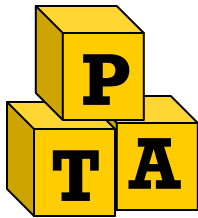
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*Artículos en español  
paginas 10 y 11*

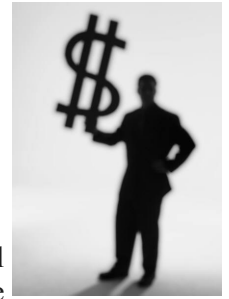
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[www.fourthdistrictpta.org](http://www.fourthdistrictpta.org)



# Time for your Basics: Mid-Year Audit



*PTAs that have a July 1-June 30 fiscal year are due for a midyear audit of the financial records. December 31 is the midyear point, so a well-prepared treasurer should wrap up loose ends before winter vacation and have the materials ready for the auditor as early as possible in the New Year.*

*Below is basic audit information from the California State PTA Toolkit—online. (Get forms and additional detail at <http://toolkit.capta.org>. The audit form and checklist are available as fillable forms on the Fourth District website.)*

*Cindy Mendoza, Fourth District PTA Auditor*

## Purpose of an Audit

An audit determines the accuracy of the books, detects inconsistencies or errors, provides recommendations for corrective action, protects the financial officers, verifies that funds were sent through channels as appropriate, and assures the membership that the association's resources were managed in a businesslike manner within the regulations established for their use.

The person conducting the audit should always be impartial and not related by blood or marriage nor reside in the same household as the president or other financial officers or any chairmen handling funds. The auditor is often a member of the budget, programs, or fundraising committees, but is never authorized to sign the PTA's checks.

The auditor may be an elected officer, appointed in-

dividual or committee, or a professional hired by the PTA in accordance with the procedures listed in the bylaws. The president, treasurer, financial secretary, secretary, or committee chairmen handling funds may not audit the finances.

## Preparation for an Audit

Collect all financial books, records and reports from the treasurer, including:

- ✓ A copy of the last audit report;
- ✓ Current bylaws and standing rules;
- ✓ Originals of checkbook register, whether handwritten or computer generated, and canceled checks (including voided checks);
- ✓ Originals of bank statements, bank book for each bank or savings account;
- ✓ Deposits and supporting documents for the cash receipts;
- ✓ Authorizations for payment with attached receipts;
- ✓ Itemized statements and receipts of bills paid;
- ✓ Monthly Treasurer's Reports;
- ✓ Original treasurer's books/ledgers including back-up files (external storage device) if books are kept on a computer;
- ✓ Financial Report by category for the period of the audit with or without budget comparison;

*Continued on page 9>>*

## Fourth District PTA

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Fourth District PTA comprises 20 councils in Orange & Los Angeles Counties with over 400 unit PTAs.

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# Shake-Up at the Fourth District PTA Board Meeting

The date of our October board meeting coincided with “The Great California ShakeOut” so we dutifully scrambled under the tables at Orange County Department of Education and waited for the “all clear” signal.

Millions of people worldwide practiced how to Drop, Cover, and Hold On at 10:16 a.m. on October 16 during Great ShakeOut Earthquake Drills, which began in California in 2008.

For more information on the drill and earthquake safety, see <http://www.shakeout.org/california/>.



*Vanessa Hatch, Harbor Council president and Jon Hultman, Buena Park Council President wait for the signal that the first phase of the drill is over*



*Capistrano Council President Sue Hill and Out-of-Council Counselor Marilyn Amato joined their PTA totes under the table during the Great ShakeOut drill.*

*Photos by Lisa Boler.*

## FOURTH DISTRICT PTA CALENDAR

### December

- 1 DUE DATE:  
Workers Comp forms**
- 4 Fourth District Board Meeting &  
Holiday Brunch**  
9:30 am - 12:30 pm  
Council President Roundtable immediately following
- 5 Reflections Entries Due**  
9 am - 1 pm  
Fourth District Office  
By appointment

### January

- 15 Council President Roundtable**  
9:30-11:30 am  
Fourth District Office
- 22 Executive Committee Meeting**  
9:30-11:30 am  
Fourth District Office
- 23 Advocacy Roundtable**  
9:30 am - 12 noon  
Fountain Valley Sch District  
10055 Slater Ave., Fountain Valley

### February

- 9-10 CAPTA State Leg Conference**  
Sacramento
- 12 District Board Meeting**  
9:30 am CP Roundtable  
10:30 am Board Meeting
- 23 Reflections Gallery & Awards**  
1:00-4:00 pm  
Orange County Dept. of Education  
200 Kalmus Drive, Costa Mesa

**Fourth District**  
**PTA**<sup>®</sup>  
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## Leadership Hints

# Keep Meetings Timely and On Time

From the California State PTA Communicator, Jan 2010

You're at a meeting that seems to go on, and on, and on. You think to yourself, "My gosh! Get this meeting under control," or, "That's not even on the agenda!"

How do you make YOUR meetings run so that people want to attend? How can you be sure that your meeting isn't on everyone's Top 10 list of things we have to do but wish we didn't?

Try the following:

### 1. Use an agenda

An agenda is a list of topics or business to be discussed. Some items are routine business, some new and some unfinished.

You need an agenda to keep everyone on topic. The *California State PTA Toolkit* is a good resource for an actual agenda and what one might look like. This is a KEY tool for running a meeting.

### 2. Time your agenda

Yes, this means putting actual time limits (or estimates) throughout your agenda. And print them right on the agenda!

Five minutes is good for opening (call to order, pledge of allegiance, inspiration...), 10-15 minutes for financial business, 20 minutes for committee reports.

**Make sure your time listed for each item adds up to the start and end time.**

Example: Sunshine Elementary PTA Meeting  
October 2, 2014  
7 – 8:25 p.m.

"7 to 8:25 p.m." means 85 minutes total time is expected to be needed to conduct the business of the organization. When people see the meeting has

these kinds of controls, they feel better about attending. People's time is valuable; let them know you value their time.

### 3. Use a consent calendar/consent agenda

What is a consent agenda? It is a portion at the beginning of the meeting where routine business is placed as items in a group for approval. This could include meeting minutes, treasurer's report of balance, etc. Minutes and other reports placed on the consent calendar must be sent out before the meeting for review. No lengthy discussion is expected.

Items placed on the consent calendar are then called for approval as a "group" of items, not individual items, thus saving the group time.

The consent calendar is not to be used as a venue for blanket approval. Items can be removed from the group by any individual and discussed separately.

When a consent agenda is placed on your meeting agenda and approved, variations and off-track comments or discussion can be more easily controlled. "That's not on our agenda," works wonders!

### 4. Time

Start your meeting on time, no matter what.

People get used to meetings that start late—they even expect it and then they adjust their arrival for the lateness.

Clearly state the meeting's start and end times right on the agenda, in the heading by the date and location. Then people attending know there is a set beginning and a set adjournment.

**These may seem like little things BUT THEY WORK!**



## SAVE THESE DATES! ADVOCACY ROUNDTABLES

FRIDAY, JANUARY 23, 2015

Topic To Be Announced

9:30AM to 11:30AM

Fountain Valley School District

10055 Slater Ave.

Fountain Valley, CA

FRIDAY, APRIL 24, 2015

Topic To Be Announced

9:30AM to 11:30AM

Fountain Valley School District

10055 Slater Ave.

Fountain Valley, CA

Fourth District

**PTA**

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All PTA members are welcome to attend.

Questions? Please contact Fran Sdao at [roundtables@fourthdistrictpta.org](mailto:roundtables@fourthdistrictpta.org)

# What do you say?

## *Anatomy of a good e-blast*

By Fourth District PTA Vice President for Communications Kathleen Fay

I recently received an email communication from one of our PTA units that impressed me so much that I want to share it with all of you. Here's why I loved it:



- **It was brief.** This is important because we're all busy, and brevity is not only effective, it is a subtle way of respecting people's time.
- **It was attractive.** A simple, easy-to-read format with good colors, contrast, and just a few graphics for visual interest encourages us to read on.
- **It celebrated success.** The PTA had just put on a big event that went wonderfully well, so they sent out congratulations to everyone for sharing in its success. They recalled the great time everyone had together, credited the fundraising activities for enriching their students' education, and acknowledged the tremendous community support they received. A positive message like this makes everyone feel good about the part they played!
- **It thanked their volunteers.** They listed their volunteers, thanked them, and credited them with the event's success. Offering public thanks and recognition to volunteers confirms that PTA values and appreciates the time and effort invested in working towards a common goal. This is critical because volunteers don't work for money, but thrive on making progress and feeling a sense of purpose. (Ignore people's efforts and you eliminate their motivation!)
- **It offered value.** Included in the e-blast were a few short updates and reminders to help parents make sure their kids would be ready to participate in upcoming school activities.
- **It looked forward to the next event.** They announced the next major PTA-sponsored event, highlighted the dates and times, and gave a few examples of what parents could do if they wanted to help out. They even noted that supplies and refreshments would be provided – nice! Who wouldn't want to help out such a successful organization that appreciates their volunteers' time and effort?

With one email blast, this PTA managed to celebrate success, update parents, ask for help, and – most importantly – thank and recognize their volunteers! It was short, informative, attractive, and very positive. Remember that people value and feel a connection to those things in which they have invested effort. Keep these points in mind when sending out emails to your PTA community and you'll get more value for your own communications efforts.

Thanks to El Morro Elementary PTA for the inspiration!

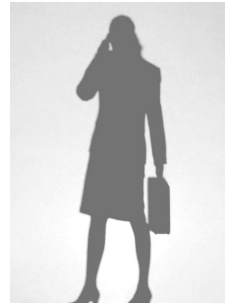
## Urgent Reasons to Call Fourth District PTA

PTA councils and district serve as available support for our units any time you need us, but some circumstances require you to contact your PTA district. Be sure to get in touch with Fourth District right away if any of these occurs:

**Suspected theft/mismanagement of PTA funds:** Fourth District leadership knows how to proceed in these cases. Do not contact the suspected person or the insurance company on your own. Fourth District should help with the full investigation.

**Communication from the IRS or California Franchise Tax Board or any other government agency:** Please scan the letter to be able to email it and then give us a call.

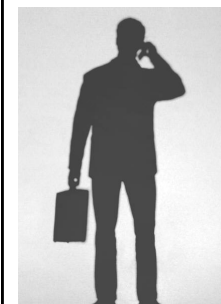
**Injury or property damage at a PTA event:** Fourth District needs to receive a copy of the incident report. Or we can assist you in making an incident report.



**Legal matters:** Any arrest or law suit or threat of law suit involving PTA activity or PTA leaders needs to be reported to Fourth District PTA.

**New Unit:** Any school that is possibly interested in forming a PTA needs to be referred to Fourth District PTA. They do not need to have fully decided before this contact. In fact, it is generally best to have Fourth District inform a potential new unit of the basic principles of PTA and the process for becoming one before they make the decision.

**Disbandment:** Any PTA that is considering closing up shop needs to contact Fourth District in order to properly complete the process. If this is done incorrectly, tax and legal complications can ensue.



If you find yourself in any of these circumstances, please call or email the office:

714.241.0495 fourthdistrictpta@sbcglobal.net



## Local Control and Accountability Plans – An Opportunity for School and Community Collaboration

*By Al Mijares, Ph.D., OC Superintendent of Schools*



### What Is the Local Control and Accountability Plan (LCAP)?

As part of California's new Local Control Funding Formula (LCFF), school districts, county offices of education, and charter schools are required to develop, adopt, and annually update a three-year Local Control and Accountability Plan (LCAP). The LCAP system provides an opportunity to engage a broad group of stakeholders in determining how to invest financial resources to achieve positive outcomes for students. Involving parents, students, teachers, and community members in the planning process is a step in the right direction toward local control, flexibility, and accountability.

#### LCAPs are designed to:

- Describe measurable, multi-year goals for student outcomes.
- Demonstrate how the district's budget will help achieve those goals.
- Assess how well the plan's strategies improve outcomes each year to encourage continuous improvement.
- Address specific needs of students from low-income families, English learners, and foster youth.

#### State Priorities

California has identified eight priorities for improving student outcomes that must be addressed by school districts in their LCAPs.

1. Basic Services – provide students access to fully credentialed teachers, instructional materials that align with state standards, and facilities maintained in good repair.



2. Implement Academic Standards – implement California's academic standards, including the Common Core State Standards in English language arts and mathematics, Next Generation Science Standards, English language development, history social-science, visual and performing arts, health education, and physical education.

3. Parent Involvement – seek parent input in decision-making and promote parent participation in the educational programs of all students.

4. Pupil Achievement – improve student achievement and outcomes along multiple measures including test scores, English proficiency, and college and career preparedness.
5. Pupil Engagement – measured by school attendance, chronic absenteeism, dropout, and high school graduation rates.
6. School Climate – measured by student suspension and expulsion rates, and other means, such as surveys of pupils, parents, and teachers on the sense of school safety and connectedness.
7. Access and Enrollment to Courses in a Broad Course of Study – student enrollment in a broad course of study in all of the subject areas, including those classes that provide Advanced Placement study.
8. Other Pupil Outcomes – measuring other important student outcomes related to required areas of study, including physical education and the arts.



### What is the Status of LCAPs in Orange County?

All 27 districts in Orange County, including the OCDE ACCESS program, have developed their LCAPs and were approved by the Orange County Superintendent of Schools in August. These LCAPs are posted on our website for public review. I am pleased to report that after a collaborative process to ensure that the needs of all students are addressed in a fiscally responsible manner, all districts have moved ahead with full implementation of their plans. Looking forward, districts will provide annual updates for stakeholders and local boards regarding progress toward their LCAP goals.

I encourage you to get involved with your local school to share your thoughts about how to best meet the diverse needs of our students. Your valuable insight will help ensure that Orange County students lead the nation in college and career readiness and success.

For more information, and to view district LCAPs, visit <http://ocde.us/lcap>.

# Summary: Orange County Board of Trustees Special Meeting on Common Core State Standards on October 20, 2014

By Fourth District PTA Advocacy Committee Member Kim Anderson

Superintendent Al Mijares was present as were all five Orange County Board of Education Trustees: John Bedell; David Boyd; Robert Hammond; Linda Lindholm and Ken Williams (president).

This was the first of two Special Meetings/Public Hearings related to the Common Core State Standards (CCSS), and the Orange County Board of Education had invited eight panelists: four in support of CCSS and four in opposition. The meeting was moderated by Attorney Maggie Chidester.

## The panelists in support were:

Dr. Claire Cavallaro - Dean of the College of Education, California State University, Fullerton

Celia Jaffe – Immediate past president, Fourth District PTA; Vice-Chair, California State PTA Education Commission; Board Member, Huntington Beach City School District

Dr. Glen Thomas – Former California Secretary of Education; UC Davis Board of Advisors

Glen Warren – Orange County Teacher of the Year, 2014; California School Library Association

## The panelists in opposition were:

Robin Eubanks – Attorney Specializing in Education in Atlanta, Georgia.

Lydia Gutierrez M.A. – Chair, Cultural Committee; Board member, Coastal San Pedro Neighborhood Council, California

Hugh Hewitt – Radio show host; Author, California

Dr. Gary Thompson – Director, Clinical Training Early Life Child Psychology and Education Center, Utah

Prior to commencement, Trustee David Boyd read a statement expressing his opposition to holding these two special meetings and spending thousands of dollars to fly panelists in from around the country at taxpayer's expense to hold a "Tea Party political rally." He also stated that the board member who put this on the agenda claimed a "growing number" of public commenters objected to the Common Core and that a review of minutes shows this claim to be unsupported.

During public comments, trustees heard from five people who spoke in favor of Common Core (including two Fourth District PTA members) and three people who spoke in opposition.

The format of the evening was that each of the panel members had five minutes for opening remarks then each trustee had two five-minute opportunities to ask questions. This was then followed by closing remarks from the panelists.

## Major points made by the panelists who spoke in favor included:

- The CCSS Initiative was led by the National Governor's Association and has never been a federal-led effort.
- California State PTA strongly supported CCSS from the beginning, because students will learn critical-thinking and problem-solving skills that they will need to be successful in a 21<sup>st</sup> century global economy.
- It's important to focus on the CCSS in California and not on the misunderstandings that have arisen in other states.
- CCSS provides the standards, but standards are *not* curriculum. Since California is a local-control state, local school boards have to approve the curriculum.
- CCSS doesn't require data collection and California has some of the strictest laws in the country regarding that.
- CCSS are opening new and exciting doors for students by focusing on the five C's: critical-thinking, collaboration, creativity, communication and (good) citizenship.
- When students enter CSU system currently, 1/3 need remedial classes and CCSS will help address that issue.

## Major points made by the panelists who spoke in opposition included:

- Common Core is using the principles used in Soviet Russia. "It's cultural Marxism."
- CCSS are a banner to hide federal involvement in public education.
- The 2012 Arne Duncan waiver was unconstitutional. The OC board of trustees should file a lawsuit against the federal government.
- Data-mining is rampant under CCSS and Pearson tests.
- SBAC test is an experiment given without informed parental consent.
- The standards are objectionable because they affect "values, attitudes, and expectations."
- Common Core is propaganda by folks with financial interests.
- Common Core will unfairly impact poor and minorities.
- The purpose of Common Core is to change the nature of American high schools.

Trustee Williams announced that there would be another special meeting on the CCSS on November 17 with different panelists and that the purpose is to get more information on Common Core. The board also has to make some decisions as it relates to grants and funding. Following the November 17 meeting, a white paper will be published by the Orange County Board of Trustees.

# Sacramento Safari: March 16-17, 2015

## It's THE place to be, so register NOW!

By Fourth District PTA Sacramento Safari Chairman Kim Anderson

Sacramento Safari is Fourth District PTA's annual two-day trip to our State Capitol where about 100 Orange County PTA members get to hear from key speakers on issues that affect children and youth, learn about the inner workings of state government, advocate directly to our legislators, and network with others. This is a highly informative and fun-filled two days!

### Conference times:

- \* Begins at 10:30 a.m. on Monday, March 16.
- \* Ends at 5:30 p.m. on Tuesday, March 17.

### Price:

- \* \$285 double occupancy, or \$385 single occupancy until January 23.
- \* After January 23, 2015, the price increases to \$305 double occupancy or \$405 single occupancy.

**Registration deadline:** February 27, 2015, or when all available places are filled (*limit of 100*).

### Registration fee includes:

- \* One night at the Embassy Suites, Sacramento
- \* Lunch and dinner on Monday
- \* Breakfast and lunch on Tuesday
- \* Conference materials

### Registration fee does NOT include:

- \* Airfare
- \* Ground transportation
- \* Airport parking fees
- \* Dinner on Tuesday

### Refund policy:

The registration fee is fully refundable until February 27, 2015, and after that it is transferrable if you find a replacement for yourself and the unit or council votes to approve the new person.

### Steps to be taken if you are planning to attend:

- \* Have your unit (or council) budget approximately \$600 for each Safari attendee.
- \* Your unit (or council) must vote to send you as a representative.
- \* Register. (Online is preferred but there is also a mail-in option.)
- \* Book your flights!



### Recommended flights (Recommended due to timing; no endorsement of any particular airline is intended.):

- \* March 16, 8:05 a.m. Southwest flight out of Orange County
- \* March 17, 7:25 p.m. Southwest flight back to Orange County

There are also flights that leave from Long Beach and Los Angeles that would work, if you prefer.

We request that you participate in the entire event, so please book your flights accordingly and also book them early...they tend to fill up quickly!

The Fourth District PTA Advocacy Team will set up the legislator appointments for you and will also accompany you when you meet with individual California Senators and/or Assembly Members from Orange County in their Capitol offices.

### On-line registration (preferred option) is available by going to:

<http://www.fourthdistrictpta.org/sacramento-safari-registration-form-2015/>

Or from the Fourth District PTA home page, go to the "Advocacy" drop menu and choose "Sacramento Safari."

A mail-in registration form is available at: <http://www.fourthdistrictpta.org/wp-content/uploads/2014/09/Mail-in-Registration-Form-Sacramento-Safari-2015.pdf>

### Orientation meeting will be held on:

Friday, March 6, 2015. 9:30 a.m. – 11:00 a.m.  
Fountain Valley School District – Board Room.  
10055 Slater Avenue, Fountain Valley

Questions?

Please e-mail: [sac-safari@fourthdistrictpta.org](mailto:sac-safari@fourthdistrictpta.org)



Thanks so much and we are so looking forward to being on safari with you!

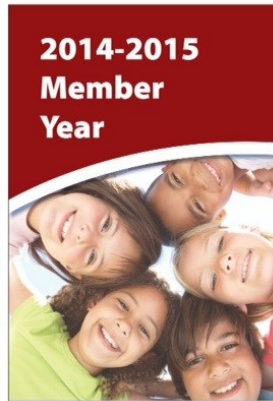
Kim Anderson



# PTA Membership Challenges & Prizes Still Coming

By Fourth District PTA Vice President for Membership Lisa Boler

At this time the majority of our schools have wrapped up their fall membership drives. Congratulations to those of you who have increased your membership numbers over last year. Thank you to all schools who have qualified to receive the "Ready Set Remit" Award. Those certificates will be coming in the near future. Your PTA could also qualify for an awesome membership challenge that could result in a free registration to California State PTA Convention. The other challenge recognition for an increase in membership will be given out at convention. Both of these challenges are described below. Remember that membership is ongoing, so keep your membership efforts alive and remit your dues monthly.



## "TEACHERS MATTER... MEMBERS MATTER" MEMBERSHIP CHALLENGE

Here's how to receive one free registration to the 2015 California State PTA Convention in Sacramento from April 30<sup>th</sup> - May 3rd:

- 100 percent of your full-time, home-based credentialed teachers join your PTA;
- Your PTA increases membership above last year's membership total; and
- A completed application form is received in the California State PTA office no later than midnight, February 2, 2015.

### **What makes this membership challenge unique?**

This challenge has two important focuses. California State PTA honors the support and loyalty of teachers—the "T"

in PTA. We also continually strive for increased membership. Each qualifying unit that meets all criteria will receive one free convention registration.

### **How to complete the application:**

Please follow these guidelines:

- ✓ Every full-time, home-based credentialed teacher at your school must have joined, with membership dues remitted through channels and received in the Fourth District PTA office by noon on January 15.
- ✓ A list of full-time credentialed teachers must be submitted as part of the application. Your principal's signature will verify that all full-time credentialed teachers based at your school site this school year have been listed.
- ✓ The signature of the PTA president will verify that per capita for every full-time credentialed teacher at your school site has been remitted through channels on time.

alive and remit your dues monthly.

## MEMBERSHIP CHALLENGE AND AWARD "ONE TO GROW ON"

Units that increase membership by March 31, 2015 will be entered into a 2015 convention drawing that will include a check for \$250, a plaque commemorating the award, a tree to plant at the school site and a visit from the California State PTA president. No application is required.

Your dues need to go through your council to Fourth District PTA by March 15.

### **>>Audit article continued from page 2.**

- ✓ Copies of board, executive committee and association minutes, including an adopted budget, any amendments that were approved during the year, approval of expenditures, and ratification of payments;
- ✓ Committee reports from chairmen (e.g., fundraising, membership, etc.);
- ✓ Any other information requested by the auditor;
- ✓ Copy of PTA-required Workers' Compensation Annual Payroll Report form;
- ✓ Copies of all required state and federal report forms if PTA hires employee(s);
- ✓ Copies of all required federal report forms if PTA hires independent contractor(s);
- ✓ Copies of the most recently filed *IRS Form 990*;
- ✓ Copies of the applicable State *Form 199 and RRF-1*.

### **Audit Procedure and Recommendations**

The Audit Checklist should be used, and each box marked in the negative should result in an audit recommendation. Audit each account separately. Check off items in red

ink as they are reviewed. Do not correct errors. Ask the responsible financial officer to correct errors. After errors have been corrected, and the auditor is satisfied that the financial accounts are correct, the auditor needs to denote the ending date of the audit. If a manual ledger and check register exists, draw a double line across the ledger and checkbook register where the audit concludes and sign and date using red ink, "Audited by (name) on (date)." If a computerized accounting program is used, attach a copy of the cash account and the last page of the check register to the audit report filed with the secretary minutes, sign and date using red ink, "Audited by (name) on (date)."

### **Auditor's Report**

A written Auditor's Report must be presented semiannually to the executive board and association after the books and financial records of the association have been audited. An Audit Checklist is required for each account. A report detailing findings and recommendations makes up the third component of an audit.



## El Arte de Incorporar a Nuevos Líderes en la PTA

Por la Presidenta del Cuarto Distrito de la PTA Maureen Christensen

Para muchos líderes de la PTA que he llegado a conocer, el trabajo más duro no ha sido el de recaudar fondos o el de organizar eventos familiares e incluso conseguir a voluntarios regulares para el carnaval. Esas tareas son fáciles en comparación con la de encontrar padres que conducirán su PTA en el futuro.

Si usted es un líder, me imagino que hay una parte dentro de usted con ansias de que llegue el día en que usted pueda transferir su trabajo a su sucesor. Tal vez usted está un poco preocupado porque no sabe quién podría ser. No hay duda que es mucho más fácil ser voluntario en la feria de libros que manejando toda la PTA. Así es que no es sorprendente que el llenar las posiciones claves de la PTA parezca desalentador.

Todo el mundo sabe que servir en la Junta Directiva de la PTA no es fácil. Los viejos trucos (café gratis y los estudiantes del 3er grado cantando canciones festivas) no le ayudarán a encontrar a su próximo Tesorero. Llenar esta posición requiere de cultivar a largo plazo, relaciones personales y un compromiso para realizar estas funciones con menos dificultad (tanto en apariencia como en la realidad).

Si usted es del tipo de líder que continuamente hace hincapié en lo ocupado que está y lo loco y difícil que es el trabajo de liderazgo, entonces va a tener muchos problemas para encontrar su reemplazo. Eso es como tratar de vender su carro y sólo hablar de las abolladuras y del consumo de gasolina por millas.

El enfatizar lo positivo a través del año será de gran ayuda cuando llegue la época de reclutamiento.

El reclutar y desarrollar su próximo grupo de líderes empieza ahora y termina en junio. Si desea sólo escoger a un Comité de nominaciones y ver a los nuevos líderes adherirse, entonces es probable que se decepcione. El siguiente grupo de líderes seguramente vendrá de su actual grupo de buenos voluntarios. Entre los voluntarios regulares con los que cuenta ahora, tendrá mejores probabilidades de encontrar nuevos tipos de líderes para el próximo año. La clave es crear empleos viables que puedan aumentar el número de candidatos al liderazgo.

Haga del reclutamiento de líderes algo personal. Boletines de noticias y correos electrónicos masivos son grandes tácticas para aumentar su participación en las reuniones. Pero cuando se trata de incorporar a los dos o tres candidatos perfectos para las posiciones de liderazgo, es un trabajo personal. Probablemente usted sabe quiénes son. No espere que tomen la iniciativa. Invítelos a participar en oportunidades de liderazgo. Trabaje en hacer su labor más atractiva mediante la eliminación

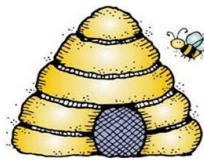
de esfuerzos que no están funcionando o que simplemente ya no son necesarios.

Recuerde: "el arte del liderazgo es la capacidad de hacer lo que uno está haciendo atractivo hacia los demás... lo suficientemente atractivo para que otros quieran unirse y asumir responsabilidades!" (Esenciales de Liderazgo, Feb de 2013) Ninguna sensación es mejor para un líder actual que el entregar el martillo sabiendo que un gran sucesor va a continuar construyendo sobre su trabajo.

Así que a trabajar. Invite a otros a compartir su alegría en la PTA! Y este atento en identificar futuros líderes!

*Maureen*

*Sweeten the World*



*One Drop at a Time*

## Razones Urgentes para Llamar al Cuarto Distrito de la PTA

Los concilios de la PTA y de los distritos sirven como apoyos para nuestras unidades disponibles en cualquier momento, pero algunas circunstancias requieren que usted contacte a la PTA de su distrito. Asegúrese de ponerse en contacto con el Cuarto Distrito inmediatamente si ocurre cualquiera de estos casos:

**Sospecha de robo/mal manejo de fondos de la PTA:** Los líderes del cuarto distrito saben cómo proceder en estos casos. No contacte a la persona sospechosa o la compañía de seguros por su cuenta. El Cuarto Distrito debería ayudar con la investigación completa.

**Comunicación de la IRS o de la Junta de Recaudación de Impuestos de California o cualquier otra agencia del gobierno:** Por favor escanee la carta, envíela por correo electrónico y después llámenos.

**Lesiones o deterioros materiales en un evento de la PTA:** El Cuarto Distrito necesita recibir una copia del informe del incidente. O podemos asistirle en la elaboración de un reporte del incidente.

**Asuntos legales:** Cualquier arresto, juicio o amenaza de demanda que implique actividades de la PTA o de sus líderes debe notificarse al Cuarto Distrito de la PTA.

**Nueva unidad:** Cualquier escuela que posiblemente esté interesada en la formación de una PTA necesita ser referido al Cuarto Distrito de la PTA. No necesitan estar completamente decididos antes de hacer este contacto. De hecho, generalmente es mejor que representantes del Cuarto Distrito informen acerca de los principios básicos de la PTA y el proceso para convertirte en una asociación, a una unidad potencial antes de que tomen la decisión.

**Disolución:** Cualquier PTA que está considerando cerrar sus puertas, debe contactar al Cuarto Distrito para completar correctamente el proceso. Si esto se hace incorrectamente, pueden acontecer complicaciones legales y fiscales.

Si usted se encuentra en cualquiera de estas circunstancias, por favor llame a la oficina (714.241.0495) o contáctese mediante correo electrónico al (fourthdistrictpta@sbcglobal.net).

# La Información de Auditoría Básica

Por Cindy Mendoza, Auditor del Cuarto Distrito de PTA



*Las PTAs que son del año fiscal Julio 1 – Junio 30 deben auditar sus archivos financieros a medio año. El 31 de diciembre es la fecha exacta del medio año fiscal. De manera que el tesorero preparado finiquite y ate todos los cabos sueltos al tener todos los materiales listos antes de las vacaciones de invierno para que la auditoría se lleve a cabo en el Año Nuevo.*

*A continuación esta la información de auditoría básica de la Carpeta de Recursos de la PTA de California – internet. (Obtenga formularios y mayor información en el sitio <http://toolkit.capta.org/es/>)*

## Propósito de la auditoría

Una auditoría determina la exactitud de los libros, detecta inconsistencias o errores, ofrece recomendaciones para la acción correctiva, protege a los funcionarios financieros, verifica que los fondos fueron enviados a través de los canales según lo dispuesto y asegura a los afiliados que los recursos de la asociación fueron administrados de una manera empresarial dentro de las regulaciones establecidas para su uso.

La persona que realiza la auditoría debe ser siempre imparcial y no tener relación de parentesco o matrimonio con, ni vivir en el mismo hogar que el presidente u otros funcionarios financieros ni directivo alguno que maneje fondos.

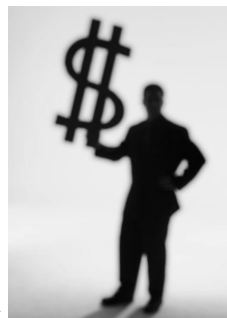
Con frecuencia, el auditor es un miembro del comité presupuestario, de programas o de recaudación de fondos, pero nunca es autorizado para firmar los cheques de la PTA.

El auditor puede ser un funcionario electo, un individuo o una comisión designados, o un profesional contratado por la PTA de acuerdo con los procedimientos señalados en sus estatutos. No pueden auditar las finanzas el presidente, el tesorero, el secretario financiero, el secretario ni los presidentes de comités que manejan fondos.

## Preparación de la auditoría

Recoja todos los libros financieros, registros e informes del tesorero, incluyendo:

- Una copia del último informe de auditoría;
- Estatutos actuales y normas permanentes;
- Originales del registro del talonario de cheques escritos a mano o electrónicamente y cheques pagados (incluyendo cheques anulados);
- Originales de los estados de cuenta bancarios, libro del banco y boletas de depósito;
- Depósitos y documentos de respaldo para los recibos de efectivo;
- Recibos por dinero en efectivo;
- Autorizaciones de pago con recibos adjuntos;
- Estados detallados y recibos de las cuentas pagadas;
- Informes Mensuales del Tesorero;
- Los libros de contabilidad originales del tesorero incluyendo los archivos de reserva



(dispositivo externo de almacenamiento) si los libros son mantenidos en una computadora;

- El Informe de finanzas por categoría para el período de la auditoría con o sin comparación con el presupuesto;
- Copias de las actas de la junta, de la comisión ejecutiva y de la asociación incluyendo un presupuesto adoptado, así como cualquier enmienda aprobada durante el año, aprobación de gastos y ratificación de pagos;
- Informes de los presidentes de los comités (por ejemplo, de recaudación de fondos, de afiliación, etc.);
- Cualquier otra información solicitada por el auditor;
- Copia de los formularios de reporte requerido de Planilla Anual de Compensación al Trabajador de la PTA;
- Copias de todos los formularios de reporte estatales y federales si la PTA contrata empleados;
- Copias de todos los formularios de reporte estatales y federales si la PTA contrata contratistas independientes;
- Copias de los Formularios 990 del Servicio de Recaudación de Impuestos (IRS) más recientes presentados; y
- Copias del formulario estatal aplicable 199 y RRF-1.

## Procedimiento de auditoría y recomendaciones

Se debe usar la Lista de cotejo de auditoría (Fig. 5-5 o Formularios, Capítulo 9) y cada casilla marcada en negativos debe dar como resultado una recomendación de auditoría. Audite cada cuenta por separado. Maque con tinta roja lo que se va revisando. No corrija los errores. Pida al directivo de finanzas responsable que corrija los errores. Solicite al directivo de finanzas responsable que corrija los errores después de presentar el informe. Una vez que se hayan corregido los errores, y el auditor se asegure de que los registros financieros sean correctos, el auditor debe anotar la fecha final de auditoría. Si hay libro mayor y registro de chequera manuales, trace una línea doble a lo ancho del libro mayor y del registro del talonario de cheques donde finaliza la auditoría. Proceda a firmar e incluir la siguiente frase con tinta roja: “Auditado por (nombre) el (fecha)”. Si se utiliza un programa de contabilidad computarizada, adjunte una copia de la cuenta de Caja y la última página del registro de chequera al informe de auditoría junto con las actas del secretario, firme y feche en tinta roja, “Auditado por (nombre) en (fecha)”.

## Informe del auditor

El Informe del Auditor debe presentarse por escrito a la junta ejecutiva y a la asociación dos veces al año después de que se hayan auditado los libros y registros financieros. Se requiere de una lista de Comprobación de auditoría para cada cuenta. Un informe detallando los hallazgos y recomendaciones constituye el tercer componente de una auditoría. Si todo está en orden, el comité de auditoría o auditor prepara un informe y el auditor o cada miembro de la comisión lo firma.

# California State PTA Convention Basic Information

By Fourth District PTA Vice President for Convention Cheri Jones



Remember to mark convention dates on your calendar, and have your unit/council budget set aside funds for sending delegates to convention.

## Important dates and information:

**When:** April 30 – May 3, 2015

**Where:** Sacramento Convention Center

**Registration Opens:** March 2, 2015

**Fees increase:** April 1, 2015

**Registration Closes:** April 24, 2015

## Convention Hotels:

Sheraton Grand

Hyatt Regency

**Room Rate:** \$175.00 per Night

## Events: (subject to change)

- ◆ EdSource Conference – April 30, 2015; 9:00 a.m. – 12:30 p.m.
- ◆ Reflections Event (Title to be determined) – May 2, 2015; 5:30 – 10 pm There will be a dinner prior to the presentation. The cost of the dinner is to be determined. The presentation will be held in the General Meeting Hall.

## Convention Registration Fees:

	3/2 - 3/31	4/1 - 4/24	Onsite
Full time (voting/nonvoting)	219	269	319
>>Register 2 or more from the same PTA (per person)	199	249	299
Full time Student (voting/nonvoting)	99	99	99
Daily Rate (nonvoting)	99	149	199
Daily Student (nonvoting)	59	59	59
Non PTA Member	500	500	500
Daily Rate - Exhibit Hall only (PTA member)	75	75	75
Daily Rate - Exhibit Hall Only (Non PTA member)	175	175	175

Dec 2014-  
Jan 2015

1520 Brookhollow Dr., #40  
Santa Ana, CA 92705-5449

**Fourth District**  
**PTA**