

23rd District PTA

2020-2021 Calendar

Meeting Location:

Riverside Office of Education - Murrieta
 38670 Sky Canyon Dr #200, Murrieta, CA 92563

[Locations are tentative based on social distancing governance due to COVID-19]

Office Hours

- By Appointment
 - Paperwork due: **Monthly Board/General Meeting [See Attached Paperwork Calendar]**

<u>July</u>	1 - Term Begins! You're On Your Way! 13-17 - 23 rd District Takes Summer Leadership Training Virtual! [Hosted via Zoom][Registration Required] 16 - 23 rd District Executive Board Meeting [Location: TBD] [7:00 P.M.] 23 - 23 rd District Virtual Council President Round Table [7:00 P.M.] [Hosted via Zoom]
<u>August</u>	13 - 23 rd District General Financial Training [Location: TBD] [6:00 P.M.] 13 - 23rd District General Association Meeting [Location: TBD] [7:00 P.M.] ★ 24-28 - 23 rd District Summer Leadership Training 2.0 [Hosted via Zoom][Registration Required]
<u>September</u>	3 - 23 rd District Executive Board Meeting [Hosted via Zoom] [7:00 P.M.] TBD - CAPTA Regional Leadership Conference [Location: TBD] 15 - Membership Remittances [Minimum of 15 members] Due for Early Bird
<u>October</u>	1 - CALIFORNIA STATE: Raffle Report Deadline! Don't forget to file! 1 - 23 rd District Executive Board Meeting [Hosted via Zoom] [7:00 P.M.] TBD - [CAPTA Assist] 23 rd District Tax Filing Assistance Workshop [Hosted via Zoom] 22 - 23 rd District Virtual Council President Round Table [7:00 P.M.] [Hosted via Zoom]
<u>November</u>	12 - 23 rd District General Financial Training [Hosted via Zoom] [6:00 P.M.] 12 - 23rd District General Association Meeting [Hosted via Zoom] [7:00 P.M.] ★ 15 - TAXES/RRF-1 FILING DEADLINE! Don't forget to file! 15 - Membership Remittances [Minimum of 15 members] Due for Good Standing 19 - Special Meeting: 23rd District Executive Board Meeting [Hosted via Zoom] [6:00 P.M.]
<u>December</u>	3 - 23 rd District Executive Board Meeting [Hosted via Zoom] [7:00 P.M.] 3 - Reflections Entries DUE to 23rd District [Hosted via Zoom] [7:00 P.M.]
<u>January</u>	7 - 23 rd District Executive Board Meeting [Location: TBD] [7:00 P.M.] TBD - 23 rd District Mid-Year Leadership Training [Location: TBD] 11 - 12 - California State PTA Legislation Conference [Sacramento]
<u>February</u>	4 - 23 rd District Virtual Council President Round Table [7:00 P.M.] [Hosted via Zoom] 17 - <i>Founders Day</i> 25 - 23 rd District General Financial Training [Location: TBD] [6:00 P.M.] 25 - 23rd District General Association Election Meeting [Location: TBD] [7:00 P.M.] ★
<u>March</u>	TBD - 23rd District Reflections Showcase and Awards [Temecula Valley High School]
<u>April</u>	1 - 23 rd District Executive Board Meeting [Location: TBD] [7:00 P.M.] TBD - 23rd District Convention Orientation [Location: TBD] [Time TBD]
<u>May</u>	6 - 23 rd District Executive Board Meeting [Location: TBD] [7:00 P.M.] 13 - 15 - California State PTA Annual Convention [Sacramento] TBD - 23 rd District Convention Evening Event [Location: TBD] [Time TBD] TBD - 23 rd District Awards Event [Citrus Park, Riverside] [Time TBD]
<u>June</u>	1 - ALL OFFICERS-ELECT MUST BE SUBMITTED TO DISTRICT/ENTERED IN PTAEZ! 17 - 23 rd District Council President Round Table [Location: TBD] [6:00 P.M.] 17 - 23rd District General Association Meeting [Location: TBD] [7:00 P.M.] ★ 30 - Term Complete! Congratulations! You Made It!

23rd District PTA
2020-2021 Paperwork Checklist
Paperwork Due

Quarterly Presidents' Report:
 Presidents will receive an email with instructions.

Paperwork items may be mailed
 to 23rd District PTA:
 P.O. Box 891116
 Temecula, CA 92589

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 to 23rd District PTA:
 P.O. Box 891116
 Temecula, CA 92589

Councils: Remit only compliance documents for your council. Please ensure and verify compliance documents are remitted for your units.

Out-of-Council units: Remit compliance documents for your unit

Paperwork can also be uploaded to PTAEZ
 Ensure all compliance documents are uploaded to PTAEZ for special recognition!

<u>July</u>	Monthly Paperwork	Due Date
<u>August</u>	<input type="checkbox"/> Unit/Council Annual Report ("Year-End Financial Report") <input type="checkbox"/> End-of-Year Adopted Audit with checklist & recommendations <input type="checkbox"/> Membership dues and Rosters (Include a numbered copy of membership roster) <input type="checkbox"/> Agenda, Minutes for July Executive Board meeting (If one was held)	8/15
<u>September</u>	<input type="checkbox"/> Membership dues and Rosters (Include a numbered copy of membership roster) <input type="checkbox"/> Unit/Council Financial Reports for August (include any not already submitted) <input type="checkbox"/> Agenda, Minutes for August meetings (include any not already submitted)	9/5
<u>October</u>	<input type="checkbox"/> Unit/Council Insurance (attach check to received invoice) [MUST BE RECEIVED BY 11/30] <input type="checkbox"/> Membership dues and Rosters (Include a numbered copy of membership roster) <input type="checkbox"/> Unit/Council Financial Reports for September (include any not already submitted) <input type="checkbox"/> Agenda, Minutes for September meetings (include any not already submitted)	10/3
<u>November</u>	<input type="checkbox"/> Membership dues and Rosters (Include a numbered copy of membership roster) <input type="checkbox"/> Unit/Council Financial Reports for October (include any not already submitted) <input type="checkbox"/> Agenda, Minutes for October meetings (include any not already submitted)	11/21
<u>December</u>	<input type="checkbox"/> Annual Worker's Comp Form (Councils, too!) [MUST BE RECEIVED BY 12/5] <input type="checkbox"/> Membership dues and Rosters (Include a numbered copy of membership roster) <input type="checkbox"/> Unit/Council Financial Report for November (include any not already submitted) <input type="checkbox"/> Agenda, Minutes for November, December meetings (include any not already submitted)	12/5
<u>January</u>	<input type="checkbox"/> Membership dues and Rosters (Include a numbered copy of membership roster) <input type="checkbox"/> Agenda, Minutes for December meetings (include any not already submitted) <input type="checkbox"/> Unit/Council Financial Report for December (include any not already submitted)	1/9
<u>February</u>	<input type="checkbox"/> Mid-Year Adopted Audit with checklist & recommendations <input type="checkbox"/> Membership dues and Rosters (Include one (1) numbered copy of membership roster) <input type="checkbox"/> Agenda, Minutes for January meetings (include any not already submitted) <input type="checkbox"/> Unit Financial Reports for January (include any not already submitted)	2/13
<u>March</u>	<input type="checkbox"/> Membership dues and Rosters (Include one (1) numbered copy of membership roster) <input type="checkbox"/> Agenda, Minutes for February meetings (include any not already submitted) <input type="checkbox"/> Unit Financial Reports for February (include any not already submitted)	3/5
<u>April</u>	<input type="checkbox"/> Annual Historian's Report (Don't underestimate those hours!) <input type="checkbox"/> Membership dues and Rosters (Include one (1) numbered copy of membership roster) <input type="checkbox"/> Agenda, Minutes for March meetings (include any not already submitted) <input type="checkbox"/> Unit Financial Reports for March (include any not already submitted)	4/2
<u>May</u>	<input type="checkbox"/> Unit Board-Elect Rosters submitted to District/PTAEZ <input type="checkbox"/> Agenda, Minutes for April meetings (include any not already submitted) <input type="checkbox"/> Unit Financial Reports for April (include any not already submitted)	5/7
<u>June</u>	<input type="checkbox"/> Unit Board-Elect Rosters submitted to District/PTAEZ [MUST BE RECEIVED BY 6/1] <input type="checkbox"/> Agenda, Minutes for May meetings (include any not already submitted) <input type="checkbox"/> Unit Financial Reports for June (include any not already submitted)	6/18

Paperwork/ Reports Key

The President is responsible for ensuring that all paperwork is remitted to District.

This key provides who is responsible for the creation of the reports to be remitted:

President – Agendas

Treasurer – Financial Documentation [Annual Report, Treasurer's Report.]

Secretary – Minutes

Auditor – Audit Report

Membership Chairman – Copies of the Membership Roster