July 22, 2013

M E M O R A N D U M

TO: MEMBERS OF THE CTA LIAISON COMMITTEE

FROM: KEN BURT, LIAISON PROGRAM COORDINATOR

SUBJECT: ***GENERAL INSTRUCTIONS & PROCEDURES FOR CTA LIAISONS***

A. **THE ONLY WAY TO SUBMIT YOUR REPORT IS ONLINE - A copy will automatically be sent to me and Dawn and you should also receive a copy for your records**. To access the member's only area you will need to register by putting in your member identification number; ***this number can be found on your CTA membership card, or the Educator***. Once you have done this you will be able to navigate through the system, if you click on the link for forms, you will see the liaison report form. **Please Note: you must file an individual report. Group reports are not acceptable, these reports must be timely "**If you have attachments with a deadline close at hand please fax the attachments to: **(916) 325-9045,** otherwise please send attachments via U.S. mail.

B. **If you are unable to attend meeting(s):** Please e-mail the CTA Vice President Eric Heins at Eheins@cta.org , ***please give at least (10) days notice*** with a copy to Ken Burt at Kburt@cta.org , so a replacement can be designated, and the person can be informed of the specifics of the meeting. Currently there are five alternate liaisons to assist in this regard.

C. **All Conferences must be approved** – Even if the conference is part of your liaison assignment. There must be advance approval in each instance. Please send an e-mail request to attend a conference to Kburt@cta.org and it will be forwarded to the Vice President for approval. ***SPECIAL CONCERN MUST BE DEALT WITH, IF THE FACILITY IS INVOLVED IN A LABOR DISPUTE***. ***You must make your own arrangements for travel, i.e. hotel, registration etc.*** If you have any questions on this or you need assistance, please contact Dawn Basurto @ dbasurto@cta.org or (916) 325-1531.

D. **Attendance will be taken -** Effective October 12, 2007 until further notice, attendance will be taken 3 times, ***networking, training meeting, and state council committee meeting.*** Effective September 9, 2009; as liaison you are expected to stay through Saturday and attend a committee meeting. Each liaison has been assigned to a State Council committee. The individual liaison is given the flexibility to stay through Sunday should he/she chooses to do so. **If you choose to remain Sunday at Council the expectation is that you sign in at your breakfast caucus, and attend the meetings.**

E. **Registration for State Council is done on-line – Current Liaison Housing Guidelines for Meeting in Conjunction with State Council** - Until further notice, the ***State Council Member Housing Guidelines***, which can be found on the back of

the State Council Hotel Reservation form, apply to all liaisons. An exception to the guidelines will be made for those liaisons arriving Thursday before the Friday liaison meeting. CTA will pay for a single room if no roommate has been assigned for that Thursday evening only. "Preferred ***roommates are assigned with the KNOWLEDGE AND AGREEMENT of the person named. If the person you select is not in agreement, another person will be assigned as your roommate."*** Registration is now being done online. If you have not received this notice please call the Governance Department at (650) 552-5300.

F. **Please keep your information current.** Please be sure to check the current copy of the Liaison Roster to make sure the information concerning you is correct. All information should be kept current. Should it change please notify Ken Burt @ kburt@cta.org and also copy Dawn Basurto @ dbasurto@cta.org

G. **No Report, No Expenses.** All member expense statements are to be mailed to the address listed below. Please note your online report ***must be filed before your expenses are approved***. (Note) Except in the case of the four liaison meetings. **For a speedy check return, please assure that all receipts are stapled to the expense statement. Send to:**

Ken Burt, or Dawn Basurto, CTA
1118 10th Street
Sacramento, California 95814

Please use the member expense form on-line. Be sure to completely fill out the top of your expense form. Frequently missed areas include correct dates and complete addresses. In the section "If Other Than State Council Meeting, give the name of the staff member who arranged for the meeting," ***put Ken Burt unless it was a meeting with someone else. Please not that effective September 1st you must have a receipt for all of your expenses. If you are missing a receipt, you can obtain a missing receipt form from the CTA Website you should attach it to your expenses. The form must be filled out completely.***

H. **Calendar Issues** - If you have additional meeting dates and/or change(s) of meeting date(s) for your group, please call our office at (916) 325-1530.

I. **Release Time Procedure-**

A letter will be sent on your behalf. To do this you will need to notify **Ken Burt** with the date(s) you need release time, the meeting you are attending and to whom the letter needs to be addressed to, i.e. ***the name, title, school district, and address and if possible e-mail.*** Please e-mail your request to, kburt@cta.org or fax it to my attention at **(916) 325-9045.** The letter will be sent to your ***district office by e-mail if you provide it***, and a copy will be sent to you by e-mail for your records. In order to make this process work better for you, ***please take a moment to review the letter to make sure it is correct including but not limited to the correct date(s) and correct information including the person(s) to whom you requested that the letter be sent***. ***Please notify me immediately if you do not use a given day for the purpose requested to prevent the possibility of CTA paying for such a day. Thank you.*** Should the letter need correcting, or should your plans change regarding the use of this day please notify Ken Burt – kburt@cta.org as soon as possible. ***Please Note: These "General Instructions & Procedures" are subject to change.***