


October 7, 2022

**MEMORANDUM**

**TO:** CTA Service Center Council Chairs

**FROM:** Teri Holoman, Associate Executive Director 

**SUBJECT:** 2022-23 School Board Events

We will once again host social events for newly elected school board members. The events will be organized and planned by Service Center Councils in conjunction with the appropriate CTA Board of Directors and your regional political organizer.

A major goal of these events is to get the newly elected school board members involved with CTA leaders at the state and local levels. An additional goal is to provide the school board members with information on current education issues from CTA's perspective.

Enclosed is information about the 2022-23 school board events, including guidelines, sample letters, and a model agenda. The guidelines indicate your event may be a breakfast, luncheon, dinner, or reception depending on what is best for your region.

The CTA/ABC Committee will reimburse your Service Center Council as specified in the "Guidelines for School Board Events." Please email completed reimbursement requests to [tcampa@cta.org](mailto:tcampa@cta.org) or mail to the CTA Governmental Relations office.

Your regional political organizer is available to help you plan your event and will furnish copies of materials to present to school board members at the time of your event.

If you have not already done so, please coordinate the event date with your CTA board member and your regional political organizer to include attendance by one of the CTA Executive Officers when possible.

<b>Call:</b>	Region One	Rick Wathen	(916) 501-5900
	Region Two	Michael Tamariz	(916) 202-3634
	Region Three	Eric Alfaro	(213) 300-2551
	Region Four	Amy Hunter	(714) 390-6114

Thank you in advance for your willingness to make these events a success.

TH/SH/tc

<b>Cc:</b>	E. Toby Boyd	Susan Harper
	David B. Goldberg	Regional Managers
	Leslie S. Littman	Regional Supervisors
	CTA Board of Directors	Service Center Council Staff Consultants
	Service Center Council Chairs	Regional Political Organizers
	Service Center Council PAC Chairs	Service Center Council Associate Staff
	Joe Boyd	Political Department Associate Staff

## Sample Memo to Chapter Presidents

To: Chapter President  
From: (Chair's Name), Chair  
(SCC Name) Service Center Council  
Date: (Date)  
Subject: 2022-2023 SCC Event for Newly Elected Board of Education Members

CTA is again sponsoring special events for newly elected board of education members. The purpose of these events includes the following:

- to develop an understanding of the relationship and perspective of CTA and its local associations;
- to assist you in developing and improving positive relationships with your school board members;
- to assist you in providing information to your school board members;
- to give your school board members positive information regarding CTA, NEA, and your local association.

The event for our service center will be:

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Place: \_\_\_\_\_

Please invite **newly elected** board members and other board members, as appropriate. CTA/ABC will reimburse the Service Center Council for your meal expenses and the meal expenses for your newly elected board members and locally endorsed school board members. Your chapter is responsible for meal costs for other guests you may wish to invite.

A sample invitation is enclosed for your use. You are encouraged to invite as many board members as you deem appropriate.

Please notify the Service Center office no later than (deadline) of the names of school board members and any other guests of your association who will attend the event. Please, be sure to let us know whether you will personally attend. We need to know who will be attending for name badges and the meal count.

Thank you for your cooperation in this endeavor. I look forward to hearing from you soon.

**REMINDER:** Your final attendance count, along with names and titles, is due to the Service Center by (deadline).

## Sample Email to School Board Member

November \_\_, 2022

Dear (School Board Member):

Congratulations on your recent election to our Board of Education. We look forward to working with you to strengthen the educational program in our district.

Please be our guest at a CTA-sponsored (name of event) for school board members on (date) at (time & place).

This event is to honor you and other newly elected board members, and to provide an opportunity for you to learn more about our organization and its structure.

Please contact me at (phone number) to confirm your attendance and to arrange transportation.

Thank you for considering this invitation. On behalf of the teachers in your district, we look forward to hearing from you and seeing you at the (name of event).

Best wishes for a productive term on the school board, and I look forward to working closely with you to provide a strong educational program for the children of our community.

Sincerely,

Chapter President

*Insert the following paragraph in place of the first paragraph if the board member you are inviting is not a newly elected member.*

Thank you for your efforts as a member of our district's Board of Education. We look forward to continuing our mutual effort to strengthen the educational program in our district.

# School Board Member Orientation Event

## Model Agenda

Your complete program, including meal and social time, should be between 2 and 2½ hours.  
The program itself will take between 1 and 1½ hours.

### **Welcome and Introductions** (20 minutes - time will vary according to number in attendance)

1. Conducted by either the Service Center Chairperson and/or the Service Center PAC Chairperson.
2. This should be an opportunity to introduce key CTA people who are in attendance.
3. Each Chapter President should be introduced by the president and then given an opportunity to introduce all of the people from his/her chapter who are in attendance including their board members.
4. The Chapter President should be prepared to say something regarding each of the board members they are introducing, i.e., newly elected and ran a terrific race--or been on the board for "x" years and has been helpful in seeing that teachers are fairly compensated.

### **California Teachers Association Overview and Current Issues** (20-30 minutes)

1. Conducted by CTA Executive Officer, CTA Director or the CTA/ABC Committee member or other appropriate person.
2. An opportunity to discuss what CTA stands for and how we conduct business (sample speech will be provided).
3. Presentation on subjects of mutual concern, especially school finance and threats to public education.
4. Answer questions.

### **Questions and Answers from School Board Members** (10 minutes maximum)

1. Service Center Council Chairperson presiding.
2. Opportunity for school board members to ask whatever they've always wanted to ask.
3. Presenters and staff should be available to answer questions.
4. If no one knows the answer, make certain to get the name of those who want an answer and follow up.

### **Thanks for Attending and Adjournment** (5 minutes)

1. Service Center Council Chairperson presiding.
2. Congratulations again extended and thanks for attending.
3. Stress continuing communication and opportunity to work together in upcoming years extended.
4. Service Center Council Chair will mail and/or email the per person cost of the meal to the school board member.



# School Board Event Report Evaluation & Reimbursement Form

Name of Service Center Council \_\_\_\_\_

Date of School Board Event \_\_\_\_\_

Type of event: breakfast lunch dinner other \_\_\_\_\_

Location of event: \_\_\_\_\_

Number of Chapters attending # \_\_\_\_\_

### Reimbursable:

CTA Officers and Board Members # \_\_\_\_\_

ABC Committee Members # \_\_\_\_\_

Number of Chapter Presidents # \_\_\_\_\_

Number of School Board Members # \_\_\_\_\_

Additional Attendees (Up to 3) # \_\_\_\_\_

Subtotal # \_\_\_\_\_

### Non-Reimbursable:

CTA staff in attendance # \_\_\_\_\_

Number of "others" attending # \_\_\_\_\_

Subtotal # \_\_\_\_\_

Total Attendance # \_\_\_\_\_

### General overview of program (Please attach copy of agenda/program)

\_\_\_\_\_  
\_\_\_\_\_

### Assessment of program (please include suggestions for future events as well as problems encountered with this event)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Expense Reimbursement Request (attach bills for event and any other expenses for which reimbursement is requested)

(Maximum Annual Expense = \$4000 over a two-year fiscal period)

Check here if this is reimbursement for a biennial event

A. Total Cost of Event / Total number of Attendees. \$ \_\_\_\_\_ (This is your Unit Cost)

B. Event: Unit Cost \$ \_\_\_\_\_ x total number \_\_\_\_\_ = \$ \_\_\_\_\_  
(Reimbursable attendees only)

C. Other expenses \$ \_\_\_\_\_  
(Invitations, Programs, Center Pieces, Flowers, etc)

Total reimbursement Request (Total of B and C) \$ \_\_\_\_\_

Return to: CTA Governmental Relations Division  
1118 - 10th Street  
Sacramento, CA 95814



## GUIDELINES FOR SCHOOL BOARD EVENTS

- I. Each Service Center Council will organize an event for school board members. This event may be a breakfast, lunch, dinner, or reception, based on the need to maximize attendance. Service Center Councils may combine for increased attendance or effectiveness.
- II. The Event should be scheduled after the November elections.
- III. Service Center Councils will bill CTA/ABC for events up to \$4,000 over a two-year fiscal period with no carryover retroactive to 9/1/17. CTA/ABC will reimburse the Service Center Councils for the following people only:
  - CTA Executive Officer(s)
  - CTA Board Member(s)
  - CTA/ABC Committee Member(s)
  - School Board Members and Their Chapter Presidents
  - Up to 3 additional guests, with the approval of the SCC Chair
- IV. A suggested program is to be developed by the Governmental Relations Division in conjunction with the local Service Center Council(s) and the appropriate CTA Board Member(s).
- V. Whenever possible, a CTA Executive Officer should deliver the program to provide statewide emphasis. In the event that no Executive Officer is able to attend, the CTA Board Member in attendance will present the program. CTA/ABC Committee Member(s) should be introduced.
- VI. Local presidents should be involved in determining which school board members are invited.
- VII. If the accumulated gift is \$50 or more in a calendar year, then the Service Center Council must notify the elected official within 30 days of the event.

9/12/13 Approved by the Board of Directors  
9/7/17 Approved by the Board of Directors  
10/11/17 Approved by the Board of Directors