The Red Book
For Unit Presidents
2019 - 2020

"You can't go back and change the beginning,
but you can
Start where you are
and change the ending."
-C.S. Lewis

This reference guide has been created by the Long Beach Council PTA Board of Directors. The information is compiled with the best intention that it gets to you in a timely manner. Information and dates are subject to change. We will keep you updated and we welcome any questions or comments you have about this book.

Many thanks to Lezlie Darling and the LBCPTA Board of Directors team of 1995-97 for creating the first issue for this resourceful Red Book.
PURPOSE OF THE CALIFORNIA STATE PTA

To promote the welfare of children and youth in home, school, community, and place of worship.

To raise the standards of home life.

To secure adequate laws for the care and protection of children and youth.

To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.

To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

CALIFORNIA STATE PTA CORE VALUES

The California State PTA is a professional, non-profit volunteer organization committed to the well-being of all children.

We believe every adult has a responsibility to ensure that all children develop to their full potential.

We believe parents are children’s first teachers and that parent involvement is essential throughout a child’s educational experience.

We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that “the family” may be defined in many ways.

We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.
Dear Unit PTA President,

Welcome to Long Beach Council PTA! As a Unit President, you are to be congratulated for being willing to take on such an important responsibility. The LBCPTA board members are looking forward to working with you during this school year.

PTA is a multi-level organization with information being passed and communicated through channels (units, council, district, state and national). Membership dues and volunteer hours are just two examples of what passes all the way from the unit level to the national level. It is so important that our units complete the necessary forms and turn them in by due dates so the council, district and state can then meet their own due dates.

This Red Book has been compiled by LBCPTA board members to help LBCPTA units fulfill requirements and have access to all sorts of PTA information. Unit presidents are encouraged to make copies of the Money Matters & Turn In Form BEFORE turning into LBCPTA. It can be used as a receipt for the treasurer book. Making copies of section for other officers and committee chairs is recommended. Sharing knowledge only makes your PTA stronger.

Unit presidents are asked to please READ AHEAD in the book. By doing so, you will be able to stay ahead of the paper trail and allow enough time to gather all the information from your officers.

In the Months section you will have an at-a-glance look at paperwork and fees due to LBCPTA each month. Unit presidents (UPs) will turn in their paperwork to their area advisors along with the Money Matters form and the green Unit President’s Tracker at UPs meetings. UPs are encouraged to keep track of what they turn in on the form provided in this Red Book. Recognition will be given at the end of the year to the units that have complied with meeting dates and action items on the Unit Tracker.

Long Beach Council PTA is committed to helping you have a smooth and successful presidency. Please do not hesitate to contact any one of us for assistance.

Warmest wishes for a great school year,

Long Beach Council PTA Board of Directors
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<tr>
<td>President</td>
<td>Erica Dawson</td>
<td>562-858-0446</td>
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<td>Executive Vice President - Convention, Office, Honorary Service Awards &amp; PAT's</td>
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<td>(1 VP) Director of Leadership - Honor Unit Awards &amp; Red Book</td>
<td>Shannon Hilleshiem</td>
<td>562-400-9675</td>
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<td>Christina Butler</td>
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<td>Maria Towne</td>
<td>562-397-8627</td>
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Chain of Command

Who should I call?

As of this school year, Long Beach Council PTA is made up of 46 PTA units at schools in LBUSD. We are a large council, divided into “areas” with an advisor for each. Area Advisors collect and help keep track of unit reports and materials that are due to council. They are also available to assist unit presidents by answering questions and providing guidance. Unit presidents should not hesitate to contact their area advisor with any questions or concerns.

Units with questions or concerns should follow these steps, subscribing to PTA’s notion of “going through channels”:

Step 1 Contact Area Advisor – if further assistance is needed proceed to step 2

Step 2 Contact LBCPTA Director of Leadership (DOL) – Shannon Hillesheim @Shilleshiem@verizon.net or the President- Erica Dawson @lbcptapresident@gmail.com - if further assistance is needed proceed to step 3

Step 3 Contact Thirty-Third District PTA (office@33rdpta.org - 562-804-4519)

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<thead>
<tr>
<th>Area 1 Advisor:</th>
<th>Bancroft (MS), Gompers(K-8), Hoover (MS), Intellectual Virtues Academy (MS), Longfellow, Los Cerritos, MacArthur, Madison, Riley &amp; Twain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nora Howit – 562-292-4082</td>
<td>10 schools</td>
</tr>
<tr>
<td><a href="mailto:nora.h.pta@gmail.com">nora.h.pta@gmail.com</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area 2 Advisor:</th>
<th>Birney, Burcham, Carver, Cubberley (K-8), Cleveland Emerson, Henry, Prisk, Rogers (MS) Tincher (K-8) &amp; Stanford (MS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maggie Magno – 310-402-6612</td>
<td>11 schools</td>
</tr>
<tr>
<td><a href="mailto:Maggiemagno81@gmail.com">Maggiemagno81@gmail.com</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area 3 Advisor:</th>
<th>Bixby, Fremont, Gant, Jefferson (MS), Kettering, Lowell, Mann, Naples, Newcomb (K-8), Signal Hill, &amp; Stevenson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarah Derrick – 562-233-3719</td>
<td>11 schools</td>
</tr>
<tr>
<td><a href="mailto:chrisandsarahderrick@gmail.com">chrisandsarahderrick@gmail.com</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area 4 Advisor:</th>
<th>Avalon (K-12), Browning (HS), Jordan (HS), Wilson (HS), Lakewood (HS), Marshall (MS), Millikan (HS), Poly (HS), Keller (MS), Hughes (MS), &amp; Robinson (K-8),</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tina Bone – 562-260-6139</td>
<td>11 schools</td>
</tr>
<tr>
<td><a href="mailto:Tinabone2000@gmail.com">Tinabone2000@gmail.com</a></td>
<td></td>
</tr>
</tbody>
</table>
How do I get in touch with:

**Thirty-Third District PTA** - Office Hours: M, W-F 8:30 am to 3:30 pm *(Call before visiting)*

<table>
<thead>
<tr>
<th>Mailing Address:</th>
<th>Office Location: (on the campus of Stephen Foster Elementary) <em>(Please call ahead)</em></th>
<th>Email: <a href="mailto:office@33rdpta.org">office@33rdpta.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>P.O. Box 1235</td>
<td>5629 Pearce Ave, Lakewood, CA 90712</td>
<td>Phone #: (562) 804-4519</td>
</tr>
<tr>
<td>Lakewood, CA 90714</td>
<td></td>
<td>Fax #: (562) 804-5460</td>
</tr>
</tbody>
</table>

**Materials available at the Thirty-Third District PTA Office.**

- Copy of Existing Unit Bylaws: $1.00
- Roberts Rules of Order in Brief: $8.00
- A-B-C’s of Parliamentary Procedures: $1.50
- PTA Logo Seals (roll of 100 small): $1.50
- PTA Logo Seals (roll of 100 large): $1.75
- Secretary Books: $18.00
- Treasurer’s Ledger: $5.00
- Assorted Pins: $1.00
- President, Past President and Other PTA Pins: Call for prices

**California**

<table>
<thead>
<tr>
<th>Address:</th>
<th>Email: <a href="mailto:info@CAPTA.org">info@CAPTA.org</a></th>
<th>Phone #: (916) 440-1985</th>
</tr>
</thead>
<tbody>
<tr>
<td>2327 L. Street</td>
<td>Website: CAPTA.org</td>
<td>Fax #: (916) 440-1986</td>
</tr>
<tr>
<td>Sacramento, CA 95816-5014</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**State PTA**

<table>
<thead>
<tr>
<th>Address:</th>
<th>Email: <a href="mailto:info@PTA.org">info@PTA.org</a></th>
<th>Phone #: (703) 518-1200</th>
</tr>
</thead>
<tbody>
<tr>
<td>1250 N. Pitt Street</td>
<td>Website: PTA.org</td>
<td>Toll Free: 1-800-307-4782</td>
</tr>
<tr>
<td>Alexandria, Virginia 22314</td>
<td></td>
<td>Fax #: (703) 836-0492</td>
</tr>
</tbody>
</table>

**National PTA**

<table>
<thead>
<tr>
<th>Address:</th>
<th>Email: <a href="mailto:CAPTA@aim-companies.com">CAPTA@aim-companies.com</a></th>
<th>Phone #: (800) 876-4044</th>
</tr>
</thead>
<tbody>
<tr>
<td>8144 Walnut Hill Lane, Suite 900 Dallas, Texas 75231</td>
<td>More information can be found on the CAPTA website under insurance.</td>
<td>Fax #: (214) 360-0802</td>
</tr>
</tbody>
</table>

**CAPTA Insurance Broker – AIM Association Insurance Management Inc.**

<table>
<thead>
<tr>
<th>Our Children – ptaourchildren.org</th>
<th>In Touch – talb.org</th>
</tr>
</thead>
<tbody>
<tr>
<td>National PTA Magazine</td>
<td>Teachers Association of LB Newsletter</td>
</tr>
<tr>
<td>CAPTA Toolkit – capta.org</td>
<td></td>
</tr>
<tr>
<td>PTA how-to information Book</td>
<td></td>
</tr>
</tbody>
</table>
Advocacy and Legislative Contacts

**Governor** Gavin Newsom  
Website: http://gov.ca.gov  
Instagram: @GavinNewsom  
Twitter: @GavinNewsom  
Mailing Address: 1303 10th St Suite 1173  
Sacramento, CA 95814  
Phone #: (916) 445-2841

The California State Assembly is the lower house of the California State Legislature. It consists of 80 members, with each member representing at least 465,000 people. Members of the assembly are generally referred to using the titles assemblyman (for men), assemblywoman (for women), or assemblymember (for all genders). The State Assembly convenes at the California State Capitol in Sacramento.

<table>
<thead>
<tr>
<th>LONG BEACH –</th>
<th>LAKEWOOD –</th>
<th>NORTH LONG BEACH –</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patrick O’Donnell – District 70</td>
<td>Anthony Rendon – District 63</td>
<td>Mike A. Gipson – District 64</td>
</tr>
<tr>
<td>Website: a70.asmdc.org</td>
<td>Website: speaker.asmdc.org</td>
<td>Website: a64.asmdc.org</td>
</tr>
<tr>
<td>Facebook:</td>
<td>Facebook:</td>
<td>Facebook:</td>
</tr>
<tr>
<td>Twitter:</td>
<td>Twitter:</td>
<td>Twitter:</td>
</tr>
<tr>
<td>Long Beach Office -5000 E. Spring St., Ste. 550 Long Beach, CA 90815</td>
<td>District Address – 12132 S. Garfield Ave., South Gate, CA 90280</td>
<td>District Address – 879 W.190th Street Suite #920, Gardena, CA 90248</td>
</tr>
<tr>
<td>Phone #: (562) 429-0470</td>
<td>Phone #: (562) 529-3250</td>
<td>Phone #: (310)324-6408</td>
</tr>
<tr>
<td>Capitol Address – P.O. Box 942849, Room 2196, Sacramento, CA 94249</td>
<td>Capitol Address – State Capitol Room 219, Sacramento, CA 95814</td>
<td>Capitol Address – State Capitol P.O. Box 942849, Sacramento, CA 94249</td>
</tr>
<tr>
<td>Phone #: (916) 319-2070</td>
<td>Phone #: (916) 319-2063</td>
<td>Phone #: (916) 319-2064</td>
</tr>
</tbody>
</table>

The California State Senate is the upper house of the California State Legislature. Due to the state’s large population and relatively small legislature, the State Senate has the largest population per representative ratio of any state legislative house. The State Senate convenes at the California State Capitol in Sacramento.

**Senator Lena G. Gonzalez** – District 33  
Website: sd33.senate.ca.gov  
Capitol Office - State Capitol, Room 2068  
Sacramento, CA 95814  
Phone #: (916) 651-4033  
LONG BEACH DISTRICT OFFICE - 3939 Atlantic Ave., #107  
Long Beach, CA 90807  
Phone #: 562-256-7921
Advocacy and Legislative Contacts (continued)

The United States Congress is the bicameral legislature of the Federal government of the United States. The legislature consists of two chambers: the Senate and the House of Representatives.

The Senate is composed of senators, each of whom represents a single state in its entirety, with each state being equally represented by two senators, regardless of its population, serving staggered terms of six years; with 50 states currently in the Union, there are 100 U.S. Senators.

The House is composed of Representatives who sit in congressional districts that are allocated to each of the 50 states on a basis of population as measured by the U.S. Census, with each district entitled to one representative.

House of Representatives

<table>
<thead>
<tr>
<th>Name</th>
<th>Congressional District</th>
<th>Website:</th>
<th>Facebook:</th>
<th>Twitter:</th>
<th>Washington Office</th>
<th>Phone #:</th>
<th>District Office</th>
<th>Phone #:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alan Lowenthal</td>
<td>47th</td>
<td>lowenthal.house.gov</td>
<td></td>
<td></td>
<td>125 Cannon HOB, Washington, DC 20515</td>
<td>202-225-7924</td>
<td>100 Broadway West Twr., Ste. 600, Long Beach, CA 90802</td>
<td>562-436-3828</td>
</tr>
</tbody>
</table>

U.S. Senate

<table>
<thead>
<tr>
<th>Name</th>
<th>Website:</th>
<th>Facebook:</th>
<th>Twitter:</th>
<th>Washington D.C. Office</th>
<th>Phone #:</th>
<th>Los Angeles Office</th>
<th>Phone #:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senator Kamala Harris</td>
<td><a href="http://www.harris.senate.gov">www.harris.senate.gov</a></td>
<td></td>
<td></td>
<td>112 Hart Senate Office Building, Washington, D.C. 20510</td>
<td>(202) 224-3553</td>
<td>312 N. Spring St., Ste. 1748 Los Angeles, CA 90012</td>
<td>(213) 894-5000</td>
</tr>
<tr>
<td>Senator Dianne Feinstein</td>
<td><a href="http://www.feinstein.senate.gov/public/">www.feinstein.senate.gov/public/</a></td>
<td></td>
<td></td>
<td>United States Senate, 331 Hart Senate Office Building, Washington, D.C. 20510</td>
<td>(202) 224-3841</td>
<td>11111 Santa Monica Blvd., Ste. 915 Los Angeles, CA 90025</td>
<td>(310) 914-7300</td>
</tr>
</tbody>
</table>
Long Beach Council PTA Glossary

Words you’ll hear a lot and what they mean.

**Agenda** – a written outline of the order of business.

**Association** – your school’s entire PTA membership also referred to as a unit. Association meetings are usually held once a month according to each unit’s bylaws.

**Audit** – a review of the financial records done twice a year by an auditor elected by your association.

**Budget** – estimate of the unit’s income and expenses for the year. It must be adopted by the association.

**Bylaws** – document that governs how a unit is to operate. Needs to be approved by CAPTA and adopted by the association. They must be reviewed annually and updated every 3 years.

**Books of Account**: All financial records should be kept for seven years, which include the current year. Ledger books are kept permanently.

**CAPTA** – California State Parent Teacher Association. Administrative level between the Thirty-Third District PTA and National PTA. Members of units automatically belong to the California State PTA. See CAPTA.org for more info.

**Council** – coordinating group for a specific set of units, usually in a common school district or geographical area. Your unit belongs to the Long Beach Council.

**District** – administrative level between council level and the state level. Acts as a liaison. Your unit belongs to Thirty-Third District.

**Executive Board** – the elected and appointed officers plus chairmen of standing and special committees.

**Founders Day** – PTA’s birthday. The celebration is held in February and it refers to our three founders: Alice McClellan Birney, Phoebe Apperson Hearst and Selena Sloane Butler.

**HSA (Honorary Service Awards)** – CAPTA award program for volunteers. Monies collected by State PTA are used to pay for scholarships. To see more info, please go to the January section of the Red Book.

**Procedure Book** – “how to” manual for each position on the board.

**PTSA** – Parent Teacher Student Association. Generally, middle or high schools which have elected student officers working with the parent and teacher officers.

**Standing Rules** – additional procedures added to the bylaws that pertain to your specific unit.

**State Board of Managers** – the officers and chairman of the State PTA.

**Toolkit** – ultimate PTA resource. Electronic version available at CAPTA.org

**Unit Delegate** – two (2) unit members who have been appointed to attend 3 council meetings a year - November, March & June.

**Charter & Charter Date**: Issued by the California State PTA at the time the PTA was organized. Missing your charter? Replace it (for a fee) from the California State PTA office.

**Minutes**: The permanent legal records of all business and financial reports of PTA meetings.

All of the #’s listed below can be found in your bylaws:

| CAPTA ID #: | Article XIV, Section 1. |
| National PTA ID #: | Article XIV, Section 2. |
| EIN #: (Employer Identification Number) | Article XIV, Section 3. |
| Franchise Tax Board Entity #: | Article XIV, Section 4. |
| Charitable Trust #: | Article XIV, Section 5. |
LBUSD Board of Education
1515 Hughes Way, Long Beach, CA 90810
Phone #: 562-997-8000
Website: www.lbusd.k12.ca.us

Voters elect five Board of Education members by geographic area to serve four-year terms. The duties of the Board include adopting the annual budget, approving all expenditures, establishing district policy, authorizing employment of personnel, approving textbooks and courses of study, and approving new and innovative academic initiatives. Regular meetings of the Board are generally held on the first and third Wednesdays of each month at 5 p.m. in the Community Room of the District Administration Building, 1515 Hughes Way, Long Beach, CA. To contact a Board member, call the number listed above.

Board of Education meetings are televised on local cable channels. Charter Cable Channel 96 serves Long Beach and Signal Hill; Time Warner Cable Channel 35 serves Lakewood; and Verizon FiOS Channel 47 serves Long Beach, Lakewood, Signal Hill, Los Alamitos and surrounding communities. Broadcast times are noon and midnight on Monday and Wednesday, 9 a.m. and 9 p.m. on Tuesday and and 8 a.m. and 8 p.m. on Thursday, Friday, Saturday and Sunday. Meetings are also televised in Avalon, Catalina Island on Catalina CATV Channel 49 on Monday, Wednesday and Friday at 5 p.m. and Saturday at 9 a.m. or immediately following the City Council broadcast.

Superintendent's Parent Forum
The Superintendent’s Parent Forums will be held during the school year to encourage open dialogue between parents and Superintendent Chris Steinhauser. Dates of the meetings and video presentations from previous Parent Forums can be viewed on the LBUSD website.

Megan Kerr - District 1
Addams, Barton, Dooley, Grant, Harte, King, Longfellow, Los Cerritos, McKinley, Powell, Hamilton, Hughes, Lindbergh, Lindsey and Jordan

Felton Williams - District 2
Birney, Garfield, Hudson, Robinson, Lafayette, Muir, Roosevelt, Smith, Webster, Stephens, Washington, Cabrillo, CAMS, Poly and Reid Continuation HS

Juan Benitez - District 3
Chavez, Edison, Herrea, Lincoln, Oropesa, Stevenson, Whittier, Willard, Franklin and Renaissance

Jon Meyer - District 4
Alvarado, Avalon, Browning, Bryant, Burbank, Fremont, Kettering, Lowell, Mann, Naples, Signal Hill, Tincher, Two Harbors, Jefferson, Nelson Academy, Rogers, Beach HS, LB School for Adults, Sato and Wilson

Diana Craighead - District 5
Bixby, Burcham, Carver, Cleveland, Cubberley, Emerson, Gant, Gompers, Henry, Holmes, MacArthur, Madison, Monroe, Newcomb, Prisk, Riley, Twain, Bancroft, Hoover, Marshall, Stanford, McBride, Lakewood HS and Millikan HS


**Honor Unit Awards**

**What are Honor Unit Awards?**

Honor Unit Awards were established to recognize units that have achieved the highest standards of responsibility and organization. Gold, Silver & Bronze levels will be awarded to the units at the June UPs meeting. This meeting is referred to as the “IN & OUT” Ceremony and Awards. It is called the “IN & OUT” because it is a time to welcome the “IN” coming officers and thank the “OUT” going officers. The “Award of Merit” level recognizes those units who are working hard to get their unit in compliance with the requirements needed to keep in good standing.

The **ABOVE AND BEYOND** award has been established to acknowledge those units who find ways to do more than they are asked to do. The determination of which units will be eligible for this level will be decided by the Leadership Team (President, Director of Leadership and Area Advisors).

The table on the next page will be used for reference by the Leadership Team to determine the award level of the units at the end of the year. If you would like to achieve a certain award, please make sure to complete all the requirements for that level.

Please contact your Area Advisor if you have any questions about how to obtain an award level or if you feel you are unable to complete a requirement. Consistent communication with your Area Advisor is an important part of your job as PTA President. Their job is to help you.

**All Required items (those with an “R” listed next to them) MUST be turned in regardless of award level. These items are passed on up the line to District, State and National PTA and show that your unit is in good standing.** If you need more time to turn in paperwork, please contact your Area Advisor.
### Honor Unit Award Guidelines (continued)

<table>
<thead>
<tr>
<th>Level</th>
<th>R Required</th>
<th>MC Membership Challenge</th>
<th>M &amp; D Meetings &amp; Delegates</th>
<th>T Training</th>
<th>P Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gold</strong></td>
<td>Turn in all required paperwork &amp; Bylaws are current</td>
<td>Increase last year’s membership by at least 1 on or before May 1st OR 100% school enrollment</td>
<td>Attend 7 UPS meetings and bring at least 2 delegates to the Nov. &amp; Mar. meetings</td>
<td>LBCPTA Red Book Meeting &amp; Attend 3 of the following: 33rd Fall Training 33rd Spring Training CAPTA Convention Sacramento Safari</td>
<td>Turn in a Unit Program Report (p. 188 in Red Book) With 4 programs your unit provides</td>
</tr>
<tr>
<td><strong>Silver</strong></td>
<td>Turn in all required paperwork &amp; Bylaws are current or in process</td>
<td>Increase last year’s membership by at least 1 on or before May 1st OR 100% school enrollment</td>
<td>Attend 6 UPS meetings and bring 2 delegates to the Nov. &amp; Mar. meetings</td>
<td>LBCPTA Red Book meeting &amp; Attend 2 of the following: 33rd Fall Training 33rd Spring Training CAPTA Convention Sacramento Safari</td>
<td>Turn in a Unit Program Report (p. 188 in Red Book) With 3 programs listed</td>
</tr>
<tr>
<td><strong>Bronze</strong></td>
<td>Turn in all required paperwork &amp; Bylaws are current or in process</td>
<td>Increase last year’s membership by at least 1 on or before May 1st OR 100% school enrollment</td>
<td>Attend 5 UPS meetings and bring 1 delegate to the Nov &amp; Mar. meetings</td>
<td>LBCPTA Red Book Meeting &amp; Attend 1 of the following: 33rd Fall Training 33rd Spring Training CAPTA Convention Sacramento Safari</td>
<td>Turn in a Unit Program Report (p. 188 in Red Book) With 2 programs listed</td>
</tr>
</tbody>
</table>

**Award of Merit**

This award level will be given at the discretion of the Leadership Team.

**Above & Beyond**

To be eligible for this award, units need to complete the Gold Level.

Join a LBCPTA Committee or volunteer for Inspiration at council meeting

Attend 3 or more of the following 33rd Conferences:
- Legislative Conference
- Presidents & Administrators Meeting
- Annual Meeting
- Diversity & Inclusion
- Spring Awards Meeting

If you choose to participate in **EXTRA CREDIT**, your Area Advisor may use this to bump you up to the next level if you were close to completing that level. More information about **EXTRA CREDIT** can be found on the next page.
LBCPTA Committees to join for Extra Credit or just for Fun

Get an idea of what it’s like to be a LBCPTA Board member. Contact the person listed below in the area you are interested in to lend your hand and earn extra credit for your unit.

<table>
<thead>
<tr>
<th>COMMITTEE</th>
<th>DESCRIPTION</th>
<th>CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspiration</td>
<td>Lead the Pledge of Allegiance and present an inspirational quote or report on a successful program/event you held at your school during an UPS meeting.</td>
<td>Director of Programs Kathy Voreh-Husek - <a href="mailto:katvh@yahoo.com">katvh@yahoo.com</a></td>
</tr>
<tr>
<td>LBUSD Liaison</td>
<td>Attend an LBUSD School Board meeting and present a brief report during an UPS meeting.</td>
<td>President Erica Dawson - <a href="mailto:lbcptapresident@gmail.com">lbcptapresident@gmail.com</a></td>
</tr>
<tr>
<td>Reflections</td>
<td>Help with the Reflections Art Program</td>
<td>Reflections Chair Kim Erkman - <a href="mailto:Fance_erkman@me.com">Fance_erkman@me.com</a></td>
</tr>
<tr>
<td>Communications</td>
<td>Help with the judging of Unit Program/Directories &amp; Newsletters</td>
<td>Director of Communications Maria Towne - <a href="mailto:maria.towne@outlook.com">maria.towne@outlook.com</a></td>
</tr>
<tr>
<td>Convention</td>
<td>Help with planning LBCPTA events leading up to and during the CAPTA Convention</td>
<td>President Erica Dawson - <a href="mailto:lbcptapresident@gmail.com">lbcptapresident@gmail.com</a></td>
</tr>
<tr>
<td>Red Book</td>
<td>Help update the Red Book for the next school year. Attend one meeting in April to give feedback.</td>
<td>Director of Leadership Shannon <a href="mailto:Hilleshiem-shilleshiem@verizon.net">Hilleshiem-shilleshiem@verizon.net</a></td>
</tr>
<tr>
<td>Founders Day</td>
<td>Help plan Founders Day</td>
<td>Director of Programs Kathy Voreh-Husek - <a href="mailto:katvh@yahoo.com">katvh@yahoo.com</a></td>
</tr>
<tr>
<td>Honorary Service Awards</td>
<td>Help find and evaluate recipients of HSAs</td>
<td>President Erica Dawson - <a href="mailto:lbcptapresident@gmail.com">lbcptapresident@gmail.com</a></td>
</tr>
<tr>
<td>In &amp; Out Meeting</td>
<td>Help plan In &amp; Out</td>
<td>Director of Programs Kathy Voreh-Husek - <a href="mailto:katvh@yahoo.com">katvh@yahoo.com</a></td>
</tr>
<tr>
<td>Teacher of the Year</td>
<td>Help judge essays turned in</td>
<td>TOTY Chairman Christina Butler - <a href="mailto:Christyb17@aol.com">Christyb17@aol.com</a></td>
</tr>
<tr>
<td>LBCPTA HS Scholarships</td>
<td>Help judge essays turned in</td>
<td>Director of Education Diana Craighead - <a href="mailto:craighead@aol.com">craighead@aol.com</a></td>
</tr>
<tr>
<td>Nominating Committee</td>
<td>Be a part of the nominating committee and find people to take positions for the next term of LBCPTA Board of Directors</td>
<td>Parliamentarian Elena Wraith - <a href="mailto:emwraith@gmail.com">emwraith@gmail.com</a></td>
</tr>
</tbody>
</table>
PTA—A Century of Commitment to Children

For more than a century, PTA has reminded our nation of its obligations to children and provided resources and important information to parents and teachers. Whenever young people’s education, health, safety, or well-being were threatened, PTA members were on the forefront of working to resolve those challenges. PTA has been instrumental in the passage of important laws and guidelines that we sometimes take for granted today, such as:

- Creating a separate criminal justice system for juvenile offenders
- Enforcing child labor laws
- Building Kindergarten into the public school system
- Supplying federally funded hot-lunches—that now feed more than 26 million children a day
- Supporting school bus safety regulations
- Creating the content-rating system for television programs—yes, PTA supported the creation of that ratings indicator you now see in the upper-left corner of your TV screen.

Many of these concerns may not have been addressed if PTA members did not take up the cause!

PTA has never been shy to tackle tough issues - from talking about sex education as early as 1916 to supporting HIV/AIDS education programs in the 1980s, PTA has been there to help parents and teachers be partners in children’s education.

Our Legacy of Caring Continues

PTA prides itself on being a powerful voice for children’s education and health issues, a relevant resource for parents, and a strong advocate for public education efforts such as:

- Developing resources for parents and teachers to promote diversity and encourage inclusiveness in our schools; and
- Offering practical information and tools for parents and teachers on a broad range of topics ranging from child nutrition and wellness to school/family communication to TV and media violence and bullying.
- Supporting and speaking on behalf of children and youth before governmental bodies & other organizations to secure adequate laws for the care and protection of children & youth.

Times and issues may have changed, but advocating for children still requires steadfast parent involvement. That’s why parent involvement remains at the core of all PTA’s efforts. Today, more than 5 million PTA members actively work in schools and communities to make every child’s potential a reality.
Organizational Structure
http://toolkit.capta.org/know-the-pta/organizational-structure/

Unit PTAs are organized and chartered in conformity with rules and regulations as prescribed in the bylaws of the California State PTA. These units are self-governing bodies for the purpose of planning programs and activities to meet local community needs. However, they are required to observe the policies and procedures of the California State PTA and/or National PTA.

Your school unit is a part of Long Beach Council PTA

Councils of PTAs are created by the California State PTA for the purpose of collaboration, leadership training, and coordination of efforts of the member units.

Long Beach Council PTA is a part of Thirty-third District PTA.

District PTAs are geographical divisions of the California State PTA, established to carry out its programs. District PTAs shall provide training and support for their units and councils. All PTA districts organized after July 1, 1980, are required to have number designations.

Thirty-Third District PTA is a part of California State PTA.

The California State PTA (California Congress of Parents, Teachers, and Students, Inc.) is a branch of the National PTA, serving as a connecting link between the national organization and its membership within the state. The California State PTA shall provide training and support for its units/councils/districts.

California State PTA is a part of National PTA.

The National PTA (National Congress of Parents and Teachers) is a volunteer educational organization, founded in Washington, D.C., in 1897. Branches of the National PTA have been established in all fifty United States, the District of Columbia, U.S. Virgin Islands, Puerto Rico and in schools for American dependents in Europe and the Pacific area.
Checklist for a Healthy PTA

Membership Enrollment
✓ Is an initial membership campaign held toward the beginning of the school year?
✓ Are continuing opportunities provided for parents and staff to join? (Membership is year-round.)
✓ Is membership per capita sent through channels at least monthly and by deadlines?

Treasurer’s Reports
✓ Are written reports presented/filed monthly? Are balances, receipts and disbursements recorded in the minutes each month?
✓ Is each check approved/ratified and listed?
✓ Are reports presented at both executive board and association meetings?

Minutes
✓ Is an attendance record kept for all meetings?
✓ Are minutes kept for all meetings?
✓ Are all action items recorded, including approval of budget, all expenses and all fundraising activities?

Audits
✓ Are audits prepared and adopted in accordance with the bylaws and PTA financial procedures?
✓ Are audits conducted at least twice a year? And whenever there is a change in check signers?

Bylaws
✓ Are bylaws reviewed yearly and updated (sent through channels for approval) every three years?

Annual Reports
✓ Are volunteer hours being recorded?
✓ Are annual reports filed by the deadline?

Financial Procedures
✓ Are financial procedures in accordance with recommended PTA policies and procedures?
✓ Is the budget approved and actual revenues and expenditures compared at least quarterly?
✓ Is the insurance premium and the workers comp form/remittance sent in by deadline?
✓ Are all checks signed by two authorized officers? And are all expenditures properly authorized?

Leadership
✓ Do members of the executive board work well together?
✓ Does the PTA attract and retain new leadership?
✓ Are new, qualified candidates nominated for office each year?
✓ Do leaders attend council/district PTA meetings and take advantage of training opportunities?
✓ Do leaders communicate effectively with members?
Duties and Responsibilities of Unit Presidents

- Preside at all meetings of the association and the executive board.
- Be a member ex officio of all committees except the nominating committee.
- Appoint the corresponding secretary, the parliamentarian, the chairmen and members of committees, subject to ratification of the executive board.
- Sign all authorizations for payment as required by the executive board or association.
- Be responsible for preparing the association Annual Historian Report required by CAPTA.
- Be the official representative of the association at council and district meetings.
- Have all newsletters, flyers and/or notices approved by the principal, PRIOR to distribution.
- Have all contracts approved by the association, prior to signing along with another elected officer.
- Be one of the authorized to check signers.
- Be a delegate at the CAPTA convention.
- Help maintain procedure books for the unit.

PTA – School Principal Relationship

In order for the school and the PTA to operate as members of a team, good working relations between both groups must be established and continued.

The school principal plays a vital role as the administrator in building sound relationships with parents and teachers.

When you are elected as president, contact the principal and set up a time to meet. At this meeting discuss what you have in mind for programs, fund-raisers, etc., for the coming year, and ask the principal for help in carrying out these plans. At the same time discuss any ideas that the principal might have as to how the PTA can better serve the parents, students and teachers of the school.

Principals have many duties and their time is at a premium. When you need to meet with the principal, call first to set up an appointment, don’t drop in.

When you meet, make sure you are organized and have an agenda. Be prepared to discuss the needs of your PTA and what cooperation you would like from the principal. If you are unsure, or hesitant, the principal may feel that you want him/her to decide for you. The Principal should be aware of school district policies and procedures and have a vision of what he/she wants for the school. The President should know PTA policies, bylaws, standing rules and parliamentary procedures and follow them at all times.

You must consult with your school principal on all matters relating to the school. Remember, all printed materials from the PTA (i.e. newsletters, flyers or notices) must be approved and initialed by BOTH the PTA president and the school principal before being printed and distributed.
**What is the School Principal’s Role?**

*PTA Presidents appreciate principals who:*

- Believe in and support the mission and purpose of PTA.
- Attend meetings of the Executive Board as well as Association meetings.
- Cooperate with the PTA in the use of school facilities.
- Make the PTA feel welcome and an important part of the school.
- Encourage cooperation between the PTA and the school in working toward mutual goals.
- Keep PTA informed about school programs, problems and needs.
- Are knowledgeable regarding PTA policies and procedures and encourage PTA leaders to carry them out.
- Help with program planning and cooperate in money-raising projects.
- Offer leadership and guidance, but who do not dominate the PTA.
- Encourage teachers to join the PTA, to help with program planning, to participate in PTA activities, to attend PTA meetings, to socialize with parents and to stress the importance of sending PTA notices home with the students.
- Help to promote parent attendance at meetings and activities.
- Relate to parents in an open, friendly way.

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**What is the PTA President’s Role?**

*School Principals appreciate PTA Presidents who:*

- Plan WITH and work THROUGH the principal, not around him/her.
- Always include the principal (or representative) in meetings.
- Plan a calendar in advance, outlining types of meetings and projects and when they will take place.
- Understand school policies and procedures.
- Show thoughtfulness in pre-planning PTA activities.
- Secure a balance between organizational matters and student oriented activities.
- Respond to requests for help.
- Respect the roles and responsibilities of others.
- Help foster good home-school relationships.
- Provide opportunities for more parent participation in PTA programs and activities.
- Encourage teacher participation in PTA planning.
- Emphasize the usefulness of reports that highlight accomplishments and provide suggestions for future work.
- Make certain that when a job is to be done, the plans are clear and those involved understand what is entailed.
- Give credit and praise when and where it is due.
Tips for effective board meetings

*It is important to value people's time and make the best use of the time available when the executive board meets. Use these tips to conduct effective board meetings:*

- Stick to the scheduled dates and times stated in the bylaws and which are published in the PTA calendar for the year.

- Always start the meeting on time. Make every effort to respect other people's time by ending the meeting at the agreed upon time.

- Prepare and send out the agenda before the meeting to provide advance notice of pending actions and to remind members of items to be prepared to discuss.

- Create an attendance list for attendees to sign or initial. Illegible writing is avoided and it helps in determining whether there is a quorum present. Think about adding a space for volunteer hours so each member can provide his/her volunteer hours on a regular basis.

- Make your agenda a working document. Try including start times for each item. For example: 6:30 Welcome, 6:35 Minutes of Previous Meeting, 6:40 Treasurer's Report etc. Use the scheduled times to keep things moving along.

- Follow parliamentary procedure when chairing a meeting. It helps prevent people from monopolizing the discussion time and assures that control is maintained.

- Ask committee chairmen to report briefly by presenting committee recommendations to the executive board. Detailed planning is done ahead of time by the committee and the executive board then approves the committee recommendation or refers the issue back to the committee for further work.

- Ensure that the secretary takes minutes at every meeting. Ask the secretary to send a draft set of minutes out no later than one week after the meeting to assure members have the opportunity to assess accuracy while recollections are fresh and to serve as a reminder of assigned tasks.

Attach a list of action items to the minutes with expected dates for completion and the person responsible to serve as a reminder to all of the expectations and responsibilities undertaken.
MAKE THE MOST OF YOUR ASSOCIATION MEETINGS

PLANNING AHEAD

*The executive board should plan the association meeting ahead of time.* Don’t forget that your principal is a member of the executive board—and be prepared to present the reports and proposed plans. Yes, that means that a board needs to meet before school starts.

Make sure your board attends association meetings so they can be introduced. Keep meetings moving along by providing copies of the necessary reports that members are being asked to approve or adopt. Make sure the meetings are informative and inspirational. Brag about what your PTA has done and be sure to mention that members belong to the largest volunteer and advocacy organization in the country. Talk about plans for the year and ask for audience members to volunteer to be involved. Be sure the attendees understand that PTA’s role is to make the school a better place for all students.

Written notice of any association meeting must be given not less than 10 days before the date of the meeting to all those who are entitled to vote at such meetings. The notice should include the date, time, location and any proposed business to be considered at the meeting. Meetings at which bylaw amendments and elections will take place need 30 days’ notice.

FIRST ASSOCIATION MEETING OF THE YEAR

*What should take place at the first association meeting of the year?*

- Introduce the PTA board
- Present minutes of the last association meeting, which may have been the election meeting or might have been the meeting when proposed programs and a proposed budget were preliminarily approved
- Present the Year-End Financial Report
- Adopt the goals for the year and approve all upcoming programs, events and projects
- Adopt the budget for the year
- Approve/ratify all expenditures since the last association meeting
- Adopt the year-end audit that was done over the summer after the close of the previous year’s books
- Thank members who have joined and ask those who have not joined to consider joining.
- Have a display (photos from last year’s events, spirit wear, or PTA materials) to entice interest in visiting the “join PTA table”.

ASSOCIATION MEETINGS ARE REQUIRED

*Can we just skip association meetings and let the board make decisions/do the work?* No, association meetings are a requirement in your PTA bylaws because California corporate law for all non-profits requires them. Your bylaws state the quorum needed to vote on business items—even if the board has already voted YES on them. Your nominating committee must be elected by the membership. PTA events are only insured if the association adopted the events and the action is recorded in the minutes of the association meeting. However, you do not need to have a monthly association meeting and your bylaws can be amended to change the number of association meetings you must hold. Check with your area advisor to find out the process for doing so.
What are PTA Programs?

When planning the year’s activities, PTAs should use the 3-to-1 Rule: There should be at least three non-fundraising programs aimed at helping parents or children or advocating for school improvements, for every one fundraiser. It should involve as many members as possible and be fun. It should not be a burden to the school staff or parent volunteers, compete with or detract from school lunch and nutrition programs, or conflict with other PTA, school, or community events. Children should never be used to sell door-to-door or exploited to raise funds. It cannot involve commercial or advertising obligations.

By establishing committees on education, parent involvement, community concerns, and health, PTAs are well equipped to address issues of concern to their community. Issues like parent involvement, violence, and drug use are best handled at the local level by the parents/guardians, students, and teachers who face these challenges every day.

PTA activities and programs, including the Reflections Program, Founders Day, graduation, and community and wellness fairs, are an excellent introduction to the work of the PTA to improve homes, schools, and communities. PTAs can use these opportunities to increase their exposure and support beyond the base of traditional membership.

When planning a PTA program, remember to take time to:

- **Survey** – Identify the priorities of your school community. Survey students, parents, teachers and administrators on what programs are needed and what type of programs would interest and engage them.
- **Brainstorm** – Get together to brainstorm ideas on what programs and activities work best for your community, based on feedback from your survey.
- **Timeline** – Work backward from the day of your event to create a planning timeline. Plan in advance so your program is included on the school calendar. Check for any scheduling conflicts with other school activities, community events or holidays.
- **Guidelines** – Talk to your site administrator about your PTA’s program plans and check to ensure that the program/event is allowed. Review the PTA Insurance Loss & Prevention Guide for red/yellow/green activities before submitting a facilities-use agreement for the event.
- **Budget** – Consider all costs of your program or activity including speakers, food and supplies before setting the budget. Identify a particular fundraiser for the program or event.
- **Sponsors** – Contact local businesses to talk about their support or sponsorship for your program with funding or in-kind donations.
- **Volunteers** – Recruit lots of volunteers to help with the program or event. That way, volunteers can work in short shifts so everyone has a chance to take part and enjoy the event.
- **Promote** – Publicize your program or activity using all media available including fliers, backpack express, campus signs, news releases, PTA newsletters, websites, email blasts and social media.
- **Evaluate** – Survey your campus to get feedback on the program or event. Review and talk about what worked well and what might be tweaked to work better next time in terms of scheduling, organization, participation and popularity of the program.
Responsibilities of Officers and Chairmen

The California state PTA does not recognize co-officers. “Co-officer” implies two people of equal rank sharing one position. In PTA, only one name may be listed for each office, and only one individual may vote. Bylaws may be amended to include additional officers to share the workload.

The bylaws provide the month for the annual election and the date when the term begins. All officers and chairmen are obligated to study and follow PTA bylaws and standing rules. They are also responsible for revising, as well as maintaining while they are in office, the procedure book specific to their office. Please see more info about Procedure Books on page 216.

All board members and chairmen are expected to:

- Accept office or position only when willing to uphold the policies and procedures of the State and National PTA
- Accept office only when willing to prepare oneself to fulfill the responsibilities of the office
- Study and follow unit bylaws and standing rules
- Attend and participate in meetings
- Review and maintain the procedure book and files for the position
- Abide by the will of the majority
- Respect the privacy of the business of the executive board
- Protect the privacy of all the members by not allowing distribution of membership lists to outside interests
- Meet deadline and fulfill assignments promptly
- Give accurate and detailed account of all monies entrusted to them
- Delegate instead of doing it all yourself
- Develop and strengthen leadership
- Attend conferences, workshops and conventions
- Ensure a good transition by passing on all resources and records
- Resign if unable to perform the required duties of the office
Committee Information

Committees are formed to plan, promote and implement the activities of the unit. Members are appointed or elected, according to the bylaws. Committees make recommendations to the board – they do not act on their own. The number of committees a unit has depends upon the size of your membership and the programs and activities planned for the year. The president appoints committees subject to the ratification of the executive board, except the nominating committee which is elected by the membership. The nominating committee chairman is elected by the nominating committee. The president is an ex officio member of all committees except the nominating committee and should be notified of all meetings. Each committee should include at least one officer. The quorum for a committee is a simple majority of the members serving on that committee.

Committees that are essential to a PTA may include:

- **Budget and Finance** – includes all financial officers and the out-going treasurer. The purpose of the committee is to prepare the budget for the year and make recommendations for changes and/or adjustments. This committee should plan to meet in the summer to prepare the budget for the upcoming year.
- **Bylaws** – Chaired by the parliamentarian. The committee reviews the bylaws and standing rules and makes recommendations for any proposed changes.
- **Nominating Committee** – The nominating committee, under the direction of the parliamentarian, is elected to nominate qualified individuals to a slate of officers for the forthcoming term. This committee retires after the election of officers.
- **Founders Day** – This committee plans a program to honor our founders and arrange for a Founders Day collection. The chairman sends out invitations to all past presidents and HSA recipients.
- **Honorary Service Awards** – it is the responsibility of this committee to meet and gather information to select a person or persons who the committee feels are worthy of being honored.
- **Membership** – chaired by the membership officer or chairman, during the summer the committee meets to determine the membership theme, prepare any membership promotional materials and decide what membership awards or rewards will be needed.
- **Ways & Means** – The function of this committee is to bring funds into the unit to support the activities and programs decided upon by the membership of the unit. Fundraising is not a primary function of the PTA. On-going year-round fund raising is hard on the unit’s officers and membership. It also may open the unit up to Unrelated Business Income Tax (UBIT). Funds raised and spent should be spread as equally as possible across the entire student body.
- **Program** – this committee plans association meeting programs and cooperates with other chairs to plan the total “PTA Program” which includes parent education, study groups, special events, projects and other activities. The program for the year must be adopted by the association.
- **Room Representative** – the committee is made up of representatives from each classroom or grade level in the school. The committee should meet at the beginning of the school year for orientation and instruction including school rules and policies, tips for helping to promote hospitality, and suggestions for contacting and interacting with parents.
- **Hospitality** – the committee helps to create a sense of belonging that invites members to become involved in PTA activities. This committee will be responsible for arranging refreshments when needed.
- **Communications** – Responsibilities to be shared by the committee include distributing information deemed necessary by the executive board via newsletter or e-communications.

| Standing Committees | perform a specific function throughout the year, subject to the directive of the membership and have a definite purpose. |
| Special Committees | are appointed or elected for a specific purpose and cease to exist when their final report is accepted. |
Creating an event

If the event is held in collaboration with community organizations or other PTAs, each participating unit, council or district PTA should follow the proper approval procedures specified below. The California State PTA strongly urges unit, council or district PTAs to refrain from serving alcoholic beverages at PTA functions. PTAs may not engage in the sale of alcoholic beverages. (See the Insurance and Loss Prevention Guide, Red Section, Alcohol and PTA Events)

Preliminary Planning

Begin six months in advance, if possible.

Discuss and obtain approval to hold an event from the PTA executive board and principal or school representative.

Ensure the event will not conflict with other unit, council or district PTA observances.

Obtain a vote of approval for the event at a meeting of the association. Include a motion to disburse monies to cover the estimated cost involved.

If being held off campus, obtain permission for facility use from appropriate manager. If asked to sign a Hold Harmless Agreement, contact the California State PTA insurance broker.

PTA president appoints the event chairman and committee. Determine the goals of this committee. Articulate what the committee hopes to accomplish with the activities.

Appoint several members to the planning committee. Unit bylaws and standing rules may have information to guide the project. If possible, include the principal or a faculty member, the public relations/publications coordinator (if there is one), and a student.

Review event material—make copies as needed. From previous chairman or committee, obtain the procedure book, National PTA Quick-Reference Guide, Our Children, and PTA in California.

Discuss budget needs with president and treasurer. Ideally, the budget should be planned with a line item for the event. The planned activities must stay within the budget. If necessary, the community may be asked to partner by donating materials, hospitality items and perhaps even a grant or sponsor to underwrite the planned activity or event. Be realistic in estimating the costs. Remember to include possible custodial costs, publicity, and postage.

Decide on a focus area, if any. Brainstorm ideas with the committee. Decide on activities that have the best chance for good participation from the student-body, the parents, and the community. If the PTA has never held this event before, do not overwhelm the faculty with activities.

Keep in mind past traditions but also investigate new ways to hold an appropriate event that will fit the school and community.

Select a theme as the major focus, and decide on the type of program (e.g., family dinner, musical program).

As early as possible, check school calendar and decide on a date.

The Americans with Disabilities Act requires that disabled persons must be reasonably accommodated by modifying policies, making physical changes and obtaining equipment to assist their participation in any activity. For PTA meetings/events, this could include seating to accommodate an attendant accompanying a member or reserved seating in a location to accommodate a member’s special need, providing written handouts to supplement discussion and/or providing qualified readers or interpreters for individuals having a hearing or sight impairment.

Discuss rules and expectations with facility management. Put all agreements in writing. Determine if permission or permits from school district or city are needed.

Notify parents and community to “save the date” for the event. Also send notes to past and present PTA presidents, leaders and award recipients, and school district and community members.

Notify staff, explaining event goals and requesting their support.

Schedule at least three committee meetings prior to event.

NEVER SIGN A HOLD HARMLESS AGREEMENT on behalf of your PTA
EVENT PLANNING WORKSHEET

PRIMARY EVENT INFORMATION

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<th>Chairperson</th>
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APPOINTED COMMITTEE MEMBERS

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CHECK WHEN COMPLETED

- ☐ OK with insurance
- ☐ Received staff input
- ☐ Hospitality arranged
- ☐ Parental permission slip
  - ☐ Developed
  - ☐ Duplicated
  - ☐ Distributed
- ☐ Evaluation form(s)
  - ☐ Developed
  - ☐ Duplicated

- ☐ OK with PTA budget
- ☐ OK with school calendar
- ☐ Volunteers confirmed
- ☐ Parking logistics
  - ☐ Signage
  - ☐ Crossing guards
  - ☐ Special requirements
    - ☐ Flag
    - ☐ Judges
    - ☐ Custodian

- ☐ Program approved by unit
- ☐ Funds allocated by unit
- ☐ Handouts collected from non-participating service providers
- ☐ Publicity materials
  - ☐ Developed
  - ☐ Duplicated
  - ☐ Letters/fliers to parents & staff
  - ☐ PTA newsletter distributed
  - ☐ Press releases and/or Public Service Announcements (PSAs) to media
### PROGRAM EXPENSES

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<th>Facility use permit $</th>
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### PUBLICITY

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<th>Fliers</th>
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<th>Newsletter Articles</th>
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### EQUIPMENT & AUDIOVISUAL REQUIREMENTS

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### SPECIAL CONTACTS (JUDGES, SPEAKERS, SERVICE PROVIDERS)

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### NOTES

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*California State PTA Toolkit – 2013*
What a chairperson should know

- Chairpersons and committee members must be current members.
- Review the procedure book from your predecessor and keep it updated during your term.
- Chairpersons and committee members are appointed by the president and ratified by the executive board.
- The chairperson shall present plans of work to the executive board for approval.
- Plans for any proposed fundraising project MUST be presented to the association for approval and must be recorded in the minutes.
- If the association approves an activity to fund a specific project/purchase, the funds must be spent for that purpose.

- Contracts may not be signed nor expense incurred without the advance association approval of the event. All contacts must be signed by the president and one other elected PTA officer and must be approved by the membership and recorded in the minutes.
- All printed matter that is sent home with students, such as fundraiser fliers, must first be reviewed and approved by the PTA president and school principal.
- Approval of the budget is not authority for expenditure of funds. All money spent must be approved by the association.
- Please review the PTA Toolkit regarding the use of a unit’s tax ID #.
- Include a cover letter with your fundraising info that goes home to the parents: “This is not a door to door sale. Students are encouraged to contact friends, relatives and parent’s coworkers. Participation is optional.”
- Prepare a “Committee Report” (form found in Red Book) at the end of the event.

What a chairperson who handles money should know

- IT IS ESSENTIAL THAT AT LEAST TWO PEOPLE COUNT MONEY TOGETHER. ONE MUST BE AN ELECTED OFFICER.
- Funds should never be handled by one person alone.
- Always use Cash Verification forms, which include two counters’ signatures.
- According to PTA Financial guidelines, money should never be taken anywhere off campus, except for deposit.

- Make arrangements with the Financial Secretary or Treasurer to get the money deposited as soon as possible.
- MONEY NOT BELONGING TO YOUR PTA IS NEVER DEPOSITED IN THE PTA BANK ACCOUNT. This is called “commingling of funds” and is against PTA financial procedures. The IRS considers all funds in your PTA account to be PTA funds and you are accountable for their use and for reporting them on all tax forms.

Insurance coverage:
- For questions regarding coverage or activities, check the most current issue of the Insurance & Loss Prevention Guide.
- Check the Red, Yellow and Green pages of the Insurance & Loss Prevention Guide for the activities you plan on having at your school.
- Secure a signed Hold Harmless agreement from each concessionaire (a concessionaire is anyone who comes on your school property or with whom you have a contract with)
COMMITTEE REPORT

Please write a committee report for all PTA activities. Attach any detailed information as requested or needed. Report to be filed with president, secretary, treasurer, historian, auditor, committee chairman and others if requested. **Report due 30 days after completion of activity.**

**Activity Details**
Name of activity ___________________ Date held __________ Time __________
Location _______________________ Approved by PTA membership on: (date) __________
Presented in cooperation with (list group, agency or organization) __________

**Goals**

Money to be used for __________

**Committee Details**
Chairman __________________ Secretary __________________
Members (including students) __________________
Consultants __________________

**Meetings**
Date(s) meetings were held: (1) __________ (2) __________ (3) __________ (4) __________ (5) __________

**Financial Details**
Proposed budgeted income $ __________ Actual income $ __________
Proposed budgeted expense $ __________ Actual expense $ __________

**Net income** $ __________

**Volunteer Details**
Number of volunteers needed to conduct activity adequately: __________ Total volunteer hours: __________

**Recommendations** ☐ Do again ☐ Do NOT do again ☐ Do again, but modify (explain in #11 below)

**Report Details.** Attach any detailed information as requested.
1. Was insurance company contacted prior to planning? ☐ Yes ☐ No
   Was extra coverage required? ☐ Yes ☐ No
   Cost __________________
2. Was the *Insurance and Loss Prevention Guide* reviewed prior to event? ☐ Yes ☐ No
3. Was a written contract required? ☐ Yes ☐ No
   Association approval? ☐ Yes ☐ No Signed by president and one elected officer? ☐ Yes ☐ No
4. Was the timing of the activity appropriate? ☐ Yes ☐ No
   If not, suggest more appropriate date(s): __________________
5. Attach a detailed timeline to report.
6. Were there any special requirements? ☐ Yes ☐ No
   Explain: __________________
7. How was activity publicized?
   Attach any articles or fliers
8. Specify equipment needs:
9. Special contacts/contact information (Speakers, judges, service providers):
10. Attach a detailed financial report. Attach copies of all inventory reports and cash verification forms for auditor.
11. Additional comments: __________________

**NOTE**
The California State PTA strongly suggests that any fundraiser be audited immediately if a large amount of monies was raised.

Prepared by __________________________ Date __________

*California State PTA Toolkit – 2013*
Volunteer Hours

California State PTA uses volunteer hours collected when it reminds our legislators of the POWER OF PARENTS when it comes to issues concerning our children.

FAQs

Why do historians collect volunteer hours for a PTA? Volunteer hours are collected and reported to maintain PTA’s federal tax exemption status. As a non-profit 501(c)(3) organization, PTA must receive 1/3 (one-third) of its support from the general public. The recorded hours from volunteers are proof of this. They are also used in advocating on behalf of children and as information in grant writing.

What do I include as volunteer hours? Include time spent by all of your members in activities related to the operation of your PTA. This includes volunteer time spent for meetings, preparation, travel, PTA events, workshops and convention. One easy way to remember is, if PTA asks you to do it, count it toward your PTA’s volunteer hours.

How do I collect volunteer hours? Start to collect and tally all of your members’ hours from the beginning of the PTA year. Consider using a sign in or tally sheet at PTA events and meetings for everyone to use to report their volunteer hours each month. To meet the due date for the PTA Unit-Annual Historian Report in your PTA council/district, usually in April/May, remind your members to project their volunteer hours through June 30 of the reporting year.

HISTORIAN RECORDS, LIKE MINUTES, SHOULD BE KEPT FOREVER.

GETTING STARTED

✓ Preparation – Look through the procedure book and other materials supplied by previous historian for ideas on how it was done and what worked best last term.
✓ Review Forms – Familiarize yourself with PTA Unit-Annual Historian Report and Historian Summary Report. Direct any questions to your Area Advisor or the LBCPTA Historian.
✓ Record Volunteer Hours – Decide on a process to record volunteer hours at all meetings and PTA events, using a tool such as a tally sheet or excel spreadsheet.
✓ PTA Training – Attend council, district and California State PTA workshops for historians to get the big picture.

PLEASE REMEMBER TO KEEP TRACK OF YOUR PTA’S VOLUNTEER HOURS. A TALLY SHEET IS AVAILABLE IN THE SEPTEMBER SECTION OF THE RED BOOK.

How?

Have a clipboard with a tally sheet available at all meetings to record volunteer hours. Another idea is to distribute a form to volunteers to fill out and return to the historian.

What hours should be counted?

| Phone Calls | Promoting PTA to friends and acquaintances |
| Travel Time | Volunteering at school for PTA administered programs |
| Meeting Time | E-mail conversations |
| General membership meetings | Writing |
| Executive board meetings | □ Agendas |
| Any other meetings attended for PTA purposes | □ Minutes |
| Preparation Time for: | □ Treasurer’s reports |
| Meetings | □ Chairman/VP reports |
| Events | Attending |
| Phone calls/emails | □ California State PTA Convention |
| Set-up/clean-up | □ National PTA Convention |
| Time spent at actual events | □ Council/District trainings |
| Shopping for event/activity | □ Legislation activities/conferences |
Parliamentary Procedure

A parliamentarian can assist the president when questions of procedure arise. If a parliamentarian is not appointed and ratified, the president should appoint one (pro tem) for each meeting to assist the president in conducting an orderly meeting.

Parliamentary law is an orderly set of rules for conducting meetings of organized groups for the purpose of accomplishing their goals fairly.

Principles of parliamentary law are:

- Justice and courtesy to all;
- Rights of the minority protected;
- Rule of the majority reflected;
- Partiality to none; and
- Consideration of one subject at a time.

Robert’s Rules of Order Newly Revised is the parliamentary text that governs the PTA where the bylaws do not apply. Bylaws for Local PTA/PTSA Units always take precedence over Robert’s Rules of Order.

Motion Language

Motions begin with the simple words “I move....”

Eight Steps to Making a Motion

A motion to take action is introduced by a member, seconded, discussed, and is voted upon. Only persons who have been members for at least 30 days are legally qualified to make motions, discuss, and vote. The steps are:

1. Member stands and waits to be recognized (in a small group it is ok just to raise your hand).
2. Chairman recognizes the member.
3. The member presents the motion by stating, “I move...”
4. The motion is seconded by another member. This shows that more than one person is interested in bringing the business before the group for discussion.
5. The chairman restates the motion. This ensures all members understand what is to be discussed.
6. Discussion is held on the motion. During discussion, all members participate fully.
7. The chairman puts the motion to a vote by stating, “All those in favor say ‘aye.’” (Pause for vote.) “Those opposed say ‘no.’”
8. The chairman announces the result of the vote to assure all members know whether the motion carried or failed.
Parliamentary Procedure (continued)

Amendments
An amendment is a way to change a motion already on the floor before a vote is taken on the motion. It may be amended by:

- Inserting or adding words
- Striking words
- Striking words and inserting others
- Substituting one paragraph or resolution for another.

Examples:
Main motion: “I move we have a parenting program at the park.”
Inserting: “I move to amend the motion by adding ‘in October’ after ‘program’ [effect of amendment if adopted: “I move we have a parenting program in October at the park.”]
Striking: “I move to amend the motion by striking “at the park” [effect of amendment if adopted: “I move we have a parenting program in October.”]
Striking and inserting: “I move to amend the motion by striking ‘October’ and inserting ‘November on the school grounds’ [effect of amendment if adopted: “I move that we have a parenting program in November on the school grounds.”]
Substituting: “I move to substitute the following for the motion on the floor: ‘that we have an ice cream social.’” [Effect of amendment if adopted: “I move that we have an ice cream social.”]

FAQ’s
Here are some short answers to commonly asked questions. For more detail, please consult the most recent edition of Robert’s Rules of Order, Newly Revised, Latest Edition, or In Brief.

Q: Do I have to stand to make a motion?
A: In a small group, it’s okay just to raise your hand, but in a large group, it’s easier to get the chairman’s attention if you stand, and also easier for the group to hear your motion.

Q: What’s the proper way to make a motion?
A: The proper form is to say, “I move...” or “I move to...” or “I move that...” Examples: “I move approval of the program committee’s recommendations.” “I move to adopt the audit report.” “I move that we hold a sea life assembly.” Note that they all begin with “I move.”

Q: What does “lay on the table” mean?
A: This is a motion to temporarily stop the business at hand in order to deal with something that has some urgency. Example: Your principal can only be at your meeting for a few minutes because of a prior commitment, but would like to give an update to your members. When the principal arrives, the chairman entertains a motion to lay the current item on the table so that the principal may speak. (The president can also ask for consensus: “If there is no objection, we will lay this item on the table to allow the principal time to speak.”) Once the principal is done, the chairman entertains a motion to take the item of business from the table, and the regular progress of the meeting resumes.

Q: What if I want to wait until the next meeting to consider an item of business?
A: The motion that makes this possible is a motion to postpone (“I move to postpone this item until the next meeting.”) See Robert’s Rules for a chart of motions or the PTA motion chart.

Q: What is a consensus vote?
A: Consensus votes happen when the chairman says: “If there is no objection...” Example: “If there is no objection, we will extend debate on this item for five more minutes.” If any member objects, then there must be a formal motion and vote. Another common consensus item is the approval of the minutes: “If there are no corrections, the minutes stand approved as printed” has the same effect as a motion to approve the minutes as printed.
Controversial Issues in Association Meetings

toolkit.cpta.org /running-your-pta/bylaws/controversial-issues-in-association-meetings/

Controversial issues may be brought up and disruptions may occur at PTA meetings. An informed and alert PTA executive board can guard against disruptions, as will consistently applied ground rules. A sense of fair play will help handle most situations. The president, first vice president, and parliamentarian should possess a good working knowledge of parliamentary procedure and how to apply it effectively.

The president presides during the program presentation as well as during the business meeting, with support from the parliamentarian and other executive board members. The president never turns the meeting over to another member, but calls on another member to make a presentation or introduce a speaker.

When dealing with difficult interruptions, the presiding officer should maintain poise in the face of interruption. An unruffled attitude reflects that the president is in control.

Allow the “interrupter” to make his/her statement, listening carefully to see where the subject might fit into the topic under discussion. If the point made is irrelevant (or not germane) to the motion on the floor, the chairman should point out that fact.

Be courteous in dealing with the interruption. In spite of apparent negative reaction from the audience, the person speaking may have a valid point or a suggestion worth investigating.

If the discussion—and the situation in general—appears to be getting out of hand, the president can decide to recess the meeting for a short time to allow people to calm down or may determine immediately the time and date of a special meeting to focus on the issue.

People Are Entitled to Their Opinions

PTA has bylaws, policies, and procedures under which it operates. While PTA respects the rights of individuals, it also has a responsibility to conduct business in a fair and dignified manner. If the “disruption” goes on and on, the president may use one of the following:

“Ms.[mail], your point is well taken, but this issue is not currently on the agenda. We do have a program commitment and an obligation to carry it through. Perhaps we could speak later.” (Then continue with the agenda.)

“Mr.[mail], we appreciate your comments on this subject, and if there is no objection, the chairman would like to appoint a committee (now or following the meeting) to study the issue, research the information, and report back at a future meeting.” (It’s a good idea to include that person on the committee.)

“Mrs.[mail], the issue you raise doesn’t fall within the nonpartisan (or whatever) policy of PTA. However, we do appreciate your sharing the information with us.”

Remember, no one expects the president to be perfect ... only poised and prepared to carry through. Executive board members should know parliamentary authority – and how to apply it – to help the president handle uncomfortable situations.
Parliamentary Procedure (continued)

When Tempers Flare
“The chairman recognizes there are many different opinions, but let’s hope we can disagree ‘agreeably.’ That is, after all, the democratic process, isn’t it?”

When the situation is getting out of hand, don’t pretend everything is all right. Instead of becoming flustered, inject a sense of humor. “My mother said there’d be times like this!” -Or- “Let’s call a truce—and look into the problem together.”

Helpful Parliamentary Procedure
The chairman should recognize the privilege of each individual to agree or disagree with the views stated by the speaker. The speaker is stating his/her own opinions and is not asking for conclusions from the audience, so interruptions are inappropriate. Honest differences of opinion may be discussed at the close of the meeting.
Board members with a good background in parliamentary procedure can aid the president with helpful motions at opportune times.

Rules to Keep in Mind
While people other than PTA members may be present at the meeting, the privilege of making motions, debating and voting shall be limited to the members of the association who are present and whose dues are paid and who have been association members for at least the previous thirty (30) days.

At least twenty-four (24) hours’ notice, in writing, must be given to the president to request to have an order of business or an announcement placed on the executive board agenda. At least fourteen (14) days’ notice, in writing, must be given to the president to request an item of business or an announcement be placed on the association agenda. New items of business or announcements brought to association meetings that have never been considered by the executive board should be referred to a committee or the executive board for study. No action may be taken on any agenda item that has not been properly noticed.

Any non-PTA material distributed at an association meeting must be reviewed and approved by the executive board prior to the meeting.

Unless the association has a special rule, no member can speak more than twice to the same question on the same day (Roberts Rules of Order Newly Revised, Section 42).
Just a Minute!

*What does the Secretary do?*

The recording secretary is elected by the association and is one of the three required officers for a PTA. The secretarial responsibilities may be assigned to one person or divided between a recording secretary and a corresponding secretary, as specified in the bylaws. If there is no corresponding secretary, the duties of the corresponding secretary may be combined with the duties of the recording secretary, in accordance with the bylaws. In addition to the bylaws, the duties of a secretary are discussed in the *California State PTA Toolkit* and *Robert’s Rules of Order Newly Revised*.

**RESPONSIBILITIES OF THE SECRETARY**

- Attend PTA-sponsored workshops or trainings.

- Obtain the secretary’s record book, which contains the minutes from previous executive board and general association meetings. Also obtain the procedure book which contains the master set of the bylaws, list of members and other official documents and records of the PTA.

- Keep an accurate, concise, permanent record of the proceedings of all meetings of the association and of the executive board. These minutes are the legal record of the PTA/PTSA and the original copy of the minutes is known as the master copy.

- Minutes are entered into a bound book. Minutes may be handwritten in permanent ink, typed, or computer generated. The original copy must be bound.

- Minutes contain a record of action taken by the group, with action recorded in the order it took place. Personal opinion and discussion are not included.

- Prepare a list of unfinished business items for the president and assist with preparation of the agenda, if requested.

- Have on hand for reference at each meeting a copy of the bylaws and standing rules, copies of agendas, motion forms, minutes of previous meetings, list of all committees, and an up-to-date list of all members.

- Read the minutes of any previous meeting, when called upon to do so.

- Copies of the association minutes may be prepared for each member to expedite the meeting, or association minutes may be published in the association newsletter. When the newsletter is distributed to the school community, only a summary of action is printed.

- With approval of the association, reading of the minutes may be postponed to a succeeding meeting, or a committee may be appointed by the president to read the minutes and report.

- Minutes are not to be posted on any website; however, a summary of association minutes is appropriate.

- Prepare the minutes and give a copy to the president soon after each meeting.

- Make all corrections to the official minutes. Corrections to the minutes are made immediately following the reading of the minutes, during the time specified on the agenda for minutes, or at any subsequent meeting when errors are discovered. The current minutes shall reflect that a correction was made. In the master copy of the minutes, the secretary circles the incorrect words with a red ink pen and notes the correction in the margin. Corrections must be dated and initialed. Only the group that held the meeting for which minutes were taken (executive committee, executive board, and association) may correct them.

- Prepare and read a report (not the full minutes) of each executive board meeting at each association meeting, and move the adoption of board recommendations.

- Sign, with the president, authorizations for payment after the association votes to pay a bill. Record all expenditures in the minutes.
RESPONSIBILITIES OF THE SECRETARY (continued)

- Enter all amendments to the bylaws in the minutes, at the meeting at which the vote is taken.
- In the absence of the president and vice presidents, call the meeting to order and preside until the election of a chairman pro tem, unless the bylaws specify otherwise.
- Be prepared to help count a rising vote when requested, and have blank paper available for voting by ballot.
- Be responsible for all records, documents and papers (except those assigned to others).

TIPS FOR RECORDING THE MINUTES

- Use a bound book for permanent storage. NEVER USE A LOOSE LEAF BINDER as pages can be lost.
- Write minutes directly into the bound book or paste typewritten or computer generated minutes into the book.
- Number pages in consecutive order.
- Keep minutes from all meetings of the executive board, executive committee, and association in the same minute book.
- Record minutes that are brief, yet contain all important information needed to check past proceedings.
- Record what is done, not what is said.
- Do not reflect the secretary's personal opinion about anything that is said or done.
- Record the business in the order it happened.
- Record minutes in paragraph form or by department/subject headings.
- Write minutes immediately following the meeting.
- Leave a wide margin in the book to allow space for corrections.
- Send an advance copy of the minutes to the president as soon as they are completed.
- Record all motions except those withdrawn, all points of order, and appeals.
- Record the name of the member who introduced the motion and the results of the vote (carried or lost).
- Do not record the name of a person who offered the second.
- Record a ballot vote as follows: number of eligible votes, number of affirmative votes (ayes), and number of negative votes (no's). For an election, include the name of the nominees and the number of votes each nominee received. A motion to destroy the ballots is in order.

HOW TO CORRECT THE MINUTES

- Corrections to the minutes are to be made immediately following the reading of the minutes or, if distributed and not read aloud, during the time devoted on the agenda to the minutes.
- Whenever an error is mentioned, it is noted in the minutes of the current meeting.
- Corrections are made in the secretary's minute book by circling the incorrect words with a red pen and placing the correction in the margin.
- All corrections must be initialed and dated.
- Corrections to the minutes can be made years later by means of a motion to amend something previously adopted. This requires a two-thirds vote or a majority vote with prior notice.
HOW TO CORRECT THE MINUTES (continued)

• With approval of the association the reading of the minutes of the meeting may be postponed to the next meeting, or a committee may be appointed to read the minutes and report findings at the next meeting. If a committee is appointed, all members must have been present at that meeting. The members of the committee must sign their names at the end of the master copy of those minutes.

• Only the group (executive committee, executive board, association) which created the minutes can correct them!

HANDLING THE MINUTES

In what format should the minutes be printed?
The format for minutes is somewhat of a unit preference. The primary concern is that all action be approved and recorded. Minutes may be computer-generated, typed, or hand written. The most commonly used format is a narrative; however, a table or any other form that has been agreed upon by the executive board / membership may be used.

Who gets a copy of the minutes?
Minutes of executive board meetings should be made available to all executive board members. (Refer to your unit bylaws to determine who is a member of the executive board.) The secretary makes a brief report of the executive board meeting for the association; however, executive board minutes are not provided to the association. Minutes of association meetings should be posted at general meetings or copies may be made available to those attending the association meeting. At a minimum, hard copies of the minutes must be given to the president and treasurer. The auditor will need minutes while conducting audits. The secretary keeps all master copies of the minutes.

Who approves the minutes?
Minutes are approved by the body that created them; e.g., the executive board approves executive board meeting minutes and the association approves association meeting minutes.

How should the minutes be stored?
Minutes should be placed in a bound book. A hard-backed, bound minute book is available through the California State PTA Store or a similar book may be purchased at an office supply store. The master copy of the minutes, along with all written reports, should be glued into the book for permanent storage. As an alternative, minutes may be kept together and taken to a binding company for binding at the end of each term. This method is most often used by district and state PTAs, which have accumulated a large number of pages of minutes during the term. Loose leaf or spiral notebooks must not be used to store minutes.

MINUTES SHOULD CONTAIN:

• Name of the association and kind of meeting (association, executive board, special);
• Date, time and location of meeting;
• Name and title of presiding officer (or pro tem);
• Attendance list;
• Disposition of minutes of previous meeting – whether read and approved/corrected, or their reading postponed, including when and how they are to be approved;
• Statement of account as given and list of bills approved for payment;
• Summarized reports of other officers and chairmen (important reports such as budget should be attached to the minutes);
• Record of each motion voted upon, the name of member who made the motion, and whether adopted or defeated (the name of the member who seconded the motion is not recorded); if counted vote requested, record if a quorum or majority was needed and the number for and against the motion; if a two/thirds vote was required; i.e., for bylaws changes, it must be noted after the outcome of the motion;
• Copy of any resolutions adopted;
• Record of results of any election and votes cast;
• Brief notation of program topic, names of participants, and method of presentation;
• Time of adjournment; and
• Signature of secretary, using own given name and date approved.
SAMPLE MINUTES

Minutes are the official legal records of the PTA and must be kept permanently!

Golden State Elementary PTSA
Association Meeting
February 17, 2018

The association meeting of the Golden State Elementary PTSA was called to order by Selena Butler, president, at 7:35 p.m., in the school library on Thursday, February 17, 2018.

The Pledge of Allegiance to the Flag of the United States was led by Cub Scout pack 131, under the direction of Cub master John Smith. Phoebe Hearst shared an inspirational message.

Minutes of the January 7, 2014, meeting were approved as read. —OR— Minutes of the meeting of January 7, 2018, were approved as corrected.

Steve Jones, treasurer, reported a balance on hand of $654.73 with receipts of $492.75 and disbursements of $57.00. (Entire treasurer’s report MUST be written in or attached to the minutes.)

Alice Birney, Budget and Finance chairman, moved to pay bills in the amount of $272.07. The motion was seconded. Motion carried. (Itemized list of bills should be written in the minutes.)

Ways and means chairman Joan Wright reported that the Winter Carnival, held on January 25, 2018, netted $462.78 after expenses.

Evelyn Brown, juvenile protection chairman, moved “That the association conduct a study on child abuse.” The motion was seconded. Motion carried.

Louis Gray, program chairman, introduced the speaker, Sgt. Ed Collins from Any town Police Department. Sgt. Collins presented a film on child abuse and answered questions. Announcements were made. Meeting was adjourned at 9:05 p.m.

Signature of Secretary
Sample Executive Board Meeting Agenda

This agenda is a guide only, adaptable to meet your unit’s needs. Copies of the agenda should be given to the recording secretary and the parliamentarian as well as the members of the association.

Ocean High PTSA Executive Board Meeting Agenda (type of meeting)
January 7, 2017 (Date of meeting)  Golden State Elementary Auditorium / 7:00 pm (Meeting location / time)

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Name/Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00</td>
<td>Call to Order - Excused Absences, Adoption of Agenda</td>
<td>Betty Boop - President</td>
</tr>
<tr>
<td></td>
<td>Pledge of Allegiance</td>
<td>George Washington - Pledge</td>
</tr>
<tr>
<td></td>
<td>Inspiration (optional)</td>
<td>Maya Angelou - Inspiration</td>
</tr>
<tr>
<td>7:05</td>
<td>Ex Board Minutes from November 24, 2016 (date of last meeting)</td>
<td>Marge Simpson - Secretary</td>
</tr>
<tr>
<td>7:06</td>
<td>President’s and/or Principal’s Report</td>
<td>Betty Boop - President</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Harry Potter - Principal</td>
</tr>
<tr>
<td>7:16</td>
<td>Financial Reports</td>
<td>Daisy Duck - Financial Secretary</td>
</tr>
<tr>
<td></td>
<td>Financial Secretary</td>
<td>Minnie Mouse - Treasurer</td>
</tr>
<tr>
<td></td>
<td>Treasurer &amp; Presentation of Bills</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(An Audit Report shall be presented only when necessary)</td>
<td></td>
</tr>
<tr>
<td>7:26</td>
<td>Correspondence (only when necessary)</td>
<td>Thomas Edison - Corresponding</td>
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<tr>
<td></td>
<td></td>
<td>Secretary OR Secretary</td>
</tr>
<tr>
<td>7:30</td>
<td>Officers and Chairmen Reports (list all who need to present their reports)</td>
<td>Bugs Bunny - First VP (Membership)</td>
</tr>
<tr>
<td></td>
<td>First VP Membership</td>
<td>Martha Stewart - Third VP (Hospitality)</td>
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<tr>
<td></td>
<td>Update on Membership numbers and new Spring drive/contest</td>
<td></td>
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<tr>
<td></td>
<td>Third VP Hospitality</td>
<td>Art Vandal - Nominating Committee</td>
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<td></td>
<td>Open House/Root beer Float Night</td>
<td></td>
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<tr>
<td></td>
<td>Nominating Committee</td>
<td>Carol Brady - Garden Party Chairman</td>
</tr>
<tr>
<td></td>
<td>Seeking volunteers</td>
<td></td>
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<tr>
<td></td>
<td>Spring Fundraiser Committee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Garden Party/Auction</td>
<td></td>
</tr>
<tr>
<td>7:50</td>
<td>Unfinished Business</td>
<td>Betty Boop - President</td>
</tr>
<tr>
<td></td>
<td>PTA sponsored Poetry Contest discussed over winter break</td>
<td></td>
</tr>
<tr>
<td>7:55</td>
<td>New Business</td>
<td>Betty Boop - President</td>
</tr>
<tr>
<td></td>
<td>Written Proposal from Librarian for Books</td>
<td></td>
</tr>
<tr>
<td>8:00</td>
<td>Comments/Questions/Announcements</td>
<td>Betty Boop - President</td>
</tr>
<tr>
<td>8:05</td>
<td>Adjourn Meeting</td>
<td>Betty Boop - President</td>
</tr>
</tbody>
</table>

Our next Executive Board meeting will be on February 7th at 7PM.
Sample Association Meeting Agenda

This agenda is a guide only, adaptable to meet your unit’s needs. Copies of the agendas should be given to the recording secretary and the parliamentarian as well as the members of the association.

Ocean High PTSA Association Meeting Agenda  (type of meeting)  
January 21, 2017 (Date of meeting)  Golden State Elementary Auditorium / 7:00 pm (Meeting location / time)

<table>
<thead>
<tr>
<th>Time</th>
<th>Action</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00</td>
<td>Call to Order - Excused Absences, Adoption of Agenda</td>
<td>Betty Boop - President</td>
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<tr>
<td></td>
<td>Pledge of Allegiance</td>
<td>George Washington</td>
</tr>
<tr>
<td></td>
<td>Inspiration (optional)</td>
<td>Pledge Ollie Oxin -</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Inspiration</td>
</tr>
<tr>
<td>7:05</td>
<td>Association Minutes from November 17, 2016 (date of last meeting) &amp;</td>
<td>Marge Simpson - Secretary</td>
</tr>
<tr>
<td></td>
<td>Report of the Executive Board</td>
<td></td>
</tr>
<tr>
<td>7:16</td>
<td>Financial Reports</td>
<td>Daisy Duck - Financial</td>
</tr>
<tr>
<td></td>
<td>Financial Secretary</td>
<td>Secretary Minnie Mouse -</td>
</tr>
<tr>
<td></td>
<td>Treasurer’s Report &amp; Presentation of Bills</td>
<td>Treasurer Rory Pond -</td>
</tr>
<tr>
<td></td>
<td>Audit Report (only when necessary)</td>
<td>Auditor</td>
</tr>
<tr>
<td>7:26</td>
<td>Principal’s Report</td>
<td>Harry Potter - Principal</td>
</tr>
<tr>
<td>7:30</td>
<td>Officers and Chairmen Reports (list all who need to present their reports)</td>
<td>Bugs Bunny - First VP (Membership)</td>
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<td>First VP (Membership)</td>
<td>Martha Stewart - Third VP</td>
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<td></td>
<td>Update on Membership numbers and new Spring drive/contest</td>
<td>(Hospitality) Art Vandaly -</td>
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<tr>
<td></td>
<td>Third VP (Hospitality)</td>
<td>Nominating Committee Carol Brady</td>
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<td>Open House/Root beer Float Night</td>
<td>- Garden Party Chairman</td>
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<td></td>
<td>Nominating Committee</td>
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<td></td>
<td>Seeking volunteers</td>
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<td>Spring Fundraiser Committee</td>
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<td>Garden Party/Auction</td>
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<tr>
<td>7:45</td>
<td>Unfinished Business</td>
<td>Betty Boop - President</td>
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<tr>
<td></td>
<td>New Business</td>
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<tr>
<td></td>
<td>Program</td>
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<tr>
<td>8:00</td>
<td>Comments/Questions/Announcements</td>
<td>Betty Boop - President</td>
</tr>
<tr>
<td>8:05</td>
<td>Adjourn Meeting</td>
<td>Betty Boop - President</td>
</tr>
</tbody>
</table>

Our next Association meeting will be on February 21st at 7PM.
**Meeting Script**

The following may be helpful use during your meetings

<table>
<thead>
<tr>
<th>Agenda Item</th>
<th>What the President says</th>
</tr>
</thead>
</table>
| Call Meeting to Order | “The meeting will please come to order”  
“_____ has/have asked to be excused from today’s meeting”  
“Any changes needed to this Agenda?”  
“_____ will lead us in the Pledge of Allegiance. Will you please rise?”  
“_____ will present an inspirational message/quote” |
| Association Meeting minutes | “The secretary will read the minutes of the (date) meeting.  
OR “The minutes are posted at the entrance/were distributed at the door/need a committee of 3.” [Write down names of committee of 3, give them a copy of the minutes and have them look over while you carry on with meeting. Be sure to come back to the minutes before you adjourn the meeting]  
“Are there any corrections?” (Note corrections.)  
“The minutes stand approved as read/printed.”  
OR “The minutes stand approved as corrected.”  

A second is not required when a motion comes from a committee/board.  
“The secretary will present the report of the executive board.”  
“You have heard the recommendations such as a motion to approve proposed programs; to approve the budget; to approve fundraising activities; for the president and one additional elected officer to sign the following contract...;”  
Follow the steps of a motion, Vote. |
| Financial Reports | “_____ will present the Financial Secretary’s/Treasurer’s/Audit Report”  
“You have heard the report. Are there any questions?”  
“The report will be filed for Audit” |
| Audit Report | “It has been moved and seconded that the audit report be adopted. Any questions?” Follow the steps of a motion and vote. |
| Presentation of Bills | “The treasurer (or the person assigned) will read the bills.”  
“It has been moved and seconded that we pay the bills. Is there discussion?” Vote.  
“It has been moved and seconded that we ratify payment of bills since last meeting” Vote.  
“It has been moved to authorize the Executive board to pay necessary Summer bills up to the budgeted amounts.” Vote. |
| Correspondence | “The Corresponding Secretary/Secretary will read any correspondence we have received” |

(continued on next page)
### Meeting Script (continued)

<table>
<thead>
<tr>
<th><strong>Officers and Chairmen Reports</strong> - including the principal, faculty representatives, and student representatives on the secondary level, Bylaw Committee, Library Committee, Convention Committee, and Fundraising Committee.</th>
<th>“__________ will present the report of the __________ committee.” “Are there any questions regarding the report?” “If not, the report will be filed.” OR “You have heard the recommendation such as a motion to release funds up to the budgeted amount for programs through the next meeting” Follow the steps of a motion. Vote.</th>
</tr>
</thead>
<tbody>
<tr>
<td>President calls for the report of the committee. The person making the report moves the adoption of any recommendations. <strong>If motions are made by the committee then follow through with a vote.</strong></td>
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<tr>
<td><strong>Unfinished Business</strong> – The president presents each item of unfinished business as indicated in the minutes. He/she should not ask “Is there any unfinished business?” A motion is needed to proceed with any plans to move forward.</td>
<td>“The first item of unfinished business is <strong><strong><strong>.” “You have heard the discussion/request about</strong></strong></strong>. Are there any questions?”</td>
</tr>
<tr>
<td><strong>New Business</strong> – A motion is necessary before discussion and vote on any new business. All proposed business to be considered at the meeting must have been properly noticed to be acted upon. (See bylaws.)</td>
<td>“The first item of new business is <strong><strong><strong>.” “You have heard the discussion/request about</strong></strong></strong>. Are there any questions?”</td>
</tr>
<tr>
<td><strong>Comments/Questions/Announcements</strong> – Date of the next meeting and important activities should be announced. If there is a social time following the meeting, this should be announced.</td>
<td>“The next meeting will be________.” “Please join us for refreshments.”</td>
</tr>
<tr>
<td><strong>Adjourn Meeting</strong> – No motion is necessary to adjourn. President raps the gavel once.</td>
<td>“The meeting is adjourned at ______ (time of adjournment).”</td>
</tr>
</tbody>
</table>
PTA Membership Information

Additional membership information is available at www.capta.org or www.pta.org.

Dues Amounts
A PTA unit member’s dues amount is specified in a unit’s current bylaws. Make sure that a member’s dues amount is greater than $5.05. This amount is transitory and is channeled through Long Beach Council PTA. Since the membership dues are written in the bylaws, they can only be changed with the association’s consent. If your unit is planning on changing the amount you will need to bring it to the association as a recommendation from your executive board. It will need to pass with a 2/3rds vote. This needs to be done BEFORE you send in your new bylaws to be updated. This is the only section that needs to be approved by the association before sending the bylaws into the Long Beach Council parliamentarian and then further on up the line.

Transitory Dues ($5.05)
- National PTA = $2.25
- CAPTA = $2.00
- Thirty-Third District PTA = $ .50
- Long Beach Council PTA = $ .30

Free Brochures Available from CAPTA & National PTA
The List of PTA Materials and the PTA Materials order form are in the CAPTA toolkit or are printable from www.capta.org or pta.org.

Member Envelopes and Cards
Your unit will order membership envelopes from the LBCPTA in the spring which may be available for pick-up during the summer or at the August UP’s meeting. Using these envelopes is not required, units can create their own. Membership cards are available through the council Membership Chairman:

Christina Butler 562-536-8966
Christyb17@aol.com

Additional cards are available as additional dues are submitted. Don’t wait until you’re out of cards to ask for more. Please give 2 weeks’ notice before you need them if you are getting low.

Awards & Deadlines
October UPs meeting – first membership turn-in (use “Money Matters” form found in the October section of the red book). Make a copy of the form BEFORE you fill it out so you will have a blank to make more of when you need it. Then make two copies of the filled out form, one for the unit treasurer and one for the membership chairman. You need to turn this sheet in every time you turn in membership money.

It is very important that membership monies are turned into LBCPTA throughout the school year. It can be looked at as cheating California State PTA if you do not remit all memberships that are turned into your unit. An individual’s dues that are not forwarded through channels are not considered a member of the PTA.

PTA
everychild. onevoice.
PTA Dues at Work

Where does membership money go?
(From the Money Matter Quick-Reference Guide)

The dues for PTA include the state portion, established by the state PTA bylaws; the national portion, established by the voting body at National PTA Convention; and the local portion, established by the local PTA bylaws. An individual who pays dues to a local PTA automatically becomes a member of the state and national PTAs. Because each PTA has a unique set of activities that are different from the activities of every other PTA, people belonging to more than one PTA pay dues to each local PTA of which they are members. The state and national levels of PTA provide several services that benefit every local PTA. These services—including national child advocacy and government relations, leadership development, program planning and execution, and resource development—all incur costs that are largely borne by a small portion of the local membership dues. Every local PTA contributes its share for these expenses. Since the PTA is an independent, private association, all monies raised from the local per-capita portion of dues and through additional efforts and other assets, including checking accounts, savings accounts, and certificates of deposit, are the property of the local PTA. Local PTA bylaws state the amount of the annual per-capita dues for membership in the association. This amount includes the local, state, and national portions of the membership dues. The local treasurer sends the state and national portions of the per-capita dues to the state and records these amounts in the local treasurer’s book. As directed by the state PTA, the state and national portions of the dues shall be forwarded to the state treasurer without requiring specific authorization by the association. These portions of dues shall never be recorded as part of the local PTA income.

PTA dues are distributed to each level of PTA. Like most national organizations, each level of PTA provides specific services and each service depends upon a small portion of the local association dues to carry out the work. Services provided at the various levels of PTA include:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Council</th>
<th>District</th>
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<tbody>
<tr>
<td>State</td>
<td>Convention Delegates</td>
<td>Convention delegates</td>
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<td></td>
<td>Emergency Student Welfare</td>
<td>Administrative expenses</td>
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<td></td>
<td>Hospitality</td>
<td>District newsletter</td>
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<td></td>
<td>Insurance</td>
<td>Hospitality</td>
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<td></td>
<td>Newsletter &amp; communications</td>
<td>Leadership training</td>
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<td></td>
<td>Organizational expenses</td>
<td>Directory</td>
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<td></td>
<td>Parent education &amp; study groups</td>
<td>Workshops</td>
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<td></td>
<td>Program directory</td>
<td>Publications &amp; communications</td>
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<td></td>
<td>School-student programs</td>
<td>Leadership training</td>
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<td></td>
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<td>Provide scholarships</td>
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<tr>
<td>State</td>
<td>National convention</td>
<td>National convention</td>
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<tr>
<td></td>
<td>Administrative expenses</td>
<td>Administrative expenses</td>
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<td></td>
<td>PTA in California (newsletter)</td>
<td>Special Projects</td>
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<td></td>
<td>Legislation Advocates</td>
<td>Field services</td>
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<td></td>
<td>Special Projects</td>
<td>Headquarters in Washington, D.C.</td>
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<td></td>
<td>California State PTA Toolkit</td>
<td>Legislative Office in Washington, D.C.</td>
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<td>State office in Sacramento</td>
<td>Annual Resources for PTAs</td>
</tr>
<tr>
<td></td>
<td>Publications &amp; Supplies</td>
<td></td>
</tr>
</tbody>
</table>
Membership Timeline

March-June
* Congratulations on your election or appointment! Here are your first steps as membership chair:
  - Meet with last year’s membership chair, and find out what worked, what didn’t and why. Plead with him/her to give you the procedure book. If there isn’t one, make life easier on your successor, and put one together. Double check your bylaws for the correct dues amount.
  - Ask your president-elect to appoint a membership committee to assist you. Begin planning now for your summer/fall membership campaign.
  - Meet with the president-elect and principal to discuss distribution and collection of membership envelopes, membership theme, and awards.
  - Go to capta.org and take advantage of the many resources and ideas available designed to make your unit membership marketing plan a huge success.

July-August
* Ask your unit president to provide you with the membership materials that are in the State PTA’s Summer Mailing. The materials will contain the new membership theme, incentives and awards, and deadlines.
* Ask your unit president to provide you with your council (if in council) and district incentives, awards and deadlines.
* Meet with your membership committee to develop a year-round plan which incorporates the State PTA Membership Incentives/Award as well as your council and district incentives/awards.
* Plan a mid-year “push” and incorporate it into your membership marketing plan. You could consider targeting a historically under-represented group such as students or dads.
* Finalize your plan, including your budget and goals, and present it to the executive board; elect for approval.
* Find out who your council or district counterpart is and make arrangements for delivery or pick up of membership cards and envelopes.
* If using hard copy cards, pre-print them using the template at www.capta.org/sections/membership/resources.cfm.
* If using electronic cards, get the template from your district.
* Use the new membership marketing flier available at www.capta.org/sections/membership/resources.cfm to create an informational flier about PTA. Or, create your own invitation letter to send home to parents, staff, and community letters. Arrange for printing.
* Attach the PTA membership envelope to your flier; one for each student to bring home.

August-September-October
* Your membership campaign begins; send the flyers home in the student’s backpacks.
* Or, you may send the marketing flyer electronically, with a link to join the PTA, if you have an electronic payment system in place.
* With your principal’s approval, meet with the teachers, and personally invite them to join PTA. Place the marketing flier with a membership envelope in each teacher’s box.
* Make arrangements to collect and count money daily, using PTA financial guidelines.
* Report your membership progress to the association and board.
* Distribute the cards; one for each member.

September-October
* Create a spreadsheet for all members; list each family member separately, as dues must be paid for each person that joins. Be sure to indicate the date that each person joined. Give one copy of the completed spreadsheet to the president and secretary, and update the spreadsheet as new members join.
* Award prizes to the winning classrooms, celebrate your membership!
* Turn-in the council/district/state/national membership per capita through proper channels abiding by council (or district, if out of council) deadlines to qualify for the State PTA “Ready, Set,...Remit” Award. To earn this award your unit must turn-in at least 30 memberships to State PTA by October 30th.

September-June
* Invite all teachers and staff members to join PTA. If possible, enlist the support of the principal.
* Kick-off your mid-year membership “push.”
* Invite all new families to join PTA; create a welcome packet with pertinent PTA information.
* Check with your president/treasurer to be sure that all per capita (dues not belonging to the unit) is sent monthly to the council or district treasurer/final secretary.
* Report on membership at all association and executive board meetings.
* Continue sending per capita memberships to council monthly.
ENGAGING TEACHERS TO JOIN PTA

Involving teachers and administrators is one of the best ways to strengthen communication between families and schools. Encouraging them to join PTA in a collaborative partnership between home and school should be one of the focal points of your membership campaign.

- Put an enthusiastic and supportive teacher member on your membership committee.
- Enlist the help of the principal. A principal’s encouragement to join goes a long way.
- Send out personalized invitations to teachers and staff to join PTA at the beginning of the school year. Be sure to include a membership envelope.
- Send out reminders to teachers who have not joined PTA including another membership envelope.
- Survey all teachers mid-year asking if they joined PTA and why, and if not, why not.
- Send all teachers information about the California State PTA Continuing Education Scholarships reminding them that they must be members to apply.
- Remind teachers and staff that PTA is more than a local fundraising group for their school. It is an advocacy organization focused on student success!
- Hold a grade level or departmental membership competition. Provide winning group with bagels or pastries.
- Challenge the staff at a nearby school to a friendly membership competition.
- Provide monthly opportunity drawings for teachers and staff who join with donated items from local merchants.
- Reward teachers and staff with a breakfast or luncheon when 100 percent membership is achieved.

BUILDING STUDENT MEMBERSHIP

Students are considered full members. Here are some great ways to encourage students to join your PTA:

- Put an enthusiastic and supportive student member on your membership committee.
- Provide membership invitations with membership envelopes in the summer registration packets to all students including incoming students from middle/junior high schools.
- Set up a PTA/PTSA table on student registration days and other school events. Highlight activities that benefit students.
- Publicize the California State PTA Graduating High School Senior Scholarship and the membership requirements.
- Provide student members with school and community service volunteer opportunities which can be listed on their college applications.
- Encourage and welcome students in PTA leadership positions. It looks great on their college applications!
- Involve students in the planning and execution of PTA events.
- Consider changing your meeting time to encourage more student participation.
- Partner with ASB for discounts at the student store or provide discounts on PTA student store items for members.
- Encourage student delegates to attend the California State PTA Annual Convention.
- Challenge a nearby high school to a friendly student membership competition.
DADS’ INVOLVEMENT STRENGTHENS PTA

There are more than 70 million fathers in the United States. That means 70 million possibilities for PTA membership, inclusion, engagement and strength for our schools and kids.

One out of every three children in America — more than 24 million in total — live in a home without their biological father present, according to a 2012 White House Fatherhood Report. And, roughly one out of every three Hispanic children and more than half of African-American children also live in homes without their biological fathers.

More engaged fathers and father figures — whether living with or apart from their children — can help foster a child’s healthy physical, emotional and social development. There’s no doubt of the positive impact male role models can have on their children’s lives.

**MEMBERSHIP: MAKE IT ABOUT MEN**

Recruiting men as PTA members may mean rethinking how your PTA is run on a day-to-day basis. If your PTA mostly relies on female caregivers, reaching out to men may involve breaking down barriers and trying new approaches and strategies:

**Communicate directly to dads** — How you and your PTA speak to members and potential members can impact the level of men’s involvement. Simply slimming down language and shortening messages in your communications can be more appealing to male readership. And be always sure to explain and emphasize how men’s unique involvement benefits kids.

**Just ask** — Nearly half of men who responded to a recent National PTA survey said they haven’t gotten involved with PTA *simply because they weren’t asked*. Those involved said their spouses’ participation led to their own involvement. So encourage women in your PTA to invite the men in their children’s lives to get involved, and take your PTA to places with large male contingents – such as service clubs – to share our message and ask for participation and membership.

**Create men-focused groups and events** — Surveys also show that men prefer to volunteer for hands-on projects and dad-only events with clear expectations. So organize special events and groups for dads to enjoy working on and being involved with together and define volunteer roles and expectations.

**Respect men’s time** — More than 70 percent of recently surveyed dads said time was a barrier to PTA involvement, and the majority said they wanted fewer meetings at more convenient times. Make efforts to schedule workdays in mind for all parents and organize results-driven meetings with clear agendas and topics.

**Celebrate engagement** — When you start getting more men involved, it’s great to celebrate! Letting the school community know will help emphasize and publicize your welcoming environment for all parents and members. Thank dads publicly at meetings and in your PTA communications, and always encourage more male membership – we’re all in it together for our kids!

**NATIONAL NEED FOR MALE ENGAGEMENT**

More than 1 million men visit schools across America each year as part of the National PTA MORE Alliance (Men Organized to Raise Engagement).

Organizations in PTA MORE are dedicated to raising the level of engagement between children and the important men in their lives. Members of PTA More serve as conduits for greater father and significant-male involvement, resulting in positive outcomes and successful relationships for children, parents, schools and communities.

**PTA MORE:**

**Acts as a resource** for families, communities and schools on fatherhood initiatives and issues

**Increases visibility and outreach** of quality programming by coalition members.

To learn more about PTA MORE, read an article on this PTA initiative and visit National PTA.
101 Ways to Increase PTA Membership

1. Just ASK!
2. Use membership materials in the back-to-school-kit found online at PTA.org/backtoschool.
3. Don’t reinvent the wheel - use State and National PTA resources.
4. Set goals, put them in writing, AND reference them often.
5. Give a short speech at open house, back to school night, orientations, etc.
6. Have a membership table at all school and PTA events; school registration, back to school nights, open house, and PTA sponsored events.
7. Create a welcome letter to let parents know what PTA does for the school and their children. Create one to welcome families back at the beginning of the year, as well as one to welcome families mid-year.
8. Be present at Kindergarten roundups and transition nights to middle and high school.
9. Reach out to pre-schools who feed into your school.
10. Challenge current members to ask other people to join.
11. Have PTA info available at parent/teacher conferences.
12. Make sure meetings are welcoming. Have a greater welcome new people who attend. Have board members introduce themselves to people before the meeting.
13. Create a welcome packet for new students and families.
14. Encourage new members to chair committees. They will know different people than you and can recruit new people to serve on the committee and join.
15. Have a collection box in the school office with membership envelopes close by to make it easy to join.
16. Have PTA shirts and/or name tags for the board so everyone knows who you are at school and PTA events.
17. Strive to have a diverse board that reflects the community you serve. People want to join groups where they can see others like them involved.
18. Offer a variety of committees. Examples: Special Needs Committee which would focus on issues dealing with child needs from special to gifted and talented; Male Engagement Committee which would offer programs specifically for males; Diversity Committee which would reach out to diverse families.
19. Encourage Reflections program participants to join PTA.
20. Reach out to new families throughout the year.
21. Work with and support the School Parent Center.
22. Put a "personal membership invitation" in the back to school mailing.
23. Send contact information for all members to your state PTA. This will start to connect local members to their state PTA and National PTA.
24. Make sure families understand that only members are entitled to vote on PTA issues.
25. Make personal asks in person or on the phone.
26. Find an enthusiastic and friendly person to be a volunteer coordinator. They will bring in new people as both members and volunteers.
27. Provide members with name badges to wear at meetings.
28. Encourage members to bring a friend to meetings and events.
29. Let people know that just because they join PTA does not mean they have to volunteer. Sometimes people believe the two are connected.
30. Put up a sign-up board in May, with volunteer opportunities for the following year. Bring it to open house/back to school nights. If people sign up who aren’t members, ask them to join.
31. Develop a “Where the PTA Money Goes” flyer to highlight the spending of your PTA. People may join once they know how money is spent.
32. Ask members from last year to join again this year.
33. Middle and high school PTAs can reach out to the schools that feed into them to get member information of families whose kids are moving to their schools.
34. Place “Join PTA” signs around the school. Consider using a theme such as street signs to get people’s attention. For example: PTA membership “yields” results. “Stop” and consider the benefits of PTA. There’s only “one way” to get all the support you need. “Do not pass” this opportunity to be a member.
TEACHERS/staff specific

35. Give a short speech at the teachers’ back to school staff meeting.
36. Put info in their box about why PTA needs to keep the “T” in PTA.
37. Establish a good relationship with the principal and staff.
38. Put a poster in the staff lounge letting them know how much PTA appreciates them and their support.
39. Have a membership goal/drive specific for teachers.
40. Ask the principal to encourage staff to join. Don’t forget to thank those who do join.
41. Ask principal for a “casual” day to celebrate PTA.
42. Offer a teacher/staff luncheon if they all join PTA.
43. Share with the principal your goal for 100% faculty and staff participation.
44. Consider adding a teacher board position or having a teacher fill a current board position. This person can create the board connection with all teachers.

COMMUNITY ENGAGEMENT

50. Solicit businesses for items to use for member drawings.
51. Ask businesses to extend discounts to PTA members.
52. Let community businesses know what PTA has done to support schools and the children.
53. Invite community members outside the school to join; such as school board members, superintendents, teacher union representatives, state legislators, etc.
54. Connect the PTA with a community event like a county fair, a local parade, at a countywide meeting, etc.
55. Ask local stores to hang PTA flyers in their store windows.
56. Ask to have a space to leave copies of your newsletter for visitors while they sit and wait. Local businesses such as doctors’ offices, hairdressers, repair shops and banks are a great place to start.
57. Display winning Reflections entries in municipal building, banks, libraries, or other visible locations.

COMMUNICATIONS

58. Ongoing communication is key. Use a variety of tools to reach everyone; newsletters, websites, Facebook, Twitter, auto-calls, morning school news, etc.
59. Publicize your meeting and program times and dates as many ways as possible.
60. Send information more than once.
61. Conduct a survey to find out what members and non-members are looking for from the PTA.
62. Have PTA membership and program information included in the school newsletter.
63. Throughout the year, remind people how and where they can join.
64. Welcome and thank new members by name in the PTA meetings and/or school newsletter.
65. Doing a big event? Get local media outlets for cover your event and to highlight supporting the PTA by joining.
66. Send an e-mail to all families encouraging them to join.
67. Prepare radio and TV spots about PTA. Perhaps your high school could do this as a class project.
68. Promote PTA membership on the school website.
69. Promote PTA membership on Facebook.
70. Keep visuals up throughout the year to show progress toward your membership goal.
71. Create a front display case or bulletin board with PTA materials like upcoming events, copies of newsletters, membership applications, a picture of the PTA board, etc. Make it fun!
DIVERSE PROGRAM IDEAS TO BRING IN MEMBERS

72. Offer a variety of programs that would be of interest to all people within your PTA community.
73. Balance meetings with family fun nights and programs.
74. Have a translator(s) at all meetings.
75. Participate in the PTA volunteering “Three for Me” program. Go to PTA.org/threelforme to get started.
76. Establish a program such as “Compadres” in which 50% English-speaking parents meet with 50% of the Spanish-speaking parents.
77. Reevaluate and update programs to keep them fresh and current.
78. Offer a “dads’ program” to encourage men to participate. Ask participants to join PTA.
79. Coordinate a “new family social” with the first PTA meeting of the school year. Ask them to join PTA.
80. Host a program in conjunction with your meetings to encourage parents that aren’t members to attend. Consider partnering with the school—PTA meeting followed by literacy night or college planning.
81. Host a PTA dance for students and families to bring together the school and PTA community. Highlight PTA at the event.
82. Offer discounts to members at PTA events that have fees.
83. Grow membership by participating in the School of Excellence program.
84. Offer parent education workshops such as helping your student with homework, teen driving, drug awareness, developmental changes in your middle school student, internet safety, etc.
85. Hold a back to school dinner. Perhaps a local restaurant would cater for free or reduced cost. Decide whether to charge for dinner. Cost could include membership, as long as the individual agrees to be a PTA member.
86. Sponsor coffees in the morning following evening meetings to update members who were unable to attend.
87. Invite the Reflections program winners to join.
88. Highlight teachers and staff members during Teacher Appreciation Week.
89. Have a homework area for kids during PTA meetings.
90. Offer qualified school-aged child care at PTA meetings.

CONTESTS/DRAWINGS/Celebrations/Offerings

91. Hold a membership contest between classes or grade levels.
92. Create a fun membership growth theme; for example: March Madness. You can have a target growth chart that is a basketball hoop and you add a picture of a basketball reaching up to the hoop as you reach your goal.
93. Have a poster or slogan contest for students for membership.
94. Have a membership contest with the winning class winning a prize such as a magic show, for example. Make it fun for the kids. Place a paper magic hat outside the classroom and each time they get a new member, place a bunny on the hat. One class from each grade wins the magic show.
95. Hold membership drawings. For example, get a couple of turkeys donated and have a drawing before Thanksgiving.
96. Do something fun to celebrate your members. Create something like a member tree in the front hallway that has the members on the leaves (names on leaves) and teacher members could be apples on the tree.
97. Provide members with a free school/student directory.
98. Reach for the stars and put member’s names on stars on a poster or hanging from the ceiling. Stars could be color coded to represent parents, teachers, students, and community members.
99. Hold a membership give-away drawing for student PTA members. Make the prize relevant to students.
100. Plant a flower bulb for each member in a prominent location and watch it flourish.
101. Cut a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.
Membership - Record Keeping Hints

Suggestions for making your membership lists

Make an Excel file for your raw data. Save it with a file name that includes a short version of your school’s name, membership and the school year, and raw data: for example, CCHS membership 2015-16 raw data. Internally make a header for the file with the same title.

Title the columns as follows (the order doesn’t matter since you pick the columns to sort by): first name, last name, street address, city and zip, date joined, amount paid, donation, phone number, email, student name. 
NOTE: If you plan to print out mailing labels, enter the fields as you would need to for the labels. If you are just entering data for sorting and list purposes, separating the fields won’t matter so much so you could combine city and zip for example.

Using the membership envelopes or the membership flyers, enter the data from the envelopes or flyers (the order doesn’t matter). The first set of data you enter might be quite large. After that, your subsequent batches will be much smaller.

Once you have the first batch entered and saved, make a new document by opening the raw data file, clicking on “save as” and make a file name that includes the short version of your school’s name, membership as of the date you entered the raw data. For example, CCHS membership as of 16 Sept 2015. Be sure to put the same title in the header). Then sort the new document by last name so that you have a list that is easy to consult. This is your copy to print out in landscape mode.

Now do a ‘save as’ of your sorted file and add the words “for Rec Sec”. Make sure the internal header reflects the new file name. Delete all columns except the first and last names, street address, student name and date joined. The secretary doesn’t need to know about donations, amounts, phone numbers, etc. The president gets a copy of this shortened list as well.

Each time you do data entry of memberships, open the "Raw data" file, go to the end of the entries and type in "batch as of (and put the date you entered the data)". Then do data entry as before in the order they come. Block and copy the new batch data and save in a new file (named as of the date you did the new smaller batch). For your use, sort alphabetically and print. Make a file for the secretary as you did before. Like you, the secretary will ultimately have to look at several lists, but that is better than printing out an ever longer list over and over.

Remember: You need a printout of your list with you at meetings; the secretary and president also need the lists with them at the meetings.

Membership – A few Basics

Membership is not a fundraiser. Your dues should be enough to cover the costs of running a membership campaign (including mailing cards to members as needed) and some of your PTA’s program costs, but you don’t want to make dues prohibitively expensive to join.

Not all the dues you collect belong to your unit. When people join PTA, they join at every level from unit right through to National PTA. The membership dues paid included dues for council, district, State PTA and National PTA as well as for your unit. That means you can’t keep the money not belonging to your unit. The unit treasurer must remit faithfully upwards EACH AND EVERY MONTH, even if it is for just one person’s dues. Similarly, councils must remit to district EACH AND EVERY MONTH.

Remitting dues upwards is a critical part of being a unit in good standing. For example, your school’s students can’t participate in the National PTA Reflections program unless your unit is in good standing (dues and insurance paid). Your unit also runs the risk of being disbanded or having it charter pulled if dues are not paid. Don’t take the risk!

All members of your PTA should receive a membership card – no ifs, ands or buts!! You can be economical in how you distribute cards but ultimately you will have to mail some cards and you should factor that into your budget.

Why do people need to join more than one PTA? Voting privileges are tied to the unit. If you want the right to decide on programs and spending in a particular PTA, you must join that PTA. That is why you should join the PTA of each school your children are in.

ALL OFFICERS AND CHAIRMEN MUST BE PTA MEMBERS – THEY SHOULD BE THE FIRST TO JOIN EACH YEAR!

NO UNIT SHALL BE REQUIRED TO GET MEMBERSHIPS AND REMIT BEFORE RECEIVING MEMBERSHIP CARDS FROM COUNCIL.
Marketing your PTA – make it personal

There is great wisdom in the time-honored caveat of marketing professionals: *If you do things the same way time and time again, you will produce the same results.*

So it goes with marketing your PTA. Is membership growing or shrinking, robust or in decline? As you plan your summer and fall PTA membership campaigns, follow this simple solution: *make it personal.*

Last year, California State PTA conducted a statewide marketing research project and surveyed more than 1,000 parents at all grade levels including PTA members and potential members throughout the state.

We asked parents many questions, from their sense of belonging on campus to ways that they volunteer. **Three key reasons emerged regarding membership and the importance of joining PTA:**

- **Joining PTA is a great way to support my school.**
- **PTA membership shows my children that I care about their education.**
- **My membership helps support valuable enrichment and programs that my school otherwise could not afford.**

These reasons reinforce a critical point: parents want their PTA to be local and personal, serving and supporting their children and the programs at their school.

Consider these message points when communicating with parents about the importance of joining PTA:

- **You signal to your child that school matters, and that you are invested in their success!**
- **You demonstrate to your child that success in school is the pathway to college, a career, and a productive life!**
- **You partner with the principal, teachers, and staff to make the campus safe, welcoming, a hub of learning and a fun place to be!**
- **You share in campus events and experiences that make your child’s school days more memorable!**
- **You connect with other parents, become part of the school community, and support every child with one voice.**
- **You proudly affiliate with the California State and National PTA, the oldest, largest, and most powerful children’s advocacy organization in the country.**
- **You join with other parents to discuss key issues and concerns of importance to your school and community.**

There’s a universe of parents and community members out there … just waiting for your invitation; just waiting to hear how your PTA is committed to making your school better.

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**Membership Marketing Made Easy – new online tool for PTAs**

PTA created a new customizable membership marketing tool, designed to help make marketing your PTA easy.

Simply customize the flier by filling in the blanks on the template, add a few photos and quotes, and save it to your computer. Your customized membership flier can be sent out electronically, or copied and distributed at PTA or community events.

Check it out for yourself and get a jump start in your PTA membership campaign. Available in English and Spanish fillable PDF versions online at [www.capta.org](http://www.capta.org) under the Membership tab and click “Membership Marketing Tools.”
Membership Themes

**Food/Ice Cream**
- Get the Scoop (ice cream)

**Sports/Teamwork**
- Join the Team (baseball)
- Don’t Strike Out
- Hit a Home Run with PTA
- Be Part of the Team

**Grow/Garden**
- Watch Us Grow (each class has its own vegetable for a display board)
- Help Us Grow (tree in school lobby is filled with apples representing membership)
- Be a Part of the Bunch (grapes)
- Reap the Rewards (Harvest Theme)

**Invest**
- Invest in Children (piggy bank)
- Invite, Involve, Invest

**Olympics/Go for the Gold**
- Winter Olympics
- Olympics
- Go for the Gold (Olympic or rainbow)
- Pot of Gold

**Build**
- Building a Better Community
- Lend a Hand
- Help Build a Strong Foundation

**Treasure/Pirate**
- Pirate Treasure
- Our Children-Our Treasure (Pirate Chest)
- Every Child a Treasure
- ARRR You Ready to Join? (Pirate Theme)

**Space**
- Space/Flight/Balloons
- Soaring with Eagles
- Up, Up and Away (balloons)
- Blast Off to a New Year (space)
- Come Blast Off With Us
- Blast Off to Learning
- Reach for the Stars
- Marvin the Martian
- PTA is Out of this World
  - May the Membership be with you... (Star Wars Theme)

**Join**
- Don't Delay-Join PTA
- Smile, Join PTA (incentive smiley ball)
- Join Our Family Tree
Membership Themes

**Animals/Insects**
- Wagging Your Way Through PTA
- Bee a Part of PTA
- Millie the Millipede
- Be Part of the Wolf Pack
- WHOOO can Join PTA? (Owl Theme)

**Race/Cars/Trains/Busses**
- Zoom to Success (race cars)
- Route 66
- Hop on Board the Membership Train/Bus
- Dragon Dash
- Race to the Finish

**Showbiz/Adventure/Circus**
- PTA Rocks (using gold and platinum records)
- Hollywood Stars
- Starzy (Hollywood/Oscar campaign)
- Roll Out the Red Carpet
- It’s Showtime! And You’re the STARS of the Show!
- Survivor
- Come Join the Big Top (circus)
- Be Part of the Adventure (Adventure Theme)

**Wave/Boats/Fish**
- Dive into PTA
- Catch the Wave, Join PTA
- Raise the Tide
- Catch the Birney Wave
- Ride the Wave of Success
- SS Membership
- Sail Away with PTA
- Get Hooked on PTA (fish)
- Fishing for Membership

**World/America/West**
- Reach Across the World
- America
- Uniting a Community
- The Wild West

**Connections**
- Celebrations and Making Connections
- PTA- Where Do You Fit In? (puzzle pieces)
- Stay Connected
- Membership is One Piece of the Puzzle
- Connecting Families and Schools

**Key**
- You are the Key to PTA Success
- Carving Keys to Success / Unlock the Future

**Fitness/Dance**
- Footprints Worth Following
- Let’s Get Moving into Membership
- Dance into 2015

**Arts**
- Painting a Brighter Future
- Every Note is Important (Music Theme)
- Use Reflections Theme all year

**Team/Together**
- Be a Part of the Team
- Better Together
- It Takes a Village

**Voice/Heard**
- PTA- Your Voice in the School
- Let Every Child Be Heard

**Make it...**
- Make it Happen
- Make Your Vote Count

**Miscellaneous**
- Kids are the Heart of PTA
- The Magic of Membership
- Super Hero – Join the League
- Mad as a Hatter
- Inching Your Way to PTA
- PTA Wants You (Use Presidents’ Quotes)
- Get PTA Fever (Thermometer Theme)
PTA Logo & Tagline
How to create and use them

PTA’s should use the logo and tagline as much as possible. Any form of communication going out from PTA must have the PTA signature, logo and tagline somewhere on the item. Make sure as president that you approve all flyers, notices, mailings, newsletters, posters & the directory BEFORE distribution. It is your job to identify that the PTA Signature, Logo and Tagline have been placed somewhere on the item by your chairman.

Plan PTA communications that inform the community about PTA activities and school functions.

- **Identify the Target Audience.** It is important to clarify who you want to reach. Is your publication written for parents? For students? For teachers?
- **Choose the Right Tool.** Decide how best to communicate with your audience. Consider using multiple tools to carry the message.
- **Prepare the Right Message.** Review and refine each article to clearly and concisely convey the message.
- **Use the PTA Style Guide.** Refer to the California State PTA Style Guide for grammar specific to PTA, helpful punctuation, writing reminders and correct use of the PTA logo.
- **Incorporate the PTA Logo into all PTA communications.** An organization’s logo catches the reader’s eye and makes an instant, familiar connection. This PTA logo can be downloaded and customized for use by units, councils and district PTAs.

-----Signature –**insert your school’s name**

-----logo

-----tagline

You can download the logo and tagline from the following site:

1) Go to [www.33rdpta.org](http://www.33rdpta.org)
2) Go to the drop down menu under “Resources” and click on “For Presidents and Officers”
3) Scroll down to “Communications” and click on “Read more”
4) Scroll down to “PTA Logo Usage Guide”
5) Click on “Download PTA Logos”.
6) See below for instructions on adding the signature (your school name)

Add the signature using Arial Black or Helvetica Black font and it should be centered above the logo. You can use imaging software (e.g. Adobe Photoshop) to add the signature or a text box in Microsoft Windows.
Communication Basics for PTA Leaders

Communicating With Confidence – Public Speaking

As a PTA leader, you may be called upon to speak in public. Keep in mind the following tips for public speaking.

- Plan remarks with an objective in mind.
- Become knowledgeable about the topic.
- Prepare talking points. Include appropriate personal stories in your presentation.
- Plan a message that will resonate with your target audience.
- Begin and end on time.

Also

- Be comfortable with yourself. Success comes from projecting your own personality.
- Don’t worry about “butterflies.” We all have them – in fact, we need them to keep us from becoming complacent.
- Do your homework. Few people can “wing it.” The trick is to appear relaxed, and you can be if you are well prepared.
- Be flexible. If necessary, adjust remarks to help meet the need at hand. Find out in advance who the audience will be, and why you were selected to speak.
- Cultivate effective listening skills. If you are part of a program, listen to what other participants are saying. If the previous speaker “steals your thunder,” comment on sharing similar viewpoints and suggest, “Let’s talk about this from another angle.” Then continue with your own remarks.
- Know when to stop. Respect your audience’s time.

Tips for Promoting the PTA

- Identify the Target Audience. When thinking about communications activities, consider your audience. The plan for reaching students may be very different from the one used to reach parents.
- Choose the Medium. Once you decide whom you need to reach, think about the best way to communicate. There is no universal choice. Depending on the audience and the message, the method could be anything from creating a website to making a phone call.
- Prepare the Message. Think through what to say and how to say it. Whether making a speech to a large group or writing an article for the PTA newsletter, take the time to review and refine the PTA Talking.
- Points to concisely convey the message. Consider what the audience should understand from the message. Focus on making that message clear. Discard the rest.

Representing PTA

PTA officers represent their unit, council or district PTA. PTA is a diverse organization, and its leaders speak with one voice on behalf of all children:

- Presidents are the official representatives of their PTAs and may appoint others to officially represent the organization, as needed.
- Know and reflect the official PTA positions.
- Do not commit the association to programs, projects or positions the association has not voted to authorize.
- Build credibility as an individual so that your comments are of value to the audience.
- Do not mix personal and PTA opinions while representing PTA.
Talking Points

When speaking about the PTA to new audiences, you often have very little time to make your point. These talking points and facts will help demonstrate the strength of the PTA. The more these messages are said, the more likely it is that they will be heard and repeated.

- The mission of California State PTA is to positively impact the lives of children and families in California.
- PTA is the oldest and largest volunteer association working on behalf of children and youth. In California alone, we have over 800,000 PTA members and have served them for over 118 years.
- PTA speaks for every child with one voice.
- PTA is a nonpartisan, nonsectarian and noncommercial organization that promotes the welfare of children and youth in home, school, community and place of worship.
- PTA connects families and schools. We encourage communication and cooperation between parents, communities and schools to ensure that children and youth receive the best possible physical, mental, social and spiritual education.
- The PTA develops educational programs for parents, teachers, students and the general public.
- The PTA fosters leadership skills in both adults and students. PTA volunteers are leaders and advocates in their schools and communities.

Making PTA Talking Points Personal

These talking points are only intended as guidelines for speaking on behalf of PTA. Make them your own by considering:

- How can I share my personal PTA experience?
- Why am I so dedicated to the work of PTA?
- How did I get involved?
- What are the areas that need improvement at our school(s) or in our community?
- Is my message concise and compelling?
Guidelines to PTA Publications

Adhere to PTA noncommercial, nonpartisan and nonsectarian policies.

Noncommercial Policy
All PTA bylaws, whether unit, council, district, state or National, require the association to be noncommercial. This noncommercial policy also means that the name “PTA,” which is a registered service mark, or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, the promotion of their goods and services. This policy should be applied with judgment, discretion, and common sense, recognizing that it is not meant to prohibit all contact or cooperation with such groups. Before accepting donations of goods or services, a PTA organization, at any level, should consider whether such acceptance might be construed as an endorsement of the provider.

Nonpartisan Policy
PTA must never support or oppose political parties or candidates, including those running for school boards on nonpartisan slates. However, PTA may adopt a position expressing its support for or opposition to issues dealing with the health, safety, education, or general well-being of children and youth, but only to the extent permissible with respect to the requirements of each PTA’s tax-exempt status. Nothing in the law or in PTA bylaws prohibits members as individuals from exercising their civic responsibilities in personal and partisan ways, including running for office. One of the Purposes of the PTA is “to secure adequate laws for the care and protection of children and youth.” It is by educating its members — and through them, the general public — on issues affecting children and youth, that PTAs can best influence the course of action of those who make policy decisions, thereby achieving the Purposes of the PTA.

PTA units may be involved in legislative activities.
- By supporting or opposing local issues that affect children or services to children in their respective communities based upon a study of the issue and a vote of the association; and
- By supporting California State PTA positions on legislation needed to achieve the Purposes of the PTA.

In order for PTAs to retain tax-exempt status and continue to receive tax-deductible contributions, under Internal Revenue Code (IRC) Section 501(c)(3), they may not (1) devote more than an insubstantial part of their activities to influence legislation; (2) participate in any political campaign on behalf of or in opposition to a candidate for national, state, or local public office. A unit’s failure to comply with these restrictions may endanger council, district, State and National PTAs’ IRC 501(c)(3) status. For further information on IRS reporting requirements and options, see Election Campaigns and the Role of the PTA.

Nonsectarian Policy
The National PTA and its unit, council, district and state PTAs welcome into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. Creed, color, race and economic status are irrelevant to qualification for membership. PTA should be hospitable to all — supporting no one religion over another and according each faith equal respect and consideration. The Purposes of the PTA acknowledge the importance of spiritual faith in the development of children and youth. As a private association, PTA has the right to offer inspirational messages to open or close its meetings; however, such messages by PTA leaders should be inspirational rather than sectarian, recognizing that in this pluralistic nation, not all members share the same beliefs. Poetry, quotations from great men and women, uplifting anecdotes, and moments of quiet meditation can serve to focus concern for and dedication to improving the lives of children and youth. PTA leaders should be well aware of their school district’s policy regarding celebration of religious holidays and should work closely with school administrators to observe whatever guidelines have been established.
Guidelines to PTA Publications (continued)

Communications must be cleared with the PTA president and school principal before printing, publishing or posting. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies. (Article VI, Section 1i, Bylaws for Local PTA/PTSA Units).

Publication best practices:
- Create a visual identity. PTA publications should be consistent in appearance and easily identifiable.
- Date all publications.
- The name of the unit, council, district and state PTA should be on each publication.
- Publications should list PTA contact information—units should use school address; council and district PTA should use office or mailing address.
- Include references to other PTA resources such as council and district PTA, California State PTA and National PTA publications, websites and social media sites.
- Develop a plan to reach all members.

In PTA publications, publish only a summary of actions taken from PTA association meeting minutes. Do not publish, without written permission, photos or personal information about students or adults. Use of photographs or videos of children requires a Photography Release form, available in English and Spanish.

Advertising and Sponsorships
PTAs may be approached by commercial businesses or individuals seeking a presence in their publications. All advertising should be screened to ensure it meets PTA’s high standards and legal obligations.

The California State PTA strongly recommends finding sponsors rather than accepting advertising. Thank funders and sponsors. One sentence should do it! To preserve the PTA’s tax-free income generated from a sponsorship, the acknowledgement thanking the organization must not actually promote the sponsor, its product or services. Please refer to the noncommercial policy stated on the previous page.

Examples of Thank You statements:
- The Sunshine PTA expresses grateful appreciation to the following merchants for making this publication possible: Neighborhood Bank and Romano Pizza
- The Sunshine PTA expresses thanks to Neighborhood Bank for the use of its parking lot for the car wash.
- Sunshine PTA thanks Romano Pizza for the generous offer to donate 10 percent of all sales made on Saturday.

Mailed publications should meet the guidelines of the US Postal Service. Learn more about nonprofit mail content eligibility by going online to: pe.usps.com/text/pub417/welcome.htm

For any publication containing advertising, use the following disclaimer:
The mention of any business or service in this publication does not imply an endorsement by the PTA.

For more information concerning Sponsorship vs. Endorsement, please go online to toolkit.capta.org/?s=sponsors

Copyright Laws
PTA must abide by federal copyright laws governing printed matter, poetry, art, music and computer software. Republish articles, art, photographs etc. abiding by all laws and in an ethical manner.

For complete copyright information, go to copyright.gov.

California State PTA articles and artwork may be used by unit, council and district PTAs without permission. Read National PTA materials carefully to determine when permission to republish is required. Always credit the source.
Guidelines to PTA Publications (continued)

It is most important that anything copyrighted, including original artwork, not be reproduced on an item to be sold or to advertise an event. Permission must be secured to avoid litigation. The artist or the syndicating company will generally require a royalty on each item sold and a specific number of complimentary copies of the item.

When showing movies during school or at after-school events or fundraisers, PTAs must observe movie/video copyright laws, site licensing, and promote the event only as permitted by the site license.

Translating Materials
PTAs should work closely with the school to meet the language needs of those who receive association publications. To translate information and materials, seek help from:

- bilingual parents on the executive board;
- teachers or support personnel in the classrooms or the school district; or
- foreign language departments at local high schools, community colleges and universities.

Consider providing translated content in one of the following ways:

- Present side-by-side translations of articles on each page, or
- Print or post a separate issue.
- Offer all information in English with short recaps of major information in languages needed in the school community.
- Have a bilingual point person to contact or a Web page with information available in each target language.
- Develop audio or videotapes of recorded newsletters, notices and parenting tips in different languages and post on your website.
- Learn how to reach out to members in your community whose native language is not English.

The California State PTA offers Outreach Translation Grants to unit, council and district PTAs for written or verbal translation of PTA materials into other languages.

Publication Preparation
Efficient and timely distribution is crucial to the publication process.

- Set a publication schedule at the beginning of the school year and share with contributors.
- Send publication article reminders as the due date approaches.
- Ask board members to contribute articles and reports about their projects and events.
- Advise contributors that material will be edited for space and form (grammar, punctuation, spelling and accuracy of information) for all publications.
- Remember to allow time for review of the publication and approval by the PTA president and school principal before distributing.
- Include the cost of materials, supplies, copying, software, service provider subscriptions and equipment in the association budget.

Publication Distribution
Send copies of unit PTA publications to council and district PTA presidents. Share your publications with the California State PTA by mailing to the state PTA office or emailing communications@capta.org. If the publication is in print form, leave several copies in the school office.

Use your publications as a PTA marketing tool. Distribute them to school district superintendents and trustees, businesses, chambers of commerce, service groups, city offices, police departments, libraries, recreation departments, after-school day-care centers, preschools, media outlets, county supervisors, junior colleges, and local state legislators.

Best practices for Improving Content

- Ask for feedback. Use an opinion poll, a questionnaire, or interactive questions on social media.
- Publicize: coming events, the results of past events, membership campaigns, and PTA award recipients.
- Remember, people don’t read, they skim. Use bullets, quotes and charts and graphics.
- Proofread everything. Have two to three people proofread before anything is distributed.
Increase your PTA Communications

Website
A website is a useful tool for promoting and providing resources. It is usually the first point of contact for persons interested in finding out more about your PTA.

- **Plan the design and content of the website strategically.** Simplicity is the key to user-friendly design.
- **Budget for website development and maintenance.** Websites may be hosted by the county office of education, the school district, or by a service provider paid for by the PTA.
- **Do not post** PTA bylaws, minutes and financial reports on the website except in summary form.
- **Update your website content regularly.** Forward approved copy to the website manager with requested posting dates and removal dates.
- **Link to information on the California State PTA, National PTA websites, council and district websites.**
- **Permission should be obtained** prior to posting any name, photograph, or contact information on a website. Observe copyright laws. Use a Photography Release form, available in English and Spanish.

PTA Email Accounts
Create PTA position-specific email addresses, e.g. ABCPTAPresident@xxx.com, called email aliases. The email alias does not change from year to year but is passed on to the position successor. Email alias addresses are set up to automatically forward email to the personal email accounts of board members. Update email aliases, forwarding addresses and passwords at the beginning of each term.

Email Distribution Lists
Email distribution lists are a cost-effective and efficient way to share information with committees, board members and the membership. Some service providers allow a user to set up a group distribution list at no charge. Blind-copy recipients to avoid publicizing members’ personal email addresses. Abide by the email limitations of personal email service providers to avoid triggering spam filters. Provide an unsubscribe option. Honor all requests to unsubscribe.

E-newsletters
**An e-newsletter** is a time- and cost-effective way to share information with a large number of people. Typically it is an informational update sent via email to members of an electronic distribution list. Use an online marketing company to send e-newsletters. Such companies offer excellent e-newsletter templates and allow your PTA to create distribution lists that are not limited by personal email restrictions. Graphic elements are blocked for some email recipients. Use a text-only format or send an email that includes the hyperlink to a newsletter posted on the PTA website. Convert your newsletter to Portable Document Format (PDF) before emailing to ensure that all recipients can open the document. Include a link to the Adobe PDF Reader website so members can download the PDF reader free of charge. Keep the e-newsletter brief. Provide short summaries for each topic, adding links to additional information available on the unit’s website. For template and design ideas, refer to the California State PTA e-newsletters.
Increase your PTA Communications (continued)

Social networks
Facebook pages and other social networks offer an interactive way to offer information like a web page, provide updates like a newsletter and send messages like an e-mail account. In setting up the page, give careful thought to the amount of information you wish the public to see, and how much freedom others will have to post information on your site. Part of that decision is how much time the communications team will have to monitor the site in case of controversy. The PTA policies apply to social media use. Foremost, remember the simple rule: do no harm.

Guidelines for social media remain the same as for every PTA publication.

- Maintain PTA’s high standards of respect and courtesy.
- Observe the PTA’s nonpartisan, noncommercial, nonsectarian policies, “do no harm” to an individual or an organization, and be knowledgeable about PTA positions.
- PTA social media site administrators should be appointed to review the site posts and messaging daily, if not more frequently.
- Follow the guidelines established by each social media site. Use the Photography Release form available in English and Spanish when publishing photographs.
- Be cautious with censorship. Social media sites encourage members and partners to share insights freely. Remove postings or comments to your social media pages or accounts only when they violate PTA social media standards of respect and courtesy, or violate our nonpartisan, noncommercial, or nonsectarian policies.

Social Media Guidelines for PTAs in California
Best practices and guidelines are not inclusive and social media and situations change.

Guidelines and Best Practices for PTA social media sites:
All PTA social media posts must be respectful, truthful, discreet and responsible. Posts must be Noncommercial, Nonsectarian, and Nonpartisan according to PTA policies.

Administering PTA Social Media Sites:
- Have at least two Administrators (Suggest: President & Communications Chair or the like). Although the President is responsible for approving material, A PTA can have a communications plan with pre-approved content and general guidelines. The president may appoint a social media person/people to post on PTA sights.
- Some sites (i.e., Facebook) allow contributors or multiple administrators, so adding specialized contributors can allow greater flexibility and faster response. (i.e., Reflections chair, Vice President for programs, fundraising chair) PTAs should set guidelines ahead of time about what each contributor can and cannot post. This would typically be posting about their particular program. This allows posts from sources which are quick and accurate.
- Be sure all logins and passwords are kept in a safe place and passed on to the next term’s officers. Suggest sites be registered to generic emails for the officers so accounts can be passed along without interruption. (i.e., sunshineptapresident@gmail.com or president@sunshinepta.org)
Increase your PTA Communications (continued)

Content on PTA social media:
- Posts should be PTA related and approved. Highlighting special events, programs, grants, PTA and school deadlines, allied agency information and other information of interest to PTA members is a good use of social media.
- Content from vetted sources or excerpts from previously PTA approved flyers, emails or website content is a good way to keep content timely without over burdening your officers. (See Red, Yellow, Green guidelines)

Others posting on PTA social media:
- PTA Social Media sites (including websites) that are administered and owned by the PTA and not the school, do not need the principal’s approval for posts. A good working relationship between the PTA and the school site administrator is best, so when possible coordinate. Remember, any PTA material that is passed out on school property or the school website still needs to be approved by both the president & principal.
- Each local PTA can decide if it wants to allow comments on sites or if it prefers a push only site. The advantage to having a more interactive site is that it allows you to know how your community feels; the disadvantage is that it allows comments which will need to be monitored. **If you do allow public comments or postings, someone will need to monitor the site and decide what is appropriate. Inappropriate or off topic comments should be deleted.** The PTA can decide to delete any comment or post it chooses.
- Setting guidelines and posting them on your sites can help if you feel it is necessary to delete a comment and are asked why. Your PTA social media sites are controlled by your local association and you are not required to post or keep any items.

Suggested Posting Guidelines:
*(This can be posted on any social media your PTA uses and allows comments from the public.)*

Please follow these guidelines when commenting on our site:
- **Be Relevant**
  Stay on topic.
- **Be Respectful**
  Keep things civil. Avoid abusive or offensive language, threats, hate speech, libels and calls for violence. And don’t make jokes about the misfortune of others.
- **Be Honest**
  Use your real name. Don’t post commercial messages. Don’t publish copyrighted material that belongs to someone else.
- **Be Discreet**
  Don’t publish telephone numbers, addresses or other personal information about yourself or others.
- **Be Responsible**
  Think about what you write before posting. Users are solely responsible for what they post.
Increase your PTA Communications (continued)

Social Media Guidelines for PTA Leaders and Members in California

Each PTA District, Council or Unit can create its own policies for members who use social media and identify themselves as PTA leaders or members. The California State PTA Social Media Policy is included as an example.

The California State PTA uses social media and encourages leaders at all levels to participate in an engaging and productive exchange. The community-based aspects of social media can benefit PTAs in reaching out to new audiences and engaging an existing base. However, use of social media carries with it certain responsibilities. To assist leaders and members in making responsible decisions about using social media, we have established the following guidelines:

Guidelines

- For our purposes, social media includes all means of communicating or posting information or content of any sort on the Internet—whether or not these channels are associated or affiliated with a PTA. Ultimately, you are solely responsible for what you post online.

- Leaders and members may associate themselves with the organization in different ways—explicitly by stating in a profile or on a site a PTA title or involvement and/or implicitly by posting photos, graphics or other information that identifies them as a PTA leader or member.

- You speak for yourself, but your actions reflect on the organization. Do not post confidential information, accusatory statements, or any defamatory information. Be respectful, truthful, discreet and responsible no matter your privacy settings.

Consider the following:

- If your profile picture identifies you as PTA, be aware when posting comments on other sites, both public and private. Remember PTA’s Noncommercial, Nonsectarian, Nonpartisan policies when posting on public sites (i.e., newspaper comments, public blogs, trade publications and other).

- Privacy settings are no guarantee of privacy. Search engines and other technologies make it impossible to take something back once it’s been posted. Screen shots, forwards and other technologies can spread messages quickly beyond your intended circle of friends or followers.

- Mistakes happen. If they do, apologize.

Working with the media

As the PTA year concludes, use this opportunity to contact the media. Review the print or electronic information pages of your newspaper and community publications to determine who writes education, health and community events articles. Contact these individuals by telephone and offer to meet them personally. Present them with background information about your PTA, a list of the PTA’s accomplishments for the year, the number of Reflections entries and awardees, high school senior PTA scholarship winners, the officers elected, and the number of volunteer hours donated by members on behalf of children. Forward your PTA newsletter to the individual or send them expanded lead articles from individual issues on a regular basis. Media outlets need articles that are well-written, have a unique angle, and evoke a picture.

Submit photographs at 600 dpi resolution and always include tight shots of three to five members in action scenes. Follow up with media contacts and ask if you can provide further assistance. It may take several attempts, but the media will come to rely on your PTA to provide quick stories that have interest and information for your community.
National PTA® Social Media: 
Twitter Tip Sheet

Companies and organizations use Twitter primarily for sharing about a product, brand or a program. It is also used to make announcements and share breaking news. All updates on Twitter should be 140 characters or less. The tips below will help increase your followers and enable you to get your message to a larger audience.


Develop Your Twitter Voice. The kind of content and the tone your members and followers respond to will help you give your Twitter voice personality. Your ultimate goal should be to inspire action and reaction from your followers.

Track Your Links!!! Use a Twitter app like Bit.ly or Ow.ly to track your links. They shrink your long links which allows more characters for tweeting. It also provides useful statistics on the number of people that click on your links.

Tweet your Content as Well as the Content of Others. Master the art of both retweeting and responding. Tweet articles or blog posts from your favorite newspapers, bloggers, and partner organizations. These practices will encourage your followers to retweet your content and information.

Follow on a 1:1 Ratio. If you have 1,000 followers, then you should follow 1,000 Twitterers in return. This will help your visibility and let your followers know that you are vested in them.

Follow People with Similar Interests. Help increase your visibility and understanding of your audience by following users with similar interests that are relevant to your goals and objectives. Do not forget to tag them in your messages by using the @ symbol.

Integrate. To maximize the success of your Twitter efforts, integrate into other online and offline materials. Incorporate a Twitter feed on your website, add a link to follow Twitter into direct mail pieces, and include a “share” button or Twitter link in an e-mail or e-newsletter.

Drive Website Traffic. 140 characters does not provide much room for detail. Offer a hook and lead your followers to your website or PTA.org for more information.

Tweet Often. Experts recommend tweeting four to six times per day. For some local units that may be too overwhelming. Twitter is most active from 9 am to 12 pm in any given time zone so focus your attention on tweeting during that time span.

Use Hashtags Strategically. Hashtags (#) allow Twitterers to discuss issues and events on Twitter in real time. They also help to organize tweets, spread information and find new friends. Tweets should not have more than one or two hashtags.

Design your Twitter Profile to Match Your Local PTA logo. Try to blog once a week and at the same time every week. Followers appreciate consistency and routine. Even if you just describe what you are working on this week, share it with the people who have invested time in your blog.

If you want more information about how your PTA can best utilize social media, please contact our Communications Department. This tip sheet is one of many resources that National PTA offers members. Go to PTA.org for more!

National PTA® Social Media
www.facebook.com/ParentTeacherAssociation
YouTube - Youtube.com/nationalpta

Twitter - @NationalPTA
PTA Great Idea Bank - www.ptagreatideabank.org
Communications Training

Twitter Terms

**Tweet**
Each message you send out to followers through Twitter is called a “tweet”. It works as a verb, as well; you tweet a message. Twitter is one big network for delivering tweets to people, and by fault, tweets are public and searchable. Each tweet must be 140 characters or less or else it won’t be published.

**RT**
RT is an abbreviation for Retweet, which is like Repeat. It’s like forwarding, but for Twitters instead of emails. If you see something really cool form one of the people you follow, you may want to Retweet it so that the people following YOU (and not the original person) can see it.

**@Mention**
You direct public messages to other Twitter users by inserting an “@” sign immediately followed by their username. For example, “@CaliforniaPTA Hi there.” This causes your tweet to also appear in the “@mentions” section of the target’s Twitter account.

**DM**
“DM” is short for “Direct Message”, a tweet-like message sent in private between two Twitter users. Unlike the public @Mentions, DMs are private and do not appear to anyone besides their specified recipients, but you can only send a DM to someone who’s following you. They’re still limited to 140 characters, though.

**#Hashtag**
People on Twitter insert “hashtags” into their tweet to provide context, and to make them easily searchable for people looking for updates on a specific topic. They’re kind of like blog tags. A hashtag is simply a keyword preceded by the hash symbol, like #marketing. Include it in your tweet and anyone who searches for that hashtag will see your updates. This convention is used a little less than it was in the past, but it’s still quite common. We often use #PTA4Kids.

**Engagement**
When people talk about “engagement” on Twitter, they’re referring to the practice of responding to and making conversation with your followers and other people on Twitter. Doing so lets people know you’re a human being they can have a relationship, and encourages them to continue following your updates. Most of the businesses that are successful on Twitter make engagement a priority.

**Feed**
A “feed” is any constantly-updating list of tweets or other updates, usually sorted chronologically with the most recent updates appearing at the top. Almost every page on Twitter includes a stream; your home pages is a feed of tweets from the people you follow, your profile page is a feed of your tweets, and Twitter’s search results are feeds of tweets containing the searched-for terms.

**URL Shortener**
Since tweets are limited to a succinct 140 characters or less, services have popped up around the web that create short website addresses that you can share with your followers without using up too many precious characters in your tweet. These services are called “URL shorteners” because “URL” is the technical term for a web address. Typically, URL shorteners create very short addresses that automatically transfer anyone who clicks on them to the longer address of the page you want to share.
National PTA® Social Media: Facebook Tip Sheet

Facebook is a great way to do Social Media marketing for your PTA. Facebook is perfect for brand awareness because it is free advertising and promotion for your local PTA, it allows you to share information with your members, it will enable you to start conversations on various topics, and it gives them the chance to share with their friends as well.


Create Your Voice. Your voice will often be found in the status updates of your fans, which means it is very important to find content that engages your fans and encourages them to want to engage with you. A great way to help you gauge this will be by the number of likes, shares, and comments you receive on your posts.

Fun and Informativ. A great place to get started with content is to share success stories, breaking news, grant deadlines, calls to action, events, and information shared by National PTA.

Professional vs. Personal. While adding personality and flair is important, keep in mind that there is a difference between a personal Facebook page and your PTA’s professional one. Set up rules of etiquette for your PTA’s Facebook page so that everyone knows the rules and can help make it a safe place for sharing information.

More Than One. Be sure to have at least two people (although three would be best) as administrators of your PTA Facebook page. This way if someone is sick, traveling, unreachable or has to leave for any reason there are multiple people with access to the page. This also helps spread the responsibility for posting and sharing content, lessening the pressure on everyone.

Posting Limits. Be sure to limit the number of posts. Too many posts will cause people to hide or un-Like your Facebook page. Ideally, four to six posts per week is best, though you should not post more than twice a day.

Content Sharing. Be sure to share links, videos, and pictures whenever possible in your posts. This will help increase your PTA’s visibility and activity. Facebook is all about sharing information.

Tagging Gold. Tag sponsors and supporters whenever possible; this will help them to keep up with what you are doing and engage them more. Plus, it gives them greater visibility among your PTA members and supporters.

Events. Create events and send them to the fans of your page. It will remind them about your unit and your events, and it will help you engage them in a new way.

Do Not Automate. It is always tempting to automatically sync several social media platforms to Facebook so you only have to send one status update. However, avoid doing this as much as possible because each social media platform is unique in the culture of the community and the way content is shared.

Encourage. Do not forget to encourage your PTA board members, volunteers, students (if you are a PTSA), teachers, and families to engage and be active on your PTA page. This will help create a flow of information and sharing that will encourage everyone! Most of all, do not forget to have fun, learn a lot, and remember that social media is just another resource for you, your members, and the parents and teachers that will give every child one voice.

If you want more information about how your PTA can best utilize social media, please contact our Communications Department. This tip sheet is one of many resources that National PTA offers members. Go to PTA.org for more!
Tips for Maximizing Your Social Media Efforts on Facebook

Most of you are already on Facebook for PTA. You’re posting regularly and you’re mixing up what you post, and how you post your content.

Are you utilizing the scheduling function?
Set a schedule for posting – too few posts and your audience will forget about you, too many and they will “unlike” your page.

A great feature on Facebook pages is the scheduling function. This means you can schedule Facebook posts in one sitting. You don’t need to log in every day if you don’t want to. You can pre-schedule important information such as holidays, testing reminders, PTA meetings, etc. Let’s schedule a few posts.

Just click on the “clock” in your post and then you can set the date and time that you want to schedule the post.

You can see the schedule posts by taking a look at your Activity Log. In your “Admin Panel” click “Edit Page”, scroll down to “Use Activity Log” and you can see what’s scheduled. You can change the time, but you can’t change or correct a post.

Are you also posting as your PTA on other pages?
By posting as PTA or sharing information as PTA on other Facebook pages you are building relationships and increasing your reach. It’s easy to do!

Switch to “Use Facebook As” your PTA, and then click home. This will show the news feed for your PTA. You should like other PTA pages, your council, district and state PTA pages, local businesses that support your PTA, allied agencies, elected officials, school board members, school districts, etc. this is where you can see what they are posting on their pages. This is similar to your personal newsfeed.

ENGAGE!
Be sure to like posts form others that makes sense for your PTA. Comment when you feel it’s appropriate. Share photos on their pages. By doing this, other people who visit that page will see your PTA and might click back to like your page as well. It’s another way to connect and get the word out there about the great things that your PTA is doing.

Don’t forget to also like, comment and somehow acknowledge those who post or share on your page. Try to make an effort to engage those folks in continued dialogue.

Hiding, Blocking and Deleting Posts – Handling Difficult Online Situations
A common questions regarding Facebook is about handling difficult situations online – people posting nasty things, or getting out of hand. Most PTAs want to know how they can handle those situations online.

And there’s a rule of thumb that you can follow – At the end of the day, it is your PTA page and as an association you don’t need to allow anything on the page that you don’t want. At the state level we have a link to our social media policy on the “About Us” section in Facebook (http://ow.ly/ljceW)

But, even though we can remove just about anything that we want, we recognize the value of having an open forum where people can respectfully express their opinion, even if it differs from ours. You’ll want to foster an open community where people can respectfully share thoughts and opinions.

So hide and delete posts sparingly. These conversations about your PTA are happening anyway, now you just have an opportunity to be included in the dialogue and help facilitate the discussion. Take it as an opportunity to engage in discussion, answer questions and maybe even clear up any miscommunication.

You can also move the conversation offline. “Thank you for your feedback. Please email leadership@capta.org for further assistance.”

However, if someone is abusive, uses foul language, is harassing or is trying to use your PTA Facebook page as a way to jump on their soapbox, then consider hiding their posts or blocking them. Remember, you can also hide and remove any posts that are sales-related.

This is a great discussion to have with your PTA Executive Board to decide what our PTA social media policy will be.
Tips for Maximizing Your Social Media Efforts on Facebook (continued)

Facebook Ads
Let’s talk about Facebook Ads. Facebook Ads are paid messages coming from business and they can include social context about friends.

Sponsored stories
Sponsored stories are built around user activity. Advertisers pay to highlight activity that a user has already taken. Popular sponsored stories include “Michelle claimed an offer from Nordstrom” or “Michelle likes California State PTA”. The goal of Sponsored Stories to get more users to take the same action that a friend has.

Page Post Ads
Page Post Ads are advertisements that begin as posts on a fan page but get additional paid distribution within News Feed or the sidebar, as a result of creating campaigns in Facebook’s ad tool. These ads can be shown to anyone on Facebook, even if users are not connected to the page themselves or through a friend.

Promoted Posts
Promoted Posts are similar to Page Post Ads because they originate as a piece of content on a page, but they are bought through the Promote button on a post itself rather than through the ad tool.

The goal of these ads is to reach more of a company’s existing audience and some of their friends. These help get a page’s content seen buy generally do not drive new Likes/

The pricing structure is different as well. With Promoted Posts, page owners pay a flat rate to reach a given number of users. For Sponsored Stores, Page Post Ads and other Facebook Ad types, advertisers pay per impression or per click.

Marketplace Ads
Marketplace Ads are desktop sidebar advertisements, which include a headline, body copy and image. These ads can lead to a page or app on Facebook, as well as to third-party websites. You’ll also start to see these in your mobile news feed now.

Creating your Facebook Ad
It’s easy to create your Facebook ad:
1. Log in as you normally would.
2. Click “create ad” on the right hand side where the ads are displayed.
3. Select your PTA page.

4. Choose what type of ad you would like to create – and follow the instruction.
5. Under “Campaign, Pricing and Schedule” select your budget, start date and end date.
6. Review your ad and you’re ready to go. It’s that simple.

Understanding insights
Understanding and monitoring Facebook Insights is a critical part in maximizing our social media efforts. Click “Insights” on your admin panel to view the following:

- Page Like
- Post Reach
- Engagement
- Likes
- Visits
- Insights on who is visiting your page

From here you can sort by each category to see what ranks to the top of each. A suggestion is to track your top 10 posts and bottom 10 posts each month in each category.

You can start to see trends – what days your members are most responsive, what times are best to post, what type of content is most engaging, etc. This will help you craft your posts moving forward.

A few additional Facebook recommendations include:

- Have more than one administrator for your PTA Facebook Page, just so you have a backup and someone can always access the account. You can decide who should be admin – perhaps the President, Communications VP and the Programs and Member Services Chair.
- Use content from the state FB page. It’s easy to share or copy and post.
- Keep a record of all social media passwords, logins, etc. This can be in an Excel document or even a hard copy. Be sure to keep this private, but shared with key members of your PTA Executive Board.
- Publicize your Facebook page – add “Like us on FB” icon to your website. Include the Facebook icon and hyperlink in our electronic newsletter. Let people know at your PTA meetings – Like us on Facebook for all the latest updates and information about what’s happening at our school and for our PTA.
Websites: The “Next Generation” Resource for Your PTA

Doesn’t it just seem like everyone has a website these days? The Internet is an amazing resource that has revolutionized our ability to distribute and access information. This article will discuss how your PTA can take advantage of it.

So, why does my PTA need a website?
A website can tackle two communication goals simultaneously. It is an excellent resource for your members, where they could find out the latest info about upcoming events, agendas for meetings, important news from your PTA, and plenty more.

Councils and districts can distribute forms and information about due dates. If you have a newsletter, distributing an online version alongside a published version can save lots of paper, not to mention printing and postage charges.

Websites also do not have the physical limitations on how much content you can publish that you may have to deal with for a printed newsletter. However, your website is also accessible from anywhere in the world, which means that it is a great way to promote your PTA to new people. Take advantage of your website to share the great things that your unit does, and possibly entice new members to join. A website is also available 24/7 and can be updated any time, so you can keep it updated much easier than just a newsletter alone. There are also many other ways that you can use a website to support your PTA.

A website has two aspects: the domain name (your URL, e.g.,www.capta.org), and the hosting (where the files that make up your website content “sit”).

What do I need to have for a website?
- Ask your school or school district if they have a website, and if they could provide hosting on their server for your PTA website. (In most cases, the URL would then be something like www.myschooldistrict.k12.ca.us/pta/ or something.)
- If that is not an option, then you may need to budget an amount to purchase a domain name (usually $5-10 per year, sometimes less) and/or web hosting (varies, but most falls between the $40-80 per year range).

PTA does not have any recommended providers for these services, but an online search can turn up a number of options. Be sure to scrutinize providers offering free hosting, as many of these require you to display advertisements in exchange for the hosting. Avoid these. It is a legitimate PTA expense to set aside funds for maintaining a website.

How do I learn how to make a website?
If you’re interested in learning how to write HTML (the language behind web pages), there are numerous tutorials online and in books that you can find. Alternatively, solicit a volunteer who is familiar with web design to be the Webmaster for your association. A great idea is to search out students who are familiar with basic web design. There are also a number of free online tools and low-cost applications that allow you to publish a website without knowledge of HTML.
Websites: The “Next Generation” Resource for Your PTA (continued)

Are there any guidelines for designing a PTA website?

Always remember that a PTA website is focused on content. Try to minimize the use of fancy images and designs and be sure that the content of the website is allowed to shine.

- Use standard, easy-to-read fonts and colors. When designing the website, remember that less is more.
- Link to the California State PTA website (http://www.capta.org) and the National PTA website (http://www.pta.org), as well as websites for any council or district PTA.
- Councils (and districts) should list the units (and councils) that they represent, and their websites.
- Link to information on these other websites if necessary; you do not always have to duplicate everything.

The privacy of your officers is important. Avoid publishing personal information such as addresses and phone numbers. A good way to handle e-mail addresses is to use a “mailto:” link instead of printing the e-mail address directly on the page. At the same time, however, make sure that there is a place where people can find contact info for your association in general, including an address, phone number, and/or e-mail.

Never present material critical of any individual or group to prevent the possibility of a libel suit. Do not publish any personal info about students or adults (including photos with or without names) without written permission. Agendas and meeting announcements may be published.

Similarly, bylaws and standing rules must NOT be distributed electronically at any time. It’s a very good idea to ask an average member of your PTA to just check out the website and make sure they can find their way around—that ensures that you’ve got a navigable, easy-to-use website.

The Website job description in the Toolkit has additional details.

How do I make sure the website stays current?

The webmaster’s position should be a full-time chairmanship. The webmaster should be responsible for soliciting and reminding board members to pass along news and other information to be posted on the website. If you have a newsletter, you can often reuse those newsletter articles as website content. A webmaster who has a busy schedule should inform board members how often he/she is able to update and set deadlines for information to be received for a particular website update. Websites are a relatively new resource that more and more organizations are taking advantage of. Although it does require a bit of a transition and some investment, you will quickly find that there are significant benefits to having a website for your association and that it will help you better connect with your members.
Capitalization, Number Use, Punctuation, Spelling, Terminology and Visual Identity for PTA Publications

CAPITALIZATION

- California Congress of Parents, Teachers and Students, Inc.
- California State PTA – not CSPTA or CAPTA
- State PTA
- National Congress of Parents and Teachers
- National Parent Teacher Association
- National PTA
- Parent Teacher Association
- Parent-Teacher-Student Association
- PTA or PTSA – no periods
- Founders Day
- Sacramento County, but Sacramento and San Joaquin counties

Nouns or Adjectives Forming Part of Proper Name of an Organization

- Sun Elementary PTA
- Hillside Council PTA
- Twenty-Fifth District PTA
- University of California

Do not capitalize association or unit, council, district PTA, university when used alone.

Terms Specific to California State PTA

- Advisory Board
- Board of Directors
- Board of Managers
- California State PTA Annual Convention
- CALL (to board or convention)
- Continuing Service Award – CSA
- “everychild. onavoice.”
- Golden Oak Service Award
- Honorary Service Award – HSA
- Mission Statement of the California State PTA
- Purposes of the PTA – as title or in a sentence
- Vice President for Communications (etc.)

PTA Projects, Programs or Workshops

- PTA Leadership Training
- Reflections Program
- “SMARTS: Bring Back the Arts!”

State or National Government Terms

- Titles (Governor, Senator and Assembly Member) capitalized ONLY when preceding a name
- Legislature, Senate and Assembly capitalized when referring to the California bodies
TITLE CAPITALIZATION

- For titles in text, capitalize the first and last words and all nouns, pronouns, adjectives, verbs, adverbs, and subordinate conjunctions (therefore, however).
- Articles (a, an, the), conjunctions (and, or, for, but), and prepositions of three letters or less (for, to, on) are lowercase, unless they are the first or last words of a title or subtitle.
- The infinitive “to” should be capitalized.
- Use typeset italic or boldface for titles of books, periodicals, movies, videos, plays, operas, reports, pamphlets, and kits.
  - California State PTA Toolkit
  - The Communicator
  - National PTA Quick-reference Guide
  - Parents Empowering Parents (PEP) Guide
- When the title or designation precedes the name, it is capitalized. If it follows the name, it is lower case.
  - President-elect Jones
  - Jane Jones, president
  - Sarah Smith, president-elect
  - Henry Jones, the principal of the school
  - James McCoy, Ed.D., principal
- Capitalize schools of a university, but not courses or departments. Capitalize languages.
  - School of Journalism
  - biology department
  - UCLA Spanish department

DO NOT CAPITALIZE

- Association, unit, council, district PTA, or board of education unless used as part of a name of a specific group;
- Titles after the word “the” or after a name;
- Organizational terms such as bylaws, chairman, committee, director, parent education, preschool, policy, scholarship, grant, vice president, workshop;
- Seasons of the year, directions (north, southeast), state, nation, federal, flag.

NUMBERS

When To Spell Out Numbers

- At the beginning of a sentence, except for years;
- One through nine, 10 and above use numerals;
- First through ninth, after 10th use numerals;
- First grade, grade one, first-grader; 10th grade, grade
- 10, 10th-grader

Note: More than 100 (not over 100) and fewer than 100 (not less than 100).

Use Numerals for

- Large numbers such as million and billion
  - $12 million
- Percentages
  - 15 percent (spell out "percent")
- Ages
  - age 3 to 6
  - 26-year-old (hyphenate)
- Pages
  - page 2
- Ratios 3-to-1; No. 1 killer of teens
PUNCTUATION

Quotation Marks
- Always set outside the comma and the period.
- Always set inside the colon and the semicolon.
- Set outside or inside the exclamation point, depending on whether the marks belong to the quoted matter.
- Use single quotation marks for quotations within quotations.
- A quoted passage of four lines or more may be used without quotation marks if indented from the body of material.
- Use quotation marks for themes, such as for conventions, workshops, or administrations.
- Avoid overuse of exclamation marks!
- Ellipses (...) should be treated as a word with a space before and after. At the end of a sentence, a period is still needed (for a total of four dots).
- Dashes require space before and after.

Colons and Semicolons
- Use a colon only if the introductory phrase can stand alone as a sentence.
- Do not use a colon after a verb.
- Capitalize the first word after a colon if it is a proper noun or the start of a complete sentence. For a vertical list, capitalize the first word of each item, use commas or semicolons with a final period if the phrases are lengthy.
- Use semicolons to separate elements of a series when the individual elements contain information that is set off by commas or to join two clauses when a coordinating conjunction (and, but, for) is not present.

Commas
Use a comma:
- Before the conjunction only when the series of items or phrases is complicated or lengthy.
  - The flag is red, white and blue.
- Before an independent phrase: "He gave me an apple, and I ate it."
- Between names of states and nations used with cities
  - Los Angeles, California, is a big city.
- For dates with month, day, and year
  - October 30, 2007
- When the day of the month is omitted, so is the comma
  - June 2007

Apostrophes
- Singular possessive - PTA's office
- Plural possessive nouns not ending in "s"
  - children's books
- "It's" means "it is"; not the possessive, "its size."
- Plural possessive nouns ending in "s"
  - unit PTAs' collaboration
- Not with plural nouns, figures
  - PTAs advocated for arts education
  - legislation in the 2000s
STYLE GUIDE (continued)

WRITING STYLE

Use:

- Active tenses, not passive;
- Verbs, not adverbs;
- 4 p.m., 10-11 a.m., noon and midnight;
- Chairman, not chair or chairperson;
- People, not persons;
- Family engagement;
- Either Dr. Jane Jones or Jane Jones, Ed.D., not Dr. Jane Jones, Ed.D.;
- United States as a noun, U.S. as an adjective.

Tips:

- Rewrite to avoid using etc., and/or he/she, s/he.
- (usually, a plural form does the trick:
- "A student likes his/her homework" becomes
- "Students like their homework."
- Beware singular noun plural pronoun problems.
- "Speak with the teacher about your child's homework.
- Their success depends on it." This is incorrect because the antecedent of "their" is the singular "child." Better: "Speak with the teacher about your child. Your student's success depends on it."
- The term disability is preferred to handicap.
- Use "people first" style – "a student with a disability," rather than "a disabled student."
- Include year of passage with names of all laws except those passed in current legislative session.
- No all cap headlines (except CALL to Convention).
- Conform to time, date, place format: meeting is at 10 a.m., May 4, at the Capitol.

OFTEN-USED PTA WORDS

<table>
<thead>
<tr>
<th>after-school programs</th>
<th>fundraising activities</th>
<th>president-elect</th>
</tr>
</thead>
<tbody>
<tr>
<td>at-risk</td>
<td>fundraiser (noun)</td>
<td>preteen</td>
</tr>
<tr>
<td>back-to-school</td>
<td>handout (noun)</td>
<td>school-based</td>
</tr>
<tr>
<td>bylaws</td>
<td>health-care clinics</td>
<td>seat belt</td>
</tr>
<tr>
<td>caregiver</td>
<td>HIV/AIDS</td>
<td>self-esteem</td>
</tr>
<tr>
<td>citywide</td>
<td>Internet</td>
<td>statewide</td>
</tr>
<tr>
<td>curricula (plural)</td>
<td>kindergartner</td>
<td>teenage/teenager</td>
</tr>
<tr>
<td>curriculum (singular)</td>
<td>nationwide</td>
<td>T-shirt</td>
</tr>
<tr>
<td>day care (noun)</td>
<td>noncommercial</td>
<td>vice president</td>
</tr>
<tr>
<td>day-care (adjective)</td>
<td>nonpartisan</td>
<td>Washington, D.C.</td>
</tr>
<tr>
<td>dropout</td>
<td>nonprofit</td>
<td>website</td>
</tr>
<tr>
<td>email</td>
<td>nonsectarian</td>
<td>well-being</td>
</tr>
<tr>
<td>extracurricular</td>
<td>online</td>
<td>year-round</td>
</tr>
<tr>
<td></td>
<td>preschool</td>
<td></td>
</tr>
</tbody>
</table>

79
PTA FINANCIAL SECTION

Sample Financial Calendar

Upon election
- 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 at the last PTA meeting of the year.
- Be sure to include convention and trainings as a line item in budget.
- Release Funds for expected summer expenses.

June/July/August
- Outgoing treasurer closes out books (June)
- Outgoing treasurer gives books and financial records to outgoing auditor for end-of-term audit, as stipulated in the bylaws (after close of fiscal year).
- Outgoing treasurer prepares Annual Financial Report or UTAR.
- Prepare tax forms as required by California State PTA. Seek the help of a qualified accountant if you are not familiar with this process.
- Give financial records and materials to the incoming financial officer (except those in audit).
- Obtain new bank account signature cards to incoming officers. See bylaws for authorized bank signers.

September/October
- Attend workshops for all officers, especially financial officers when offered.
- Taxes are filed
- Re-present budget to the association for adoption at its first meeting.
- Send approved audit and year-end financial report and current year budget to council.
- Send the first remittance of per capita dues through channels. Send monthly thereafter.

November
- Send checks for insurance premiums through channels. Do not send checks directly to the California State PTA office or the insurance broker. The premium must be forwarded through PTA channels, or a late fee of $25 will be assessed.
- Complete and send the Workers’ Compensation Annual Payroll Report through channels, whether or not the association has employees.
- Review California State PTA Toolkit 5.11 PTA as an Employer for additional filing requirements.

January
- Submit books and financial records for midyear audit, as specified in the bylaws.
- Revise budget, if necessary.
- Ensure that Workers’ Compensation form and insurance surcharges have been forwarded through channels.

February
- Send Founders Day freewill offering through channels to LB Council PTA when collected. The event may be held during a month other than February.
- Determine if convention registration fees need to be paid.

March
- Continue to submit per capita dues through channels, in accordance with established due dates for convention recognition.

April
- Issue convention checks for authorized expenditures for elected delegates.

May/June
- Ensure all per capita dues have been forwarded through channels.
- Attend workshops for financial officers, when offered.
## PTA Financial Flow Chart

<table>
<thead>
<tr>
<th>PTA Executive Board (Board-elect) Plans the PTA Year</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PTA Goals and Program Developed</strong></td>
</tr>
<tr>
<td>Executive Board and Program Committee develop and</td>
</tr>
<tr>
<td>give to Budget Committee</td>
</tr>
<tr>
<td><strong>Budget Developed</strong></td>
</tr>
<tr>
<td>Budget Committee</td>
</tr>
<tr>
<td><strong>PTA Program and Budget Approved</strong></td>
</tr>
<tr>
<td>Executive Board approves Association approves;</td>
</tr>
<tr>
<td>recorded in minutes</td>
</tr>
<tr>
<td><strong>Executive Board/Committee Plans Details of Approved Activity</strong></td>
</tr>
<tr>
<td>Executive Board oversees activity planning and</td>
</tr>
<tr>
<td>implementation. Board ensures insurance regulations</td>
</tr>
<tr>
<td>are followed, approves all plans and records in</td>
</tr>
<tr>
<td>minutes.</td>
</tr>
</tbody>
</table>

## PTA Financial Procedures

<table>
<thead>
<tr>
<th><strong>Funds Released</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Association</td>
</tr>
<tr>
<td>authorizes</td>
</tr>
<tr>
<td>budgeted amount</td>
</tr>
<tr>
<td>for upcoming</td>
</tr>
<tr>
<td>activity</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Activity Plans Approved</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Board approves</td>
</tr>
<tr>
<td>committee’s plans and</td>
</tr>
<tr>
<td>authorizes expenditures</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Supplies Purchased/Activity Arranged</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Committee chairman purchases/orders</td>
</tr>
<tr>
<td>supplies for activity (within budget)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Receipt(s) Presented</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt(s) attached to</td>
</tr>
<tr>
<td>Payment Authorization/</td>
</tr>
<tr>
<td>Request for Reimbursement form</td>
</tr>
</tbody>
</table>

**OR**

<table>
<thead>
<tr>
<th><strong>Check Written Immediately</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Two (2) signatures obtained,</td>
</tr>
<tr>
<td>given to recipient</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Bills Presented at Association Meeting</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Motion to Ratify Check</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>During Executive Board</td>
</tr>
<tr>
<td>meeting</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Motion to Pay Bills/Approve Check</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Check written immediately</td>
</tr>
<tr>
<td>Two (2) signatures obtained, given to</td>
</tr>
<tr>
<td>recipient</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Treasurer’s Report</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Check(s) presented</td>
</tr>
<tr>
<td>to association for</td>
</tr>
<tr>
<td>ratification</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Treasurer’s Report</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Presented at next</td>
</tr>
<tr>
<td>association meeting</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Motion to Ratify Check(s)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>During association meeting</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Financial Records</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Placed on file for</td>
</tr>
<tr>
<td>audit</td>
</tr>
</tbody>
</table>
The budget is a financial representation of the goals, activities and operations a PTA expects to conduct during a specified time period. The budget estimates income and expenses for the year and must be presented to the association for approval and recorded in the association minutes. The budget must coincide with the term of office, which is usually also the association’s fiscal year.

**Developing the Budget** *(Toolkit p. F21)*

The budget committee, which is appointed by the president (or president-elect if the budget is being developed for the new term in advance of taking office), has the responsibility for developing the annual budget. The treasurer (or treasurer-elect if the budget is being developed for the new term in advance of taking office) is designated as the committee chairman. The budget committee may include financial officers, the principal or other designated representative, the president (ex officio), and others. The committee cannot develop the budget until the board-elect has determined the goals and programs for the upcoming year. The executive board should have surveyed the school community before developing the goals and programs.

**Once the goals and priorities are established, the committee should:**

- Know the goals the association is trying to achieve for the year and plan finances accordingly.
- Invite board members to submit suggestions.
- Review the program(s) proposed by the program committee, including detailed expense projections.
- Review past budgets, income and expenditures.
- Estimate probable income from all sources.
- Balance probable income with probable expenses.
- Determine the amount of carry-over funds to set aside to begin operations at the beginning of the subsequent PTA fiscal year, prior to the onset of fundraising activities.
- Unallocated Reserve funds represent the amount remaining after making allocations for budgeted programs and activities and may be used to cover any unexpected or unplanned expenses in the current fiscal year.

**Approving the Budget** *(Toolkit p. F22)*

In the spring, the board-elect develops the budget and present the proposed budget for adoption to the current executive board and the membership at the last PTA meeting of the year. The association approves the release of any funds required prior to the next association meeting in the fall. This allows the board to cover routine expenses as outlined in the bylaws. The PTA shall not assume any financial obligation in any one term of office that will be carried over into the succeeding term. The proposed budget must be presented to and voted upon by the executive board and recommended for adoption at the first association meeting each year. After the budget is adopted by the association, it should be followed closely in all financial transactions. Adoption of the budget does not authorize the expenditure of the funds.

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**BUDGET COMMITTEE AND TIMELINE**

**Committee:**

- The Budget Committee is a function of next year’s board.
- Look in your Standing Rules to see if there are guidelines.
- The Budget Committee is organized/called by the incoming president and is chaired by the incoming treasurer.
- It is helpful if the current president asks the current board for recommendations for next year’s budget.

**Time Line:**

- After the PTA/PTSA election, the incoming president and treasurer call a meeting of the budget committee. This should be done as soon as possible.
- The proposed budget is voted on by the incoming board at their first meeting.
- The proposed budget will be voted on by the association at the last association meeting of the year, usually in May or June.
- Once the proposed budget is approved by the association, the incoming treasurer should release funds for budget categories where expenses may occur over the summer and after the start of school (e.g., registration, First Day Coffee, hospitality supplies, August/September board and association meeting hospitality, board/president expenses for photocopying or postage, June training at Thirty-third district). DO NOT RELEASE THE ENTIRE BUDGET.
- Over the summer the budget (final version) MUST be approved/adopted at your first association meeting of the new school year, usually in August or September.

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The main rule (this is a rule):
You must have a balanced budget.
Your income and expenses must be equal.

A good starting point is determining what programs from the current school year you would like to continue (Yellow/Red Ribbon, Reflections, H.S.A., assemblies, field trips, and parent education, for example).

Review expenses related to those programs

Some programs have expenses based on participation like Reflections, so if you plan on upping your game on some programs, don’t forget to increase expenses.

Hospitality (Food/Beverage expense) served with a program. If you have hospitality with a program—for instance: registration—put that under the program budget, not under the hospitality or support service budget.

Determine the level of other expenses like insurance, officers’ expenses, PTA training/workshop attendance (increase a little if you have a new treasurer, president, recording secretary who might want to attend some training), photocopying, postage, council/district expenses. All these should be separate line items.

DON’T increase what you charge for membership (your membership dues) right now. What you charge for dues is listed in your bylaws and you cannot charge more without doing a bylaws change with CAPTA.

Hospitality: the total of your hospitality budget should not exceed 5% of your total budget. This means the hospitality for your meetings and teacher appreciation or other hospitality that you may provide are not part of a program.

Legislative Activities also have a 5% rule.

Mileage: you must check your standing rules to see if you have any guidelines for mileage reimbursement. Depending on the location of the CAPTA Convention, delegates may want to drive.

Standards for PTA Fundraising (Finance Toolkit p. F23 – Nov. 2016)
Fundraising is the method of raising money to finance PTA programs and projects. The fundraising project must support the goals of PTA and be related to the educational, charitable, and philanthropic purposes as a tax-exempt organization. When planning the year’s activities, PTAs should use the 3-to-1 rule: There should Fundraising be at least three non-fundraising programs aimed at helping parents or children or advocating for school improvements, for every one fundraiser. It should involve as many members as possible and be fun. It should not be a burden to the school staff or parent volunteers, compete with or detract from school lunch and nutrition programs, or conflict with other PTA, school, or community events. Children should never be used to sell door-to-door or exploited to raise funds. It cannot involve commercial or advertising obligations. See National PTA’s Back-to-School Kit sections Finance and Fundraising, which prescribes the ethics of fundraising. The fundraising project must have the approval of the membership in advance of the event, and the vote must be recorded in the minutes. Projects must have a specific purpose. If the fundraising project is ongoing (e.g. e-scrap), it must be approved each year by the association membership.

Hospitality (Finance Toolkit p. F30 – Nov. 2016)
PTAs must maintain their nonprofit status as governed by the Internal Revenue Service Code section 501(c)(3). Within the language of the code, the IRS does permit expenses that are not directly related to the primary purpose of the PTA if the expenses are not of a significant amount. "Not of a significant amount" is defined by the IRS as an amount that does not exceed 5 percent of the nonprofit association’s annual budget. Five percent is the recommended limit to be used as a guideline for PTAs for all hospitality expenses, including staff or volunteer appreciation. It is important to budget appropriately when considering all PTA expenditures, and all expenditures must be approved by the membership. The PTA may provide hospitality for association, executive board, and committee meetings; staff appreciation; volunteer appreciation; and other events requiring refreshments, food, paper goods, certificates, or decorations. The PTA may choose to:

- Purchase nonalcoholic drinks and/or snacks
- Solicit donations from businesses or members, or
- Store supplies to make coffee and/or punch, etc.

The cost of meals or beverages provided for volunteers during the course of their work; e.g., while processing fundraiser orders or counting money after an evening program, are not considered to be hospitality. Such expenses must be budgeted and approved by the association in advance. The expenditures are accounted for as a cost of doing the program or fundraiser on which they are working; e.g., wrapping paper sales or a fall festival.

Legislative Activities (Advocacy Toolkit p. A14 – May 2016)

IRS Reporting Requirements
A PTA operating as a 501(c)(3) may not devote more than an insubstantial part of its activities and budget to influence legislation. The "insubstantial part" is not clearly defined, but is often interpreted to be no more than 5 percent of an organization's annual operating expenditures.

PTA funds should not be used to purchase personal gifts, equipment for staff lounges and lunchrooms or for furnishings for principals’ offices. Personal gifts include gift cards and gifts for baby showers, Secretary’s Day, bereavements, weddings, or birthdays. If the membership determines that such items are necessary, the individual members can make personal donations to purchase the designated items. These donations should not be commingled with PTA funds.

**Staff Appreciation**

The California State PTA understands the importance of staff appreciation in building a stronger home-to-school connection. PTA resources may be used for this type of expense. Acceptable expenditures may include a staff lunch as long as the expenses follow the above guidelines and the expenses are approved by the membership.

**Volunteer Appreciation**

A simple and appropriate way to thank volunteers for their time and effort supporting the PTA is to plan and budget for a volunteer appreciation event near the end of the school year. Invite all volunteers who helped with PTA activities and programs during the year. The PTA may present each volunteer with a certificate of recognition. If the PTA wishes to reward volunteers with personal gifts, the association may vote to do so and seek out donations to cover those items. Alternatively, officers or other members may make donations to pay for such items.

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**Unallocated Reserve**: *(Finance Toolkit p. F21 – Nov. 2016)* Unallocated reserve funds represent the amount remaining after making allocations for budgeted programs and activities and may be used to cover any unexpected or unplanned expenses in the current fiscal year with approval of the association. The budget should be amended to reflect funds transferred from Unallocated Reserves to other expense categories.

**Restricted Reserve**: In planning the budget, it is permissible for PTAs to have a savings account to hold funds for more than one year for the following reasons:

- Efficient management of restricted funds;
- A PTA program requires large donations to the school and the school district requires advance notice if the PTA cannot continue to fund the activity; i.e., computer equipment or teacher aide salary; and
- Money to finance long-term or unexpected but approved projects or programs, i.e., playground project. As a guide, the savings account reserve should not exceed one-half of the association’s budget for an average year.

**Recommended Budget Line Items** *(Toolkit p. F21)*

When developing a PTA budget, consider including the following line items:

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**How are you going to pay for this?** Remember the 3 to 1 rule. You should have 3 programs for every 1 fundraiser. This rule is to ensure that you are focusing on programs and not on raising funds.

- Take a minute to go onto CAPTA.org website under finance and click on fundraising. There is valuable information on the difference between fundraising and sponsorship.

- Gifting to the school district should be a line item with a ZERO balance. As you gift, you will put your gifting expense on this line but you DO NOT BUDGET for gifting. (This doesn’t mean personal gifts, as those are not allowed. This is giving to the school or to other non-profits.)

**DO NOT include in the budget** (things that PTA’s cannot pay for):

- **Gifts** (personal gifts to teachers, parents, board members, staff, custodians, etc.). You can facilitate the collection of money, but those funds cannot go into the PTA bank account.

- **Flowers as gifts** (even for bereavement). See rule above. You can use flowers as decorations but you cannot give flowers as gifts.

- **Gift Cards** (these would be considered personal gifts), even if you are buying it for the office or for teachers to pay for supplies. The IRS requires itemized receipts. State PTA recommends that you solicit donations of gift cards if you want to use them as gifts or as incentives for programs/fundraisers. You should not use PTA fund to pay for them.

**OTHER STUFF**

- You don’t have to put your carryover in your budget if you carry over the same amount each year.

- You can put in an unallocated reserve to cover any unexpected expenses.

- If you asked for money for specific things like disaster funds, library funds, supplies, etc. these MUST be kept separately and any leftover at the end of the year CANNOT be swept into your general fund. You must keep a separate accounting for these funds on a year to year basis.
**Carry-over Funds:** Carry-over funds represent the amount which is set aside to begin operations at the beginning of the next PTA fiscal year, prior to the onset of fundraising activities. To calculate the amount of this reserve, review the prior year's Annual Financial Report to determine which operation or program expenses require funding during transition, and estimate costs for these items in the new fiscal year.

**Convention:** The annual California State PTA convention is usually held at the end of April or the first part of May. The unit should budget enough money to cover the cost of registration, hotel room, transportation and food for the allowed number of delegates based on the unit's membership (Attending Conventions and Conferences, Running Your PTA Chapter).

**Donations:** PTAs may ask community supporters to donate funds for a specific program.

**Fundraisers:** Fundraising income is the gross income from fundraisers. List each fundraiser individually. The expenses for conducting each fundraiser should be listed under Expenses individually by fundraiser.

**Gross Income:** This includes the total amount of income for the year, excluding council, district, State, and National PTA portions of the per capita dues and freewill offerings.

**Insurance:** Participation in the California State PTA insurance program is required of all PTAs in California. Budget an amount that is similar to the actual expense from the previous year’s premium. Units are notified of the

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**Funds Not Belonging to the Unit (Toolkit p. F22)**
Council, district, State, and National PTA portions of membership dues and the Founders Day freewill offering are not a part of the unit's funds to be used for expenses. They should not be included in the annual budget as receipts for budget planning purposes. They also are not included in the gross receipts when reporting to the IRS (Gross Receipts). These funds can be paid without the authorization of the membership. Such funds should be forwarded through channels immediately. Council or district PTA remittance forms must be issued to track ensure proper allocation of funds from the unit.

All disbursement of funds not belonging to the unit must be recorded in the next treasurer's report and reported to the association. Council and district PTAs set their own dates far enough in advance of the California State PTA due dates to have sufficient time for such pass-through funds to be received by the California State PTA office (Budget Sample, Fig. F-1 or Forms Chapter).

**Membership Dues:** Each association determines its own membership dues, but a portion of each membership must be forwarded through channels. The forwarded funds are listed as “Funds Not Belonging to the Unit.” The budget should only reflect the amount of dues the unit retains as income.

**Membership Envelopes:** The purchase or printing of membership envelopes is listed as an expense.

**Reimbursable Expenses:** PTA should reimburse executive board members for any approved out of pocket expenses. PTA funds may not be used for personal expenses, gifts, personal acknowledgments, or personal use items. Appropriate out of pocket expenses include photocopies, office supplies, etc. Unit, council and district PTAs should budget for out-of-pocket expenses and ensure the budget is shared equitably among officers/chairmen in accordance with job responsibilities. Members should be reimbursed upon submission of a signed payment authorization/request for reimbursement form. Receipts must be submitted for all reimbursable expenses. Unit, council and district PTAs may not budget for an officer's allowance. The IRS considers an allowance as miscellaneous income that must be declared by the recipient as such and will be taxed accordingly.

**Staff/Volunteer Appreciation:** PTA resources may be used for hospitality for staff/volunteer appreciation as long as it does not represent a significant amount. “Not of a significant amount” is defined by the IRS as an amount that does not exceed 5 percent of the nonprofit organization’s annual budget (see Staff Appreciation). PTA funds cannot be used to purchase personal gifts for staff or volunteers, such as gift cards.

**Training/Workshops:** Budget funds to send executive board members to council, PTA district, and California State PTA workshops/meetings.

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**Amending the Budget (Toolkit p. F22)**
If adjustments are needed, the budget can be amended by a two-thirds vote of the association. It is recommended that the treasurer provide the executive board with a budget-to-actual comparison report quarterly, but at least midterm.

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premium amounts by October 1. The premium must be forwarded through PTA channels to be received in the California State PTA office by December 20, or a late fee of $25 will be assessed by the California State PTA.
# BUDGET (SAMPLE)

## FISCAL YEAR

<table>
<thead>
<tr>
<th>Name of Unit</th>
<th>IRS EIN #</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Council</th>
<th>District PTA</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Bank Name</th>
<th>Account #</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Bank Address</th>
</tr>
</thead>
</table>

### BALANCE ON HAND from previous year

**$**

### ESTIMATED RECEIPTS

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest income</td>
<td>$</td>
</tr>
<tr>
<td>Membership dues (unit portion only)</td>
<td>$</td>
</tr>
<tr>
<td>Fundraising (list individually)</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

### RECEIPTS NOT BELONGING TO UNIT

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council, district, State and National PTA membership per capita</td>
<td>$</td>
</tr>
<tr>
<td>Founders Day freewill offering</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

### ESTIMATED DISBURSEMENTS

#### Operating expenses

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership envelopes</td>
<td>$</td>
</tr>
<tr>
<td>Insurance premium</td>
<td>$</td>
</tr>
<tr>
<td>Newsletter and publicity</td>
<td>$</td>
</tr>
<tr>
<td>Council/district PTA leadership workshops</td>
<td>$</td>
</tr>
<tr>
<td>Convention (State/National PTA)</td>
<td>$</td>
</tr>
<tr>
<td>Officers’ and chairmen’s reimbursement</td>
<td>$</td>
</tr>
<tr>
<td>Past president’s pin</td>
<td>$</td>
</tr>
<tr>
<td>Honorary Service Award</td>
<td>$</td>
</tr>
</tbody>
</table>

#### Program expenses

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs and assemblies</td>
<td>$</td>
</tr>
<tr>
<td>Reflections Program</td>
<td>$</td>
</tr>
<tr>
<td>Family Engagement</td>
<td>$</td>
</tr>
<tr>
<td>Emergency preparedness</td>
<td>$</td>
</tr>
<tr>
<td>Hospitality</td>
<td>$</td>
</tr>
</tbody>
</table>

#### Fundraising

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnival</td>
<td>$</td>
</tr>
<tr>
<td>Book fair</td>
<td>$</td>
</tr>
<tr>
<td>Gift wrap</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry-over to next year</td>
<td>$</td>
</tr>
<tr>
<td>Unallocated reserves</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

### DISBURSEMENTS NOT BELONGING TO UNIT

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council, district, State and National PTA membership per capita</td>
<td>$</td>
</tr>
<tr>
<td>Founders Day freewill offering</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL DISBURSEMENTS</strong></td>
<td>$</td>
</tr>
<tr>
<td><strong>BALANCE ON HAND</strong></td>
<td>$</td>
</tr>
</tbody>
</table>

---

Treasurer’s Signature

Date
# The five-minute audit for PTAs

A treasurer’s report includes meaningful information, but how does the PTA know it’s accurate? The unit needs to assign a non-check signer to review the bank statement each month. The most logical choices are the auditor or a member of the audit committee.

 Armed with the treasurer’s financial report, minutes and the bank statement the following can be checked:

<table>
<thead>
<tr>
<th>Treasurer’s Report Nov 1-Nov 30:</th>
<th>Bank Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beginning Balance – Nov. 1</strong></td>
<td><strong>Bank Stmt Beginning Balance</strong></td>
</tr>
<tr>
<td>Income</td>
<td>$3,550</td>
</tr>
<tr>
<td>Giftwrap 11/01 $2,400</td>
<td>Deposits 11/05 $2,400</td>
</tr>
<tr>
<td>Memberships 11/14 $300</td>
<td>11/15 $300</td>
</tr>
<tr>
<td></td>
<td>$2,700</td>
</tr>
<tr>
<td>Expense</td>
<td>Checks 99 $50 last treas. gr.</td>
</tr>
<tr>
<td>CK 100 ABC Co $1,299</td>
<td>100 $1,299</td>
</tr>
<tr>
<td>CK 102 Alpha PTA Council $160</td>
<td>103 $300</td>
</tr>
<tr>
<td>CK 103 Mary Smith $250-$300</td>
<td>$1,649</td>
</tr>
<tr>
<td></td>
<td>$2,709-$1759</td>
</tr>
<tr>
<td>Ending Cash Balance $3,493 $4441</td>
<td>Ending Bank Balance CK 102 -160</td>
</tr>
</tbody>
</table>

_Call president and treasurer. Looks like Nov. treas.’ report – check #103 needs to be corrected. Could be bank error?

Note: If the bank statement does not include copies of checks, the unit has to obtain copies. Most banks have online access. PTAs can have online access to their bank accounts, but they must decline any access to online payment of bills.

**Step 1: Look at the checks. Verify**
- Two signatures on every check
- Payee, amount and date match the treasurer’s report
- Purpose of payment is included in the check’s note section

**Step 2: Look at the deposits. Verify**
- Date and amount match the treasurer’s report
- Deposits have been timely

**Step 3: Assure no online payments or withdrawals have been made using a debit/ATM card.

**Step 4: Reconcile the bank statement to the treasurer’s report.**
- Make adjustments for checks that have not cleared and for deposits not shown.

**Step 5: Contact the treasurer to determine the source of the error(s). Corrections, if required, are included in the next treasurer’s report. Report findings to unit president, treasurer and auditor (if reviewer isn’t the auditor). Note: the five-minute audit will NOT reveal that the treasurer allocated $100 collected for Membership Dues to Gift-Wrap Income instead, but it will point out that a $1,000 deposit showing on the treasurer’s report didn’t actually make it to the bank or that a check cashed by the bank didn’t show up on the treasurer’s report. If this happens, ask more questions and investigate further!

PTA resources include _Toolkit_, Finance section: 5.3 Banking, 5.3.3 Bank Statements, 5.3.6a Check Writing; Forms section: Check Sample.

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### TREASURER’S REPORT (SAMPLE)

**PTA**

November 1, 2018 thru November 30, 2018

**CHECKING ACCOUNT**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/15</td>
<td>DEP: Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/17</td>
<td>DEP: Membership dues, unit portion (150 @ $5)</td>
<td>750.00</td>
</tr>
<tr>
<td>11/22</td>
<td>DEP: Book fair</td>
<td>349.50</td>
</tr>
<tr>
<td>11/25</td>
<td>DEP: Gift wrap</td>
<td>5,000.00</td>
</tr>
<tr>
<td>11/30</td>
<td>NSF check #1113 – Book Fair purchase</td>
<td>(16.50)</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td>7,533.00</td>
</tr>
</tbody>
</table>

**FUNDS NOT BELONGING TO THE UNIT INCOME**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/17</td>
<td>DEP: Membership, 150 @ $4.00 (council/district/State/National PTA)</td>
<td>$600.00</td>
</tr>
<tr>
<td>11/20</td>
<td>DEP: Founders Day freewill offering</td>
<td>213.00</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td>813.00</td>
</tr>
</tbody>
</table>

**TOTAL INCOME**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td><strong>$12,596.00</strong></td>
</tr>
</tbody>
</table>

**EXPENSES**

<table>
<thead>
<tr>
<th>Check #</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3150</td>
<td>Cajon Council, insurance premium</td>
<td>$195.00</td>
</tr>
<tr>
<td>3151</td>
<td>Mary Smith, Carnival expenses</td>
<td>55.00</td>
</tr>
<tr>
<td>11/10</td>
<td>Bank fee, NSF Ck # 1113</td>
<td>10.00</td>
</tr>
<tr>
<td>3153</td>
<td>Patty Harper, hospitality</td>
<td>7.49</td>
</tr>
<tr>
<td>3154</td>
<td>Book Fair Company</td>
<td>120.00</td>
</tr>
<tr>
<td>3155</td>
<td>VOID</td>
<td></td>
</tr>
<tr>
<td>3156</td>
<td>Cajon Council, convention/2 delegates</td>
<td>260.00</td>
</tr>
<tr>
<td>3157</td>
<td>Susan Bird, office supplies</td>
<td>15.29</td>
</tr>
<tr>
<td>3158</td>
<td>VOID</td>
<td>0.00</td>
</tr>
<tr>
<td>3159</td>
<td>Beverly Anderson, postage</td>
<td>3.70</td>
</tr>
<tr>
<td>11/30</td>
<td>Transfer to savings</td>
<td>5,000.00</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td>5,666.48</td>
</tr>
</tbody>
</table>

**FUNDS NOT BELONGING TO THE UNIT EXPENSES:**

| #3152     | Cajon Council, 150 members @ $4.00 (council/district/State/National PTA) | $600.00  |
| #3160     | Cajon Council, Founders Day Freewill Offering     | 213.00   |
|           | **TOTAL**                                                                                        | 813.00   |

**TOTAL EXPENSES**

|               |                                                                                                 | **$6,479.48** |

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/30</td>
<td>DEP: Interest</td>
<td>4.32</td>
</tr>
<tr>
<td>11/30</td>
<td>DEP: Transfer from checking</td>
<td>5,000.00</td>
</tr>
<tr>
<td></td>
<td>Withdrawals</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**BALANCE ON HAND 11/30/2018**

|               |                                                                                                 | **$6,116.52** |

**SAVINGS ACCOUNT**

**BALANCE ON HAND 11/1/2018**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/30</td>
<td>DEP: Interest</td>
<td>4.32</td>
</tr>
<tr>
<td>11/30</td>
<td>DEP: Transfer from checking</td>
<td>5,000.00</td>
</tr>
<tr>
<td></td>
<td>Withdrawals</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**BALANCE ON HAND 11/30/2018**

|               |                                                                                                 | **$13,653.87** |

**Signature**

Date
**FINANCIAL SECRETARY’S REPORT (SAMPLE)**

PTA

November 1, 2018 thru November 30, 2018

A monthly report must reflect the duties of a financial secretary as assigned in the bylaws and should include:

**RECEIPTS**
(Listing of monies received and given to treasurer to deposit.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/13</td>
<td>Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/17</td>
<td>Membership dues (150 @ $9)</td>
<td>1,350.00</td>
</tr>
<tr>
<td>11/21</td>
<td>Book fair</td>
<td>349.50</td>
</tr>
<tr>
<td>11/25</td>
<td>Gift wrap</td>
<td>5,000.00</td>
</tr>
<tr>
<td>11/27</td>
<td>Founders Day freewill offering</td>
<td>213.00</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>$8,362.50</td>
</tr>
</tbody>
</table>

**DEPOSITS**
(Listing of monies deposited — a duplicate copy of deposit slip is given to treasurer.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/14</td>
<td>Carnival</td>
<td>$1,450.00</td>
</tr>
<tr>
<td>11/18</td>
<td>Membership dues (150 @ $9)</td>
<td>1,350.00</td>
</tr>
<tr>
<td>11/22</td>
<td>Book fair</td>
<td>349.50</td>
</tr>
<tr>
<td>11/26</td>
<td>Gift wrap</td>
<td>5,000.00</td>
</tr>
<tr>
<td>11/28</td>
<td>Founders Day freewill offering</td>
<td>213.00</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>$8,362.50</td>
</tr>
</tbody>
</table>

__________________________________________  ____________________________
Financial Secretary Signature                    Date
## Bank Reconciliation (Sample) — PTA

<table>
<thead>
<tr>
<th>Bank Statement Balance at October 31, 2014</th>
<th>40,729.90</th>
</tr>
</thead>
</table>

### Outstanding Deposits:

- 1887 10-Oct  45.00  
- 1890 15-Oct  70.14  
- 1894 30-Oct  703.00  
- 1895 30-Oct  4,836.51  
- 1896 30-Oct  34.16  
- 1897 31-Oct  1,198.80  
- 1898 31-Oct  1,009.12  
- 1899 31-Oct  130.80  

**Total** 8,027.53

### Treasurer Report Cash Balance at 10/31/2014

32,702.37

### Notes:

Review the bank statement to ensure that all transactions posted by the bank are posted to your books.

Example transactions that are posted by the bank are e-commerce like Paypal, Square, Totem, etc. and bank charges such as Non-Sufficient Funds checks, bank fees, deposit adjustments, etc.

#### E-Commerce:

- Post total purchase to the appropriate income (like Spirit Wear) -- the processor fee to the expense account set up for fees -- the net of these transactions to cash (checking account) which should be the amount posted by the bank.

Use reports from the e-commerce website to ascertain the gross sales and type of product sold, if you have multiple products.

#### PTAEZ Users:

- The balance adjustment should be used for all of the above bank transactions. The receipt module should only be used to post funds received and deposited to the bank by the PTA.

#### Totem Deposits:

- Post membership dues collected by TOTEM to the unit membership income.

If a donation is collected, post the total donation to donation income, the TOTEM Fee to an expense account for such fees and the net amount to the checking account.

Example: $100 to donation income -- $10 to Fee expense -- $90 to the checking account (bank).
Treasurers’ and Auditors’ Notes

Every Board member has a fiduciary responsibility to protect the assets of the PTA. Assets include money, volunteers, reputation and continuity of the organization. The financial officers have the responsibility to ensure the financial transactions are reported properly and the transactions are transparent for the board members and the members of the association.

Many resources are available to make the job easier. The Finance Section and Forms Section of the PTA Toolkit have valuable information and can be downloaded from the PTA website at www.capta.org. Other references on the website are Communicator articles and PTA Connects. The Finance Pocket Pal is available for purchase from the PTA materials and publication section of the website. Additional treasurer and auditor resources can be found on the Service Mailing CD. When in doubt, contact your counterpart at the council/district.

Every unit must file the appropriate IRS Form 990 and California Form 199 and an RR1 form (Attorney General).

Every unit must file these tax returns and informational returns by the 15th day of the 5th month after the fiscal year ends. The latest tax requirements can be found at www.capta.org, Tax Filing Updates button (left side of the home page). Tax returns and reporting forms are currently due Nov. 15th.

Any letters received from the Internal Revenue Service (IRS), Franchise Tax Board (FTB) or Attorney General’s Office should be reported to district PTA immediately via the Long Beach Council PTA. All letters must be dealt with swiftly to avoid further penalties or loss of non-profit status. CAPTA has very helpful contacts with these agencies to assist us.

FINANCIAL ACTIVITIES CHECKLIST

___ Visit the bank immediately upon taking office.
- Add new check signers as authorized in the bylaws and listed in association minutes.
- Verify old signers are removed.
- Verify NO ATM cards are associated with account, deposit cards allowed.
- On-line access to the account is permitted as long as bill pay is blocked.

___ Revise the budget that was developed in the spring.
- Review the goals and programs.
- Present and get approval of the budget by the Executive Board.
- Prominently display the approved budget and/or send to the school population along with the invitation to join PTA.

___ Make sure the outgoing treasurer has completed the Unit Annual Treasurers Report.

___ Make sure the year-end audit is completed by outgoing auditor or audit committee as soon as possible after fiscal year end, contact council for help if not completed by Aug 15.

___ Arrange for a non-check signer (auditor) to review bank statement monthly (Use the 5 Minute Audit in the finance packet on the Service Mailing CD).
FINANCIAL ACTIVITIES CHECKLIST (continued)

___Make sure outgoing treasurer files the applicable IRS Form 990. California Form 199 and RRF-1 form by the due date of Nov. 15th.

___Get your financial books in order.
   • Computer vs. manual ledgers and register: if using a computer other than PTAEZ, PTA should own the program so it can be passed from treasurer to treasurer.
   • Train officers/chairmen on use of Cash Verification form and how to count cash.
   • Provide Payment Authorization/Request for Reimbursement form and instructions to officers/chairmen.

___Plan to attend fall training provided by council/district.
   • Make contact with council/district treasurers to determine due dates.
   • Sign up for PTA Connects www.capta.org/sections/communication/connects.cfm.

___First association meeting:
   • Present the Annual Financial Report and Year-end Audit for adoption.
   • Request approval of proposed programs and fundraisers.
   • Present proposed budget for adoption, request release funds from appropriate expense categories for fall programs. Release of funds does not authorize anyone to spend funds; plans must be presented to executive board before funds expended.
   • Present Treasurer Report and request ratification of checks written since last association meeting.

___Forward copies of year-end Audit Report, budgets, Annual Financial reports and tax returns to the council/district.

___Forward membership remittances monthly.

___Forward insurance premium and Workers Compensation Form by the due dates (Check with district PTA for due dates and amounts due). NOTE: the Worker’s Compensation Form must be completed even if the unit has not had any employees.

___Prepare a treasurer report for every PTA meeting. Budget to Actual comparison reports should be prepared for the Executive Board at least quarterly.

___Make sure financial activities are transparent.

___PTA leaders throughout the state have requested assistance for financial record keeping. In response, California State PTA has launched a program called PTAEZ Accounting Online. PTAEZ strengthens financial controls and procedures, generates financial reports customized for PTA, ensures a smooth transition of records from year to year, and provides summary information for the 990 and 199 tax returns and much more. PTAEZ Accounting Online is available at a low annual subscription price exclusively to California State PTA units, councils and districts. Check out PTAEZ at www.ptaez.org
Records Retention Schedule and Destruction Policy

It is very important that certain records be retained. The current IRS letter of determination, the current bylaws and standing rules approved by the state parliamentarian, and articles of incorporation (for incorporated PTAs) must be readily accessible at all times.

Listed here are items that must be reviewed on a periodic basis and kept in a safe place. Members of the executive board must properly dispose of records by shredding the document within 30 days of the expiration of the holding period.

To assist in this process, it is recommended that upon filing records, note on the outside of the box a “Destroy After” date.

PERMANENT STORAGE

- All audit reports
- Articles of Incorporation
- Canceled checks for important transactions (e.g., taxes, contracts). Checks should be filed with papers pertaining to each transaction.
- Corporation exemption documents (if incorporated)
- Corporation reports filed with the Secretary of State
- Legal correspondence
- Insurance records:
  - Accident reports
  - Claims
  - Employee Acknowledgment Forms
  - Insurance Incident Reports
  - Policies
- Ledgers (bound)
- Minutes of executive board and association (bound)
- PTA Charter
- Tax documents:
  - Exempt status
  - Group exemption
  - Letters assigning federal and state identification number (Federal Identification Number and State Taxes and Government Forms)
  - State and federal tax forms, as filed
- Correspondence with state or federal agencies
- Trademark registrations

10 YEARS

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

7 YEARS

- Bank statements that contain photocopies of canceled checks
- Cash receipt records
- Checks (other than those listed for permanent retention)
- Expired contracts and leases
- List of board members and their contact information
- Payment authorization and expense forms (receipts attached) for payments to vendors or reimbursement to officers
- Purchase orders
- Sales records

3 YEARS

- General correspondence
- Employee records (post-termination)
- Employment applications
- Membership lists, including names and full contact information

1 YEAR

- Bank reconciliations
- Certificates of insurance
- Correspondence with vendors if non-contested
- Duplicate deposit slips
- Inventories of products and materials, updated yearly
- Membership envelopes/forms for current membership

NOTE: Financial officers have a fiduciary responsibility to protect sensitive and confidential information. Copies of deposited checks should be shredded after the audit has been completed.

California State PTA Toolkit
Purpose of an Audit
http://toolkit.capta.org/finance/pta-audit/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 individual 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
http://toolkit.capta.org/finance/pta-audit/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;
- 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 REPORT

Date __________________________ Fiscal Year __________________________

Name of Unit __________________________ IRS EIN Number __________________________

Council __________________________ District PTA __________________________

Bank Name __________________________ Account # __________________________

Bank Address __________________________ City/Zip __________________________

Dates covered by this audit __________________________

Check numbers reviewed in this audit __________________________

<table>
<thead>
<tr>
<th>BALANCE ON HAND</th>
<th>RECEIPTS</th>
<th>DISBURSEMENTS</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>at time of last audit (date)</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>since last audit</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BANK RECONCILIATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last BANK STATEMENT balance (date)</td>
</tr>
<tr>
<td>DEPOSITS not yet credited (add to balance)</td>
</tr>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHECKS OUTSTANDING (List check number and amount)</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
</tr>
<tr>
<td>TOTAL outstanding checks (subtract from balance)</td>
</tr>
<tr>
<td>BALANCE in checking account (date)</td>
</tr>
</tbody>
</table>

*These lines must balance

☐ I have verified that all tax forms, PTA- and government-required forms have been filed, if required.

The following is all that needs to be read when the auditor’s report is given:

I have examined the financial records of the treasurer of __________________________ PTA/PTSA and find them

☐ correct Audit completed __________________________

☐ substantially correct with the following recommendations Executive Board Adopted __________________________

☐ partially correct more adequate accounting procedures need to be followed so that a more thorough audit report can be given Association Adopted __________________________

☐ incorrect Auditor’s Signature __________________________

Auditor’s Printed Name __________________________

(Copies: unit president, secretary, and treasurer; council treasurer or auditor and district PTA treasurer or auditor as directed by the district PTA. Attach copy of tax form(s) to next level PTA, if required to file.)

Submit separate report of explanation and recommendations to executive board. A separate audit form must be completed for each bank account.
<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bynames &amp; Standing Rules</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Budget(s)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Last Audit Report</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Ledger</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Checkbook register</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Canceled checks (including voids)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Authorizations for Payment</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cash Verification Forms</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Bank statements, bank books and deposit slips</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Receipts/bills</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cash receipts</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Executive board minutes</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Association minutes</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Committee reports</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Monthly Treasurer Report</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Monthly Financial Secretary Reports</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Annual Financial Report</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Workers’ Compensation Annual Payroll Report form</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>IRS Forms 941</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>IRS Form 1099</td>
<td>☐</td>
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</tr>
<tr>
<td>State Form DE-6</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>State Form DE-542</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Financial records provided; (Original)</td>
<td>☒</td>
<td>☐</td>
</tr>
</tbody>
</table>

**Beginning Balance Records**

1. Check to see if amount shown on first bank statement (adjusted for outstanding checks and deposits not posted to bank statement) corresponds to the starting balance recorded in checkbook register, ledger, treasurer’s report and ending balance of last audit

2. All bank statements reconciled since last audit by treasurer and reviewed monthly by non-check signer

3. Ending balances (checkbook register, ledger and treasurer report) agree with last bank statement (adjusted for outstanding checks and deposits not posted to bank statement)

4. Deposits and checks written (signed by two authorized check signers per the bylaws)
   - Recorded in checkbook register
   - Recorded in ledger in proper columns
   - Agreed with treasurer reports

5. Bank charges and interest recorded in checkbook register, ledger and treasurer reports

**Membership**

1. Amount recorded and deposited equals total number of memberships
   - (members) ☐ ☐
   - (membership dues listed in bylaws) ☐ ☐

2. Amount forwarded to council/district PTA equals total number of memberships
   - (members) ☐ ☐
   - (amount listed in bylaws) ☐ ☐

**Insurance – premium(s) forwarded to council/district PTA by due date**

**Minutes**

1. All expenditures approved and recorded in executive board minutes (List those expenditures not approved on recommendation report)

2. All expenditures approved/notified in association minutes (List those expenditures not approved on recommendation report)

3. Committee minutes record plans, proposed expenditures, and total of monies earned

4. All authorizations written for approved amounts (List missing authorizations on recommendation report)

5. All authorizations have receipt/bill attached (List missing receipts/bills on recommendation report)

6. All authorizations match checks written

**Income**

1. Deposits properly supported

2. Cash Verification Forms used with two people counting money

3. Income received matches deposits recorded in checkbook register, ledger and treasurer reports

4. Designated income spent as specified

5. Designated income used for specified projects

6. Reserve funds used as specified

7. Income from special events reported

8. Income from fundraiser events reported

9. Income from sales reported

10. Income from donations reported

11. Income from other sources reported

**Financial Secretary Reports**

1. Filed monthly

2. Receipts/Deposits agree with ledger & register

3. Annual Financial Report

**Treasurer Reports**

1. Filed monthly

2. Agree with ledger and checkbook register

3. Annual Financial Report

**Committee Reports**

1. Committee reports for all fundraisers submitted or report in minutes.

**Reporting Forms and Tax Returns**

1. Verify on Audit Report that all forms have been filed annually (if required)

2. Prepare and present written report with recommendations to executive board

3. Present audit report to association for adoption

4. Forward report to the next level PTA (See Bylaws, Duties of Officers, Auditor)

**Audit Recommendations**

All “NO” answers should be included in the report as recommendations to change financial procedures.

**Audit Conclusions**

At the completion of the audit, meet with president and financial officers to discuss recommendations and any corrections as needed.

When errors have been corrected by a financial officer and accounts are accurate, draw a double line in red ink where the audit concludes on all reports. Sign & date the audited materials.

**Mismanagement – Is mismanagement suspected? (Contact district PTA president immediately for assistance.)**
5.1.5 Fiduciary Agreements and Gifts to Schools

PTA programs promoting parent education, home and school cooperation, children’s well-being, community betterment, and funding for education must have first call on PTA funds. However, when a PTA is asked to purchase or provide materials for the local school, it is necessary to follow certain guidelines so that the gift will be acceptable to both the PTA membership and the school district.

When making gifts, a Fiduciary Agreement should be completed by the PTA and signed by all involved so that all parties acknowledge and agree to gift restrictions (Forms, Chapter 9). If a Fiduciary Agreement is not completed, gifts to the school that are accepted by the school district become the property of that district and can be moved or used at any school within the school district.

Certain gifts, such as funding for field trips, enrichment programs, teacher aides, special instructors, books, classroom supplies, or major equipment purchases, require prior approval from the PTA membership, school principal, and school district. Many school districts have policies and regulations on accepting gifts. Be sure to check with the school district before purchasing any materials or gifting funds to the school.

PTA members must approve all expenditures of funds, including the amount of monies to be used for gifts to the school, prior to the expenditure of those funds. This approval must come in the form of a motion and vote at a meeting of the membership and must be recorded in the association minutes of the meeting. Since PTA membership is new each year, funds cannot be committed from one year to the next unless funds were raised for a specific purpose and are therefore restricted. One example might be funds raised over three years for a major purchase. If restricted funds are not used for their designated purpose the funds must be returned to the donors or the donors must agree to the new purpose.

A gift to the school should benefit the largest number of students possible. Gifts should be in the form of a donation, presented and accepted by the school board at a school board meeting and recorded in the school board minutes. This ensures the school district will assume responsibility for the liability, maintenance and upkeep of any equipment purchased. Check with the school district to determine whether it is better to donate money for any equipment and have the district purchase the item(s) instead of the PTA purchasing the item(s) and then gifting them to the school.

At the first association meeting following the acceptance of the gift by the school board, a description of what was given to the school district must be noted again, and the date the school board accepted the gift must be recorded in the PTA association minutes.

The school district is subject to fiduciary responsibility. If the school district accepts money or equipment that is given subject to a restriction, then the restriction must be honored or the law will impose personal liability on the officers or trustees of the school district in their individual capacities. It is possible that the law would merely require the refund of the gift not used for the restricted purpose. The law does not do that automatically – there must be a complaint filed with the school district by the donor.

If the school district or any recipient is not willing to honor the restrictions on use which accompany a charitable contribution, then the recipient must decline to accept the gift. There is no duty of any recipient of an offered charitable gift to actually accept the gift if there is a restriction attached.

Gifts to Schools

- Field Trips - Should benefit the majority of students within the school. PTA should not pay directly for the busses, or entrance fees, nor sign any papers relating to the proposed trip. REMEMBER: PTA Insurance does not cover children except as volunteer workers.
- Trees and Plants – Should be cleared by the principal through the school district.
- Computers - Should benefit the majority of students within the school. All purchases should be made in consultation with the school district. PTAs should determine how the equipment will be used to enhance the instructional program and make sure:
  1. That there is a comprehensive school district plan specifying how the equipment will be used with school curriculum.
  2. That the equipment to be purchased is part of the school district’s overall plan.
THE FIDUCIARY AGREEMENT
LBUSD SPECIFIC POLICIES AND PROCEDURES

The Fiduciary Agreement is a PTA form representing the agreement between the PTA and the School to remit funds to the Long Beach Unified School District (LBUSD) in accordance with the Gifts to School budget, as approved by the PTA Association.

There is a separate agreement between the principal/school administrator and (LBUSD).

Gifts over $100 must be approved by the LBUSD Board of Education (at their regular meeting) and a letter will be sent to the PTA accepting the gift. Please consider the LBUSD Board meeting schedule when remitting funds as this does delay fund availability.

There is a LBUSD financial tracking system which ensures that funds are spent in accordance with the PTA Fiduciary Agreement. Even though principals have access to the gift accounts, they do not have the ability to move funds.

Equipment should be purchased by the District (not PTA) in accordance with approved LBUSD procurement procedures, i.e., the school initiates a requisition and the District will implement the purchase order, administer contracts, as needed, and pay the vendor. As a result, LBUSD owns the equipment and is responsible for the insurance, maintenance and repair of the equipment.

Although a Fiduciary Agreement should accompany a PTA check to the District, the District will process the payment without it. It is the choice of the PTA to send the Fiduciary Agreement to LBUSD to obtain a signature prior to remitting the check. There is an approximate turnaround time of 10 work days. The other option is to send the Fiduciary Agreement with the check and the signed form would be returned with the acceptance letter.

Since gifts are accepted by the LBUSD Board of Education, residual funds may not be refunded without Board approval. The PTA may request to move the residual funds to another line item. Otherwise, the funds will be moved to a general account to be used at the discretion of the school administrator.

If you have any questions regarding the Fiduciary Agreement or the status of a submitted Fiduciary Agreement or check, please contact Renee Arkus, Executive Director of Fiscal Services at (562) 997-8126 or email at rarkus@lbschools.net.
FIDUCIARY AGREEMENT

The ________________________________ PTA/PTSA (PTA), hereby gives to the ________________________________

of ________________________________ Public School District, a monetary grant in the amount of ________________________________
dollars ($______________) check number ________________, dated and signed by ________________________________ president and ________________________________ treasurer of the ________________________________ PTA.

The gift money is for the sole purpose of ________________________________

____________________________________

It is hereby agreed that the gift monies will be spent for the above-stated purpose on or before ________________________________. Any portion of such funds that is unused or unexpended as of such date shall be reimbursed in full to the ________________________________ PTA within seven (7) business days of the expiration date.

The PTA hereby gives to the ________________________________ Public School District, the following equipment ________________________________

____________________________________

The ________________________________ Public School District accepts ownership of the above described equipment, accepts responsibility for the installation, operation and maintenance of the above described equipment, and will keep the above described equipment at ________________________________, for a period of no less than ________________________________ (_______) years.

The conditions set forth in this Fiduciary Agreement are restrictions placed by the PTA upon the donation and use of the above described money or equipment.

______________________________   ________________________________
PTA/PTSA President                     Date

______________________________   ________________________________
PTA/PTSA Treasurer                    Date

______________________________   ________________________________
School Administrator                  Date

______________________________   ________________________________
School District Administrator         Date
Working with Foundations and Booster Clubs

The goal of most on-campus organizations is to provide support and sometimes resources for the students and their families. We are all volunteers trying to make our school a better place for our children. It is because of this common goal that we must strive for trust, communication and coordination with other school affiliated groups. Also, it is imperative to know that we only have the power and duty to run our own organization. We have no jurisdiction over any other organization.

The first step in working with other groups is to schedule a meeting with the principal. All leaders should present their ideas and goals for the school year and seek the principal’s approval on special calendar events (the issue of fundraising is of the utmost importance and should also be discussed). This meeting should serve to set an example of cooperation and to create a harmonious tone.

Fundraising events and activities should be scheduled in such a way as to not conflict with each other.

Another important step would be to develop a non-voting advisory position on the PTA board. This step requires an amendment to the bylaws. A courtesy seat can be granted to a liaison who is not a PTA member. Having a liaison from another group would promote the spirit of cooperation, enable the sharing of information and helping to avoid the duplication of services and activities. Those PTAs who publish a newsletter can allow another organization to have space as long as their information is aligned with the PTA standards and approved by the PTA president.

When it comes to financial matters, the rule to know is that all monies must be kept separate – there should be no co-mingling of funds. Please consult the Toolkit, it is an excellent resource for these and other financial issues. Also when it comes to financial matters, be advised that the IRS has many regulations pertaining to non-profit organizations and that there are significant tax implications when dealing in conjunction with other non-profit organizations.

Make sure you are well informed before engaging in any financial arrangements.
FAQs about Contracts
Who, What, and Why

What is a contract?
A contract is a written legally enforceable agreement between two or more persons or organizations.

Who approves a contract?
Any contract with another organization must be read carefully and must be signed by two elected officers, one of whom must be the president, after a vote of approval by the membership.

Who is responsible for the contract?
When entering into a contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract. The signature on a written contract should read FOR EXAMPLE: “Sunshine PTA, by: John Doe, President.”

What about a verbal contract?
There are no verbal contracts in PTA. Contracts must be in writing. Understand the terms and conditions of the contract. Have the contract reviewed by legal counsel if needed. Ensure that the length of the contract is limited. Do not sign a contract that makes the PTA responsible for injury or damages.

Why is evidence of insurance important?
It is critical that outside vendors/concessionaires/service providers have their own insurance to reduce the possibility the PTA unit will be held liable for the activity. PTAs are required to obtain a Hold Harmless Agreement and Evidence of Insurance from each vendor/concessionaire/service provider that is used. The vendor/concessionaire/service provider, instead of providing a copy of their insurance to each unit, may file an annual Evidence of Insurance with the California State PTA insurance broker.

A list of vendors/concessionaire/service providers that have filed Evidence of Insurance with the PTA is included in the Insurance Loss Prevention Guide. These vendors/concessionaire/service providers do not need to sign the Hold Harmless Agreement or provide a copy of their insurance AS LONG AS the policy had not expired — refer to policy expiration date following their name.

The bottom line is...
NEVER sign a Hold Harmless Agreement on behalf of the PTA unit until the California State PTA insurance broker has been contacted. If the school district requires the PTA to sign a Hold Harmless Agreement for the use of school premises, the PTA should first contact the California State PTA insurance broker. If you are then directed by the insurance broker to sign an Addendum to the facilities use permit, you will find that form in the forms section of the Toolkit.

CAPTA Insurance Broker:
AIM (Association Insurance Management, Inc.) ................ (800) 876 4044
Email: capta@aim-companies.com
DIRECTORS AND OFFICERS LIABILITY INSURANCE

California State PTA provides $1,000,000 Directors and Officers Liability Insurance. This policy covers all unit, council and district PTA officers in the state.

You as a director, officer, member or volunteer of an organization, can be sued because of failure or alleged failure to act within established guidelines. Directors and Officers have a fiduciary duty to their organization and are sued by those who feel members have not lived up to the responsibilities or duties assumed as members of the organization.

Generally these duties are:

**Duty of Loyalty:** Requires you to act in good faith. You must not allow your personal interest to prevail over the interests of the organization. Don’t us the PTA as a personal forum.

**Duty of Care:** Requires you to be diligent and prudent in managing the organization’s affairs. You must be informed and regularly review all financial statements, have regular attendance at board meetings and avoid conflicts of interest.

**Duty of Obedience:** Forbids acts outside the scope of corporate powers. The governing board of the organization must comply with state and federal law, and conform to the organization’s charter, articles of incorporation and bylaws. Refer to your bylaws.

Examples of actual claims that have been filed against nonprofit organizations:

- Wrongful Termination
- Breach of Employment Contract
- Fund Misappropriation
- Discrimination
- Antitrust
- Civil Rights Violation
- Sexual Harassment
- Promotions and Compensation
- Invasion of Privacy
- Interference with Employment Contract
- Inefficient Administration
- Waste of Assets
- Failure to Deliver Services
- Fund-Raising Activities
- Lobbying Activities
- Entering into Contracts where Conflict of Interest May Exist
- Libel and Slander

If you have a potential claim or receive a summons, do NOT hire an attorney. Report the loss immediately to our Broker. If you hire your own defense you will not be reimbursed.

*California State PTA Insurance and Loss Prevention Guide*
BONDING INSURANCE

The basic bond for all unit, council and district PTAs provides $15,000 Employee/Volunteer Theft, $15,000 Forgery and $15,000 Theft, Disappearance and Destruction of money or scrip. There is a $500 deductible. CA State PTA is able to negotiate a very low premium for the bond coverage because of the financial guidelines contained in the PTA Toolkit. It is important to be familiar with and follow the guidelines.

"Theft" means an unlawful taking of property covered by the Policy to the deprivation of the PTA. The term “unlawful” requires criminal intent, and the PTA must have been deprived of the benefit of the claimed property.

The bond provides very limited coverage for credit cards; therefore we discourage the use of cards by unit, council and district PTAs. If you accept cards for payment at your events and one of your volunteers steals the number and misuses it our bond will not cover this type of loss. Units are not allowed to have credit card in the name of the unit or ATM card attached to any PTA bank account.

The insurance carrier has higher limits available for those PTA who have a need. If you wish a higher limit please contact the AIM Association Insurance Management Inc. The higher limit must be purchased by the renewal date in January and is available to units, councils and districts. (Please check the most current Loss and Prevention guide to get the exact date in January)

It is very critical that PTA Financial Guidelines be followed. Two signatures are required on all checks. When a fundraiser is held and large amounts of cash are collected, two unrelated people should count the funds and deposit the money in the bank. Cash should not be left unattended in any car. When a large fundraiser is held it is a good practice to do a review on the fundraiser immediately upon completion of the event. A review will immediately reveal if funds are missing. If funds are not deposited right away a copy of the cash verification form must be kept separated from the cash. If stolen with the cash you will have lost your evidence.

It is very critical that you have a good paper trail on your transactions. If you have a loss, you need to prove the loss to the company with sufficient paperwork. If you cannot, the bonding company will not pay the loss.

You must report a loss within 60 days of discovering a potential claim. Contact your PTA District President as soon as you suspect mismanagement.

The bonding company can refuse to insure a unit if they are not following PTA financial procedures. There is no coverage afforded to anyone under the bond if you are aware they have previously stolen. Refer to the Insurance and Loss Prevention Guide for the Bond Claim Form.

No Property Insurance

The California State PTA does not provide insurance for any personal or real property the association might own. If the PTA owns computers, merchandise being held for sales (e.g., gift wrap, food items), staging, costumes, decorations or any other items of value, the association should contact a local insurance broker for coverage. If goods held for sale are stolen, burned in a fire or are in anyway damaged there is no coverage. The PTA unit may also contact the California State PTA Insurance broker for coverage.

California State PTA Insurance and Loss Prevention Guide
Conflict of Interest Policy

 Anyone in a position to make decisions about spending the PTA’s resources (i.e., transactions such as purchases and contracts) – who also stands to benefit from that decision – has a duty to disclose that conflict as soon as it arises or when it becomes apparent; he or she should not participate in any final decisions.

 A copy of this policy shall be given to all members of the board, officers, and staff members upon commencement of such person’s relationship with the PTA or at the official adoption of this policy. Each board member, officer, and staff member shall sign and date the policy at the beginning of his or her term of service or employment and each year thereafter. Failure to sign does not nullify the policy.

 Each member of the board, officer, and staff member shall annually sign a statement which affirms such person (see Conflict/Whistleblower Form on next page):
 a. Has received a copy of this conflict of interest policy,
 b. Has read and understands the policy,
 c. Has agreed to comply with the policy, and
 d. Understands that the PTA is a constituent organization of the California State PTA as a nonprofit corporation and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax exempt purposes.

 Whistleblower Policy
http://toolkit.capta.org/running-your-pta/planning-organizing/whistleblower-policy/

 This Whistleblower Policy of the California State PTA: (1) encourages directors, officers, staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the association; (2) specifies that the association will protect the person from retaliation; and (3) identifies where such information can be reported.

 1. Encouragement of reporting. The association encourages complaints, reports or inquiries about illegal practices or serious violations of the association’s policies, including illegal or improper conduct by the association itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which the association has existing complaint mechanisms should be addressed under those mechanisms, such as raising matters of alleged discrimination or harassment via the association’s president or the council/district president. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

 2. Protection from Retaliation. The association prohibits retaliation by or on behalf of the association against employees or volunteers for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. The association reserves theright to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.

 Where to report. Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the basis of the complaints, reports or inquiries. They should be directed to the association president and the council/district PTA president; if the president is implicated in the complaint, report or inquiry, it should be directed to the only to the council/district PTA president. The association or council/district will conduct a prompt, discreet, and objective review or investigation. Officers, volunteers, and staff must recognize that the association may be unable to fully evaluate a vague or general complaint, report, or inquiry that is made anonymously.
CONFLICT/WHISTLEBLOWER FORM
ANNUAL QUESTIONNAIRE

UNIT NAME ____________________________

NAME: ____________________________ Telephone: (_____) ____________

PTA POSITION: ____________________________

Occupation: ____________________________

Name of Employer: ____________________________

Employer’s Address: ____________________________

City ____________________________ State Zip ____________

1. I have read the California State PTA Conflict of Interest Policy (http://toolkit.capta.org/running-your-pta/planning-organizing/conflict-of-interest-policy/): Initial ____________

2. I have read the California State PTA Whistleblower Policy (http://toolkit.capta.org/running-your-pta/planning-organizing/whistleblower-policy/): Initial ____________

3. I understand that as a board member, I have a responsibility to review the tax return: Initial ____________

4. Are you currently being compensated by the PTA for services rendered to the organization (whether as a part-time or full-time employee, independent contractor, consultant or otherwise) within the previous 12 months? Yes No

5. Do you anticipate the receipt of compensation from the PTA for the rendering of services as described in question 1 above during the upcoming 12 months? Yes No

6. If any person bearing any of the following relationships to you is currently being compensated by the PTA for services rendered to it as described in question 4 above within the previous 12 months, please list his or her name in the following space and indicate the person’s relationship to you by using the relationships designated below (if no such person is being compensated, please print the word “none” in the first space): Yes No


   Name ____________________________ Relationship ____________________________

7. If any person bearing any relationship to you as described in question 6 above anticipates the receipt from the PTA for the rendering of services to it as described in question 4 above within the next 12 months, please list his or her name in the following space and indicate this person’s relationship to you (if no such person anticipates receipt of such compensation, please print the word “none” in the first space).

   Name ____________________________ Relationship ____________________________

8. Are you a director, an officer, an employee or an owner in any business or entity which has done business within the previous 12 months with the California State PTA, or currently is, or is contemplating doing business with the business? Yes No

   If yes, please explain type of business, type(s) of transaction(s), relationship: ____________________________

   ____________________________ ____________________________

Date: ____________________________ ________ 20__, Signature ____________________________

2327 L Street, Sacramento, CA 95816-5014 916.440.1985 • FAX 916.440.1986 • info@capta.org • www.capta.org
## CASH VERIFICATION FORM

(Membership, Fundraisers, Programs, Donations)

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>START UP CASH $_________ (denomination breakdown may be used to prepare future start up cash)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COINS</th>
<th>CURRENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>x 1¢ =</td>
<td>x $1 =</td>
</tr>
<tr>
<td>x 5¢ =</td>
<td>x $5 =</td>
</tr>
<tr>
<td>x 10¢ =</td>
<td>x $10 =</td>
</tr>
<tr>
<td>x 25¢ =</td>
<td>x $20 =</td>
</tr>
<tr>
<td>x 50¢ =</td>
<td>x $50 =</td>
</tr>
<tr>
<td>x $1 =</td>
<td>x $100 =</td>
</tr>
</tbody>
</table>

TOTAL $_________  TOTAL $_________

Deduct Start Up Cash (any denomination) before preparing Activity Deposit ($ _________)

<table>
<thead>
<tr>
<th>COINS</th>
<th>CHECKS Attach adding machine tape of itemized checks.</th>
</tr>
</thead>
<tbody>
<tr>
<td>x 1¢ =</td>
<td># $ # $</td>
</tr>
<tr>
<td>x 5¢ =</td>
<td># $ # $</td>
</tr>
<tr>
<td>x 10¢ =</td>
<td># $ # $</td>
</tr>
<tr>
<td>x 25¢ =</td>
<td># $ # $</td>
</tr>
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<tr>
<td>x $1 =</td>
<td># $ # $</td>
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</table>

TOTAL $_________  # $ # $

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<th>CURRENCY</th>
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<td>x $50 =</td>
<td># $ # $</td>
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<tr>
<td>x $100 =</td>
<td># $ TOTAL $_________</td>
</tr>
</tbody>
</table>

TOTAL $_________  GRAND TOTAL $_________

Make a copy of this form and keep it separate from deposit. Copies of checks is optional and will not assist to recoup a loss from the insurance Co. PTA is responsible for private information on checks that are copied and kept on file. The Insurance Bond Policy does not cover deposits that go missing in a mysterious or unexplained way.

### MEMBERSHIP DUES

# members @ $_________ (dues) = $_________ + donations = $_________ Grand Total $_________

### FOR OFFICIAL USE ONLY

<table>
<thead>
<tr>
<th>Name</th>
<th>Signature</th>
<th>Amount Received: $_________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Signature</td>
<td>Name Signature</td>
</tr>
<tr>
<td>Name</td>
<td>Signature</td>
<td>Receipt # Date</td>
</tr>
</tbody>
</table>

106
Payment Authorization Form

Name of Unit

Activity/Program/Event Name: ___________________________ Total Amount Requested: $__________

Description of Expenses: ____________________________________________________________

Name of Requestor: ___________________________________ PTA position: ____________________

Address: __________________________________________________________________________
          Street                  City                  Zip
          ________________________________________________________________

Telephone (___) ________________________________________________________________

E-mail: __________________________________________________________________________

Write Check to: (If different than above)

Address: __________________________________________________________________________
          Street                  City                  Zip
          ________________________________________________________________

Telephone (___) ________________________________________________________________

E-mail: __________________________________________________________________________

Officer/Chairman’s Name: ______________________________ Signature: ______________________ Date: ____________

Date Expenses were approved in Association minutes: ____________

Recording Secretary’s Name: ______________________________ Signature: ______________________ Date: ____________

President’s Name: ______________________________ Signature: ______________________ Date: ____________

TREASURER’S USE ONLY:

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Budgeted Amount</th>
<th>Previous Disbursement(s)</th>
<th>Available Balance</th>
<th>Check Number</th>
<th>Amount</th>
</tr>
</thead>
</table>

Instructions for Payment Authorizations

- Must be signed by two officers: secretary and president.
- Must be signed by the person making the request.
- Must be written for amounts approved in the minutes.
- Must have a receipt or invoice attached.
- Must include who to make the check out to.
- Must include the Check No
REQUEST FOR AN ADVANCE FORM

Date: __________________  Activity: ___________________________________________

Check Payable to: ___________________________  Email: ___________________________

Address: ___________________________________________  Telephone No: ___________

Approved Budget Amount: ___________________

Previous Advance Amount: ___________________ (Budget Balance Available $ __________)

Requested Advance Amount: ___________________ (Attach List of Estimated Expenditures)

Available Budget Amount: ___________________

I request the above advance for expenses authorized by the Board and funds released by the Association for the approved PTA activity. Within 2 weeks of the completed activity, I agree to submit an Advance Clearance Form with all required original receipts and to refund the unused portion of the advance or to claim, on a Payment Authorization form, monies paid by me in excess of the advance amount but within the approved budget.

Printed Name: ___________________________  Position: ___________________________

Signature: ___________________________________________  Date: _________________

Chairperson Approval (If different than Requestor):

Name ___________________________  Signature ___________________________

President/Recording Secretary Use Only:

______ Membership-Approved Activity  ______ Funds Released by Membership

______ List of Estimated Expenditure attached

President’s Signature ___________________________  Date: ___________________________

Recording Secretary’s Signature ___________________________  Date: ___________________________

Treasurer Use Only:

Advance Check #: __________  Check Date: __________  Check Amt.: __________

Note: Advances will not be authorized for expenditures which are invoiced by a vendor and can be paid directly to the vendor via a check issued by the PTA.
ADVANCE CLEARANCE (EXPENSE STATEMENT)

(Attach all original receipts)

Original Advance – Check Date: ______________ Check #: ______________ Check Amount: ____________

Date: ______________ Activity: ____________________________________________________________________________

Requestor Name: _________________________________________________________________________________________

Position: _____________________________________________________________________________________________

List Expenditures: ______________________________________________________________________________________

Amount: ____________

__________________________________________________________________________ Amount: ____________

__________________________________________________________________________ Amount: ____________

__________________________________________________________________________ Amount: ____________

Total Expenditures (per attached receipts not to exceed budget): Amount: ____________

Total Amount Claimed: ____________ (total expenditures above)

Less Advance Received: ____________ (subtract advance received)

Reimbursement Claimed: ____________ (expense exceeds advance-submit check request)

Refund to PTA: ____________ (expense is less than advance – attach check)

Requestor Name: ______________________________ Signature: ______________________________

Reviewed by: ______________________________ Date: __________________

Treasurer

NOTE: Within 2 weeks of the completed activity, I agree to submit an Advance Clearance Form (expense statement) with all required original receipts and to refund the unused portion of the advance or to claim, on a Payment Authorization Form, monies paid by me in excess of the advance but within the approved budget.
FINANCIAL RED FLAGS

- Unapproved annual budget and/or calendar of events
- Board unfamiliar with payment authorization procedure
- Receipts not attached to Payment Authorization/Request for Reimbursement Form(s)
- Fundraising projects that benefit a board member financially (Conflict of Interest)
- Lack of documentation of fundraiser income and expenses
- Only one person counting money; no cash verification sheets
- Only one person signing checks; only one person on bank signature card
- Signing blank checks
- Late payment of bills
- Bank statements sent to officer’s house rather than the school
- Bank statements not reviewed by a non-check signer
- No treasurer’s reports at executive board or association meetings
- Reports are given orally with written information to be provided “later”
- Organization not meeting Federal and California filing requirements and deadlines
- Audits not performed as scheduled
- Failure to provide a year-end audit on request

FINANCIAL SITUATIONS TO AVOID

- President writes the checks because the treasurer has no experience, is unavailable, etc.
- Funding projects without going through the approval process required by PTA
- School staff member as treasurer or president
- Paying for salaries for ongoing staff positions (encumbering future boards)
- Lack of/incomplete minutes, particularly in matters involving use of funds; no motions releasing funds or approving expenses
- Banks that do not return processed checks or make copies available
TREASURER Money Matters & Turn-in Form

Complete the information below, attach this form to your paperwork/check(s) and turn in to your Unit President prior to the monthly UPS meeting. Refer to the 2019-2020 Unit Treasurer Tracker to ascertain what is due. The president should initial the receipt of these items and return the form to the Treasurer.

(If the president is unavailable to turn in the below mentioned items to their area advisor, contact your area advisor for a mutually agreeable turn in time and place. Please go to Chain of Command, page 2 of the Green Book to find your area advisor.)

(PLEASE MAKE COPIES OF THIS FORM BEFORE FILLING IT IN)

Date: _______________  Unit Name: ___________________________________________
Person Completing Form: _______________________________________________________
PTA Position: ___________________________ Phone #: ___________________________
Email: _____________________________ Area Advisor: ___________________________

WHAT IS BEING TURNED IN:
Make all checks payable to LBCPTA unless otherwise noted.

<table>
<thead>
<tr>
<th>Item</th>
<th>Total</th>
<th>Ck#</th>
<th>UP Init</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership: (#) ________ members X $5.05</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership: (#) ________ members X $5.05</td>
<td>$</td>
<td></td>
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<tr>
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<td>$</td>
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<td></td>
</tr>
</tbody>
</table>

Paperwork Items  Notes  Copies  UP Initials

Make a copy of this form (before turning in to President) and file with payment authorizations file.
# 2019 – 2020 Unit Presidents Tracker

**TURN IN THIS FORM EVERY MONTH, ALONG WITH THE MONEY MATTERS FORM ON PAGE 100 OF THE RED BOOK.**

**Unit Name:** 

**PTA President:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Item</th>
<th>Copies</th>
<th>Area Advisor Notes &amp; Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aug. 13</strong>&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Red Book Training Meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sep. 10</strong>&lt;sup&gt;th&lt;/sup&gt;</td>
<td><strong>UPs Executive Board Meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 100</td>
<td>Money Matters &amp; Turn In Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td>Treasurer’s Report (May – August)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 105</td>
<td>Unit Treasurer’s Annual Report [UTAR] 7/1/18 to 6/30/19</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 84</td>
<td>Year End Audit (January 2019 – June 2019)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 115</td>
<td>Taxes – 199 State (7/1/18 – 6/30/19)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 115</td>
<td>Taxes – 990 Federal (7/1/18 – 6/30/19)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 115</td>
<td>RRF-1 (7/1/18 – 6/30/19)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 40</td>
<td>Membership Dues (#):</td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td>p. 109</td>
<td>Officer, Committee Chair &amp; Delegate Contact Info</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>RESERVATIONS for 33&lt;sup&gt;rd&lt;/sup&gt; Legislative Conference (10/10/19)</strong></td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td></td>
<td><strong>RESERVATIONS for 33&lt;sup&gt;rd&lt;/sup&gt; Fall Meeting &amp; Training (10/12/19)</strong></td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td><strong>Oct. 8</strong>&lt;sup&gt;th&lt;/sup&gt;</td>
<td><strong>UPs Executive Board Meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 100</td>
<td>Money Matters &amp; Turn In Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td>Treasurer’s Report (September)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 121</td>
<td>Council Assessment Fee $100.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 75</td>
<td>Unit Budget [Approved by association in Sep.]</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 38</td>
<td>Membership Dues (#):</td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td>p. 33</td>
<td>Association Meeting Minutes (September)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 164</td>
<td>PAT Award Certificate Order Form [Praise, Appreciation, &amp; Thanks]</td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td></td>
<td><strong>RESERVATIONS for 33&lt;sup&gt;rd&lt;/sup&gt; Presidents &amp; Principals (11/7/19)</strong></td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td><strong>Nov. 12</strong>&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Council Association Meeting BRING (min of 2) DELEGATES!</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 100</td>
<td>Money Matters &amp; Turn In Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td>Treasurer’s Report (October)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 74</td>
<td>Insurance Premium – amount to be determined</td>
<td>(Chk #):</td>
<td>($)</td>
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<tr>
<td>p. 127</td>
<td>Worker’s Compensation Form - ALL UNITS MUST FILL OUT AND TURN IN</td>
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<td></td>
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<tr>
<td>p. 40</td>
<td>Membership Dues (#):</td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td>p. 33</td>
<td>Association Meeting Minutes (October)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 164</td>
<td>PAT Award Certificate Order Form [Praise, Appreciation, &amp; Thanks]</td>
<td>(Chk #):</td>
<td>($)</td>
</tr>
<tr>
<td>p. 145</td>
<td>Unit Program/Directory Award Form</td>
<td>2</td>
<td>1</td>
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<tr>
<td>p. 147</td>
<td>Reflections Entries &amp; Forms</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>p. 121</td>
<td>Delegate Names:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Highlighted** items are REQUIRED. No unit will be considered for an award unless these items are turned in. Please make sure to communicate with your Area Advisor on a monthly basis.
### 2019 – 2020 Unit Presidents Tracker

**TURN IN THIS FORM EVERY MONTH, ALONG WITH THE MONEY MATTERS FORM ON PAGE 100 IN THE RED BOOK.**

<table>
<thead>
<tr>
<th>Date</th>
<th>Item</th>
<th>Copies</th>
<th>Area Advisor Notes &amp; Initials</th>
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<tbody>
<tr>
<td>Jan. 14th</td>
<td><strong>UPs Executive Board Meeting</strong></td>
<td></td>
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<tr>
<td>p. 100</td>
<td>Money Matters &amp; Turn in Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td><strong>Treasurer’s Report (November &amp; December)</strong></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 38</td>
<td>Membership Dues (#):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 33</td>
<td><strong>Association Meeting Minutes (November &amp; December)</strong></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 164</td>
<td>PAT Award Certificate Order Form (Praise, Appreciation, &amp; Thanks)</td>
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<tr>
<td></td>
<td>RESERVATIONS LBCPTA Founders Day Meeting (2/26/19)</td>
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<td>RESERVATIONS for 33rd District Annual Meeting</td>
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<td>RESERVATIONS Sacramento Safari (2/25-26/2020)</td>
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<td>Feb. 11th</td>
<td><strong>UPs Executive Board Meeting FOUNDERS DAY</strong></td>
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<tr>
<td>p. 100</td>
<td>Money Matters &amp; Turn In Form</td>
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<tr>
<td>p. 159</td>
<td>33rd District PTA Free Will Offering</td>
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<td>p. 38</td>
<td>Membership Dues (#):</td>
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<td></td>
<td>RESERVATIONS for 33rd Diversity &amp; Inclusion Conference</td>
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<tr>
<td>Mar. 10th</td>
<td><strong>Council Association Meeting - BRING Min of 2 DELEGATES!</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 100</td>
<td>Money Matters &amp; Turn In Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td><strong>Treasurer’s Report (January &amp; February)</strong></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 84</td>
<td>Mid-Year Audit (July 2019 – December 2019)</td>
<td>2</td>
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</tr>
<tr>
<td>p. 168</td>
<td>Annual Historians Report</td>
<td>2</td>
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</tr>
<tr>
<td>p. 75</td>
<td>Budget Update (Year-to-Date Actuals)</td>
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<td>p. 38</td>
<td>Membership Dues (#):</td>
<td></td>
<td></td>
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<tr>
<td>p. 33</td>
<td><strong>Association Meeting Minutes (January &amp; February)</strong></td>
<td>1</td>
<td></td>
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<tr>
<td>p. 164</td>
<td>PAT Award Certificate Order Form (Praise, Appreciation, &amp; Thanks)</td>
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<tr>
<td>p. 171</td>
<td>LBEPTA Communications (Copies of 3 different issues) Award Form</td>
<td>2 each</td>
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<tr>
<td></td>
<td>RESERVATIONS for 33rd Spring Awards &amp; Meeting (4/23/19)</td>
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</tr>
<tr>
<td>p. 166</td>
<td>Delegates Names:</td>
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<tr>
<td>Apr. 7th</td>
<td><strong>UPs Executive Board Meeting</strong></td>
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<tr>
<td>p. 100</td>
<td>Money Matters Turn In Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td><strong>Treasurer’s Report (March)</strong></td>
<td>1</td>
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</tr>
<tr>
<td>p. 181</td>
<td>2020-2021 Officers Contact Form</td>
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<tr>
<td>p. 38</td>
<td>Membership Dues (#):</td>
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<td></td>
</tr>
<tr>
<td>p. 33</td>
<td><strong>Association Meeting Minutes (March)</strong></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 164</td>
<td>PAT Award Certificate Order Form (Praise, Appreciation, &amp; Thanks)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 179</td>
<td>Teacher of the Year (TOTY) Entry Form and Essay</td>
<td>1</td>
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</tr>
<tr>
<td>p. 166</td>
<td>Unit Information Sheet &amp; Fees for CAPTA Convention</td>
<td>1</td>
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</tr>
<tr>
<td>p. 166</td>
<td>PTA Membership Envelopes</td>
<td></td>
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<tr>
<td>p. 166</td>
<td>Thirty-Third District Calendars</td>
<td></td>
<td></td>
</tr>
<tr>
<td>May 12th</td>
<td><strong>UPs Executive Board Meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 100</td>
<td>Money Matters Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 77</td>
<td><strong>Treasurer’s Report (April)</strong></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 38</td>
<td>Membership Dues (#):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p. 33</td>
<td><strong>Association Meeting Minutes (April)</strong></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 164</td>
<td>PAT Award Certificate Order Form (Praise, Appreciation, &amp; Thanks)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>RESERVATIONS LBCPTA In &amp; Out Meeting &amp; Awards (6/2/20)</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>RESERVATIONS 33rd Spring Training (6/6/20)</td>
<td></td>
<td></td>
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<tr>
<td>p. 186</td>
<td>Volunteer/Teacher/Community Recognition Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 188</td>
<td>Unit Program Report Form</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>p. 190</td>
<td>Bylaws Status Form</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AUGUST 2019

(R) = Required

WHAT YOU MAY NEED TO WORK ON THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)

Professional Governance Standards: see instructions in the SEPTEMBER section for continuing to earn a Certificate of Recognition for your unit from California State PTA.

Due in September:
• (R) Treasurer’s Reports: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month beginning in SEPTEMBER where you will need to turn in reports from MAY to AUGUST.
• (R) Year-End Audit: This audit covers the months from JANUARY to JUNE. See the AUDIT INFO pages in the FINANCE section of the RED BOOK for form and guidance.
• (R) Unit Treasurer’s Annual Report (UTAR): The numbers reported will be used in filling out the unit’s income tax forms. More information can be found in the AUGUST section of the RED BOOK.
• (R) Taxes – 199 State and 990 Federal: More information available in the September section of the Red Book.
• (R) RRF-1 – More information available in the September section of the Red Book.
• (R) Officer, Chairman & Delegate List (OCD List): This is a list of the people who make up the executive board in your unit and the names of your delegates. Article X in your unit bylaws state that you should appoint 2 delegates to bring with you to the Unit Presidents meetings in NOVEMBER, MARCH AND JUNE.
• Reservations – Thirty-Third District PTA Legislative Conference: Info will be emailed directly to the Unit Presidents. This conference is open to all PTA officers. We also encourage high school units to include students who may be interested in advocacy and education for this event.
• Reservations – Thirty-Third District PTA Meeting & Training: Info will be emailed directly to the Unit Presidents. Your attendance at the meeting and workshops is strongly encouraged. Attend up to three workshops to help you understand your position on your PTA board this year. Refresh your knowledge of PTA.

Community Outreach: If your unit participates in a collection of items to donate to BETHUNE or another local charity, it counts towards the Programs portion of the Honor Unit Awards. Please look in the NOVEMBER section of the Red Book for more information.
THIRTY-THIRD DISTRICT PTA
INSTRUCTIONS FOR UNIT TREASURER’S ANNUAL REPORT TO COUNCIL

July 1, 2018 to June 30, 2019

This report is to be prepared in triplicate: one copy for the Thirty-Third District PTA treasurer, one copy for the council treasurer, and one copy for the unit procedure book. This report is most important, especially when filing Federal Income Tax Forms and are audited by the IRS. PLEASE NOTE: if you have more than one account, you may report the less active accounts on a separate page and include sub totals on the main report, or you may do a report for each separate account and combine all accounts on one main report. CAUTION: Do not duplicate transferred amounts from one account to another in the total.

RECEIPTS: Indicate balance(s) on hand as of June 30, 2019, which should be the same as the ending balance reported on the prior annual report.

1. **Membership Dues** — indicate only the portion that the unit keeps. Fill in the unit portion of dues per member times the number of members (for example: $1.50 x 200 = $300).

2. **Program Service Revenue** — any revenue received from events sponsored for parents & students (activities not meant as fundraisers).

3. **Interest Income** — interest received on checking and savings accounts.

4. **Special Events and Activities** — all receipts (gross) from fundraisers; i.e., carnivals, paper drive, magazine subscription sales, book fairs, etc.

5. **Other Income** — any income not included in the above categories is included on this line.

6. **Receipts Not Belonging to the Unit** — the portion of the per capita membership that is passed on to the council for council, district, State and National dues, as well as receipts from the Founders Day free will offering are included here. Indicate the number of memberships times the dollar amount sent to the council, as well as the total.

DISBURSEMENTS

1. **Program Service Expense (Student Assistance & Parent Education)** — the amount expended for student welfare and programs, such as room parties, awards, scholarships, gifts to the school, leadership training expenses and parent education programs.

2. **Direct Expenses of Special Events** — all expenses incurred in fundraisers (see #4 above).

3. **Organizational Expenses** — President’s reimbursable expenses, convention expenses, officers’ and chairmen expenses, insurance, supplies, etc. This category also includes Honorary Service Award pins and past president’s pins.

4. **Honorary Service Award** — include only the money sent to State PTA for each award (do not include cost of pin). This money is used for scholarships and the amount is part of Program Service Expense on the tax forms.

5. **Founders Day** — Unit donation as budgeted. Also, part of Program Service Expense on the tax forms.

6. **Other Disbursements** — list anything that doesn’t come under another category.

7. **Disbursements Not Belonging to the Unit** — per capita membership sent to council for council, district, State and National share of dues, as well as Founders Day receipts (free will offering only). Indicate the number of memberships times the dollar amount sent to the council.

**BALANCE ON HAND, ANNUAL REPORT June 30, 2019** — subtract TOTAL DISBURSEMENTS from TOTAL RECEIPTS AND BALANCE ON HAND. These figures must match the checkbook balance plus balances in any savings and/or investment accounts. **Draw a green line in the checkbook and ledger** to show what has been included in this year’s report and where the treasurer will begin next year’s report.
THIRTY-THIRD DISTRICT PTA
UNIT TREASURER’S REPORT TO COUNCIL
July 1, 2018 to June 30, 2019

UNIT_________________ COUNCIL_________________
ANNUAL DUES ARE $___________ PER MEMBER IRS-EI NUMBER_________________
BANK_________________ CHECKING ACCOUNT #_________________

RECEIPTS

BALANCE ON HAND, ANNUAL REPORT June 30, 2019 $___________ A

1. Membership Dues ($_______) X (_______) $___________
   unit portion times # of members

2. Program Service Revenue $___________
3. Interest Income $___________
4. Special Events and Activities (Gross Income) $___________
5. Other Income $___________

   TOTAL INSIDE COLUMN (sum of 1, 2, 3, 4 & 5) $___________ *

6. Receipts not belonging to unit:
   a. Council, district, state and national portion of dues
      ($5.05) X (_______) $___________
      transitory portion of dues times number of members
   b. Founders Day gift (free will offering) $___________

   TOTAL INSIDE COLUMN (sum of 6a & 6b) $___________ *

TOTAL RECEIPTS (SUM OF TOTALS MARKED WITH *) $___________ B

TOTAL RECEIPTS AND BALANCE ON HAND (sum of A & B) $___________ C

DISBURSEMENTS

1. Program Service Expense (Student Assistance & Parent Ed) $___________
2. Direct Expenses of Special Events $___________
3. Organization Expenses $___________
4. Honorary Service Awards (_______)
   (do not include cost of pins)# of awards $___________
5. Founders Day Unit Donation as Budgeted $___________
6. Other Disbursements $___________

   TOTAL INSIDE COLUMN (sum of 1-6) $___________ #

7. Disbursements Not Belonging to Unit:
   a. Council, district, state & national portion of dues
      ($5.05) X (_______) $___________
      transitory portion of dues times number of members
   b. Founders Day Gift (free will offering) $___________

   TOTAL INSIDE COLUMN (sum 7a & 7b) $___________ #

TOTAL DISBURSEMENTS (sum of totals marked with #) $___________ D

BALANCE ON HAND, June 30, 2019 (subtract D from C) $___________

(This figure should be the same as the total in your checkbook and savings at the time of this report.)

_________________
NAME OF PERSON MAKING THIS REPORT _____________________

_________________
CELL _____________________

RETAIN ONE COPY FOR YOUR UNIT & SEND TWO COPIES TO YOUR COUNCIL
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SEPTEMBER 2019

WHAT IS DUE THIS MONTH:

(Please contact your Area Advisor if you need help with any of the items listed below)

(R) = Required

(R) Treasurer’s Reports: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

(R) Unit Treasurer Report (UTAR) See August Section for more information

(R) Year End Audit

(R) Taxes – 199 State & 990 Federal

(R) RRF-1

(R) Officer, Committee Chair & Delegate Contact Info

RESERVATIONS - 33rd Legislative Conference (10/10/19)

RESERVATIONS - 33rd Presidents & Administrative Conference (11/7/19)

Membership Dues – Membership dues are to be turned in monthly as received. More information can be found in the PTA BASICS section of the Red Book.

PAT Award Certificates Order Form.

(R) Officer, Chairman & Delegate List (OCD List): This is a list of the people who make up the executive board in your unit and the names of your delegates. Article IX or X – Council Membership in your unit bylaws state that you should appoint 2 delegates to bring with you to the Unit Presidents meetings in NOVEMBER, MARCH AND JUNE.

Professional Governance Standards: see instructions in the SEPTEMBER section for completing this form and earning a Certificate of Recognition for your unit from California State PTA.

WHAT YOU MAY NEED TO WORK ON THIS MONTH:

Due in October:

• (R) Council Assessment Fee: This money is used to run the business side of the Long Beach Council PTA. Each unit must pay this to be considered a “unit in good standing” with the Long Beach Council PTA.

• (R) Unit Budget: You need to have your budget approved at your first association meeting. Your unit would have worked on this over the summer and it should be presented and approved at the first association meeting of the school year in September. See the SAMPLE BUDGET in the FINANCE section for guidance.

• (R) Membership dues: Make sure to start your Membership Campaign as soon as possible. If you would like your unit to be eligible for the Ready, Set, Remit award, you will need to turn in dues for 30+ members. More information on Membership Dues and Campaigns can be found in the PTA BASICS section.

• Reservations – Thirty-Third District PTA Presidents and Administration Conference: Info to be emailed directly to the Unit Presidents.

• Red Ribbon Celebration (last week in OCTOBER): info in the OCTOBER section of the Red Book.
INCLUSION + LEADERSHIP = AN AMAZING PTA
INCLUSION ALL YEAR LONG

September
*Smile – A smile can be contagious
*Break the ice – Start a conversation with someone new
*Demonstrate mutual respect – Inclusion means being respectful regardless of position or title.

October
*Say “Hello” – You could make someone’s day!
*Say “Thank You” – Gratitude is a gift that’s never too small.
*Be a relationship builder – Seek ways to expand your network.

November
*Be open – Try to experience new thoughts and ideas as learning opportunities.
*Communicate respectfully – It is not what you say, but how you say it.
*Get someone else’s point of view – After sharing your perspective, give others a chance to share theirs.

December
*Practice patience – Take time to get the full story.
*Seek understanding – It’s better to not fully understand than to fully misunderstand.
*Listen – People feel respected when they know you’re listening to their point of view.

January
*Do the right thing – Be fair
*Get involved – Make a difference. Get caught being good.
*Lend a hand – A little help can go a long way.

February
*Reinvent the wheel – Do something that hasn’t already been done.
*Be flexible – Things don’t always go as planned. Adapt to changing conditions when necessary.
*Remember, we all make mistakes – Resist the urge to point out the ones others make.

March
*Treat others the way you want to be treated – Find out what respect means to others.
*Be culturally competent – Differences are barriers only if we allow them to be.
*Find common ground – Discover what you have in common.

April
*Sweat the small stuff – It’s often the small things, such as being kind and courteous that make a difference.
*Be considerate – Your words and actions affect others.
*Join the team – Do your part to support teamwork.

May
*Ask – It’s ok to ask when you are not sure.
*Share your point of view – Everyone has a perspective. Let others benefit from yours.
*Take a healthy step – Do something good for your health and encourage a friend to join you.

June
*Lead the way – Let your inclusive behavior light a path for others.
*Become a mentor – You, yes you can help others realize their potential.
*Be a champion of dignity and respect – Encourage others to do the same.
# Unit Roster for 2019 – 2020 school year

*You can use this form or your own version to turn into your Area Advisor.*
The first three officer positions are required for every PTA. Your unit may not have all the other positions listed. Check your bylaws for elected and appointed board positions.

<table>
<thead>
<tr>
<th>Officer</th>
<th>Name</th>
<th>Phone #</th>
<th>email</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secretary</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Treasurer</td>
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<td></td>
</tr>
<tr>
<td>Additional Positions</td>
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<tr>
<td>Executive VP</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Auditor</td>
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<tr>
<td>Financial Secretary</td>
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</tr>
<tr>
<td>Historian</td>
<td></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Please write in what each VP shall serve as</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Vice President:</td>
</tr>
<tr>
<td>2nd Vice President:</td>
</tr>
<tr>
<td>3rd Vice President:</td>
</tr>
<tr>
<td>4th Vice President:</td>
</tr>
<tr>
<td>5th Vice President:</td>
</tr>
<tr>
<td>6th Vice President:</td>
</tr>
<tr>
<td>Appointed Positions</td>
</tr>
<tr>
<td>Corresponding Secretary</td>
</tr>
<tr>
<td>Parliamentarian</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delegates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegate 1</td>
</tr>
<tr>
<td>Delegate 2</td>
</tr>
</tbody>
</table>
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Professional Governance Standards

toolkit.capta.org/running-your-pta/planning-organizing/professional-governance-standards/

everychild.we voice.

The bylaws and standing rules for each PTA provide a framework for the organization. In order to operate effectively using this framework, PTA executive boards and individual board members will benefit from adherence to professional standards of governance.

Professional governance standards specify principles involved in governing responsibly and effectively and were developed to support PTA boards in their efforts to enhance their membership’s and the community’s understanding about the responsibilities of the PTA board.

The Individual Board Member

A PTA board member is a person elected or appointed to serve on a PTA executive board. Individual board members bring unique skills, values and beliefs to the PTA board and in order to function effectively, individual board members must work together for the association.

To be effective, an individual board member

➢ Recognizes and respects differences of perspective and style among the individual board members;
➢ Acts with dignity and understands the implications of demeanor and behavior;
➢ Honors the confidentiality of board discussions;
➢ Is open to new ideas and suggestions;
➢ Is familiar with the bylaws in respect to the individual position as well as the organization as a whole;
➢ Understands that authority rests with the board as a whole and not with individuals;
➢ Understands that the basis for all authority rests with the membership;
➢ Participates in opportunities for training;
➢ Commits the time and energy necessary to be an informed and effective leader;
➢ Assists those with less experience;
➢ Understands the distinctions between PTA and the school staff and refrains from performing functions that are the responsibility of the school district;
➢ Values, supports and advocates for public education;
➢ Represents the PTA only when authorized to do so.

The PTA Executive Board

The members of the PTA executive board work together as a governance team which assumes collective responsibility for building unity and creating a positive climate during term of office.

To operate effectively, the executive board

➢ Develops a unity of purpose by involving parents/guardians, students, staff and community;
➢ Communicates a common vision;
➢ Operates with trust and integrity;
➢ Remains responsive to input from the school community;
➢ Governs in a professional manner, treating everyone with civility and respect;
➢ Fulfills requirements set within bylaws and standing rules;
➢ Takes collective responsibility for the board’s performance;
➢ Proposes for adoption by the membership a fiscally responsible budget based on the organization’s vision and goals;
➢ Monitors the fiscal health of the association regularly;
➢ Ensures that safe and appropriate activities are provided to implement the goals;
➢ Provides community leadership on issues that affect children and youth;
➢ Works collaboratively with other groups and agencies that share the same concerns on issues that affect children and youth;
➢ Encourages individual board members to attend available training opportunities;
➢ Serves as a communication link between the home, school and community;
➢ Evaluates the activities and direction of the board on a regular basis.

Procedures for Adoption of Professional Governance Standards

The California State PTA has adopted the Professional Governance Standards and encourages all unit, council, and district PTA executive boards to review and adopt the standards at the beginning of their term as an integral part of their team building and orientation process; however adoption of the standards can take place at any time. The Toolkit includes the brochure entitled Professional Governance Standards, which includes a form that a PTA may complete upon adoption by a vote of the PTA board.

The PTA shall submit the form in the brochure (or you can use the one below) to the California State PTA office after adoption and include the total number of board members and the expiration date of their term.

Upon receipt of the form completed and signed by the president, a certificate will be mailed to the PTA president by the California State PTA office. A letter of acknowledgement will be mailed to the PTA administrator.

Wallet cards for the number of board members noted on the form will be enclosed with the letter to the PTA president. The wallet card serves as an acknowledgement and reminder of the PTA board’s and individual board member’s commitment to adhere to the Professional Governance Standards.

*****************************************************************************

The California State PTA would like to recognize your PTA for its work. Please notify the California State PTA that your PTA has adopted the Professional Governance Standards. A certificate will be mailed to the PTA president and a letter of acknowledgement will be sent to your administrator.

Name of PTA_________________________________________________________ ID# __________________

Name of Principal_________________________Number of PTA Executive Board Members ________

Name of PTA President ________________________________

Mailing Address ______________________________________________________

Email Address ______________________________________________________

Date Adopted_____________Council_________________________District _______________

PTA President Signature__________________________________________Print Name _______________________

Mail to: California State PTA, 2327 L Street, Sacramento, CA 95816-5014
916.440.1985 • FAX 916.440.1986 • www.capta.org • info@capta.org
CAPTA Grants and Scholarships

Please go to CAPTA.org to find information and applications for the following:

GRANTS

CULTURAL ARTS
Develop and implement student-centered cultural arts programs which complements the California State PTA’s commitment to a quality arts education.

The programs and projects should focus on expanding the students’ awareness and appreciation of the field of cultural arts and/or enriching and enhancing arts education programs and must be sponsored by the PTA applying for the grant.

OUTREACH TRANSLATION
Translate PTA written materials and oral presentations in an effort to involve every member of the school community. Presentations or materials must be sponsored by the PTA applying for the grant. The California State PTA may use these translated materials when appropriate. Copy of the translated material must accompany the evaluation report.

HEALTHY LIFESTYLES GRANT
Healthy Lifestyles Grants are available from the California State PTA to develop, promote and implement programs, projects and activities that will improve the overall health of children and adults. Refer to the Insurance and Loss Prevention Guide for approved activities.

PARENT EDUCATION
Develop and implement parent education programs and projects in such areas as health, child development, child abuse prevention or parenting skills. Programs or projects must be sponsored by the PTA applying for the grant.

Scholarships

CONTINUING EDUCATION SCHOLARSHIP FOR CREDENTIALED CLASSROOM TEACHERS AND COUNSELORS Continuing Education Scholarships for Credentialed Teachers and Counselors for up to $500.00 each are available from the California State PTA to elementary and secondary teachers and counselors employed in California public schools.

CONTINUING EDUCATION SCHOLARSHIP FOR PTA VOLUNTEERS Continuing Education Scholarships for PTA Volunteers for up to $500.00 are available from the California State PTA to enable PTA volunteers to continue their education.

CONTINUING EDUCATION SCHOLARSHIP FOR SCHOOL NURSES Continuing Education Scholarships for School Nurses for up to $500.00 each are available from the California State PTA to public school nurses employed in California public schools.
How to put together a Procedure Book

Because of regular changes in leadership and volunteer personnel, each officer and chairman should have a procedure book to ensure continuity and progress. The procedure book, together with all material belonging to the office or chairman, should be delivered promptly to one’s successor.

A procedure book should contain all materials needed to accomplish the work of the office or chairmanship, plus any additional information that a new volunteer would find helpful.

It is recommended that the procedure book contents be placed in a loose-leaf binder, large enough to hold 8-1/2” x 11” paper. The president may need additional binders to hold the National PTA resource materials, California State PTA Toolkit, and additional support material.

A procedure book should include:

1. **Title page with**
   - Name of office or chairmanship;
   - Name of association, council and district PTA;
   - Previous officer/chairman and dates served; and
   - This statement: “This procedure book belongs to the PTA unit and not the individual.”

2. **Job description** including the summary included in the California State PTA Toolkit for the specific position (if applicable) (Recommended Officers 2.3.10; Committee Development and Guidelines 2.5 and Officer and Chairman Job Descriptions in the California State PTA Toolkit).

3. **Current bylaws and standing rules** (for executive board positions)

4. **Calendar of events and/or responsibilities for each month**

5. **Reports from current and previous officers/chairmen**

6. **Information from conferences, workshops, and correspondence**

7. **Newsletters and other unit communications**

8. **Executive board roster**
Every PTA Must File Tax Returns

California State PTA is committed to providing information to help make your PTA aware of the latest state and federal requirements. Federal and state laws require nonprofit groups, including PTAs, to file tax returns. Below is a list of the requirements as they relate to PTAs for the Federal IRS Form 990 and for the State of California Franchise Tax Board Form 199. Please continue to check the California State PTA’s website www.capta.org for the latest information.

Note: For PTAs that require specific filing assistance, it is recommended that an accountant or tax professional specializing in nonprofit 501(c) 3 organizations be consulted regarding all tax filings.

Federal IRS Form 990
Internal Revenue Service (IRS) Form 990 tax returns or an extension request Form 8868 must be filed by the return due date. Returns are due four months and 15 days after the fiscal year-end. The RRF – 1 will be included with this form when mailing in.

Which form to file:
990N Gross receipts normally equal to or less than $50,000
990EZ Gross receipts equal to or more than $50,000 and less than $200,000 and total assets less than $500,000
990 Gross receipts equal to or more than $200,000 or more, and total assets equal to or more than $500,000

A Schedule B must be completed if the PTA receives a donation of $5,000 or more from a single donor.

California State Franchise Tax Board Form 199
Starting with the 2010 tax year, the California State Franchise Tax Board (FTB) is requiring all tax-exempt organizations to file the electronic Form 199N or Form 199. In the past, PTA units and councils were not required to file Form 199 of they were unincorporated. Based on this new reporting requirement, all units, councils and districts must now file the Form 199. Returns are due four months and 15 days after the fiscal year-end.

Which form to file:
199N Gross receipts normally equal to or less than $50,000
199 Gross receipts normally greater than $50,000

Form RRF – 1
Please see info on next page. (This form will be included with the 990 when mailing)
You should file your taxes in August once you have completed the Annual Treasurers Report in July.
Please contact LBCPTA if you need help finding an accountant.
The purpose of the Form RRF-1 is to assist the Attorney General’s Office with early detection of charity fiscal mismanagement and unlawful diversion of charitable assets. The Form RRF-1 is a short form calling for the most current information available to the charity and is designed to close the reporting delays on significant issues of charity fiscal accountability.

**WHO MUST FILE A FORM RRF-1?**

Every charitable nonprofit corporation, unincorporated association or trustee holding assets for charitable purposes that is required to register with the Attorney General’s Office is also required to annually file Form RRF-1 regardless of whether the corporation files Form 990s annually or on an extended reporting. Nonprofit corporations and organizations not required by law to register with the Attorney General are not required to file the RRF-1. These include:

1. a government agency,
2. a religious corporation sole,
3. a cemetery corporation regulated under Chapter 19 of Division 3 of the Business and Professions Code,
4. a political committee defined in Section 82013 of the California Government Code which is required to and which does file with the Secretary of State any statement pursuant to the provisions of Article 2 (commencing with Section 84200) of Chapter 4 of Title 9,
5. a charitable corporation organized and operated primarily as a religious organization, educational institution or hospital,
6. a health care service plan that is licensed pursuant to Section 1349 of the Health and Safety Code and reports annually to the Department of Managed Health Care,
7. corporate trustees which are subject to the jurisdiction of the Commissioner of Financial Institutions of the State of California or to the Comptroller of Currency of the United States. However, for testamentary trusts, such trustees should file a copy of a complete annual financial summary which is prepared in the ordinary course of business. See Probate Code sections 16060-16063.

**WHAT TO FILE**

ALL REGISTERED charities, regardless of receipts or assets, except for those listed above as being exempt, must file the Annual Registration Renewal Fee Report (RRF-1) with the Attorney General’s Registry of Charitable Trusts.

Trusts four months and fifteen days after the close of the organization’s calendar or fiscal year.

Charities with total gross revenue or assets of $25,000 or more must file a copy of the IRS Form 990, 990-EZ, or 990PF and attachments with the Attorney General’s Registry of Charitable Trusts.

**EXTENSIONS FOR FILING**

Extensions of time for filing the RRF-1 will be allowed if an organization has received an extension from the Internal Revenue Service for filing the IRS Form 990, 990-PF, or 990EZ. An organization shall file both forms (RRF-1 and IRS Form 990, 990-PF, or 990-EZ) with the Registry of Charitable Trusts at the same time, along with copies of all requests to IRS for an extension and, where approval of the extension is not automatic, a copy of each approved extension request. IT IS NOT NECESSARY TO SEND A COPY OF THE EXTENSION REQUEST PRIOR TO FILING THE REPORT.

**ANNUAL REGISTRATION RENEWAL FEE**

Charities and trustees registered with the Attorney General’s Registry of Charitable Trusts must file the appropriate registration renewal fee with the Annual Registration Renewal Fee Report (RRF-1) based on the registrant’s gross annual revenue for the preceding fiscal year, as follows:

<table>
<thead>
<tr>
<th>Gross Annual Revenue</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $25,000</td>
<td>$0</td>
</tr>
<tr>
<td>Between $25,000 and $100,000</td>
<td>$25</td>
</tr>
<tr>
<td>Between $100,001 and $250,000</td>
<td>$50</td>
</tr>
<tr>
<td>Between $250,001 and $1 million</td>
<td>$75</td>
</tr>
<tr>
<td>Between $1,000,001 and $10 million</td>
<td>$150</td>
</tr>
<tr>
<td>Between $10,000,001 and $50 million</td>
<td>$225</td>
</tr>
<tr>
<td>Greater than $50 million</td>
<td>$300</td>
</tr>
</tbody>
</table>

NOTE: A REGISTRATION FEE IS NOT DUE WITH AN AMENDED REPORT FOR ANY REPORT PERIOD IN WHICH A FEE HAS ALREADY BEEN PAID.
STATE CHARITY REGISTRATION NUMBER

The State Charity Registration Number is the Charitable Trust (CT) number assigned to an organization by the Registry of Charitable Trusts at the time of registration. The State Charity Registration Number consists of no more than six digits. If you do not know the organization's State Charity Registration Number, check the "CT Number Search" on the Charitable Trusts' website at [http://ag.ca.gov/charities/](http://ag.ca.gov/charities/). If you are unable to locate the State Charity Registration Number, leave that line blank and Registry staff will insert the number when it is received in the Registry of Charitable Trusts.

OTHER IDENTIFICATION NUMBERS

The corporate number is assigned by the Office of the Secretary of State and is stamped on the organization's articles of incorporation.

The organization number is assigned by the Franchise Tax Board for non-corporate entities. Both are seven-digit numbers.

The Federal Employer Identification Number is assigned by the Internal Revenue Service. It is a nine-digit number.

The following will assist you in responding to the questions on the RRF-1 report:

PART B, QUESTION #1
If "yes," provide the following information on the attachment:

1) Full name of the director, trustee, or officer involved with the organization.

2) Nature of the transaction, e.g., loan to director, contract with officer's business, etc.

3) Attach a copy of the board of directors' meeting minutes authorizing the transaction.

4) Include, if applicable, the date of transaction; purpose of transaction; amount of the loan or contract; interest rates; repayment terms; balance due; type of collateral provided; copy of contract, loan or other agreement; amount paid to director, trustee, or officer for the period; evidence of other bids received related to the transaction.

PART B, QUESTION #2
If "yes," provide the following information on the attachment:

1) Nature, date, amount of the loss.

2) Description of the steps the organization took to recover the loss. Attach a copy of any police and/or insurance report.

3) Description of the procedures the organization implemented to prevent a recurrence of the situation.

PART B, QUESTION #3
If "yes," provide a signed statement listing the non-program expenditures and the reasons why they exceeded 50% of gross revenues. If you believe that non-program expenditures were reasonable, furnish a signed statement explaining the reasons why. If not, describe the steps the organization will take to lower non-program expenditures. Non-program expenditures are any expenditures that do not meet the definition of "program services" set forth in the Internal Revenue Service Instructions for Form 990 and Form 990-EZ. The IRS Instructions are set forth on the Attorney General's website at [http://ag.ca.gov/charities/](http://ag.ca.gov/charities/). See the IRS Instructions for a discussion of the expenses that are attributable to program services.

PART B, QUESTION #4
If "yes," provide the following information on the attachment:

1) Description of the fine, penalty, or judgment and the circumstances that resulted in the payment. Also indicate the name and title of the person(s) responsible and why the payment was made with the organization's funds.

2) Name of the organization or government agency that issued the fine, penalty or judgment; date of payment; and the amount of the fine, penalty, or judgment.

3) Copies of all communications with any governmental agency regarding the fine, penalty, or judgment.

4) Description of procedures the organization implemented to prevent a recurrence of the fine, penalty, or judgment.

PART B, QUESTION #5
If "yes," provide an attachment listing the name, address, telephone number, and e-mail address of the commercial fundraiser, fundraising counsel, or commercial cooperator.

PART B, QUESTION #6
If "yes," provide an attachment listing the name of the agency, mailing address, contact person, and telephone number.

PART B, QUESTION #7
If "yes," provide an attachment indicating the number of raffles and the date(s) they occurred.

PART B, QUESTION #8
If "yes," provide an attachment indicating whether the vehicle donation program is operated by the charity or whether the charity contracts with a commercial fundraiser.
MAIL TO:
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470
Telephone: (916) 445-2021
WEB SITE ADDRESS:
http://ag.ca.gov/charities/

ANNUAL REGISTRATION RENEWAL FEE REPORT
TO ATTORNEY GENERAL OF CALIFORNIA
Sections 12586 and 12687, California Government Code
11 Cal. Code Regs. sections 301-307, 311 and 312
Failure to submit this report annually no later than four months and fifteen days after the
end of the organization's accounting period may result in the loss of tax exemption and
the assessment of a minimum tax of $500, plus interest, and/or fees or filing penalties
as defined in Government Code section 12586.1. IRS extensions will be honored.

<table>
<thead>
<tr>
<th>State Charity Registration</th>
<th>Check if:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ Change of address</td>
</tr>
<tr>
<td></td>
<td>□ Amended report</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Organization</th>
<th>Corporate or Organization No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address (Number and Street)</th>
<th>Federal Employer I.D. No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City or Town, State and ZIP Code</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
</tbody>
</table>

ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311 and 312)
Make Check Payable to Attorney General's Registry of Charitable Trusts

<table>
<thead>
<tr>
<th>Gross Annual Revenue</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $25,000</td>
<td>0</td>
</tr>
<tr>
<td>Between $25,001 and $100,000</td>
<td>$25</td>
</tr>
<tr>
<td>Between $100,001 and $260,000</td>
<td>$50</td>
</tr>
<tr>
<td>Between $250,001 and $1 million</td>
<td>$75</td>
</tr>
<tr>
<td>Between $1,000,001 and $10 million</td>
<td>$150</td>
</tr>
<tr>
<td>Between $10,000,001 and $50 million</td>
<td>$225</td>
</tr>
<tr>
<td>Greater than $50 million</td>
<td>$300</td>
</tr>
</tbody>
</table>

PART A - ACTIVITIES

For your most recent full accounting period (beginning / ending):

Gross annual revenue $  
Total assets $

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: If you answer “yes” to any of the questions below, you must attach a separate sheet providing an explanation and details for each “yes” response. Please review RRF-1 instructions for information required.

1. During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof either directly or with an entity in which any such officer, director or trustee had any direct or indirect interest? Yes No

2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization’s charitable property or funds? Yes No

3. During this reporting period, did non-program expenditures exceed 50% of gross revenues? Yes No

4. During this reporting period, were any organization funds used to pay any penalty, fine or judgment? If you filed a Form 4720 with the Internal Revenue Service, attach a copy.

5. During this reporting period, were the services of a commercial fundraiser or fundraising counsel for charitable purposes used? If "yes," provide an attachment listing the name, address, and telephone number of the service provider.

6. During this reporting period, did the organization receive any governmental funding? If so, provide an attachment listing the name of the agency, mailing address, contact person, and telephone number.

7. During this reporting period, did the organization hold a raffle for charitable purposes? If "yes," provide an attachment indicating the number of raffles and the date(s) they occurred.

8. Does the organization conduct a vehicle donation program? If "yes," provide an attachment indicating whether the program is operated by the charity or whether the organization contracts with a commercial fundraiser for charitable purposes.

9. Did your organization have prepared an audited financial statement in accordance with generally accepted accounting principles for this reporting period?

Organization's area code and telephone number (______-______-______)
Organization's e-mail address

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, it is true, correct and complete.

Signature of authorized officer
Printed Name
Title
Date

130
This page to be left blank for turn in
WHAT IS DUE THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)

(R) = Required

(R) Treasurer’s Reports: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.
(R) September Association Meeting Minutes
(R) Council Assessment Fee
(R) Unit Budget (approved by association in September)
RESERVATIONS for 33rd President’s & Administration Conference (President will be emailed with more details)

Membership dues – Membership dues are to be turned in monthly as received. More information on Membership Dues and Campaigns can be found in the PTA BASICS section of the Red Book.

PAT Award Certificates Order Form

Professional Governance Standards – see instructions in the SEPTEMBER section for completing this form and earning a Certificate of Recognition for your unit from California State PTA.

WHAT YOU MAY NEED TO WORK ON THIS MONTH

Due in November:
• (R) Insurance Premium - Amount to be announced at the October UPs meeting.
• (R) Workers Comp Form – Form can be found in the NOVEMBER section of this book
• Unit Program / Directory – Info located in the NOVEMBER section of the Red Book.
• Reflections – Info can be found in the NOVEMBER section of the Red Book and at CAPTA.org & PTA.org.
• Delegates – your bylaws require that in addition to the president attending the NOVEMBER UPs meeting, your association should also send two (2) delegates (see Article X in your unit bylaws).
• Grants & Scholarship Applications – (Due to CAPTA by Nov 15th) CAPTA.org in the forms section
• Reflections

Appoint Bylaws Committee – If you need to make a change to your Bylaws, it is a good idea to appoint this committee by your NOVEMBER association meeting. Bylaws and standing rules must be reviewed every year and submitted through channels for approval every three years. Appoint a small committee with the parliamentarian as chairman to study them, make recommendations, and forward through LBCPTA to the California State PTA parliamentarian.

(R) Nominating Committee – If you do not have a meeting in December, it is a good idea to elect this committee at your NOVEMBER association meeting. Please see Article V in your bylaws for information on how to elect this committee. A form has been provided in the NOVEMBER section to help you.
Red Ribbon Week Celebration

The Red Ribbon Week Celebration is held annually during the month of October. Some schools use the entire month for the celebration and others use only the last week of October. The Red Ribbon Campaign began in California in 1986 to commemorate the death of a federal agent Enrique Camarena, who was slain by drug traffickers in Mexico. The campaign went nationwide in 1987, and the name was changed to Red Ribbon Week Celebration in 1989. The purpose of Red Ribbon Week Celebration is to present a unified, positive and visible commitment toward a safe and drug-free America. PTAs are encouraged to plan prevention activities and programs in schools and communities to support a healthy, drug-free lifestyle.

PTA has been active in Red Ribbon Week Celebration since its inception. Remember to follow all PTA procedures and guidelines, should the PTA unit choose to participate in any activity or distribute printed material. In all cases, the PTA’s procedures and guidelines take precedence over those of other agencies. If there are any questions or concerns about planned Red Ribbon Week Celebration activities, please contact the council and/or district PTA.

Additional information also may be found on the California State PTA website, [www.capat.org](http://www.capat.org).

ADDITIONAL RESOURCES
California Department of Education ([www.cde.ca.gov/ls/he/ct](http://www.cde.ca.gov/ls/he/ct))
Community Alliances for Drug Free Youth (CADFY) ([www.CADFY.org](http://www.CADFY.org))
California Friday Night Live Partnership ([www.fridayoutlive.org](http://www.fridayoutlive.org))
Partnership for a Drug-Free California ([www.drugfree.org](http://www.drugfree.org))
Sundt Memorial Foundation ([www.sundtmemorial.org](http://www.sundtmemorial.org))
The Enrique S. Camarena Educational Foundation ([www.CamarenaFoundation.org](http://www.CamarenaFoundation.org))
Time to Talk (Partnership for Drug-Free America webiste directed at parents) ([www.timetotalk.org](http://www.timetotalk.org))
WEAR RED RALLY DAY [http://www.preventionpartners.com/stuff/activities.cfm?dom=t=804](http://www.preventionpartners.com/stuff/activities.cfm?dom=t=804)

Some ways to celebrate Red Ribbon Week:
http://www.tvusd.k12.ca.us/redribbonweek-pta

- Hold a “Hugs Not Drugs Day” and invite students to bring in their favorite stuffed animal
- Create posters with drug prevention messages for classrooms
- Hold a “Red Ribbon Run For Fun” to reinforce your commitment to healthy living
- Organize a ‘Band Against Drugs’ Talent Show
- Invite drug prevention experts for an assembly
- Decorate trees and fences with red ribbons
- Hand out red ribbons or armbands to students
- Invite everyone to wear red for the day
- Sponsor an essay contest
- Write personal pledges to be drug-free
- Plan Family Fun Night with games & activities
- Cover playground with drug prevention slogans in chalk
- Ask everyone to wear sneakers for “Don’t Let Drugs Sneak Up On You” day
- Hold a contest for the best drug prevention slogan to use for your RRW Celebration
- Wear clothes backwards for "Turn Your Back On Drugs" day
- Sign red ribbons and send them to Washington as a symbol of unity and concern
- Serve red foods such as red popsicles, watermelon, pizza and tomato juice
- Collect canned foods for a local food bank for "We Can All Say No To Drugs!"
- Write poems on Red Ribbon Celebration themes and post them around the school
- Create a drug prevention mural, offering a prize for the best prevention mural theme
- Have a Coloring Contest for students to color in a picture with a prevention theme
- Party at a Family Night “Red Ribbon Sock Hop” with everyone wearing red socks
What is Convention?

The California State PTA Convention is held annually for certain business transactions. It is also an opportunity to provide training in many areas of interest to our members, and provide a forum for attendees to speak directly with exhibitors who may be of assistance to our associations.

Delegates to convention determine the direction of the state association through:

- Electing officers;
- Approving amendments to the California State PTA Bylaws;
- Voting on the California State PTA Legislation Platform and the California State PTA Legislation Policies and Procedures; and
- Adopting resolutions.

According to the California State PTA Bylaws, each association in good standing is represented at the California State PTA Convention by the president-elect or president and all other elected delegates to which the association is entitled, as well as elected delegates representing the council and district PTAs.

Planning for convention and providing an opportunity for delegates to attend is a priority. The California State PTA strongly encourages its unit, council, and district PTAs to budget for and send as many delegates as entitled to each annual convention. Convention is an authorized expense to cover registration, housing, meal allowance, and transportation for each delegate. Convention expenses should be a line item in the unit, council, and district PTA annual budgets.

Registration fees help defray convention expenses. Registration fees are non-refundable; name transfers may be made if the original registrant has not checked in for convention. Nonvoting registrants include PTA members who are not elected delegates, school personnel, school board members, and/or representatives of allied agencies. Nonvoting registrants will receive convention materials and may attend all meetings, conferences, and workshops; however, they may not introduce motions, participate in debate, vote or speak during general sessions. Registration is performed online. Notifications will be mailed out to all units providing the web address and relevant dates for registering. Confirmation letters and additional information will be mailed or emailed to each person registering.

"PTA members and leaders are the change makers. I believe in you."

Dianna MacDonald, CAPTA President 2017/19

Don't miss your chance to take part in the largest school-based convention in the nation. Save the date for May 15-17, 2020 in Riverside, CA. You'll get the training and information you need to help connect your family, school and community. Stay tuned for more information.
WHAT TO TURN IN THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)
(R) = Required

(R) Treasurer’s Reports: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

(R) Bring minimum of 2 delegates to meeting. This is for council to make quorum for voting purposes and also provides insight to your board part of the president responsibilities.

(R) October Association Meeting Minutes

(R) Workmen’s Compensation Form – All units must fill out and turn in form. If no employees were paid, write “NONE” across the page

(R) Membership dues – Membership dues are to be turned in monthly as received. More information on Membership Dues and Campaigns can be found in the SEPTEMBER section of the Red Book.

(R) Nominating Committee – If you do not have a meeting in December, it is a good idea to elect this committee at your NOVEMBER association meeting. Please see Article V in your bylaws for information on how to elect this committee. A form has been provided in the NOVEMBER section to help you.

(R) Appoint Bylaws Committee - If you need to make a change to your Bylaws, it is a good idea to appoint this committee by your NOVEMBER association meeting. Bylaws and standing rules must be reviewed every year and submitted through channels for approval every three years. Appoint a small committee with the parliamentarian as chairman to study them, make recommendations, and forward through channels to the California State PTA parliamentarian.

Program/Directory & Award form
Reflections – Unit entries & form.
PAT Award Certificate Order Form (Praise, Appreciation & Thanks)

RESERVATIONS -Sacramento Safari – Reservations and money due in early December to 33rd. It is best to turn reservations in at the November UP’s meeting, but can be done in December. Scholarships may be available.

WHAT YOU MAY NEED TO WORK ON THIS MONTH:
Upcoming in 2020:

• LBCPTA Founder Day meeting – FEBRUARY 12th invite will come via email. Due at the JANUARY UPs meeting. More info can be found in the FEBRUARY section.
• Thirty-Third District Diversity and Inclusion Conference (Reservations due in FEBRUARY)
• Communications – Due at the MARCH UPs meeting, submissions for the Outstanding Newsletter / Website / E-Bulletin. More information and submission forms can be found in the COMMUNICATIONS section of the RedBook.
• (R) Unit Annual Historian’s Report – Due at the MARCH UPs meeting. Be sure to keep a record of the volunteer hours of your unit. A Volunteer Tally Sheet is located in the PTA BASICS section for your use.
Workers’ Compensation Annual Payroll Report

toolkit.capta.org

All PTAs must pay the base Workers’ Compensation premium, which is part of the California State PTA Insurance Program, whether or not they hire employees.

Each unit, council, and district PTA must file a Workers’ Compensation Annual Payroll Report no later than January 31 of each year. This report will cover the period of January 5 through January 4 of the preceding year. If no one was hired, complete all the information requested and write, “No one paid,” sign and forward through channels.

Any individuals paid directly by PTA are considered employees of the PTA and must be listed by name of individual worker, type of work performed, dates worked, amount paid, and whether this person has his/her own Workers’ Compensation insurance on the Workers’ Compensation Annual Payroll Report. If the PTA does not pay the worker directly but donates the money to the school, do not list the worker.

If total payments (gross) for ALL employees are more than $1,000, a PTA will incur an additional premium.

For example: $2,500 total (gross) payments, less $1,000 = $1,500 x 5% = $75 premium for this PTA. $200 (Base Premium) + $75 (5% surcharge) = $275 (Total Premium).

PTAs can avoid paying this additional premium by not hiring or making payments to individuals. If the PTA membership votes to support a program that requires payments to individuals in any capacity, ask your school district to employ and pay that person, and gift the funds to the school district for the expense. This not only reduces the cost to support programs, it offers an additional layer of protection against potential liability and removes the PTA’s responsibility for filing government-required employee reporting forms and payroll withholding. If the school district pays the individual with monies gifted from a PTA, the PTA does NOT have to report this activity on the Workers’ Compensation Annual Payroll Report.

For more information on Workers’ Compensation Insurance, please review Bonding and Insurance, and the Insurance and Loss Prevention Guide.

PTA-Provided Baby-Sitting Services

These guidelines shall apply to all baby-sitters, whether paid or volunteer. Baby-sitting services are exempt from licensing by the State Department of Social Services, since such services are defined as being provided when a parent/guardian is on the premises; e.g., children being tended in the same building as the association meeting being attended by parents. Baby-sitting services must be provided by two unrelated persons 18 or over for parents engaged in PTA-sponsored volunteer activities or parents who are attending a PTA meeting.

All baby-sitters paid by the PTA must be listed on the Workers’ Compensation Annual Payroll Report form filed by each PTA and submitted through channels to the California State PTA office no later than January 31 of each year. Treasurers must ensure that records of such payments are kept current, both for the PTA’s records and to facilitate completing the required Workers’ Compensation Annual Payroll Report.

State law mandates that “every employer shall establish, implement and maintain an effective injury and illness prevention program.” Any PTA that pays wages directly to an individual must comply with this state law.

If baby-sitters are paid more than $100 in a calendar year, see IRS Publication 937 for further information. The PTA may charge a reasonable fee for baby-sitting services. For more information on the noncommercial policy, see Bylaws for Local PTA/PTSA Units, Article III, a. and b.

Insurance Requirements

Guidelines for baby-sitters:

There are at least two unrelated persons 18 or over in attendance at all times.

Children are kept in a safe environment:

If outdoors – in an enclosed playground.

If indoors – in a room with safe, age-appropriate toys. Bathroom facilities should be nearby.

Child : adult ratios are not exceeded:

0 to 5 years of age, 10 children to 2 adults; 1 additional person, high school age or older, for 11-15 children, and so forth.

6 to 10 years of age, 14 children to 2 adults; 1 additional person, high school age or older, for 15-28 children, and so forth.

A baby-sitter shall not change any diapers. A parent should be called to perform this task.
WORKERS’ COMPENSATION ANNUAL PAYROLL REPORT

(Attach insurance premium payment to Report and forward to council/district PTA as directed by their due date. Payment must be received from district PTA on or before January 31.)

Name of PTA__________Twin Elementary____________ District PTA____Thirty-third________

Address________5021 E. Centralia St._________________ Council__Long Beach________

City________Long Beach, CA________ Zip________90808________

Please note: List only those employees that PTA pays directly. Attach copies of all DE-6 and DE-542. Do NOT list when monies are donated to school district for employee salaries. Do NOT list company name, only individual names.

<table>
<thead>
<tr>
<th>NAME OF WORKER</th>
<th>TYPE OF WORK BE SPECIFIC</th>
<th>DOES PERSO(N) PAY CARRY HIS/HER OWN WORKER'S COMPENSATION INSURANCE?</th>
<th>DATES WORKED</th>
<th>PAYROLL AMOUNT PAID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Mary Jones</td>
<td>Babysitter</td>
<td>No</td>
<td>2/14; 4/21</td>
<td>$50.00</td>
</tr>
<tr>
<td>2 Sally Smith</td>
<td>Babysitter</td>
<td>No</td>
<td>10/14; 11/5</td>
<td>$200.00</td>
</tr>
<tr>
<td>3 Joe Harris</td>
<td>Musician</td>
<td>No</td>
<td>10/12; 10/14</td>
<td>$500.00</td>
</tr>
<tr>
<td>4 Bill Johnson</td>
<td>Carpenter</td>
<td>No</td>
<td>1/3; 4/5</td>
<td>$1,500.00</td>
</tr>
<tr>
<td>5 John White</td>
<td>Storyteller</td>
<td>Yes</td>
<td>1/10</td>
<td></td>
</tr>
<tr>
<td>6 Sarah Melody</td>
<td>Holiday show help</td>
<td>No</td>
<td>12/1; 12/5</td>
<td>$250.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th>JAN 5, TO JAN 4,</th>
<th></th>
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</thead>
<tbody>
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<td></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>A</th>
<th></th>
<th>Total Payroll for ALL Employees</th>
<th>$2,500.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td></td>
<td>Less $1,000</td>
<td>-$1,000.00</td>
</tr>
<tr>
<td>C</td>
<td></td>
<td>Gross Payroll</td>
<td>$1,500.00</td>
</tr>
<tr>
<td>D</td>
<td></td>
<td>Premium due for additional Workers’ Compensation insurance coverage. _____% of Gross Payroll (Line C)</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

*If yes, worker must supply the PTA with a Certificate of Insurance from his/her Workers’ Compensation insurance carrier. This report form must be completed and forwarded through channels to reach the California State PTA office no later than January 31.

• Unit, council and district PTAs are required to file this form, even if no one was paid.
• Report ALL paid workers – attach additional Payroll Report detail pages(s) as necessary.
• Attach copies of quarterly employee reporting forms DE-6 and DE-542 for Independent Contractors.
• Write “NO ONE PAID” across form if no one was paid.
• Signed by treasurer or president.
• Forward through channels (unit to council to district). DO NOT send directly to the California State PTA office.
• See California State PTA Toolkit, “Workers’ Compensation Annual Report,” 5.3.3i for more information.

Date________December 21, 2014________ Signed________Martha Jones________

Telephone (_562_) _______123-4567________ Position____Treasurer____
**EVERY UNIT, COUNCIL AND DISTRICT PTA MUST COMPLETE AND RETURN THIS FORM EVEN IF NO ONE WAS PAID**

**WORKERS’ COMPENSATION ANNUAL PAYROLL REPORT**

(Attach insurance premium payment to Report and forward to council/district PTA as directed by their due date. Payment must be received from district PTA on or before January 31.)

Name of PTA

District PTA

Address

Council

City

Zip

Please note: List only those employees that PTA pays directly. Attach copies of all DE-6 and DE-542. Do NOT list when monies are donated to school district for employee salaries. Do NOT list company name, only individual names.

<table>
<thead>
<tr>
<th>NAME OF WORKER</th>
<th>TYPE OF WORK</th>
<th>DOES PERSON PAID CARRY HIS/HER OWN WORKERS’ COMPENSATION INSURANCE?</th>
<th>DATES WORKED</th>
<th>PAYROLL AMOUNT PAID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>YES</td>
<td>JAN 6, ___</td>
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<td></td>
<td>NO</td>
<td>JAN 4, _____</td>
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<td>1</td>
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<tr>
<td>12</td>
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</tr>
</tbody>
</table>

A. **Total Payroll for ALL Employees** $0.00

B. **Less $1,000** - $1,000.00

C. **Gross Payroll** $0.00

D. **Premium due for additional Workers' Compensation insurance coverage.** % of Gross Payroll (Line C) $0.00

*If yes, worker must supply the PTA with a Certificate of Insurance from his/her Workers’ Compensation insurance carrier. This report form must be completed and forwarded through channels to reach the California State PTA office no later than January 31.*

- Unit, council and district PTAs are required to file this form, **even if no one was paid.**
- Report ALL paid workers – attach additional Payroll Report detail pages(s) as necessary.
- Attach copies of quarterly employee reporting forms DE-6 and DE-542 for Independent Contractors.
- Write "NO ONE PAID" across form if no one was paid.
- Signed by treasurer or president.
- Forward through channels (unit to council to district). DO NOT send directly to the California State PTA office.
- See California State PTA Toolkit, "Workers' Compensation Annual Report," 5.3.3i for more information.

Date ____________________________ Signed ____________________________

Telephone (_______) ____________________________ Position ____________________________
PAGE LEFT BLANK FOR TURN-IN
How to Elect the Nominating Committee for PTA/PTSA’s

*The President runs the election but is NOT eligible to serve.*
*The President may NOT make nominations.*

1. The president announces that it is time to elect the nominating committee. This needs to be done at least 2 months prior to the election meeting in March or April (check your bylaws for month) and should be placed under New Business on the agenda.
2. Have the parliamentarian read aloud to the association sections 3a through 3g in the bylaws.
3. Next, open the floor to nominations. People can nominate themselves. Have the secretary check that each nominee is a paid member.
4. If the person is nominated by someone else, verify with each candidate that they will serve on the committee. Candidates for this committee must be present at the meeting to accept the nomination to the committee. Once the slate has been filled, the nominations are closed.
5. The president reads the slate of names.
6. Someone moves to accept the slate and it needs to be seconded.
7. President calls for discussion, then calls the vote.
8. President announces that the slate has been elected.
9. The form on the next page can be used by the nominating committee. They can use it to present the slate to your Association during your election meeting in March or April.

<table>
<thead>
<tr>
<th>Number</th>
<th>Position</th>
<th>Name</th>
<th>Phone # / Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Officer</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>2</td>
<td>Chairman</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>3</td>
<td>Member</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>4</td>
<td>Member</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>5</td>
<td>Member</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td></td>
<td>Teacher Rep or Principal</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>1</td>
<td>Alternate #1</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>2</td>
<td>Alternate #2</td>
<td></td>
<td>Phone #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Email</td>
</tr>
</tbody>
</table>
# Slate of Officers for ___________________________ PTA/PTSA

The first three officer positions are required for every PTA. Your unit may not have all the other positions listed. Please check in your bylaws for the positions that are relevant to your unit.

<table>
<thead>
<tr>
<th>Officer</th>
<th>Name</th>
<th>Phone #</th>
<th>email</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secretary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Treasurer</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Additional Positions

<table>
<thead>
<tr>
<th>Position</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive VP</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auditor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Secretary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Historian</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please write in what each VP shall serve as

1. **1st Vice President:**

2. **2nd Vice President:**

3. **3rd Vice President:**

4. **4th Vice President:**

5. **5th Vice President:**

6. **6th Vice President:**

## Appointed Positions - To be appointed by the board-elect after July 1st

<table>
<thead>
<tr>
<th>Position</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Corresponding Secretary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parliamentarian</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Handling Requests for Relief Assistance
(Finance Section California State PTA Toolkit F9 – November 2016)

PTAs are often asked to provide assistance with the coordination of relief activities when a disaster strikes or personal tragedy occurs in a community. While PTA may appear to be a logical association to provide this coordination, PTAs are prohibited from making personal gifts to a specified family or individual. A PTA may not collect and disburse funds for the benefit of specified families or individuals. A PTA’s EIN may not be used for the establishment or maintenance of any financial account designated for the benefit of specified families or individuals.

The IRS may impose penalties if these rules are not observed. Unit, council and district PTAs may participate in community relief efforts by making a monetary donation to a relief organization recognized by the IRS as a 501(c)(3) organization. Organizations such as the American Red Cross, the Salvation Army, and United Way handle donations for relief efforts under benevolent fund procedures, which means that funds are received for disbursement to a broad class of potential recipients. These organizations may not accept funds for a specific family or individual. In order for PTA funds to be donated, PTA financial procedures must be followed. The membership is the only body authorized to approve, or ratify, the donation to another 501(c)(3) organization. The approval of the donation must appear in the minutes of a meeting of the association.

PTAs may participate in disaster relief efforts by

- Encouraging members to make personal donations to a relief organization of individual choice;
- Encouraging members to volunteer to assist at a location providing services to disaster victims;
- Providing information on local blood-drive locations;
- Providing information about other relief efforts in the community;

PTAs may participate in personal tragedy relief efforts by

- Working to locate another agency or organization that may handle donated funds to benefit the affected family or individual;
- Offering to meet with other community leaders to arrange with a local bank for the establishment of a special account to handle donated funds (Cannot use PTA EIN).
LBCPTA Procedures and Guidelines for a Partnership with Bethune/Homeless Assistance

2101 San Gabriel Ave., Long Beach, CA 90810

The Mary McLeod Bethune Transitional Center for Homeless Students began in 1991. Bethune provides local support for families living in transitional housing within the Long Beach Unified School District. Bethune is considered LBUSD’s homeless education department. This component offers services for students who are currently experiencing homelessness under the McKinney-Vento Act. There are approximately 8,000 students in the school district that can be considered homeless. Bethune Transitional Center provides mental health assessment and support, health screenings and social development activities and many other services that promote the success of its students. As the number of homeless students has increased over the years the program has enlarged to cover every campus in Long Beach Unified School District. However, Bethune could not succeed without the support of community organizations. The Long Beach Chamber of Commerce, the Junior League of Long Beach, Assistance League/Rick Rackers, churches, synagogues and corporate partners (Verizon and Boeing) help make a difference in the lives of these students. The Long Beach Education Foundation identifies funds to support this unique education structure.

If your unit has decided to help with Bethune, your next step would be to establish a Homeless Assistance/Bethune Chairman and form a Homeless Assistance Committee. Contact the district representative at your school site whose responsibility is to meet the needs of students who might be considered homeless. They will be able to tell you if your school has a need for homeless help. This person may be a counselor, nurse or secretary. All assistance to homeless students is done anonymously (only school staff may know the identities of these students).

If it has been decided that your unit will help a school other than your own, the chairman should obtain a list of schools in need by contacting the LBCPTA Bethune/Homeless Assistance chairman (please see page 1 of the Red Book for contact information). If dropping off donations is an issue, consider adopting a school that is in closer proximity and still has a great need. You may also wish to partner with a neighborhood school and jointly adopt a school in need.

Once you have established communication with the site liaison, go over the list of suggested donation items. The lists of suggested items for donations will be sent to you via email by Long Beach Council PTA after the Red Book meeting. Concentrate on collecting those items that are suggested by the liaison. There may have specific information about the needs of the school. All items of clothing must be new with sales tags still attached or in original packaging.

PTA units may make a monetary donation to homeless assistance at their own school or Bethune Transitional Center. PTA units may also create a line item for Homeless Assistance in their budget. These must be approved by the unit association. PTA units may not make personal gifts to specified families or individuals.

Next, you should set up a method for collecting donations:

- A Collection bin at PTA meetings/events
- A Collection bin in nurse’s office
- Week long drive with a box in each classroom

It is suggested that cash donations be used for higher need/higher cost items:

- Bus passes
- Grocery store gift cards
- Food gift cards
- Head lice shampoo

Long Beach Council PTA will be conducting several drives throughout the school year. You may choose to conduct your drive in conjunction with the Council drive or conduct your drive on your own. Either is acceptable. If you have further questions, please contact the LBCPTA Bethune/Homeless Assistance chairman.
# Bethune Transitional Center

2221 Argonne Ave., Long Beach, CA 90815  
(562) 498-2324 Fax (562) 435-5746  
Nancy Izumi nizumi@lbschools.net  
Maribel Gonzalez mgonzalez@lbschools.net

<table>
<thead>
<tr>
<th><strong>Suggested Donated Items</strong></th>
<th><strong>Lista de donaciones sugeridas</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CLOTHING</strong></td>
<td><strong>ROPA ESCOLAR</strong></td>
</tr>
<tr>
<td>Gift Cards to</td>
<td>Tarjetas de regalo para uniformes escolares</td>
</tr>
<tr>
<td>Fallas Paredes – 5450 Cherry Ave., LB, CA</td>
<td>Fallas Paredes – 5450 Cherry Ave., LB, CA</td>
</tr>
<tr>
<td>Factory 2-U - 3220 Anaheim St., LB, CA</td>
<td>Factory 2-U tienda 3220 Anaheim St., LB, CA</td>
</tr>
<tr>
<td>Uniform pants</td>
<td>Pantalones de uniforme (color caqui/kaki)</td>
</tr>
<tr>
<td>Uniform shirts (white collared)</td>
<td>Polo de uniforme escolar (color blanco)</td>
</tr>
<tr>
<td>Uniform colored jackets (any color for non-uniform school sites)</td>
<td>Chamarra del color del uniforme (cualquier color para los planteados escolares que no requieren uniforme)</td>
</tr>
<tr>
<td>Uniform colored sweatshirts (any color for non-uniform school sites)</td>
<td>Sudaderas del color del uniforme</td>
</tr>
<tr>
<td>P.E. uniforms</td>
<td>Uniformes de Educación Física (PE, según sus siglas en inglés)</td>
</tr>
<tr>
<td>Socks</td>
<td>Calcetines</td>
</tr>
<tr>
<td><strong>SCHOOL SUPPLIES</strong></td>
<td><strong>MATERIALES ESCOLARES</strong></td>
</tr>
<tr>
<td>Backpacks</td>
<td>Mochilas</td>
</tr>
<tr>
<td>Glue sticks</td>
<td>Pegamento en barras</td>
</tr>
<tr>
<td>Colored pencils</td>
<td>Lápices de colores</td>
</tr>
<tr>
<td>Markers</td>
<td>Marcadores</td>
</tr>
<tr>
<td>Erasers (durable pink)</td>
<td>Borradores (rosita durable)</td>
</tr>
<tr>
<td>Post-it notes</td>
<td>Notas adhesivas</td>
</tr>
<tr>
<td>Loose leaf college ruled paper</td>
<td>Hojas sueltas de papel universitario</td>
</tr>
<tr>
<td>Highlighters</td>
<td></td>
</tr>
<tr>
<td>Lined spiral notebooks</td>
<td>Cuadernos rayado con espiral</td>
</tr>
<tr>
<td>Computer flash drive (2-4 GB)</td>
<td>Memoria Flash o USB 2-4 GB</td>
</tr>
<tr>
<td>Pencils</td>
<td>Lápices</td>
</tr>
<tr>
<td>Folders (2 pocket)</td>
<td>Carpetas (con 2 bolsillos)</td>
</tr>
<tr>
<td>Hard pencil supply boxes</td>
<td>Estuche duro de lápices</td>
</tr>
<tr>
<td>Pens (red, blue, black ink)</td>
<td></td>
</tr>
<tr>
<td>Notebook dividers</td>
<td>Resultadores de texto</td>
</tr>
<tr>
<td>Small pencil sharpeners</td>
<td>Separadores para cuadernos</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>TOILETRIES AND HOME ITEMS FOR STUDENTS &amp; FAMILIES OF ALL GRADE LEVELS</strong></th>
<th><strong>ALIMENTOS PARA LA FAMILIA Y LOS ESTUDIANTES DE TODOS LOS GRADOS ESCOLARES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shampoo</td>
<td>Champú</td>
</tr>
<tr>
<td>Conditioner</td>
<td>Acondicionador</td>
</tr>
<tr>
<td>Soap (liquid and bar)</td>
<td>Jabón (liquido o barra)</td>
</tr>
<tr>
<td>Lotion</td>
<td>Crema</td>
</tr>
<tr>
<td>Anti-bacterial wipes</td>
<td>Toallitas anti bacterianas</td>
</tr>
<tr>
<td>Lip balm (for dry weather)</td>
<td>Protector labial</td>
</tr>
<tr>
<td>Deodorant</td>
<td>Desodorante (para mujer y hombre)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>FOOD-RELATED ITEMS FOR STUDENTS AND FAMILIES OF ALL GRADE LEVELS</strong></th>
<th><strong>TARJETAS DE REGALO PARA LOS RESTAURANTES DE COMIDA RAPIDA</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket Gift Cards</td>
<td>Tarjetas de Regalo para el supermercado</td>
</tr>
<tr>
<td>Fast Food Gift Cards</td>
<td>Tarjetas de Regalo para comida rápida</td>
</tr>
</tbody>
</table>
Food Finders
Phone: 562-283-1400
3744 N. Industry Ave., #401
Lakewood, CA 90712
Website: www.Foodfinders.org

Food Finders is a multiregional food bank and food rescue program headquartered in Lakewood, CA. We pick up donated food from hundreds of local grocery stores, bakeries, restaurants and produce markets and distribute it directly to missions, shelters and social service agencies to feed the needy and impoverished. Our volunteers and staff drivers pick up and deliver on a same-day basis. On average, Food Finders helps provide 40,000 meals a day, reducing the amount of food insecurity prevalent throughout Southern California.

Anyone interested in donating food items please contact Diana Lara at (562) 598-3003 or email dlar@foodfinders.org

<table>
<thead>
<tr>
<th>Canned Items</th>
<th>Packaged Items</th>
<th>Hygiene Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>all vegetables</td>
<td>flour</td>
<td>body soap</td>
</tr>
<tr>
<td>all fruits</td>
<td>sugar</td>
<td>shampoo</td>
</tr>
<tr>
<td>beans</td>
<td>pancake mix</td>
<td>conditioner</td>
</tr>
<tr>
<td>tuna</td>
<td>pasta</td>
<td>toothpaste</td>
</tr>
<tr>
<td>meats</td>
<td>rice</td>
<td>toothbrush</td>
</tr>
<tr>
<td>baby food</td>
<td>cereal</td>
<td>dental floss</td>
</tr>
<tr>
<td>broth</td>
<td>tea</td>
<td>deodorant</td>
</tr>
<tr>
<td>soups &amp; stew</td>
<td>cake mix</td>
<td>razors</td>
</tr>
<tr>
<td>peanut butter</td>
<td>salt</td>
<td>feminine hygiene products</td>
</tr>
<tr>
<td>jelly</td>
<td>pepper</td>
<td>diapers</td>
</tr>
<tr>
<td>cooking oil</td>
<td>oatmeal</td>
<td>baby wipes</td>
</tr>
<tr>
<td>mayonnaise</td>
<td>pet food</td>
<td>detergent</td>
</tr>
<tr>
<td>mustard</td>
<td>paper towels</td>
<td>bleach</td>
</tr>
<tr>
<td>catsup</td>
<td>toilet paper</td>
<td></td>
</tr>
<tr>
<td>syrup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>coffee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>juice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>baby formula</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Project Shepherd
Lakewood Project Shepherd
c/o Rotary Club of Lakewood
5050 Clark Avenue
Lakewood, California 90712

Project Shepherd has made holiday wishes come true for thousands of Lakewood residents in need. The neighbor-to-neighbor assistance program has collected canned goods, dry staples, toys and simple gifts in an effort to spread holiday cheer to struggling single moms, out-of-work parents, youngsters and lonely seniors who may otherwise face a bleak Christmas.

Project Shepherd operates via the work of volunteers from the Rotary Club of Lakewood, Lakewood schools, and many Lakewood organizations and individuals. They help collect food items, sort and package the gift bundles, and assist with their distribution to the needy. The

Lakewood city family – through the city's Recreation and Community Services Department – helps Project Shepherd with warehouse space and the review of recipient applications.

Project Shepherd collects cash donations and gifts of staple food items to help hundreds of Lakewood families in need. Donations are made primarily during the winter holidays, but are welcomed throughout the year.

Help is needed throughout the year. Donations are always accepted at the Burns Community Center, Lakewood City Hall, or any city park facility. Go to www.lakewoodcity.org/parkfinder to locate a park in your neighborhood.

Donations needed:
Food and personal care items
- Dry, non-perishable food items such as cereal, sugar, flour, pasta, rice and beans
- Canned meat, fish, fruit, vegetables and soup
- Peanut butter and jelly
- Diapers
- Laundry detergent
- Toilet paper
- Toothpaste, shampoo and soap

New gifts
- Toys for children (Barbies, Legos, Hot Wheels, board games, craft kits, Disney princess dolls)
- Gifts for teenagers (fragrance sets, basketball, football, soccer ball, CDs, curling iron, blanket)
- Practical items for seniors, such as umbrellas and grooming items
- Choose a Teddy Bear Tree ornament and fulfill the specific wish of a child in need (Teddy Bear Trees are displayed at City Hall and park facilities beginning in late November)
- Backpacks and school supplies are collected in the summer - when the program is active, the donation list will appear on their website.

During the December giving program, donations of food items and gifts may be dropped off at:

<table>
<thead>
<tr>
<th>Burns Community Center</th>
<th>Palms Park Community Center</th>
<th>Lakewood Youth Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>5510 Clark Ave.</td>
<td>12305 E. 207th St.</td>
<td>4658 Woodruff Avenue</td>
</tr>
<tr>
<td>M – F 10:00 am to 6:30 pm</td>
<td>M – F 2:00 p.m. to 5:00 p.m.</td>
<td></td>
</tr>
<tr>
<td>Sat – 8:00 am to 11:00 pm</td>
<td>Sat - 1:00 p.m. to 5:00 p.m.</td>
<td></td>
</tr>
<tr>
<td>Sun - Closed</td>
<td>Sun - 1:00 p.m. to 5:00 p.m.</td>
<td></td>
</tr>
</tbody>
</table>
The Essential Role of Bylaws

Bylaws are designed to help your PTA function in an orderly manner. PTA bylaws describe the purpose of PTA and its mission and members’ rights, in addition to officers, committees and their respective duties. The only official set of PTA bylaws for any PTA is an original approved current set of bylaws, signed and dated by the state parliamentarian, PTA president and secretary, and on file with the unit PTA secretary. A copy of the association’s bylaws for the local PTA/PTSA unit must be made available to any association member upon request. A copy should be provided to all officers and board members. Each executive board member is responsible for making a thorough study of them.

The Essential Role of Bylaws - http://capta.org/pta-leaders/run-your-pta/bylaws-andstanding-rules/

Know Your Bylaws
Bylaws include PTA Mission and Purposes; member rights; membership dues amounts; officer nomination, election and duties and removal; association meeting dates, business requirements and quorum; executive board member list, limits on authority, business requirements and quorum; committee duties; relationship with council, when in council, and district PTA; important identification numbers and fiscal year; date of adoption with critical signatures page; and standing rules including executive board meeting days and list of standing committees.

Bylaws Review
Annually the parliamentarian reviews the bylaws with the executive board relative to the bylaws content, duties of officers, executive board responsibilities and association meeting requirements. Bylaws must be submitted every three years to the state parliamentarian for review even when there are no proposed changes. Check the signature page of the bylaws to determine when bylaws were last reviewed and adopted by the association. Follow the bylaws review instructions on pages i, ii, and iii and submit copy through channels as indicated. Use the easy e-Bylaws system to quickly develop and print your bylaws. Refer to e-Bylaws at www.capta.org.

e-Bylaws Simplify Updates. Go to: CAPTA.org to begin.
California State PTA’s e-Bylaws are a quicker way for you to revise and update your unit PTA/PTSA bylaws! To use the e-Bylaws system, you must request a username and password. Once you have your_username and password, you can proceed directly to “Build e-Bylaws.” Please contact the Council PTA parliamentarian or your Area Advisor for assistance. Use the e-Bylaws Screen by Screen guide on pages 138, 139 & 140 along with a copy of your bylaws to help you fill in the info online. NOTE, this is the first step in updating your bylaws. Read all directions and ask questions.

Note that e-Bylaws are available only for local PTA units and only in English.
Easy Steps for PTA Bylaws Review

PRESIDENT
- Appoint 3-5 members to bylaws committee

PARLIAMENTARIAN
- Set meeting date
- Read detailed instructions (page i): Procedures for Bylaws Review
- Read and review bylaws (current and new standard) prior to meeting
- Obtain necessary information from council or district PTA for Articles IV, VI and X
- Obtain Bylaws Submittal Form from council or district PTA
- Bring copy of current bylaws for each committee member

BYLAWS COMMITTEE
- Read Instructions for Completing the Standard Bylaws (page ii), #1 through #8
- To assist in the process, follow #9 (pages ii and iii) while reviewing articles
- List all proposed amendments on separate paper while reviewing; include article, section and page number.

EXECUTIVE BOARD MEETING
- Parliamentarian presents proposed amendments
- Executive board votes to approve (outcome recorded in minutes)
- Use California State PTA’s e-Bylaws system to update bylaws or fill-in preprinted standard bylaws.

SUBMITTING BYLAWS
- Unit parliamentarian keeps one copy
- Attach Bylaws Submittal Form (Page___in Red Book) including list of proposed amendments on the back side of the form
- Attach a copy of the current Unit Standing Rules, if any.
- Include one (1) original set of bylaws (either changed or as is)
- Four (4) additional signature pages (both sides, back to back)
- Submit to council parliamentarian
- If your bylaws are sent back from council/district or state parliamentarian, make corrections as detailed and resubmit.

WHEN BYLAWS COME BACK

Returned unsigned by State parliamentarian
- Make required changes
- Resubmit through channels

Signed by State parliamentarian
- Schedule association meeting to adopt the amendments to bylaws
- Notify members at least 30 days in advance
- Proposed amendments must be included with notice
- A two-thirds (2/3) vote of the association membership is required to adopt
- Adopted bylaws are now the official bylaws of the unit

AFTER ADOPTION
- Secretary and president sign and date original bylaws. The original set is kept with the Secretary’s procedure files.
- Secretary and president sign additional signature pages and insert in the president’s and parliamentarian’s bylaw copies.
- Secretary mails two signed signature pages to council, if in council, or one to district PTA

COPIES
- Make a copy for all board members to be kept in their procedure files
- Provide copy to principal
- Have copies available for members, upon request
E-Bylaws - Screen by Screen

every child. one voice.

The following is a “screen by screen” walk through of completing your Bylaws online. This can be done by going to the CAPTA.org website.

You will need to choose a username and request a password. If you are the first to do this for your unit, please pass this information on to your incoming PTA president and/or Parliamentarian. You will need to reference the most current copy of your bylaws to help you get through this process. The steps listed below allow you to only change certain sections of the bylaws. If you have any questions, please contact the LB Council PTA parliamentarian, Area Advisors or PTA president. Page numbers and sections listed below are approximate. They may differ in your version of bylaws but they will be close to what is listed here.

1st Screen
Unit Information
This will already be filled in for you. You will not need to make any changes on this screen. If your records differ from information seen here, please contact the LB Council PTA Parliamentarian, Area Advisor or President for further assistance.

Click the NEXT button

2nd Screen
Article IV - Membership Dues
(Page 3 in the bylaws)

If you want to make changes to your Annual Dues, you will type in the new amount here. It will calculate what your unit’s portion will be after the Per Capita Dues are subtracted.

Click the NEXT button

3rd Screen
Article V – Officers and Their Election (pages 4-6 in the bylaws)

You will need to supply the following information here:

SECTION 2 IN THE BYLAWS
Executive Vice President? ______Yes ______No  Number of Vice Presidents ______
Corresponding Secretary? ______Yes ______No
Financial Secretary? ______Yes ______No
Auditor is Officer? ______Yes ______No

SECTION 3 IN THE BYLAWS
Nominating Committee Members ______  Nominating Committee Alternates ______

SECTION 7 IN THE BYLAWS
Officers Assume Duties on: July 1  DO NOT CHANGE THIS DATE

SECTION 11 IN THE BYLAWS
Vacancy Notice served by: ______Executive VP ______First VP

Click the NEXT button
E-Bylaws Screen by Screen (continued)

4th Screen - Article VII – Association Meetings (pages 13 & 14 in the bylaws)
You will need to supply the following info here:

SECTION 1 IN THE BYLAWS
Meetings Held On: Day of the week (for example: Second Tuesday) __________________________

SECTION 1 IN THE BYLAWS
Of: Months (circle all that apply)
September October November December January February March April May

SECTION 2 IN THE BYLAWS
Annual Election Meeting: ________
SECTION 4 IN THE BYLAWS
Board Members to Call a Special Meeting: ________

SECTION 5B IN THE BYLAWS
Number of Members in a Quorum: ________
Click the NEXT button

5th Screen - Article VIII – Executive Board (pages 15 & 16 in the bylaws)
You will need to supply the following info here:

STANDING RULE #6 (page 25 in the bylaws)
Meetings Held On: ____________________ Day of the week – for example Fourth Tuesday
Make sure this day is 14 days prior to your association meeting date.

SECTION 2C (located in the very beginning of the bylaws on page iii)
Maximum Unbudgeted Bills: $__________________

SECTION 6 Board Members to call a Special Meeting: ________

SECTION 7B Number of Members in a Quorum: ________
Click the NEXT button

6th Screen - Article IX – Committees (pages 16 -18 in the bylaws)
You will need to supply the following info here:

SECTION 7b
Chairmen’s Report Filed With: ______President OR ______Historian

Article X – Council Membership
SECTION 1b
Council Delegates are: ______Elected OR ______Appointed In: September

SECTION 1c
Term of Service (Years): 1

SECTION 2
Council Election Delegates Are: ______Elected ______Appointed

Click the NEXT button
E-Bylaws Screen by Screen (continued)

7th Screen - Article VI - Duties of Officers (pages 7-13 in the bylaws)
You will need to supply the following info here:

SECTION 11
Officers Reports filed with: ____ President OR ____ Historian

SECTION 2 OR 3
Vice Presidents: List the VP’s you have and what their titles are.
For example:
First VP Shall Serve As: Membership Chairman
Second VP Shall Serve As: Program Chairman
Third VP Shall Serve As: Fundraising Chairman

SECTION 6h
Treasurer: Additional Check Signers (choose any two)
____ Executive VP _____ First VP _____ Second VP _____ Third VP
____ Fourth VP _____ Fifth VP _____ Sixth VP _____ Financial Secretary
_____ Historian

SECTION 7a
Financial Secretary: Remit Monies to the Treasurer? ____ YES OR ____ No

Click the NEXT button

8th Screen – Article VI – Duties of Officers
You will need to supply the following info here:

Audit
Mid-Year Audit Completed in: September  Year-End Audit Completed in: July
Written Report to Executive Board in: October  Written Report to Executive Board in: August
Adoption Report to Association in: __ November  Adoption Report to Association in: __ September

Click the NEXT button

9th Screen - Standing Rules (page 25 of bylaws)
You will need to supply the following info here:

List any Standing Committees you have, Please be aware if you list more than 10 you will need to increase your association and executive board quorums (for example 10 standing committees will increase your quorums by 5).

Once you have filled in all the information you will then click on the BYLAWS button and complete your bylaws. Print out an instruction sheet, follow the directions and then submit the packet to your area advisor. The e-Bylaws are only a “fill-in” application. You will still need to print and submit to get your bylaws approved. Please attach the LBCPTA Bylaws Cover Sheet (found on pages 151 & 152 in the Red Book) before handing over to your area advisor.
BYLAWS COVER SHEET FOR UNITS AND COUNCILS

Long Beach Council Unit Presidents: Please attach this form to each set of Bylaws submitted for approval. Please submit your Bylaws packet to your Area Advisor.

ENCLOSED IS ONE ORIGINAL SET OF BYLAWS WITH STANDING RULES, FOUR (4) DOUBLE SIDED COPIES OF THE SIGNATURE PAGES (pgs. 23 & 24) AND A CHECK MADE OUT TO THIRTY-THIRD DISTRICT FOR $5.00.

BYLAWS FOR

Unit: __________________________

Council: Long Beach District PTA: Thirty-Third

(The following are located on page 22 or Article XIV of your Unit Bylaws)

Article XIV Section 1 – California State PTA #: __________________________

Article XIV Section 2 – National PTA ID #: __________________________

Article XIV Section 3 – EIN #: __________________________

Article XIV Section 4 – FTB #: __________________________

Article XIV Section 5 – Charitable Trust #: __________________________

Fiscal Year: July 1st to June 30th

Date Submitted to District: __________________________

Date Submitted to State: (District Use Only) __________________________

The enclosed set of Bylaws are for (check all that apply):

_____ New Unit  _____ New Council  _____ Organization Date: __________________________

_____ Update to most current edition without changes

_____ Change of Status / Name Change – original form signed by district president attached

_____ Mandatory update required to reinstate charter/recognition

_____ Proposed amendments (please use the form on the back side of this sheet or attach a typed page of amendments to this form – include the Page #, Article #, and Section # for each proposed change)

_____ Additional Standing Rules attached as required  _____ Unit/Council has no additional Standing Rules

FROM: Unit Parliamentarian - Name: __________________________

Address: ________________________________________________

Phone #: (____) ______________________________ email: __________________________

Council Parliamentarian - Name: __________________________

Address: ________________________________________________

Phone #: __________________________ email: __________________________

For District Use only: Date Received from State: __________ Date Returned to unit/council: __________
<table>
<thead>
<tr>
<th>Page #</th>
<th>Article#</th>
<th>Section #</th>
<th>Proposed Changes (please attach additional pages if necessary)</th>
</tr>
</thead>
</table>


Thirty-Third District
Program / Directory Award Requirements & Instructions for Unit PTAs

The purpose of a program directory is to give PTA, school and school district information to the PTA board or to the entire school community. Program Directories can be in any form: booklet, pamphlet, trifold, folder, digital, etc. Your PTA program directory should be ready shortly after the start of the school year. Even though your publication contains school information, it is a PTA program directory, not a school program directory, and PTA information should appear first.

Thirty-third District PTA Awards

- Program directories must be distributed by December 1st to qualify for awards
- Program directories distributed by November 1st will earn the Early Bird Award
- The submission form lists items that should be included in your program directory.
- Each item is worth 1, 2, or 3 points, the 3 point items being the most important.
- Your points total will determine your award level.
  - Gold: minimum 80 points
  - Silver: minimum 65 points
  - Bronze: minimum 50 points
- Turn in two (2) copies of the program directory and two (2) copies of the submission form and checklist by the council deadline in November (please check with your Area Advisor for the exact date).

Questions? Contact LBCPTA Director of Communications:
Maria Towne - maria.towne@outlook.com

Follow the instructions listed below to be eligible for awards from Thirty-Third District PTA, which will be given out at the Annual Meeting in April.

Requirement Descriptions — The following are explanations for some of the Requirements as found on the Submission Form:

Unit PTA name/logo, tagline, council PTA name, Thirty-Third District PTA, California State PTA labeling on front cover or inside first page — It is critical to display the hierarchy of PTA levels properly exactly as follows:
Disclaimer on front cover, inside front cover or inside first page - The contact information inside of your program/directory is private and not intended for use by businesses or any other entities. It is critically important to display the following statement in a high profile manner exactly as follows:

If distributed to PTA board members only:

“This program/directory has been completed for the sole use and convenience of the [school name here] PTA/PTSA officers, chairmen and advisory personnel. All names and phone numbers are for PTA use only. PLEASE GUARD CAREFULLY AGAINST UNAUTHORIZED USE BY OTHERS.”

If distributed school wide:

“This program/directory has been completed for the sole use and convenience of the [school name here] parents and staff. All names and phone numbers are for PTA use only. PLEASE GUARD CAREFULLY AGAINST UNAUTHORIZED USE BY OTHERS.”

CAPTA Mission Statement on front cover or inside first page - The following statement must be displayed exactly as follows:

The mission of the California State PTA is to positively impact the lives of all children and families.

CAPTA Purposes of the PTA Statement on front cover or inside first page - The following statement must be displayed exactly as follows:

PURPOSES OF THE CALIFORNIA STATE PTA
To promote the welfare of children and youth in home, school, places of worship and throughout the community;
To raise the standards of home life;
To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
To promote the collaboration and engagement of families and educators in the education of children and youth;
To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
To advocate for fiscal responsibility regarding public tax dollars in public education funding.

List of PTA officers and committee chairpersons with contact information - Include everyone and their personal contact information where possible. This can include home and/or cell phone numbers and email addresses. Be sure that you have the direct permission of your board members to share their information before publishing.

Example:

Smith Elementary PTA Officers
President Sally Wilson (h)562/123-4567 (c)562/765-4321 (e)wilsonfam@woohoo.com
Executive VP Joe Spalding (h)562/321-7654 (c)562/567-1234 (e)JoeS45@email.com

District, State and National PTA contact information:

LONG BEACH COUNCIL PTA
Erica Dawson
1260 E 33rd St.
Signal Hill, CA 90755
562-858-0446
lbcpptapresident@gmail.com
longbeachcouncilpta.org

THIRTY-THIRD DISTRICT PTA
Cindy Ellenberg
5629 Pearce Ave
Lakewood, CA 90712
Mail to: P.O. Box 1235
Lakewood, CA 90714
562-804-4519
Fax: 562-804-5460
president@33rdpta.org
www.33rdpta.org

CALIFORNIA STATE PTA
Celia Jaffe
2327 L Street
Sacramento, CA 95816
916-440-1985
Fax: 916-440-1986
info@capta.org
www.capta.org

NATIONAL PTA
Leslie Boggs
1250 N. Pitt Street
Alexandria, VA 22314
800-307-4PTA
Fax: 703-836-0942
info@pta.org
www.pta.org
Thirty-Third District
Program / Directory Award Submissions Form for Unit PTAs
2019 - 2020

Please complete this form, attach it to 2 copies of your unit’s program/directory and turn it in to your council PTA representative at the November Unit Presidents meeting.

Name of council PTA: Long Beach Council of Parents and Teachers, Inc.

Name of unit PTA: ____________________________

Name of unit program/directory chairman: ____________________________

Phone #: ____________________________email: ____________________________

Name of unit PTA president: ____________________________

Phone #: ____________________________email: ____________________________

Please check off each item listed below and on the back side of this sheet that is included in your directory.

<table>
<thead>
<tr>
<th>Council Use</th>
<th>Points</th>
<th>X</th>
<th>REQUIREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>EB</td>
<td></td>
<td>X</td>
<td>Enter date distributed:</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Distributed to members by December 1st</td>
</tr>
<tr>
<td>COVER</td>
<td></td>
<td></td>
<td>Name of PTA</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>PTA logo, name &amp; tagline (see instructions on previous page)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>School year (e.g. 2017 – 2018)</td>
</tr>
<tr>
<td>COVER, INSIDE FRONT COVER, OR FIRST PAGE</td>
<td></td>
<td></td>
<td>PTA founding year (on front cover of bylaws)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>PTA website address (if no website, write N/A)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Purposes of the PTA (see instructions on previous page)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>California State PTA Mission Statement (see instructions on previous page)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Long Beach Council PTA</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Thirty-Third District PTA</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>California State PTA</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Disclaimer (see instructions on previous page)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>School street address</td>
</tr>
</tbody>
</table>

This form is subject to change by Thirty-Third District PTA. If new information arises, LBCPTA will distribute new forms. Please use this form unless otherwise directed.
<table>
<thead>
<tr>
<th>Council Use</th>
<th>Points</th>
<th>X</th>
<th>REQUIREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>IN DIRECTORY, ANY LOCATION</strong></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>PTA &amp; School Event Calendar</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Meeting dates, times &amp; locations</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>List of unit officers and chairmen, including their PTA positons and at least one type of contact information (email, phone, address)</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Long Beach Council PTA president’s name / contact info</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Thirty-Third District PTA president’s name / contact info</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>California State PTA president’s name / contact info</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>National PTA president’s name / contact info</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Teacher and administrator list</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Bell schedule</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>School map</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Superintendent’s name</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>School district office address and phone number</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>School phone number</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>School website address</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>School district board members’ name / contact info</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>City Council members’ name / contact info or link</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>President’s theme / logo</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Unit mission statement</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>PTA membership (how to join)</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Program descriptions</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Message from PTA president</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Message from principal</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>School rules</td>
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<td>1</td>
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<td></td>
<td>Student contact information</td>
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<td>1</td>
<td></td>
<td></td>
<td>School after hours emergency number</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Table of contents</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Libraries (city / county)</td>
</tr>
<tr>
<td>1</td>
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<td>Parks</td>
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<td></td>
<td>Suicide prevention hotline number</td>
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<td></td>
<td>Poison control number</td>
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<td></td>
<td>Graffiti removal number</td>
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<td>Animal control number</td>
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<td></td>
<td>Police / Sheriff number (non-emergency)</td>
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<td></td>
<td>Fire department number (non-emergency)</td>
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<td></td>
<td>School emergency / disaster procedure</td>
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<td>Electric company emergency number</td>
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<td>Gas company emergency number</td>
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<td>Water company emergency number</td>
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<td>Hospital / emergency rooms</td>
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<td>U.S. Senators’ contact info or link</td>
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<td>U.S. Representative contact info or link</td>
</tr>
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<td>1</td>
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<td></td>
<td>California Senator contact info or link</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>California Assembly member contact info or link</td>
</tr>
</tbody>
</table>

*This form is subject to change by Thirty-Third District PTA. If new information arises, LBCPTA will distribute new forms. Please use this form unless otherwise directed*
National PTA® Reflections
California State PTA Local PTA Unit Participation Form

OFFICIAL PTA COUNCIL NAME: ___________________________ PTA DISTRICT #: __________ STATE: CALIFORNIA

OFFICIAL PTA/PTS NAME: ___________________________ NATIONAL 8-DIGIT ID NUMBER: ___________________________

REFLECTIONS CHAIR NAME: ___________________________ PHONE: ___________________________ EMAIL: ___________________________

CITY: ___________________________ STATE: ___________________________ ZIP: ___________________________

TOTAL SCHOOL ENROLLMENT: ________________

CHECK ALL DIVISIONS THAT YOUR PTA/PTS REFLECTIONS PROGRAM OFFERED:

___ Primary (Grades PK-2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School, Special Artist (All Grades)

By division, how many entries did your PTA receive in each arts category?

<table>
<thead>
<tr>
<th>Dance Choreography</th>
<th>Film Production</th>
<th>Literature</th>
<th>Music Composition</th>
<th>Photography</th>
<th>Visual Arts</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Intermediate</td>
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<tr>
<td>Middle School</td>
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<tr>
<td>High School</td>
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<tr>
<td>Special Artist</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

GRAND TOTAL NUMBER OF ENTRIES RECEIVED: ________________

By division, how many entries did your PTA advance to the next judging round in each arts category?

<table>
<thead>
<tr>
<th>Dance Choreography</th>
<th>Film Production</th>
<th>Literature</th>
<th>Music Composition</th>
<th>Photography</th>
<th>Visual Arts</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Intermediate</td>
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<tr>
<td>Middle School</td>
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<tr>
<td>High School</td>
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</tr>
<tr>
<td>Special Artist</td>
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<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GRAND TOTAL NUMBER OF ENTRIES ADVANCED: ________________

158
This page to be left blank for turn in.
Enroll your school, by visiting the CAPTA, or National PTA’s websites and receive a free digital kit, providing you with information, tools and resources you need to take your program to the next level. Planning tools, judging resources, celebration ideas and more.

Literature
Dance
Photography
Visual Arts
Film Production
Music Composition

*Special Artist Division

Share your program kick-off activities with thousands of program leaders across the country using #PTAReflections and #ArtsEdWeek on social media.

Reflections Theme Contest
Students are invited to submit a concept to the considered for a future Reflections program theme. Every year, one student’s theme is selected by a team of National PTA volunteers and the winning student is awarded and recognized. See CAPTA for more info on guidelines and deadline.

Council Due Date: November UP’s Meeting (11/12/19)
Units must be in good standing (up to date on ALL REQUIREMENTS to be considered for advancement to 33rd)
Questions?? Contact Reflections Chair: Kim Erkman @ Fance_erkman@me.com
WHAT YOU MAY NEED TO WORK ON THIS MONTH:

No meeting this month
(Please contact your Area Advisor if you need help with any of the items listed below)

(R) = Required

- **(R) Treasurer’s Reports**: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

- **Membership dues**: Membership dues are to be turned in MONTHLY as received. More information on Membership Dues and Campaigns can be found in the PTA BASICS section of the Red Book.

- **(R) Nominating Committee** — Please see Article V in your bylaws for information on how to elect this committee. A form has been provided in the NOVEMBER section to help you.

- **Sacramento Safari** – See information in the November section or pta33rdsacsafrica.com

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**Upcoming in 2019:**

- Due in January:
  - Reservations for LBCPTA Founders Day meeting - invite will come via email. More info can be found in the FEBRUARY section.

- **Due in February:**
  - **CAPTA High School Senior Scholarships** — Due FEBRUARY 1st See CAPTA.org
  - **Reservations for Thirty-Third District Diversity and Inclusion Conference** more info in the February section

**Due in March:**

- **(R) Mid-Year Audit** — (Jul. 1st to Dec. 31st) Please see the FINANCE section for more information about Audits.

- **(R) Unit Annual Historian’s Report** — Be sure to keep a record of the volunteer hours of your unit. A Volunteer Tally Sheet is located in the SEPTEMBER section for your use.

- **Laura Costley Scholarship** — Who’s going to Convention? Please check the CAPTA website for information on when registration begins. Make sure your unit has convention as a line item in your budget. You should have put aside enough money for at least two people from your unit to attend. Scholarship money may be available. Please see the next page for more info about the Laura Costley Scholarship

- **Communications** — Due at the MARCH UPS meeting, submissions for the Outstanding Newsletter / Website / E-Bulletin. More information and submission forms can be found in the COMMUNICATIONS section of the Red Book.
PTA CONVENTION IS THE PREMIER TRAINING PROGRAM FOR PTA LEADERS AND PARENTS

In the new era of education reforms and parent engagement, your voice as a PTA leader and parent is more important than ever. California State PTA’s Annual Convention is the place to get the latest information on key issues, build the skills to strengthen your school and community, and have fun and connect with PTA leaders from across the state.

PTA Convention continues to be our premier training program for PTA leaders, parents, advocates and more! PTAs and school districts that dedicate a small amount of their resources to send parent leaders to convention win big in the end.

SAVE THE DATE:
MAY 15 - 17, 2020
IN RIVERSIDE, CA
Laura Costley

PTA Convention Scholarship

This year’s recipient will be able to receive up to $500.00 to be used to offset unit-approved expenses to attend the California State PTA convention.

Laura Costley was a valuable member of Long Beach Council PTA for many years and this scholarship was graciously started by her family. Laura was an outspoken voice for the need to train board members of units in order to keep the PTAs in Long Beach strong. **WHY:** To help a Long Beach Council PTA unit attend the California State PTA Convention to receive training. *We are limiting this to units that have an annual budget not exceeding $50,000.*

**Essay submissions will need to be turned into LBCPTA by the MARCH UP’S MEETING**

**Application Requirements:**

- Answer the questions on the back side of this form. Missing information will disqualify the unit so please make sure the form is complete before you turn it in.
- Submit current 2019/2020 approved unit budget.
- The winning unit will be notified in April. Long Beach Council PTA reserves the right to issue this scholarship based on these stated requirements.

Any questions, please contact **Erica Dawson**

Email – **lbcptapresident@gmail.com**

Laura Costley PTA Convention Scholarship Application

*Please turn in by the March UP’s meeting with all accompanying documents

Please fill-in the information requested on both sides of this form.

Unit PTA Name: ____________________________________________________________

Name of Person or people attending convention: ____________________________________________

________________________________________________________________________

PTA Presidents Phone #:________________________ Email: ____________________________
Please respond to these questions so we may find out more about your unit and why you feel you are eligible to receive the Laura Costley Scholarship to attend Convention.

This scholarship is limited to units who have an annual budget that does not exceed $50,000.00. Please let us know what your annual budget is. $____________________. Please attach a copy of your budget to this form.

Will you need the full $500 or a portion thereof: ________________________________

Tell us who makes up your Executive Board (from your Bylaws):

_____President  _____Executive Vice President:  _____Secretary  _____Treasurer

_____Financial Secretary  _____Historian  _____Auditor  _____Corresponding Secretary

_____Parliamentarian  List all VP’s: ____________________________________________

How many executive board members will you be sending? ________________________________

How many students are in enrolled at your school? ________________________________

Has anyone from your school attended the CAPTA Convention before? ________________________________

How will you use the money for convention? _____Registration  _____Travel  _____Hotel

Why is attending the California State PTA Convention important to your unit and how would your unit benefit from it?

______________________________________________________________________________

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WHAT IS DUE THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)
(R) = Required

- **(R) Treasurer’s Reports:** See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting. You will turn in a copy to council every month.

- **(R) Association Meeting Minutes (December & January)**

- **Membership dues** – Membership dues are to be turned in MONTHLY.

- **LBCPTA Founders Day** – Flyer to come from LBCPTA. We will celebrate Founder’s Day at our FEBRUARY meeting. Invite your officers, committee chairs, volunteers, principal & staff to this event. This is a legitimate PTA expense.

- **Recognition Awards** – Many units present Honorary Service Awards (HSAs) and Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or business in their community that are helpful and supportive. This can be done if your unit has a Founders Day Celebration in February or for your last PTA meeting of the year in May or June. Form a committee no later than your January association meeting to help arrange these awards to be given out. An HSA info sheet can be found in the FEBRUARY section along with a nomination form, award form and the PAT form. Online ordering is available for HSA’s only at CAPTA.org. PATs are only available through Long Beach Council PTA. Contact your Area Advisor for more information.

- **Elections** – Notice must be sent out 30 days prior to elections. Elections should be held in March or early April. See Article V of your unit’s Bylaws. A script to help you with the election can be found in the MARCH Section. See OFFICERS AND THEIR ELECTIONS section of your unit bylaws.

WHAT YOU MAY NEED TO WORK ON THIS MONTH:

**Due in February:**

- **Thirty-Third District Freewill Offering** – (optional) Due at the FEBRUARY LBCPTA Founders Day meeting celebration. See info page in the FEBRUARY section.

- **Reservations** – Thirty-Third District Diversity and Inclusion Conference. Invitation to come from Thirty-Third District.

- **CAPTA High School Senior Scholarships & Continuing Education Scholarships** – Due FEBRUARY 1st See CAPTA.org

**Due in March:**

- **Budget Update** – Due at the MARCH meeting. Year to date actuals.

- **Convention** – Who’s going to Convention? Please check the CAPTA website for information on when registration begins. Make sure your unit has convention as a line item in your budget. You should have put aside enough money for at least two people from your unit to attend. Laura Costley Scholarship money may be available to help your unit go. Please see the page in the DECEMBER section for more info.

- **Communications** – Due at the MARCH UPs meeting, submissions for the Outstanding Newsletter / Website / E-Bulletin. More information and submission forms can be found in the COMMUNICATIONS section of the Red Book.

- **(R) Mid-Year Audit** – (Jul. 1st to Dec. 31st) Please see the FINANCE section for more information about Audits.

- **(R) Unit Annual Historian’s Report** – Be sure to keep a record of the volunteer hours of your unit. A Volunteer Tally Sheet is located in the SEPTEMBER section for your use.

- **Teacher of the Year** – Due at the APRIL meeting. See APRIL section for more info.

- **LBCPTA High School Scholarship Application** - for more info, please see the April section in the Red Book.
45th Annual Sacramento Safari
Advocacy and Legislation in PTA
Training and Learning Conference

Dates: February 25-27, 2020
Reservations due to Council: Monday, Dec. 9, 2019

Want to be an advocate for your community? Interested in Politics? Public Policy? Education Policy? History?

All Adults and High School Juniors and Seniors are invited to attend.

Registration Includes: Registration and Information Packet, 2 nights at a hotel, 2 breakfasts, 3 lunches and 2 dinners, taxes, tips, and hotel portage.

Round-trip air transportation for students, chaperones and adult delegates (Adult delegates may choose to not travel with the group).

Bus transportation between the airport and hotel for students, chaperones and delegates (Delegates traveling separately must make arrangements to and from the hotel).

Approximate Price: (prices subject to change) Students, chaperones & delegates $700
(includes airfare, hotel, bus transportation, and meals while in Sacramento)

Program Includes: One mandatory student & chaperone orientations and one mandatory adult delegate orientation – dates and times to be announced later.
Extraordinary speakers, meetings with your legislators, Legislative Committee meetings, General Sessions of the Senate and Assembly, Guided tour of the Capitol and meetings with PTA advocates.

Terms and Conditions:
Reservations and Payments – Checks are to be made out to LBCPTA.

Students who attend Sacramento Safari as a delegate are responsible for notifying their teachers and completing missed class work. Three full days of school will be missed.

After the December deadline, delegates must call the Thirty-Third District office to verify space availability and to arrange for payment.

LBCPTA may be able to help units with the cost of attending. For more information or questions, please contact your Area Advisor.
FAQs about Sacramento Safari

• What is Sacramento Safari?
Sacramento Safari is an educational and advocacy-training trip to Sacramento that occurs in the month of March. Through scheduled visits to the Legislature and representatives, participants learn how the legislative system works, about advocacy, and pending legislation. This opportunity is open to all interested members. High school students are encouraged to attend, but must be accompanied by an adult chaperone.

• Depending on availability, the program may include:
  Extraordinary speakers        Guided tour of the Capitol
  Meetings with your legislators Meetings with PTA advocates
  Legislative committee meetings Thirty-Third District PTA will provide a
certificated teacher as part of the program.

• How much does it cost and who pays?
The cost to attend Sacramento Safari will be approximately $700. Cost includes airfare, hotel, transportation and meals. Unit PTAs can pay or individuals can pay for themselves to attend. Scholarships may be available. Please speak with your Area Advisor about availability.

• Who is eligible to go?
Adults from any PTA/PTSA unit in good standing with an interest in advocacy are encouraged to attend. Students in 11th and 12th grade are encouraged to apply for this opportunity. An adult chaperone is required for every 4 students from their unit. All attendees must be current PTA members and a student in good academic standing. A copy of your current PTA membership card is required with your application form.

• Where will the students and adult attendees be staying in Sacramento?
This information will be made available closer to the date of the event.

• Do I need to attend the mandatory Orientation Meeting?
YES! If you cannot make the commitment to attend these meeting, please do not apply. Important information will be presented and instructions provided at the meeting. All delegates are required to attend the Orientation.

• If a student or adult delegate is selected and changes his/her mind, can we cancel our reservation?
Substitutions can be made but there will be NO REFUNDS given once payment has been made.

*Students who attend Sacramento Safari as a delegate are responsible for notifying their teachers and completing missed class work. Three full days of school will be missed.*
WHAT DUE THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)

- **Membership dues** – Membership dues are to be turned in **MONTHLY** as received. More information on Membership Dues in the **PTA BASICS** section of the Red Book.
- **33rd District PTA Free Will Offering**
- **RESERVATIONS** for 33rd Diversity & Inclusion Conference
- **Recognition Awards** – Many units present Honorary Service Awards (HSAs) and Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or business in their community that are helpful and supportive. This can be done if your unit has a Founders Day Celebration in February or for your last PTA meeting of the year in May or June. Form a committee no later than your January association meeting to help arrange these awards to be given out. An HSA Info sheet can be found in the **FEBRUARY** section along with a nomination form, award form and the PAT form. Online ordering is available for HSA’s only at CAPTA.org. PATs are only available through Long Beach Council PTA. Contact your Area Advisor for more information.
- **Elections** – Notice of the election meeting and the slate of nominees must be sent out 30 days prior to the meeting. Elections should be held in March or early April. See Article V of your unit’s Bylaws.

WHAT YOU MAY NEED TO WORK ON THIS MONTH:

**Due in March**

- **(R) Mid-Year Audit** – (Jul. 1st to Dec. 31st) See the **FINANCE** section for more information about Audits.
- **(R) Unit Annual Historian’s Report** – Be sure to keep a record of the volunteer hours of your unit. A Volunteer Tally Sheet is located in the **SEPTEMBER** section for your use.
- **(R) Budget Update** – Due at the **MARCH** meeting. 2 copies of your year-to-date actuals.
- **Delegates** – Due at the **MARCH** meeting. Your bylaws require that in addition to the president attending the meeting, your association should also send two (2) delegates (see Article IX or X in your unit bylaws).
- **LBCPTA High School Scholarship Application** – for more info, please see the **MARCH** section.
- **Convention** – Who’s going to Convention? Please check the CAPTA website for information on when registration begins. Make sure your unit has convention as a line item in your budget. You should have put aside enough money for at least two people from your unit to attend. The **Laura Costley Scholarship** may be available to help your unit go. Please see the page in the **DECEMBER** section for more info.
- **Communications** – Due at the **MARCH** UPS meeting, submissions for the Outstanding Newsletter / Website / E-Bulletin. More information and submission forms can be found in the **MARCH & PTA BASICS** sections of the Red Book.
- **Thirty-Third District Spring Awards and Association meeting** – Due at the **MARCH** meeting. An invitation will be emailed from Thirty-Third District. You may bring officers and chairmen from your unit. Units are encouraged to bring a tri-fold display board that displays your PTA highlights. Entries will be judged and given an award. Unit and Council awards are given during the breakfast meeting. You must bring your membership card with you because business will be conducted at this meeting.

**Due in April**

- **Teacher of the Year** – Due at the **APRIL** meeting. See **APRIL** section for more info.
- **(R) Officers Contact Form** – delay in submitting this info will result in your principal receiving a letter from CAPTA. Form can be found in the April section.
- **Order for PTA Membership Envelopes**
- **Order for Thirty-Third District Calendars**
- **Convention Fees** - see **APRIL** section.
WHAT IS FOUNDERS DAY?
The Founders Day celebration originated in 1910 by Mrs. David O. Mears, a charter member of the National Congress of Mothers founded by Alice McLellan Birney and Phoebe Apperson Hearst in Washington, D.C. on February 17, 1897. The Founders Day observance has continued through the change of organization names in 1925 to the National Congress of Parents and Teachers, and the unifying in 1970 with the National Congress of Colored Parents and Teachers founded in 1926 by Selena Sloan Butler, to become the National PTA.

Each year in February, PTA honors the three founders as well as past and present PTA leaders. Through special programs and events PTA also attempts to increase the awareness of its members and the community not only about its past achievements but its present and future activities, projects and goals. A portion of the Founders Day freewill offering collected during an observance is returned to the districts to be used to extend PTA’s work and develop leadership.

Donations collected during Founders Day observances benefit the entire organization.

FOUNDERS DAY PROGRAM IDEAS TO HELP YOU CELEBRATE PTA’s BIRTHDAY

A Founders Day Program should have three components:
✓ Honoring of PTA’s Founders and review of past PTA achievements
✓ Raising awareness about PTA (especially yours) and its current activities and goals
✓ Participation in the traditional Founders Day freewill offering/gift

1. **Display your PTA’s history proudly.** Organize all of the memorabilia since the founding of your PTA and display it in the school library.

2. **Celebrate your volunteers.** Hold a volunteer recognition luncheon to honor those who make a difference in your PTA. This might be a good time to present an Honorary Life Membership from your state PTA or the National PTA to an exceptional volunteer.

3. **Sponsor a speaker series for your community.** Each February 17th, invite a locally known speaker to address a concern of your community regarding education and/or children. This can be an event you co-sponsor with another organization. Be sure to advertise your event widely to your community.

4. **Plan a Family Fun Night at your school.** Whether it is Karaoke, movies, games, reading, or pizza, plan an event to bring together families in a fun way while recognizing the PTA Founders.

5. **Honor your past leaders.** Organize a reception to honor the past leaders of your PTA. Invite past leaders, school administrators and local leaders. Be sure to highlight the accomplishments of the past PTA leaders and outline your future plans.
FOUNDERS DAY FREEWILL OFFERING
"PTA BIRTHDAY GIFT"

Donations collected during Founders Day observances benefit the entire organization: unit, council, district PTAs, State and National PTA. California State PTA returns one-fourth of its offering to the district PTA and retains one-fourth for its work throughout the state. Half of the offering is sent to National PTA.

District PTAs use the funds to:
- Organize new units and councils. Strengthen PTAs and PTSAs. Train leaders through workshops and conferences. Offer leadership training and parliamentary procedure courses. Promote PTA publications and special projects. Plan special contacts with teachers and administrators to increase the value of the PTA to school and community.

California State PTA uses the funds to:
- Service new units and councils. Strengthen PTAs and PTSAs.
- Provide special assistance to council and district PTAs through workshops and leadership conferences. Conduct field services in local areas by California State PTA officers and members of commissions. Perform regional extension work throughout the state. Counsel with individuals and groups.

National PTA uses the funds to:
- Provide requested field services (instructions, guidance and other assistance for California State PTA leaders). Train leaders. Promote contacts with educational groups. Disseminate materials that will further the aims and Purposes of PTA. Hold conferences. Provide extension of parent-teacher services throughout the country.

Please bring your donation to the LBCPTA Founders Day event on

February 11, 2020

Please cut hear and bring to the LBCPTA Founders Day event. Thank You.

----------------------------------------------------------------------------------------------------------------------------------

Founders Day Free Will Offering

PTA Unit Name: ________________________________________________________________

PTA Unit President: ____________________________________________________________

Email: ________________________________

Council Name: Long Beach Council PTA        Donation Amount: $_________________
HONORARY SERVICE AWARDS

Honorary Service Awards (HSAs) are awarded year round and designed as a unique way for PTA units, councils and districts to publicly acknowledge both individuals and organizations for outstanding community service to children and youth in a community. All monies collected with this program are used exclusively to fund the California State PTA Scholarship and Grant Program.

RECOGNITIONS – The program offers six, distinctive types of awards:

**Very Special Person Award (VSP)** – This award is given to recognize an individual or organization for their service to PTA. An award certificate is available with a contribution of $15 or more by a PTA unit, council or district. PTAs may also purchase a VSP service pin at an additional cost.

**Honorary Service Award (HSA)** – This award is given to recognize an individual or organization for outstanding service to children and youth in your community, going above and beyond what is asked of them. An award certificate is available with a contribution of $30 by a PTA unit, council or district in the name of the recipient. PTAs may also purchase a HSA service pin at an additional cost.

**Continuing Service Award (CSA)** – This award is given to recognize an individual or organization for ongoing or long-time service to children and youth, providing support year after year. An award certificate is available with a contribution of $30 by a PTA unit, council or district in the name of the recipient. PTAs may also purchase a CSA service pin at an additional cost.

**Outstanding Teacher Award (OTA)** – This award may be given to recognize a teacher for outstanding service to children and youth through PTA, school, or community. An award certificate is available with a contribution of $30 by a PTA unit, council or district in the name of the recipient. PTAs may also purchase an OTA service pin at an additional cost.

**Outstanding Administrator Award (OAA)** – This award may be given to recognize an administrator for outstanding service to children and youth through PTA, school, or the community. An award certificate is available with a contribution of $30 by a PTA unit, council or district in the name of the recipient. PTAs may also purchase an OAA service pin at an additional cost.

**Golden Oak Service Award (GOSA)** – This award is given to recognize, as the most prestigious of the Honorary Service Awards, an individual or organization that has made significant contributions to the welfare of children and youth in a school or community. An award certificate is available with a contribution of $60 by a PTA unit, council or district in the name of the recipient. PTAs may also purchase a GOSA service pin at an additional cost.

PTA CHECK LIST – HONORARY SERVICE AWARDS

- **Review** the types of awards, donation amounts and criteria for selecting honorees for specific awards.
- **Publicize** the awards and ask for suggestions for honorees from your members. Distribute a flyer requesting names and information.
- **Meet** to discuss and select honorees. Remember to keep your proceedings confidential.
- **Budget** for HSA awards as a line item and keep expenditures within your budget.
- **Order** specific awards and certificates using order forms in the California State PTA Toolkit. Service pins can also be ordered at the same time, allowing four to six weeks for delivery.
- **Arrange** for award presentations at a meeting or function such as Founders Day or end-of-the-year luncheon.

Devises an innovative way to present an award using a poem, skit or other unique way to highlight the recipients’ accomplishments. Remember to mention that HSA contributions fund the California State PTA Scholarship and Grant program in the honoree’s name.

- **Arrange** for families and friends of the honorees to attend the presentation.
- **Provide** the award recipient with a copy of the biographical materials used in the presentation.
- **Arrange** for a committee member to take photos for the recipient.
- **Write** a summary of the event for the chairman’s procedure book and add copies of the photos, program and biographies as well.
- **Maintain** an accurate record of all HSA awards in a permanent file.
- **Celebrate** volunteers and community service.
HONORARY SERVICE AWARD*
NOMINATION FORM FOR UNIT, COUNCIL AND DISTRICT PTAs

The Honorary Service Award Selection Committee requests that members of ________________________
PTA/PTSA assist in the selection of deserving recipients for recognition at PTA/PTSA event or at a PTA meeting.
Nominated individuals or organization who have made significant contributions to the well-being of children, youth or families
in this school and/or community can be considered for this award. Current members, officers and teachers may also be
considered for this award.

*Honorary Service Award Program includes the Honorary Service Award (HSA), Continuing Service Award (CSA), and Golden Oak
Service Award (California’s highest honor), Very Special Person Award (VSP) and Donations in name of individual or organization.
(See Toolkit, Section 7.6.3 Honorary Service Award (HSA) Program)

HONORARY SERVICE AWARD PROGRAM
--- Please print ---

Specify award category:

____ Honorary Service Award (HSA)  ____ Very Special Person Award (VSP)  ____ Continuing Service Award (CSA)

____ Golden Oak Service Award  ____ Donations

Name of individual nominated: ___________________________________________________________

   Title or position: ____________________________________________________________

Name of organization nominated: ______________________________________________________

   Contact Person: _________________________________________________________________

   Address: _________________________________________________________________

   Telephone: (___) __________________ Email: ______________________________________

Reason for nomination:

_______________________________________________________________________________

_______________________________________________________________________________

Name of person submitting the nomination: _______________________________________________

   Telephone: (___) __________________ Email: ______________________________________ Date: __________

All nominations will be considered. The HSA Selection Committee will select the recipient.

Nomination DUE DATE for presentation: _______________________________, 20__

PLEASE RETURN FORM TO: _________________________________ PTA/PTSA

California State PTA Toolkit – 2013


**HONORARY SERVICE AWARD (HSA) ORDER FORM**

All monies raised with the sale of HSAs fund the California State PTA Scholarship and Grant Program.

**Presented By**

*PTA/PTSA Unit # ___________________________

*Please Print Clearly Name of PTA unit, council or district presenting HSA Award*

**PTA Council** ___________________________

**District PTA # ___________________________

**Ship To – Contact Person:**

*______________________________________________________*

*Street Address ___________________________________________

*City ___________________________ Zip _______________________

*Email ___________________________ Telephone (_______) _______


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<th>AWARDS – See Toolkit for Descriptions</th>
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<td>VSP Very Special Person Award</td>
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**AWARD RECIPIENT’S NAME – To appear on certificate**

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<th>Please Print Clearly First Name</th>
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**METHOD OF PAYMENT**

- **CHECK or MONEY ORDER** – Payable to Kustom Imprints
- A fee of $10 is charged for any check returned due to insufficient funds.
- Two signatures are required on all PTA/PTSA checks.

- **MasterCard**
- **Visa**

**Zip Code** ___________________________

**Credit Card Number** ________________

**Exp Date** ___________________________

**Print Name** ___________________________

**Signature** ___________________________

**FOR OFFICE USE ONLY:**

*Invoice # ___________________________ Ck # ___________________________ AMT ___________________________ ☐ PTA ☐ PER ___________________________ 9/2010

Order Online at www.ShopPTA.com! You can also place an order and pay by check.
PAT Award Certificate Order Form

**Praise, Appreciation & Thanks**

Everyone can use a “PAT” on the back from time to time. That’s just what the LBCPTA “PAT” Award is all about! Consider ordering this award to give for a guest speaker, volunteers for a special project, VIPs that attend your meetings or anyone you feel deserves a “PAT” on the back. This award can be given at any time during the school year. Just $10.00 each!

Please allow two (2) weeks to process the certificates.

Fill out the form and hand in with the payment to your area advisor at any UPs meeting. Make copies for future turn-ins.

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<th>PTA Unit:</th>
<th>PTA President:</th>
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Presentation Date: _______________

Please PRINT names of recipients below:

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<th>First Name</th>
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</tr>
</tbody>
</table>

Grand Total $ _______________________

CHECK # _______________________

LBCPTA Financial Secretary’s initials
WHAT IS DUE THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)

- **(R) Treasurer’s Reports**: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting and turned into council every month.
- **Mid-Year Audit** (July 2019 – December 2019)
- **Annual Historians Report**
- **Budget Update (Year-to-Date Actuals)**
- **Membership dues** – Membership dues are to be turned in MONTHLY as received. More information on Membership Dues can be found in the PTA BASICS section of the Red Book.
- **Association Meeting Minutes (January & February)**
- **Convention** – Who’s going to Convention? Check the CAPTA website for information on when registration begins. Make sure your unit has convention as a line item in your budget for at least two people from your unit to attend. The Laura Costley Scholarship may be available to help your unit go. Please see the DECEMBER section for LC Scholarship form and more info.
- **Recognition Awards** – Many units present Honorary Service Awards (HSAs) and Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or business in their community that are helpful and supportive. This can be done if your unit has a Founders Day Celebration in February or for your last PTA meeting of the year in May or June. Form a committee no later than your January association meeting to help arrange these awards to be given out. An HSA info sheet can be found in the FEBRUARY section along with a nomination form, award form and the PAT form. Online ordering is available for HSA’s only at CAPTA.org. PATs are only available through Long Beach Council PTA. Contact your Area Advisor for more information. Please allow up to two weeks to process.
- **Elections** – Notice must be sent out 30 days prior to elections. Elections should be held in March or early April. See Article V of your unit’s Bylaws.

WHAT YOU MAY NEED TO WORK ON THIS MONTH

**Due in April**

- **Teacher of the Year** – Due at the APRIL meeting. See APRIL section for more info.
- **Officers Contact Form** – delay in submitting this info will result in your principal receiving a letter from CAPTA. Form can be found in the April section.
- **LBCPTA High School Senior Scholarships**
- **Order for PTA Membership Envelopes**
- **Order for Thirty-Third District Calendars**
- **Convention Fees**

**Due in May**

- **LBCPTA In & Out Meeting and Awards Reservations**
- **Reservations for Thirty-Third District PTA Spring Training**
- **Unit Program Report** – see form in MAY section
- **PATs** – Last day to request the LBCPTA PAT’s is at May UP’s meeting.

End of Year Things to Do

- ✔ Procedure Books
- ✔ Unit Annual Treasurers Report (should be completed by outgoing Treasurer by June 30th)
- ✔ Transition Meeting for out-going and in-coming boards to pass on info and advice
Sample President’s Script for Elections

It can be nerve-racking to stand in front of your membership and conduct elections. What do you say and, how do you say it?
Consider the following:

This info was compiled from an article on the CAPTA.org website. http://downloads.capta.org/parl/ElectionsScript.pdf

<table>
<thead>
<tr>
<th>Who Speaks</th>
<th>What is said</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRESIDENT:</td>
<td>“We will now conduct our elections. Would the parliamentarian please read the sections of the bylaws pertaining to elections?”</td>
</tr>
<tr>
<td>PARLIAMENTARIAN:</td>
<td>The parliamentarian reads aloud the following sections of the unit bylaws: Article V Sections 1, 2, 3a, 3b, 3d, 3g, 4, 5, 6, 7 and 11 OR these can be presented in written format and the reading aloud may be dispensed with if all are in agreement.</td>
</tr>
<tr>
<td>NOMINATING COMMITTEE CHAIRMAN:</td>
<td>The chairman reads the prepared report that states the slate of nominees, the nominating committee members and the date of the report. The chairman’s part in the elections is concluded.</td>
</tr>
<tr>
<td>PRESIDENT:</td>
<td>The president asks each nominee to stand as their names are read from the Nominating Committee’s report:</td>
</tr>
<tr>
<td></td>
<td>“According to our bylaws, nominations from the floor are now in order. For president, ________________ is nominated. Are there further nominations from the floor?” (Give a few moments for response.) “Seeing none, the nominations for president are closed.”</td>
</tr>
<tr>
<td></td>
<td>“______________ has been nominated for executive vice President. Are there further nominations from the floor?” (Give time for response.) “Seeing none, the nominations for executive vice president are closed.”</td>
</tr>
<tr>
<td></td>
<td>The president then goes through each elected position as specified in the bylaws asking for nominations from the floor. If a nomination is received for an office that has no candidate, that election can be held by voice vote. Should a nomination be received for an office with a candidate, a ballot election must then be held for that office or offices; a ballot election must also be held at the request of any member of the association.</td>
</tr>
<tr>
<td>PRESIDENT:</td>
<td>The president then reads the candidates and offices.</td>
</tr>
<tr>
<td></td>
<td>“As there are single candidates for each office, we will conduct the elections by voice vote. Is there any objection to this procedure?”</td>
</tr>
<tr>
<td></td>
<td>If no one has called for a ballot vote, elections continue.</td>
</tr>
<tr>
<td></td>
<td>“All those in favor of electing ________________ as president, ________________ as executive vice president ... (reads all the names) “say ‘Aye.’ Those against, say ‘No.’ The ayes have it and you have elected the following officers.”</td>
</tr>
<tr>
<td></td>
<td>The president then restates the names and offices of those elected. The voice vote election is concluded.</td>
</tr>
</tbody>
</table>
PTA UNIT – ANNUAL HISTORIAN REPORT FORM
Reporting Period – July 1 to June 30, __________

Instructions:
Complete this form and file it in your Historian’s procedure book
Make 2 copies of your completed form:
• Give 1 copy to your unit secretary to file with the minutes.
• Send 1 copy – through channels – to your PTA council/district.
• Check your council/district due date.

Tips – Reporting Volunteer Hours:
Total your unit’s volunteer hours projected to June 30
Remember to include time spent by your members involved in:
• PTA activities benefiting children.
• Unit, council, district, state and National PTA programs, projects and training.
• PTA-related meetings as well as travel, phone, email and paperwork time.

UNIT INFORMATION (Please Print)

PTA/PTSA Name: ____________________________
____ Preschool  ____ Elementary School  ____ Jr./Middle School  ____ High School  ____ Other

District PTA Number/Name: ____________________________  State PTA Identification #: ____________
See bylaws or mailing labels from State PTA for ID number

Report Completed by:______ Historian  ____ President  ____ Other

Name: ________________________________________

Street Address: ____________________________________

City/Zip: ______________________________________

Phone #: ______________________ Email: __________________

President’s Name: ________________________________

President’s Signature: ____________________________

DATE: ___________________ TOTAL VOLUNTEER HOURS REPORTED = ____________________
Historian’s Summary Report: July 1, 20____ to June 30, 20____
Complete and file with Minutes, Historian’s Procedure Book & President’s Memory Book

Name of PTA: ________________________________

Charter Date: __________________ Membership Total: __________________

List of Officers and Chairmen with contact information (attached)

Any Bylaws Changes: ________________________________

__________________________________________________________________________

Awards/ Recognitions Received: ________________________________

__________________________________________________________________________

Publicity Received: ________________________________

__________________________________________________________________________

HSAs Awarded To:

<table>
<thead>
<tr>
<th>Name</th>
<th>HSA Received</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tbody>
</table>

Founders Day Celebration: ________________________________

__________________________________________________________________________

PTA Activities/ Programs: ________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
Outstanding
Newsletter / Website / E-Bulletin
Award Form

For more information, please contact
LBCPTA Director of Communications
Maria Towne - maria.towne@outlook.com

Award Outline - The Outstanding Newsletter / Website / E-Bulletin award recognizes LBCPTA units doing an outstanding job of communicating to its members.

Application Instructions

- Please attach this form to your entries.
- Submissions are due at the March Unit President’s Meeting.
- Submissions will be judged on PTA identification, content, overall appearance, and creativity.
- Each unit must include two (2) printed copies of three (3) different issues distributed through the current school year.
- Failure to include the completed application pages, required copies of publications and website address and any password required to view website will not be judged and will be given a participation award only.
- Partial credit may be awarded if deemed appropriate by the judging committee.
- Decisions of Outstanding Newsletter / Website / E-Bulletin Committee and Director of Communications are final.
- Awards will be presented at the final Unit President’s Meeting in June.
- Only PTAs in good standing with LBCPTA, Thirty-Third District and California State PTA will be allowed to participate.
- Please use the judging form on the back of this application as a guide.

Directions: Fill in the information requested and check off the communications categories on the back side of this form for which you are asking to be recognized.

Unit Name: ___________________________________________

President’s Name: ___________________________________

Email Address: _____________________________________

☐ Newsletter Editor's Name: ____________________________

☐ Website Webmaster's Name: __________________________

Website Address: ___________________________________

Password (if required to view): _________________________

☐ E-Bulletin Editor's Name: ____________________________
# LBCPTA OUTSTANDING NEWSLETTER / WEBSITE / E-BULLETING JUDGING FORM

**DATE: __________**

## Section 1: Masthead / Home Page / Front Page

<table>
<thead>
<tr>
<th>Category</th>
<th>Points</th>
<th>Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Name of Newsletter / Website / E-Bulletin</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>2. Name of PTA</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>3. Month and year of Newsletter / Website / E-Bulletin</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4. Unit’s PTA Logo is prominently displayed on first page</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>5. Editor or President’s name and contact information</td>
<td>3</td>
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</tr>
</tbody>
</table>

## Section 2: Content

<table>
<thead>
<tr>
<th>Category</th>
<th>Points</th>
<th>Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does the Newsletter / Website / E-Bulletin establish itself as a PTA publication and not a school publication?</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>2. Is your PTA’s mission statement listed?</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>3. Does the Newsletter / Website / E-Bulletin speak to the mission and objectives of the PTA?</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>4. Is there a President’s Message prominently located and relevant?</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>5. Does it include links/info to LBCPTA, Thirty-Third District PTA or California State PTA?</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>6. Does it include articles about Parent Involvement/Education? Child health/safety?</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>7. Does it include articles/submissions on topics of advocacy and legislation?</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>8. Does it include membership information and/or updates?</td>
<td>2</td>
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<tr>
<td>9. Does it include calendar or a schedule of upcoming events?</td>
<td>3</td>
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<tr>
<td>10. Does it include volunteer opportunities or other ways parents can participate?</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>11. Does it include volunteer recognition?</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

## Section 3: Overall Appearance & Creativity

<table>
<thead>
<tr>
<th>Category</th>
<th>Points</th>
<th>Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Are the examples easy to read (fonts/styles are easy to read, adequate spacing)?</td>
<td>6</td>
<td></td>
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<tr>
<td>2. Are the examples provided eye catching (nice color scheme, not overcrowded)?</td>
<td>6</td>
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<tr>
<td>3. Do the examples provided include photos/clip-art/kids’ activities, etc.?</td>
<td>6</td>
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<tr>
<td>4. Do the examples provided have an overall interesting and engaging appearance?</td>
<td>6</td>
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<tr>
<td>5. Do the examples provided have a logical and appealing layout?</td>
<td>6</td>
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</tr>
<tr>
<td>6. Are the examples provided well branded (good and proper use of PTA logo(s), obvious it is a PTA communication, consistent graphics used, etc.)?</td>
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</table>

### SECTION 1

<table>
<thead>
<tr>
<th>TOTAL POINTS EXAMPLE 1</th>
<th>15</th>
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</thead>
<tbody>
<tr>
<td>TOTAL POINTS EXAMPLE 2</td>
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<td>TOTAL POINTS EXAMPLE 3</td>
<td>15</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>45</td>
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</table>

### SECTION 2

<table>
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<th>TOTAL POINTS EXAMPLE 1</th>
<th>25</th>
</tr>
</thead>
<tbody>
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<td>TOTAL POINTS EXAMPLE 2</td>
<td>25</td>
</tr>
<tr>
<td>TOTAL POINTS EXAMPLE 3</td>
<td>25</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>75</td>
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</table>

### SECTION 3

<table>
<thead>
<tr>
<th>TOTAL POINTS EXAMPLE 1</th>
<th>25</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL POINTS EXAMPLE 2</td>
<td>25</td>
</tr>
<tr>
<td>TOTAL POINTS EXAMPLE 3</td>
<td>25</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>75</td>
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</tbody>
</table>

Section 1: Maximum allowed 45=
Section 2: Maximum allowed 75=
Section 3: Maximum allowed 40=________

Total Points: Max 160=________

**Points Needed:**
- Gold = 144 points
- Silver = 128 points
- Bronze = 112 points
- Participation = <111 points
LBCPTA is offering each High School with a PTA/PTSA a $500.00 scholarship.

Please make it a priority to get the word out to your HS Seniors!

The Lena Galbraith Fund was created in 1965 to award $25.00 for students pursuing a career in teaching. One student was selected from each of the high schools. This was to be given to the student upon enrollment in Long Beach City College to cover the cost of books.

Now LBCPTA has a $500.00 scholarship for High School students who meet the criteria listed on the application. The scholarship can be used at any college or career school for tuition, books or other college fees. This scholarship is available to one qualified student from each of the LBUSD high schools with an active PTA/PTSA unit in good standing.

- Application Deadline is April 7, 2020
- The scholarship is for applicants who will attend any college or career school in the fall as a full-time student.
- The student’s cumulative GPA must be 2.0 or above.
- The student applicant must be a current PTA / PTSA member at any LBUSD school. Students may join when submitting application.
- Check the Long Beach Council PTA website for the most up to date information regarding deadlines.

Questions?
LBCPTA Director of Education – Diana Craighead at: craighedd@aol.com

Thank you so much for supporting the LBCPTA High School Senior Scholarship Program
Long Beach Council PTA 2020
Graduating High School Senior
Scholarship Application

Name of High School: ___________________________ Expected Date of HS Graduation: _________________

<table>
<thead>
<tr>
<th>Last name</th>
<th>First name</th>
<th>Middle name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Street Address</th>
<th>City</th>
<th>Zip</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Phone number</th>
<th>email</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Applicant’s signature</th>
<th>Date</th>
</tr>
</thead>
</table>

Cumulative GPA: ________ Counselor’s Name: ___________________________

Counselor’s signature verifying GPA: ____________________________ Date: _______________

Postsecondary School you plan to attend: ___________________________

Intended major/course of study: ___________________________

To be considered for this $500 LBCPTA scholarship the following must be provided:

1) A completed application.
2) Attach a copy of your current PTSA membership card. If you are not a current PTSA member, you can join before submitting the application.
3) One to two page explanation on how PTA has influenced your education throughout your school years. Some examples would be clubs, activities, and organizations you have been involved with. It may also include interests, career plans and reason for applying for the scholarship.
4) One confidential letter of reference from an adult (excluding relatives). Your reference letter must be in a sealed envelope with reference’s signature across the envelope seal.

Applications tentative Due Date is Tuesday, April 7, 2020
For more information contact Director of Education - Diana Craighead at crigheadd@aol.com or visit the LBCPTA.org website for the most up to date information.
WHAT IS DUE THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)

- (R) Treasurer’s Reports: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting and turned in to council.
- (R) 2020-2021 Officer’s Contact Form
- (R) Association Meeting Minutes (March)
- Membership dues – Membership dues are to be turned in MONTHLY as received.
- Teacher of the Year (TOTY) essays due
- Convention—Who’s going to Convention? Please check the CAPTA website for information. Make sure to release funds for convention attendees. The Laura Costley Scholarship may be available to help your unit go. Please see the DECEMBER section for LC Scholarship form and more info.
- Recognition Awards—Many units present Honorary Service Awards (HSAs) and Praise, Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or business in their community that are helpful and supportive. This can be done if your unit has a Founders Day Celebration in February or for your last PTA meeting of the year in May or June. Form a committee no later than your January association meeting to help plan the awards ceremony. An HSA info sheet can be found in the FEBRUARY section along with a nomination form, award form and the PAT form. Online ordering is available for HSA’s only at CAPTA.org. PATs are only available through Long Beach Council PTA. May UP’s meeting is the last day to order for year.
- Elections – Notice must be sent out 30 days prior to elections. Elections should be held in March or early April. See Article V of your unit’s Bylaws.

WHAT YOU MAY NEED TO WORK ON THIS MONTH:

Due in May
- LBCPTA In & Out Meeting and Awards Reservations
- Reservations for Thirty-Third District PTA Spring Training
- Unit Program Report – see form in MAY section
- PATs – Last day to request the LBCPTA Praise, Appreciation and Thanks (PAT) awards is the May UPs meeting. Please use the form in the FEBRUARY section. Turn in to your Area Advisor. Please allow for two weeks to process.

End of Year Things to Do
- Procedure Books
- Unit Annual Treasurers Report (should be completed by outgoing Treasurer by June 30th)
- Transition Meeting for out-going and in-coming boards to pass on info and advice.
Getting the Most from Convention

Before you decide to attend
- Determine what you need and hope to gain from convention.
- Consider the value of convention. We only make progress if we accept the challenge of change – to learn and grow in knowledge, skills and experience.
- Ensure that your PTA includes a line item in the budget to send attendees to the Annual California State Convention every year.

After you’ve decided to attend
- Write down your objectives for attending so you are clear about your purpose and what you want from convention.
- Plan how your time will be spent; design an itinerary that allows flexibility to pursue unexpected learning or networking opportunities.
- Be responsible about attending. Your PTA is sending you to convention to participate fully. Do not shop or tour on your PTA’s time or money.
- Be positive about attending!

When you arrive at convention
- Review the program for changes and updates – revise your itinerary as appropriate.
- Participate in ALL general meetings and take notes.
- Voting delegates can participate in the business of the association – vote on a legislative platform that will direct our advocacy efforts; establish the priorities to be addressed; participate in the election of future California State PTA leaders.
- Celebrate the outstanding work of local unit, council and district PTAs.
- Participate in a variety of workshops where ideas and skills can be learned; hear from experts in fields of PTA concern.
- Develop leadership skills
- Purchase a workshop handout CD in the PTA Store. The CD contains handouts from those workshops you aren’t able to attend.
- Visit the exhibit hall and consider the potential of products and services to increase your PTA’s ability to serve its parents and students effectively and efficiently.
- Meet state and National PTA leaders.
- Network! Exchange ideas and successes with others. Learn from PTAs around the state.
- Create helpful lists of PTA contacts.

After returning home
- Report to your PTA on what you learned and how it can benefit you and your PTA.
- Demonstrate that your attendance was well worth the time and expense.
- Share your notes with others who can make the information work for them. Adapt the information to benefit your PTA.
- Share the handout materials you collected.
- Share the handout CD you purchased in the PTA Store.
- Follow-up with contacts you made and nurture the rapport you established.
- Continue to share ideas and success with others.
- Apply the knowledge and skills you acquired immediately.

Encourage your PTA to send more attendees to future conventions.
PTA Teacher Appreciation Week
May 2020.

Recognize Educators during Teacher Appreciation Week
Celebrate National PTA Teacher Appreciation Week the first full week of May and California Day of the Teacher, the second Wednesday in May.

Since 1984, National PTA has designated one week in May as a special time to honor the men and women who lend their passion and skills to educating our children.

PTA events at the national, state and local levels celebrate the outstanding contributions teachers make. Teacher Appreciation Week offers the opportunity for citizens to reaffirm their commitment to parent-teacher partnerships. PTA Teacher Appreciation Week is the perfect time to personally thank your students’ teachers for their support and encouragement for children throughout the year. While appreciation alone will not reduce the challenges teachers face, it will let them know their efforts are not going unnoticed.

Appreciation Ideas for Students, Families and PTAs
• Create and display posters, banners, and fliers in schools and in the community promoting Teacher Appreciation Week and the California Day of the Teacher
• Discuss ways to honor teachers with students in your PTSA and work together
• Brainstorm with your school principal about significant ways to honor the staff through the year
• Contact area merchants, business and community groups to invite their participation
• Plant a tree or flowers on the school property
• Bring bouquets to school
• Provide a nutritious brunch
• Wash cars or windshields
• Give teachers positive feedback on their teaching by sending a thank-you note
• Design a resource file for your school that includes names of parents and family members who are willing to use their expertise to assist teachers on projects and activities
• Publish proclamations in the PTA newsletter and post them in the school
• Request that your mayor or county board of supervisors issue a proclamation in observance of Teacher Appreciation Week or California Day of the Teacher
• Coordinate an event for teachers sponsored by community organizations and invite press and media coverage
• Call in to radio talk shows early and tell the host or hostess what your PTA is doing for teacher appreciation.
• Think about beginning a year-long project to tell your teachers how important they are.

See more ideas from National PTA.

Read about more ways to celebrate Teacher Appreciation Week on the One Voice blog and PTAOurChildren.org.
**Teacher of the Year Award**

Long Beach Council PTA is proud to continue the tradition of honoring an outstanding Teacher of Long Beach Unified School District each year. This award was created to recognize an outstanding teacher who implements creative and innovative ideas that enrich the learning experience of our children.

As a Unit PTA President, we ask for your help in getting this information out to your association. The application can go into your newsletter, sent home as a flyer and online, if you have a website. Be sure to inform your principal that you are participating in this program.

*The application is due to Long Beach Council PTA at the UPS meeting in APRIL.*

It is important that you put your own due date on the application prior to distributing it to your association. Only PTA Units that are in good standing may send in applications.

**Encourage your members to participate and nominate an outstanding teacher!**

Don’t overlook specialized teachers, such as those teachers in Special Education. If it isn’t practical for the students in Special Education to take home the application, you might want to mail these to the student’s home directly. It is possible that a school administrator, not a teacher, can help these students with their application.

You may send only one application to be considered by Long Beach Council PTA. If you have more than one application, you will have to judge them and determine the winner. Create a committee to judge the applications. While it may be difficult in a small school, you need to be impartial. Make sure that someone or someone’s child who has submitted an application is not on this committee.

Consider holding your own celebration for all of the teachers at your school who were considered for Teacher of the Year.

**Nominations can be submitted by parents and/or students.**

The winner of the Teacher of Year will be presented with a $300 classroom grant and will be recognized at the Long Beach Council In & Out Meeting & Awards Ceremony held in June each year.
Teacher of the Year Award 2020

Guest

Name of Nominee ____________________________________________

Name of submitter __________________________________________ (if a student, grade level) __________

Address __________________________________________ City, ____________________ Zip__________

Phone #: ___________________ Email _________________________

Name of PTA/PTSA __________________________________________

Name of PTA/PTSA President: __________________________________

President’s Phone #: ___________________ Email: ____________________

UNIT DUE DATE ______________________________________________________________________ (Late entries will not be accepted)

Questions? Contact TOTY Chair, Christina Butler at Christyb17@aol.com

APPLICATION FORMATTING REQUIREMENTS:

➢ Typed or handwritten
➢ Double spaced with 1” margins
➢ 2 single-sided pages maximum

AWARD APPLICATION QUESTIONS:

Prepare a brief narrative for the following questions: (Be as specific as possible)

1. How do the qualities of the candidate make an outstanding role model?

2. What techniques does the teacher use to be able to reach all students?

3. How does the teacher provide a positive learning environment where all students can thrive?

4. How does the teacher make learning fun?
Teacher of the year Essays will be reviewed based on the following rubric:

What makes the teacher outstanding?  
Comments:

How is the teacher a good role model?  
Comments:

Does the teacher use a variety of techniques to reach all students?  
Comments:

Give example of the techniques?  

How does this teacher promote a positive learning environment where students feel they can be successful?  
Comments:

How does the teacher make learning fun?  
Comments:

Overall impression of essay:  

5 4 3 2 1
Officers Contact Information Form
2019 - 2020

Please complete the requested information on both sides of this form and turn in to your area advisor immediately following your unit’s election of officers. The PTA mailing list is confidential. This information will only be used by the following organizations:

Long Beach Council PTA, Thirty-Third District PTA, California State PTA & National PTA

Unit Name: __________________________________________________________

Please provide contact information for the following positions on your incoming board. If no one has been elected for any one of these positions, please indicate by writing the word “VACANT” next to the open position. Thank you.

Name of incoming or returning president: ________________________________

Home Mailing Address: _________________________________________________

Email address: _________________________________________________________

Phone #:_____________________________________________________________

Name of incoming or returning treasurer: ________________________________

Home Mailing Address: _________________________________________________

Email address: _________________________________________________________

Phone #:_____________________________________________________________

Name of incoming or returning Secretary: ________________________________

Home Mailing Address: _________________________________________________

Email address: _________________________________________________________

Phone #:_____________________________________________________________

Please fill out the back side of this form also. Thank you!
Slate of Officers for ____________________________ PTA/PTSA

Your unit may not have all the positions listed. Please check in your bylaws for the positions that are relevant to your unit.

<table>
<thead>
<tr>
<th>Officer</th>
<th>Name</th>
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<td>Executive VP</td>
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<td>Auditor</td>
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<td>Historian</td>
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Please write in what each VP shall serve as

1st Vice President:

2nd Vice President:

3rd Vice President:

4th Vice President:

5th Vice President:

6th Vice President:

Appointed Positions -

Corresponding Secretary

Parliamentarian
WHAT YOU MAY NEED TO WORK ON THIS MONTH:
(Please contact your Area Advisor if you need help with any of the items listed below)

- **(R) Treasurer’s Reports**: See the FINANCE section of the Red Book. This report needs to be presented at every executive board and association meeting and will turn this into council each month.
- **(R) Association Meeting Minutes (April)**
- **Membership dues** – Membership dues are to be turned in MONTHLY as received. Treasurers should confirm membership totals with membership chair before this meeting for final remittance.
- **Recognition Awards** – Many units present Honorary Service Awards (HSA) and Parent Appreciation and Thanks (PAT) awards to volunteers at their schools or to people or business in their community that are helpful and supportive. Online ordering is available for HSA’s only at CAPTA.org. Long Beach Council PATs are specifically design for Long Beach Council PTA units. Honor your volunteers.
- **RESERVATIONS** – LBCPTA In & Out Meeting & Awards.
- **RESERVATIONS** – 33rd Spring Training (Get ready, go to training and lead with confidence)
- **Volunteer/Community Recognition**
- **Unit Program Report**
- **Bylaws Status Form**
- **Elections** – Notice must be sent out 30 days prior to elections. See Article V of your unit’s Bylaws. Elections should be held in March or early April. If you have not had your elections by May, notify your Area Advisor. See Article V of your unit’s Bylaws.

WHAT YOU MAY NEED TO WORK ON THIS MONTH:

**June**

*In & Out Meeting and Award Ceremony* – This is our end of the year meeting and celebration. We will say goodbye to those who are leaving their position and hello to those coming in. This meeting is held off the campus of our monthly UPs meetings. Breakfast will be served and we hold our annual Laura Costley Scholarship Raffle to raise money to help units send attendees to the CAPTA Convention. We honor unit presidents who have worked very hard all year to keep their unit in good standing. It is appropriate to invite outgoing as well as new incoming board members to this meeting. This is also a great event to invite your principal to so they can see how well your unit has worked all year.

**End of Year Things to Do**

- ✓ Procedure Books
- ✓ Unit Annual Treasurers Report and taxes should be completed by outgoing Treasurer in a timely matter and submitted to Long Beach Council at the September UP’s meeting.
- ✓ Transition Meeting for out-going and in-coming boards to pass on info and advice.
KEYS TO A SMOOTH TRANSITION for PTA LEADERS

TRANSITION - In PTA, we often hear the word “transition” during this time of year. Transition is a process of turnover from an outgoing to an incoming board, officer or chairperson. It is a time of change; the time to finish a job, prepare to hand over materials, receive materials and begin a new job. This process is important and should be undertaken seriously by all board members. Smooth transition from one board to another or one officer to another can make a significant difference in the future of your PTA. The process of transition can be divided into two equally important phases: **Outgoing** and **Incoming**.

The Board-Elect officially takes office on July 1st.

**Outgoing Transition**

*Finish your current job!* As we prepare to take on a new position, let us not forget to complete our current duties. This should include a final report or thorough preparation for audit. Rather than “winding down” as our term ends, let’s finish with a flare!

**Prepare your procedure book** - A complete procedure book is essential for a successful transition. This book provides a history of our office or position and tells us how to do our job. Write down job procedures and include all reports. Clear out useless or unimportant information. Consult the unit or council president if there is any doubt about how to prepare a proper procedure book.

**Meet with your successor** - After a year on the job, much more is learned than what can be contained in a notebook or file box. Take your successor under your wing for the remainder of the term. Introduce your successor to those with whom you have worked during your term of office. Go over materials and position duties with your successor and discuss his/her new role.

**Be a gracious and supportive past officer** - Back away, but support your successor by being available for advice when asked. Being available as a resource provides practical guidance and continuity. Backing away lets the new officer gain confidence, try new ideas, improve on good work and become stronger. There is more than one way to do a job. Encourage your successor. Don’t be afraid or insulted if he/she has great new ideas. Remember, we are volunteering. For all children and we all want what is best for them.

Change and new ideas bring vitality to the board. A vital board brings support to our children.

**Incoming Transition**

**The Board-Elect** - Congratulations on your election! Now get busy. The board-elect should begin work as soon as possible after election. The board-elect may set goals and prepare a master calendar. With the help of current officers, review evaluations of current term activities and prepare the proposed budget for the following term. Propose programs and fundraisers, fill any board vacancies and ratify the president-elect’s appointments, including the parliamentarian, corresponding secretary and chairman. The board-elect cannot write checks or call meetings of the association. As the board-elect plans and prepares, each member must keep in mind that he/she has not yet taken office. Other than making plans, members of the board-elect should not assume their new duties until the date outlined in the bylaws and should be respectful of those still holding office. Refer all matters and questions regarding your future position to the current officer or chairman.

**Take on your new job** - Let’s hope that you have had a meaningful transition with your predecessor. He/she can be a great resource as you begin your new position. Study your new materials and resources. Adapt newly received materials to your own style of organization. Consider what will work best for you and your new job. Notebooks lend themselves well for some jobs, while file boxes work best for others. Every new board will embark on an early process of development. As we begin our new positions with eagerness and enthusiasm, we are also part of a team.
Volunteer/Community Recognition Program

(Due at the MAY UPs meeting)

Having a “Teacher of the Year” Essay contest at your school is a program that can be used to comply with the PTA 3 to 1 rule. You can also honor people by awarding them with either a CAPTA Honorary Service Award or an LBCPTA PAT Award (Please see information pages and forms in the FEBRUARY section in this book). If your unit does not participate in the “Teacher of the Year” program that is facilitated by LBCPTA but you do something at your school to honor a teacher, volunteer or business please fill out the form below and turn it in at the MAY UPs meeting. Doing so will meet a Program requirement for Honor Unit Awards.

Please use the form below and on the next page, to briefly describe how and why the award/s was/were presented. All who are honored in this way will be acknowledged in the program that is distributed at the In & Out Ceremony & Awards meeting held in June. Your description will be added to the program. We look forward to hearing about the people who stand out in your school community.

FOR EXAMPLE: “We presented our teacher Mr. Jones with a PAT award because he was helpful and enthusiastic about encouraging people to join our PTA and we honored our outgoing Membership Chairman Sally Smith with an HSA for her efforts raising our membership numbers at our April association meeting”

PLEASE PRINT CLEARLY. THANK YOU.

Unit Name: ____________________________________________

PTA President’s Name: ___________________________ Email: __________________________

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<th>Name of Honoree</th>
<th>Award given (Type of HSA or PAT)</th>
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**Name of Honoree**

**Award given (Type of HSA or PAT)**

**Date**

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**Award given for:**
LBCPTA Unit Program Report 2019 - 2020

Please use this form to let council know about the programs that you do at your school. This counts towards the Program portion of the requirements for Honor Unit Awards.

PTA unit name: ______________________________

Name of person completing this form: ______________________________

PTA Position: ______________________________

Mark all the programs your PTA facilitates at your school or write in any that are not listed:

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<td>Red Ribbon Week</td>
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<td>Reflections</td>
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<td>Directory/Program</td>
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<td>Award Recognition</td>
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<td>High School Scholarships</td>
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<td>Guest Speakers at Meetings</td>
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<td>Honorary Service Awards</td>
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<td>Literacy Nights</td>
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PLEASE MAKE SURE TO MAKE A COPY FOR YOUR UNIT’S RECORDS
PAGE LEFT BLANK FOR TURN-IN
Bylaws Status Form

Please provide the following information regarding your unit bylaws and turn this form into your Area Advisor at the May UPs meeting.

Unit Name:

Date last approved by California State PTA Parliamentarian:

(Info found on the signature page of the bylaws - look around page 23 or 24)

Date last adopted by your unit:

(Info found on the signature page of the bylaws - look around page 23 or 24)

Current Status:

_____ we have reviewed the bylaws at our unit and have determined that no changes need to be made at this time.

_____ we currently reviewing the bylaws at our unit.

_____ we sent our revised bylaws to LBCPTA’s parliamentarian

_____ our revised bylaws have been returned to us signed by the California State PTA Parliamentarian on: ____________________________ Date

_____ other (please explain): ____________________________

Report submitted by:

PTA position:

Email:

AREA ADVISORS please write in the date this form was received by LBCPTA: ____________________________________________
PAGE LEFT BLANK FOR TURN-IN
Meeting Date: June 2, 2020
Time: 9:00am

In & Out Meeting and Award Ceremony
Place: To Be Determined

What bring to the In & Out Meeting:

In & Out Meeting and Award Ceremony – This is our end of the year meeting and celebration. We will say goodbye to those who are leaving their position and hello to those coming in. This meeting is held off the campus of our monthly UPs meetings. Breakfast will be served and we hold our annual Laura Costley Scholarship Raffle to raise money to help units send attendees to the CAPTA Convention. We also take time to honor unit presidents who have worked very hard all year to keep their unit in good standing. It is appropriate to invite outgoing as well as new incoming board members to this meeting. This is also a great event to invite your principal to so they can see how well your unit has worked all year.

THE FOLLOWING MUST BE COMPLETED BY THE 2019 – 2020 OFFICERS PRIOR TO TRANSITION TO THE NEW OFFICERS

(Please contact your Area Advisor if you need help with any of the items listed below)

— Year End Audit for January 1st to June 30th, 2020
— Unit Treasurers Annual Report for July 1, 2019 to June 30, 2020
— 2019 Federal Tax Return (990)
— 2019 State Tax Return (199)
— 2019 Charitable Trust Form (RRF-1)(This is to accompany the 990 form)
— Procedure Book

Items for Outgoing Board to pass on
✓ Red Book
✓ LBCPTA Directory
✓ Procedure books
✓ CAPTA Toolkit
✓ Unit Bylaws
✓ Any summer mailings

Items for Incoming Board to work on
✓ New bank signature cards
✓ Schedule a budget meeting to develop a budget
✓ Make sure to release monies for summer spending
✓ Choose a Membership theme
The Long Beach Council of PTA’s would like to thank all of the hardworking and dedicated PTA volunteers for donating your time, skills, know-how and money in order to benefit every student and their families. Special thank you to those who have stepped up to be PTA officers and chairpersons. You are the lifeline of the PTA.

Here’s to all PTA volunteers, those dedicated people who give selflessly of their time, talent and treasures. Thank you for making LBCPTA a better place.

Why be a Volunteer?
It’s not for money, it’s not for fame.
It’s not for any personal gain.
It’s just for love of fellow man.
It’s just to send a helping hand.
It’s just to give a tithe of self.
That’s something you can’t buy with wealth.
It’s not medals won with pride.
It’s for that feeling deep inside.
It’s that reward down in your heart.
It’s that feeling that you’ve been a part.
Of helping others far and near,
That makes you be a volunteer.
- Author Unknown